SCHEDULE SOURCE

275 Century Circle, STE 102, Louisville, CO 80027

ScheduleSource Self Training LOCATION: Release 2016.1   New Features

Location users may want to review the Enterprise new features, to discuss with the organization Enterprise Administrators.

Location Portal:

1) Admin/Privileges/Employee Access: A new setting control for 'Shift notes' was added. This allows each location to elect to not show the shift notes on the shifts to employees in the Employee Portal. Unchecking this box will remove notes in both the schedule and swapboard employee sections.
   - **Action** is needed if you want to hide notes, the default will be on. Uncheck the box to hid the shift notes.
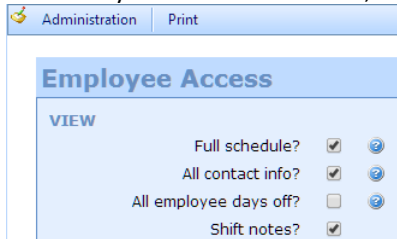
   - **Note**: This will hide the shift notes on both the Schedule and the Swapboard. This switch will <u>over-ride</u> the setting in the Swapboard to 'show notes. Even if it is checked, notes will not show if Employee Access box above is Unchecked.
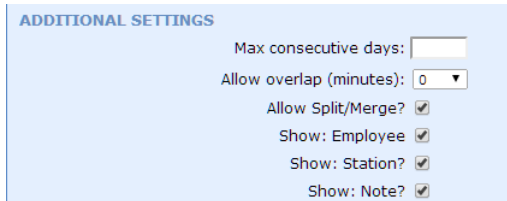
2) Employee Section/ Employees Edit Page – User defined fields was expanded from 6 to 10. The data is view only in the location.

3) Employee Section/ New Custom Attributes. If the Enterprise has created attributes, a new tab named 'Attributes' will appear when you open an individual employee. The data will be under this tab.
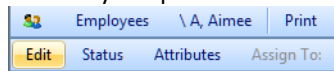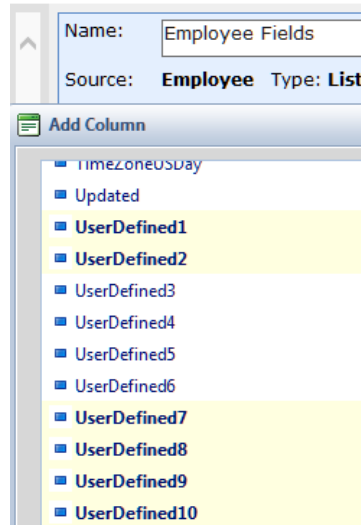

4) Reports Section/Filters: Added inactive employees to employee list filter so now can filter to data for inactive employees in reports. Inactive employees will appear at the bottom of the list with 'inactive' in front of the name.
   - In Report/Adjust Filter when choosing Condition: Employees.
  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

5) <u>Reports/ Employee Udf's 7</u>-10 were added to column choices for both the list and cross-tab report.

Name:	Employee Fields
Source:	**Employee** Type: **List**

Add Column

- TimeZoneUSDay
- Updated
- **UserDefined1**
- **UserDefined2**
- UserDefined3
- UserDefined4
- UserDefined5
- UserDefined6
- **UserDefined7**
- **UserDefined8**
- **UserDefined9**
- **UserDefined10**

Employee Portal:
1) TeamWork 5 (TW5) Employee Portal will be removed from Beta and will replace the <u>mobile</u> employee portal.
2) This change is scheduled for May 1, 2016 for automatic re-direct.
   o 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.
   o 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)