

TeamWork implements SAML 2.0 services to support single-sign-on (SSO) from customer systems. Configuration is required for both the customer and TeamWork systems.

- 1) Customer provides a certificate for validating assertions.
- 2) This certificate is installed and configured on TeamWork servers.
- 3) Customer system submits SAML 2.0 assertions to a URL and provides specific information identifying the user (ExternalId or EmployeeNum, or UserName) and optionally the location to open.
 - Customer has to conform to SAML 2.0 and ScheduleSource requirements for the setup.
 - There is no additional setup fee.
 - Please contact support for more information at helpdesk@schedulesource.com

Enterprise Portal:

- 1) **Enterprise Role:** Under Reports the 'View' only role is now strictly enforced to not add or edit a report.
Action: Review your selection and re-assign privileges as needed. Uncheck Edit if want View only access.

View
 Edit

- 2) **Location Role:** Under Reports and Templates added a 'View' only role. Previous single role was 'Full' which allowed both view and edit, but now these privileges have been split into 2 roles.
Action: Review your selection and re-assign privileges as needed. If you had 'Full' previously selected, **the default new role will be View only** in both Reports and Templates. **Add Edit** role if you want the role to include editing.

View
 Edit

- 3) **Admin/Custom Fields.** Added Udf7, Udf8, Udf9, and Udf10 to Employee Custom Fields.

Custom Fields » Employee

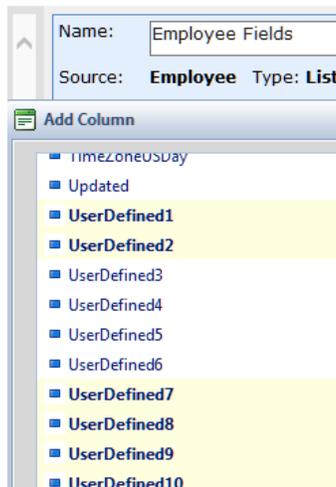
1) 18 Years	2) Contact	3)	4)	5)	6)	7)	8)	9)	10)
-------------	------------	----	----	----	----	----	----	----	-----

The Custom Fields remain at 6 for the other sections: Enterprise, Location, User, and Stations

Custom Fields » User

1) Custom Field	2)	3)	4)	5)	6)
-----------------	----	----	----	----	----

New Udf's 7-10 were added to Reports as columns choices, in List and Cross-tab reports, and also added to GenericIO export.



- 4) Admin/Custom Fields. Two New input data types were added to all Custom Fields. Optional pattern validator or special input control (date, number) require HTML5 browser support.

Custom Fields » Employee

1) 18 Years 2) Contact 3) 4) 5) 6) 7) 8) 9) 10)

Name:

Values: If a select list is desired, please enter one value per line.

Or, provide one of the following:

Input type: (special control)

Pattern: (for validation)

Help: (describe usage)

- **NOTE:** The two new options for validating/controlling text input into UDF's are dependent upon browser support for HTML5. For the pattern validation, IE11, Edge, Firefox 44, or Chrome 47 is the minimum required. For the date-control, the browser must be Edge, or Chrome 47 at minimum. We recommend not using these options until you are sure your users run compliant browsers.
- To see if the browser version you are using supports HTML5, check your browser version under Tools.
- To test your browser to see if it supports HTML5, go to <https://html5test.com/> and under Forms what input types your browser supports. It must have input type = date and input type = number both checked Yes to use the format options 2 and 3 in the UDF.
 - <http://caniuse.com/#feat=input-pattern>
 - <http://caniuse.com/#search=datetime>



You can only use 1 type of input – now expanded to 4 options:

- Create entry field box, allows either number or text, by leaving Values box empty – same as before.
- Create a drop-down list of values by entering list choices in Values box – same as before.

Result on Location/Edit page:

Manager:

Manager Cell:

c) Create entry field with Input Type – **New**.

1. Choose **date** from Input type drop-down list.

- This will give a custom field with a date-picker popup for entry of the date. The type of calendar popup depends on the browser you are using.
- Add Help note for user entry.
- Entry Example: Location Custom Field

2. Choose **number** from Input type drop-down list.

- This will give a custom field with a number required for entry.
- Add Help note for user entry.
- Entry Example: Location Custom Field

3. Open the section where custom field was created, to enter the data.

- Ex: Location/Edit page

- Enter data – Save.

- **ALERT:** If your browser is not supporting HTML5, it will allow data entry not in the required format. So the Result on Location/Entry page would allow this to be saved. Don't enter this data. Open a new browser that supports HTML5.

d) Create entry field with a pattern validator. – **New**

- **NOTE:** The pattern validator must be chosen from html5 pattern link. <http://html5pattern.com/>

1. Leave Input type blank.
2. Enter pattern for **date** format from website above.

NOTE: To sort by date, you must use the Full Date Validation (year first format). Other formats will not sort the dates correctly in reports.

(?:19|20)[0-9]{2}-(?:(?:0[1-9]|1[0-2])-(?:0[1-9]|1[0-9]|2[0-9])|(?:?!02)(?:0[1-9]|1[0-2])-(?:30))|(?:(?!0[13578]|1[02])-(?:31))

- Enter Help to clarify the entry requirements. This will appear next to the entry box.
- Entry Example: Employee Custom Field

Or, provide one of the following:

Input type: (special control)

Pattern: (for validation)

Help: (describe usage)

- Result on Employee Edit page:

date: *Must enter date as YYYY-MM-DD*

OR

1. Enter pattern for number format from website above.

- For Number: (Under Miscs on webpage) format: `[+]?[0-9]*[.]?[0-9]+`

Numbers with or without decimals

`[+]?[0-9]*[.]?[0-9]+`

Format: 9 or 9.9 or 9,9

- Enter Help to clarify the entry requirements. This will appear next to the entry box.
- Entry Example: Employee Custom Field.

Or, provide one of the following:

Input type: (special control)

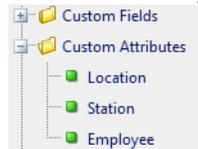
Pattern: (for validation)

Help: (describe usage)

- Result on Employee Edit page:

Dollars: *Must use #.#.#*

- 5) Admin/Custom Attributes: New functionality which are like Udf custom fields, but are one-to-many and date-based.



- Can be created for Employees, Locations, or Stations.
- Are only visible in Enterprise. Are not visible in the Location Portal.
- When created a New Tab will appear in the Section menu bar when section is opened.
- Note: The Attributes tab only appears, if Attributes have first been created in the Admin section.



- Open the Attributes tab to Add Attributes to individual Employee, Station or Location.

A. Create Attribute in Admin section.

1. Open Section choice from left menu. Click [Add New]. Attributes already created show in left list.
 - Example Employee.

Custom Attributes » Employee

Keys	Settings
Words per Minute	Name: <input type="text"/>
CPR	
[Add New]	
	Optional:
	Input type: <input type="text" value=""/> (special control)
	Pattern: <input type="text"/> (for validation)
	Help: <input type="text"/> (describe usage)
	<input type="button" value="Save"/>

2. Enter Attribute. Use input option same as on Udf fields above.

- Entry Example: Employee

Custom Attributes » Employee

Keys	Settings
<p>Words per Minute</p> <p>CPR</p> <p>[Add New]</p>	<p>Name: <input type="text" value="Words per Minute"/></p> <p>Optional:</p> <p>Input type: <input type="text" value="number"/> (special control)</p> <p>Pattern: <input type="text"/> (for validation)</p> <p>Help: <input type="text" value="Must be a whole number"/> (describe usage)</p> <p><input type="button" value="Save"/></p>

B. Open Section that Attribute was entered for (Location, Station, or Employee)

- Open one Employee (or station, location).
- Open the Attributes Tab.
- Click Add to add an attribute for that individual. The window displays the options to choose the attributes that have been created in the Admin section. Select attribute from list.

- Enter criteria. Close and Refresh List.
- No data is required. This allows tracking an item that is just a reminder flag during a specific date, such as 'no swapping allowed', with no value being required.

- To Edit the attribute, click on the name.

Employees \ A, Aimee Print				
Edit Status Attributes Assign To: Folders Locations Stations Agreements Lc				
Attributes Add				
Attribute	Start	End	Value	Note
Words per Minute			92	Retest May 1st

- 6) **Reports Section/Filters:** Added inactive employees to employee list filter so now can filter to data for inactive employees in reports. Inactive employees will appear at the bottom of the list with 'inactive' in front of the name.
- In Report/Adjust Filter when choosing Condition: Employees.
 - Allows you to report data on Inactive Employees.



Employee Portal:

- 1) TeamWork 5 (TW5) Employee Portal will be removed from Beta and will replace the mobile employee portal.
- 2) This change is scheduled for May 1, 2016 for automatic re-direct.
 - The TW5 Employee portal supports ***all*** of the regular employee portal features. This is in contrast to the old "mobile" pages that only supported a subset.
 - It has been built using HTML 5 which uses for responsive design. This means that TW5 will respond to the size of the device the employee is using and respond accordingly whether it is an iPhone, a tablet, a laptop, or similar viewing device.

Reminder: Helpdesk – Submitting Support Tickets (2015.2 Release)

- New help desk is available to enable faster response times and better access to our help materials.
 - If customers create an account within the help desk, they can access non-public materials and review ticket status for all open tickets.
 - New FAQs are published based on Frequently Asked Questions by customers
- Our new Helpdesk and ticketing system is accessible three ways:
 - 1) online at <http://helpdesk.schedulesource.com>
 - 2) via email by sending a question to helpdesk@schedulesource.com
 - 3) from the main menu of the application (click the help link on the right)