

## ScheduleSource ENTERPRISE Self Train Document: Release 2014.3

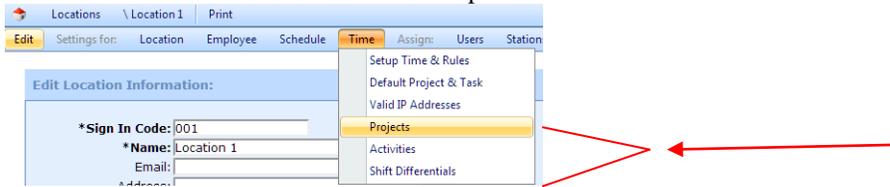
### New Features & Enhancements

Note: The bullets in blue match the bullet item list on the Release Notes pages.

#### Enterprise Portal:

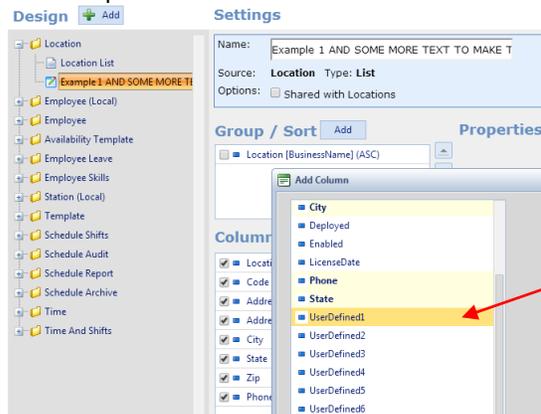
##### 1. Location Section

- Time drop down menu:
    - Moved Project and Activities to the Time section.
    - Added a Shift Differential screen (for use with the Policy Module).
1. New Location Menu bar with the new Time Drop Down List

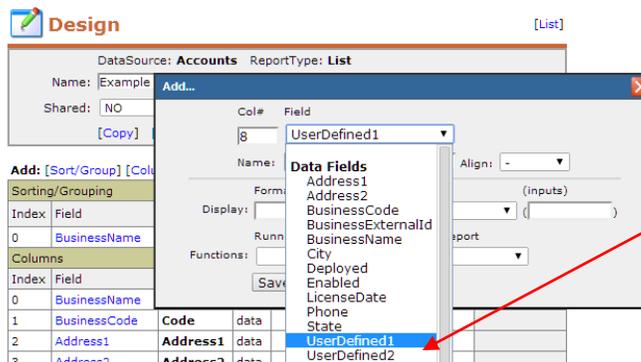


##### 2. Reports Section

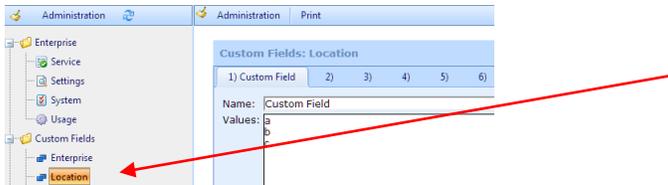
- Location report fields now include UDFs (Custom fields created).
1. In the New Reports the Data Source 'Location' has User Defined Fields added as column choices.



2. In the Old report section: The Data Source 'Accounts' (Location information) has User Defined Fields added as column choices.



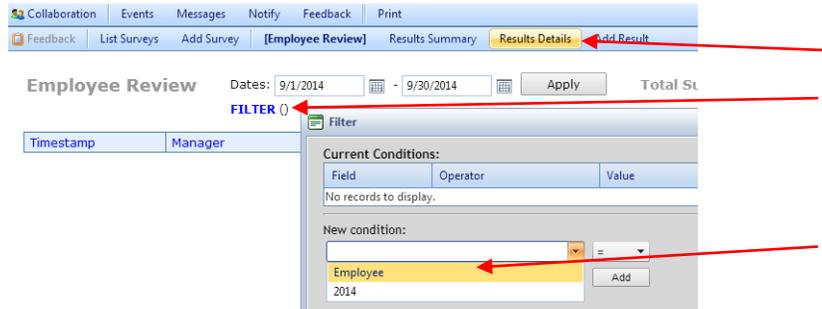
3. User Defined Fields are the 'Custom Fields' created in the Admin section for the Location.



### 3. Collaboration/Feedback

- **Added employee to Collaboration filter in Feedback Results Detail.**

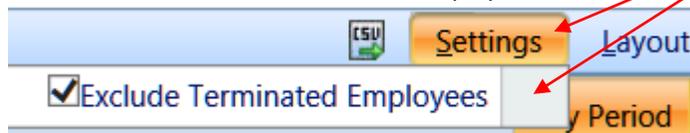
1. Open a created survey.
2. Open Results Detail Tab.
3. Click on Filter link – a new filter appears to filter by employee.



### 4. Time Module

- **Ability to not include terminated employees in the payroll export.**

1. Pay Period Section: Open the Payroll page.
2. Hover over 'Settings' in Top Menu.
3. Check the box to 'Exclude Terminated Employees'.



- **Absent/On page now includes column for Alert/Note/Clock Reason.**

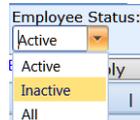
1. Review Section: Open the absent/on page.
2. New Column: Status

#### Absent/On

Tuesday, July 01, 2014 - Thursday, July 31, 2014											
Date	Start	End Station	Plan	Hours	VS	Type	On	Actuals Off	Project / Task	Status	Hours
					[All Attendance]						
						admin	6:00 AM	10:00 AM	P001 / T001		4.00

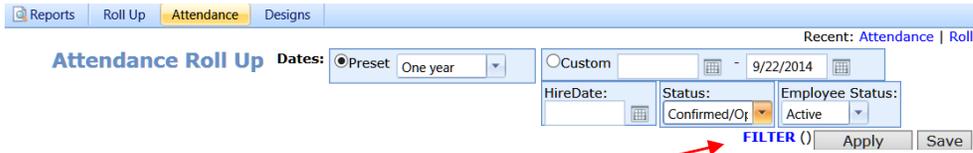
- **Attendance Roll up does not include inactive employees by default.**

1. Reports: Open the Attendance Report
2. An 'Employee Status' filter has been added. The default will be active. You can also choose Inactive or All from the drop-down filter list.



- **Attendance Roll up filters can now be saved.**

1. Reports: Open the Attendance Report
2. The filters in the blue shaded boxes apply only to this page. Set Filters.
  - Click Apply to view data.
  - Click Save to save the filter for the next time you return to this page.



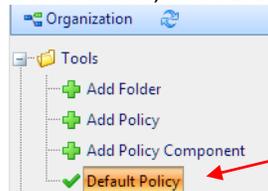
3. Reminder: **FILTER ()**
  - This is the time Filter applies to All pages in the time section.



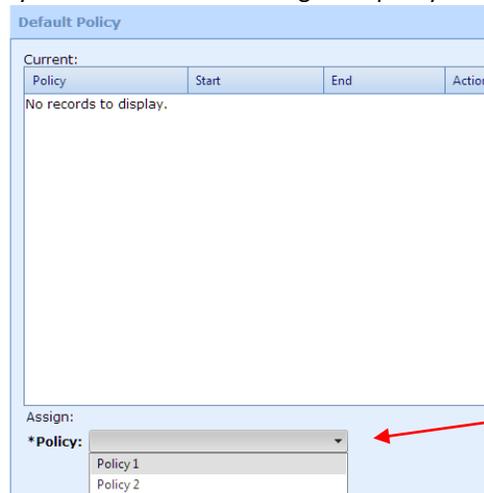
## 5. Organization Section: Policies Module

- **Ability to add a 'Default Policy' so that all employees will have a policy if a specific policy is not assigned to that employee.**
  - ✚ **Functionality:**
    - ✚ To use a default policy so that all employees have a policy for time calculations even if the first policy assignment is in the middle of the week.
    - ✚ The logic will now check for a policy assignment for the first day of the week, if it can't find one, it will check for the Default policy for that date. If none is found it will start scanning the employee assignments to the end of the week and pick the first one it finds.
    - ✚ If no one is found it will do the same for the default enterprise policy assignments. Only if all these steps fail, will the employee be without a policy for time calculations.
    - ✚ The default policy applies to the whole enterprise and it is applied date-based.

1. In the Tools folder, there is a new link to add a 'Default Policy'



2. Click on the link to open the right page.
3. Choose the Policy that you want for the default policy. The default will be used for any employee that has not been assigned a policy in the Employee/Agreement section.



- **Ability to add 'Shift Differential Definitions' which can be defined per location.**

**✦ Functionality:**

- ✦ Allows user to define different shift differentials for different locations.
- ✦ A location can also have no shift differential.

**To Use this feature:**

1. In Organization Section:

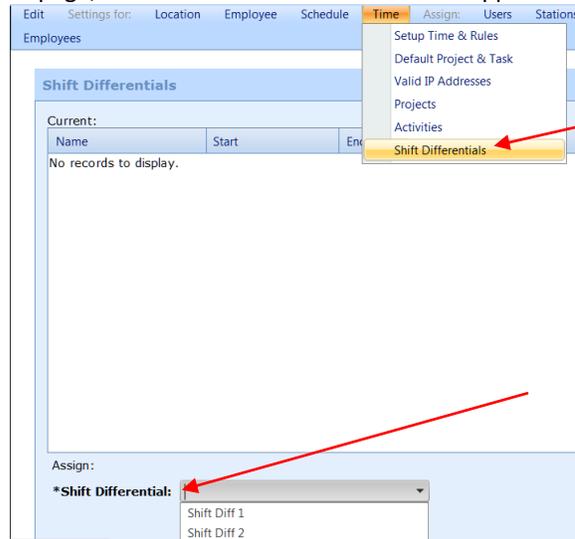
- a) Add a Policy component for Shift Differential – or Edit an Existing Shift Differential.
- b) On definition page check both checkboxes.



- c) If the 'Use Location Shift Differential' box is checked, the system will look at the differential that has been defined for the Location in the Location Section.
- d) If the 'Use Location Shift Differential' box is not checked, the system will use the shift differentials defined on this screen.
- e) Add as many different differentials as needed.

2. In Location Section

- a) Open Location.
- b) Choose 'Shift Differential' from the Time drop down list.
- c) On the Edit page, choose the shift differential to be applied at this location.



3. Shift differentials are date-based in assignment, since if you would ever change them you would not be able to re-calculate older time data.

- **Time Settings by Location in Policies: New option so users can now tell the policy to use the 'Time Settings' that have been defined in the Location section time settings page.**

**✦ Functionality:**

- ✦ This will enable existing customers to start using policies while still using the setting for different locations.
- ✦ It will also enable customers that need to have different rules for different locations to make that work in conjunction with Policies.

**To Use this feature:**

1. In Organization Section:
  - a) Add a Policy component for 'Time Settings Component' – or Edit an Existing Time Setting component.
  - b) On definition page choose the new option to 'Use Location Time Setting'.

- c) When selecting Locations settings, the settings for policy on this page get hidden as you will now choose the settings in the Location section.

2. In Location Section:

- a) Open Location.
- b) Choose 'Setup Time & Rules' from the Time drop down list.
- c) On the Edit page, choose the criteria for time settings to be applied at this location.
- d) Click Save.

## 6. Recruiting Module

- **Users can now copy Recruiting Applications.**

1. Go to Configuration in Menu Bar; Choose 'Applications'.

2. In the List of Applications, Click on the name of the Application to open it.

3. Click on Copy.

[List]

**Application - First Application**

\*Name:   Enabled

Header Help:

Footer Help:

\* - Required Field

[Delete] Copy

4. A pop-up will ask you to confirm making a copy. You can also give this application a new name.

Script Prompt:

Copy this design?

FirstApplication - Copy

- **Upgrades to Recruiting portal filters.**
- **New Recruiting filter that allows users to easily find persons that have not filled out an application.**

1. People Section: Choose 'List' from the drop-down menu.

People Applications

List

Summary

2. Click on Filter.

People  
FILTER (Status)

3. On the 'Recruiting Filter pop-up', click down arrow in application box.
4. Choose 'No submitted Applications' from the drop-down list.

People List Summary Add

People  
FILTER (Status=New Applicant;)

Last Name	First Name	Email Address	Street Address	City
Henson	Bob	h	h	h

Recruiting Filter

Person Application Availability

Application:

All

Enabled Applications

No Submitted Applications

First Application

5. Click Save Filter.
6. The List will automatically refresh showing only those people who have not submitted an application.

People  
FILTER (Status=New Applicant;Application=No Submitted Applications;)

Drag a column header and drop it here to group by that column

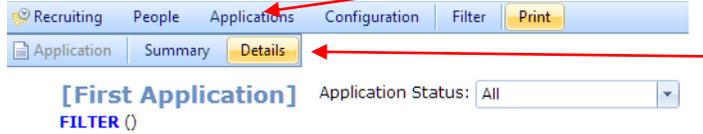
Last Name	First Name	Email Address	Street Address	City
Henson	Bob	h	h	h

- **Users can now change a Recruiting Person's Application status.**

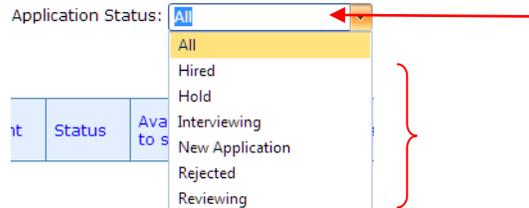
✚ **Functionality:** You can now change the status of an application, in addition to being able to still change the status on a person.

1. Open Application Section in menu bar.

- Open an Application from the drop-down list.
- Open the Details Tab.



- Open the 'Application Status' drop-down list. Choose the status.

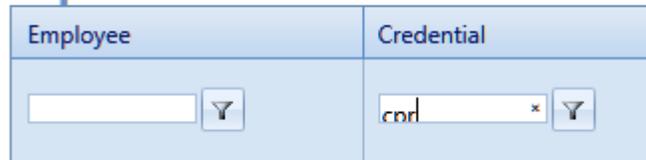


## 7. Credentials Module

- Add Credential column filtering to Expired & Expiring Credentials pages.**

- Open Reports Folder.
- Open Expired or Expiring Credentials report.
- Filter on Credential column.

### Expired Credentials



### Expired Credentials

Employee	Credential
B, Bob	CPR

- New Location filter for Credentials.**

- Open Reports Folder.
- Open Filter Folder.
- Click on the down arrow in the 'Select a Default Location' box.



- Choose the location you want to filter to.

