

# TeamWork Employee Guide

---

TeamWork Help Documentation

## Contents

---

|   |    |
|---|----|
| 1. TeamWork Employee Guide                | 5  |
| 1.1 About TeamWork                        | 5  |
| 1.2 What You Do                           | 5  |
| 1.3 How You Do It                         | 5  |
| 1.4 What You Use                          | 6  |
| 2. Getting Started                        | 8  |
| 2.1 Supported Browsers                    | 8  |
| 2.2 Signing In                            | 9  |
| 2.3 Navigating TeamWork                   | 12 |
| 2.4 Using Filters                         | 12 |
| 3. Employee Portal Definitions            | 16 |
| 4. Employee Portal Workflow               | 17 |
| 5. Calendar                               | 18 |
| 5.1 Calendar Overview                     | 18 |
| 5.1.1 Using the Calendar                  | 18 |
| 5.1.2 Display Options                     | 18 |
| 5.1.3 Shift Borders                       | 19 |
| 5.2 Setting Calendar Options              | 20 |
| 5.3 Performing Actions from Calendar      | 21 |
| 5.4 Approving All Shifts                  | 22 |
| 5.5 Viewing and Claiming SwapBoard Shifts | 23 |
| 5.6 Viewing Leave Requests                | 24 |
| 5.7 Viewing or Changing Availability      | 25 |
| 5.8 Exporting Calendar to iCal            | 26 |
| 6. Availability                           | 27 |
| 6.1 Availability Section Overview         | 27 |
| 6.2 Viewing My Availability               | 28 |
| 6.3 Adding a Template                     | 29 |
| 6.4 Maintaining a Template                | 31 |
| 6.5 Adding a Date-Based Template          | 32 |
| 6.6 Adding an Single-Day Override         | 33 |
| 6.7 Selecting Volunteer Pools             | 34 |
| 6.8 Deleting a Template or Override       | 35 |
| 6.9 Adding a Leave Request                | 36 |
| 6.10 Viewing a Leave Request              | 37 |

|      |  |    |
|------|--|----|
| 6.11 | Canceling a Leave Request                | 38 |
| 6.12 | Listing All Leave                        | 39 |
| 7.   | Schedule                                 | 40 |
| 7.1  | Schedule Section Overview                | 40 |
| 7.2  | Using My Schedule                        | 41 |
| 7.3  | Approving One Shift or All Shifts        | 42 |
| 7.4  | Placing a Shift on the SwapBoard         | 43 |
| 7.5  | Reclaiming Your Swapped Shift            | 44 |
| 7.6  | Trading a Shift                          | 45 |
| 7.7  | Reclaiming Your Traded Shift             | 47 |
| 7.8  | Splitting a Shift                        | 48 |
| 7.9  | Merging a Split Shift                    | 49 |
| 7.10 | Saving My Schedule                       | 50 |
| 7.11 | Displaying Schedule Totals               | 51 |
| 7.12 | Displaying All Schedule Info             | 52 |
| 7.13 | Displaying Coworkers Contact Info        | 53 |
| 8.   | SwapBoard                                | 54 |
| 8.1  | Swapping & Managing Your Shifts          | 54 |
| 8.2  | Placing a Shift on the SwapBoard         | 55 |
| 8.3  | Reclaiming Your Swapped Shift            | 56 |
| 8.4  | Claiming a Shift                         | 57 |
| 8.5  | Claiming an Empty Shift                  | 58 |
| 8.6  | Splitting a Shift                        | 59 |
| 8.7  | Merging a Split Shift                    | 60 |
| 8.8  | Trading a Shift                          | 61 |
| 8.9  | Reclaiming Your Traded Shift             | 63 |
| 9.   | Time                                     | 64 |
| 9.1  | Time Section Overview                    | 64 |
| 9.2  | Clocking On and Off                      | 65 |
| 9.3  | Creating a Time Card                     | 66 |
| 9.4  | Using the Timesheet                      | 67 |
| 10.  | Collaboration                            | 69 |
| 10.1 | Collaboration Section Overview           | 69 |
| 10.2 | Reviewing and Adding Events              | 70 |
| 10.3 | Reviewing and Adding Messages and Alerts | 71 |
| 10.4 | Creating Feedback on Surveys             | 74 |
| 10.5 | Reviewing and Adding Notifications       | 75 |

|                                |    |
|--------------------------------|----|
| 11. Settings                   | 77 |
| 11.1 Settings Section Overview | 77 |
| 11.2 Editing Information       | 78 |
| 11.3 Editing Preferences       | 79 |
| 11.4 Viewing Deployments       | 80 |
| 11.5 Viewing Scheduling        | 81 |
| 11.6 Viewing Credentials       | 82 |
| 11.7 Using Public Pages        | 83 |

# 1. TeamWork Employee Guide

---

## 1.1 About TeamWork

---

ScheduleSource TeamWork is an application that helps your company manage work in your organization. As an employee, you log in to the Employee portal and can always view your schedule, calendar, and message board. You record the time you work and submit a timesheet. In addition, you can set email notifications.

While each organization decides which other features your organization will use, you may be able to claim empty shifts, split empty shifts and claim one part, enter leave requests, swap and/or bid on shifts, view coworker information, enter availability, and view a schedule of all stations and locations in which you are assigned to work.

## 1.2 What You Do

---

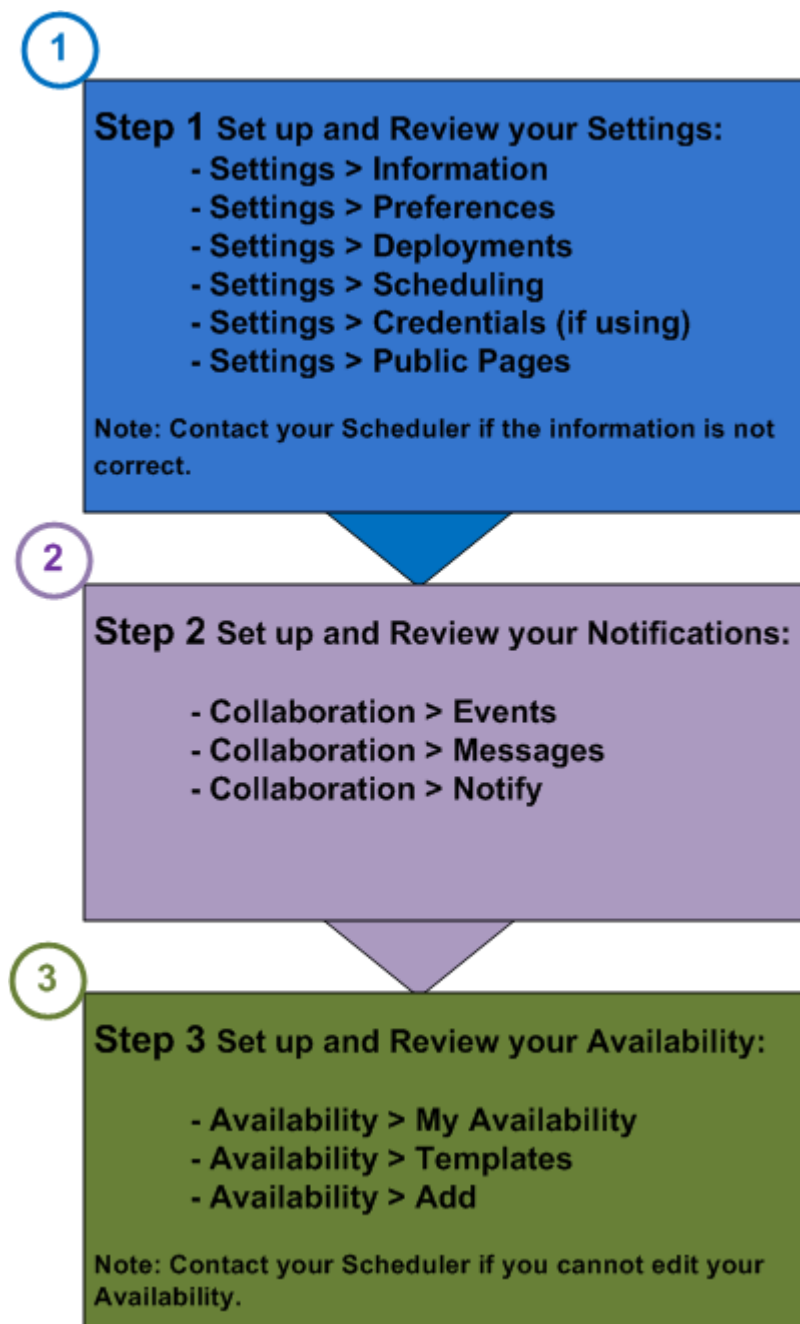
Once your Employee portal account is set up and you are assigned to a station in a location, you can be scheduled to work shifts. You can use the Employee portal to:

- See the shifts you are scheduled to work. Swap shifts, split and claim empty shifts, bid on shifts, and request time off.
- Manage your settings including personal info and contact info.
- Set up notifications for shift changes and upcoming events.

## 1.3 How You Do It

---

For specific information, see [Employee Portal Workflow](#) and the How To's for [Settings](#), [Collaboration](#), and [Availability](#).



## 1.4 What You Use

---

For specific information, see the How To's for each section. The following statements describe the functions you perform in each section and link to the How To's. If you do not see the section, then your organization does not use that feature. Contact your system administrator with questions.



**Home** — displays summary information and links to Availability, Schedule, Time, Collaboration, and Settings. Refresh the view at any time using Home > Refresh. Use Home as your default home page or use Settings > Preferences to select a different default home page.



**Calendar** — displays your schedule for each of the stations and locations you are assigned to. Set options, view your schedule, approve shifts, and review your availability.



**Availability** — display overall availability as well as availability at specific locations. Add templates and override availability for one or all locations.



**Schedule** — display all scheduling information. Create filters to display the specific information you are looking for. Save your schedule as a PDF or Excel file.



**Swap** — provides a quick link to the SwapBoard. Adjust your schedule to meet your needs. Split a shift, place a shift on the swapboard, claim a shift, and reclaim a swapped shift if it is not taken.



**Time** — displays a clock, time card, and timesheet. Use it to enter the time you work and manage your timekeeping.



**Collaboration** — review and add events, review and add messages and alerts, create feedback on surveys, and review and add notifications so you are informed when your schedule is available, posted shifts are claimed or removed by your manager, shifts become available, and leave requests change status.



**Settings** — display and manage your Employee portal account information. Set your home page and select default calendar display preferences. View deployments, scheduling, credentials, and public pages.

## 2. Getting Started

---

The following provide general guidelines for using the Employee portal.

### 2.1 Supported Browsers

---

You can use the Employee portal on a variety of internet accessible devices. Refer to the following table for a list of recommended browsers and links for downloading them.

| Operating Systems | Browsers   |
|-------------------|--|
| Windows           | Latest versions of the following: <a href="#">Mozilla Firefox</a> , <a href="#">Apple Safari</a> , and <a href="#">Google Chrome</a> |
| Mac               | Latest versions of <a href="#">Apple Safari</a> and <a href="#">Mozilla Firefox</a>  |
| iOS               | <a href="#">Apple Safari</a> (built in)<br><b>Note:</b> A two-fingered swipe scrolls the scrollable regions in the regular site.     |
| Android           | Built-in browser   |

Important: Make sure your browser is enabled to support JavaScript and allow cookies from this site.



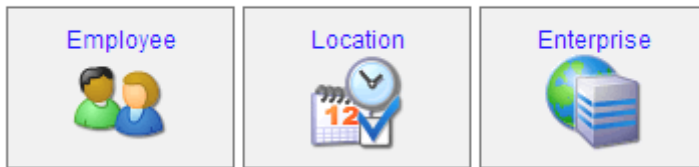
## 2.2 Signing In

---

Once you have the URL and a login, use these instructions for signing into the Employee portal.

1. Enter the URL for TeamWork that your organization provides you.  
ScheduleSource portal page displays. We recommend creating a bookmark for quick access.

Please select your portal...



2. Select Employee.  
Sign In page displays.

## Sign In

Portal  Employee  Manager

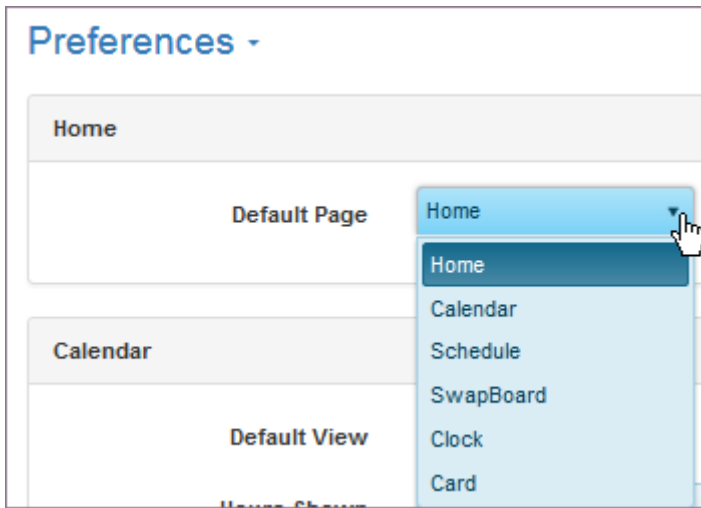
Code

Username

Password

Note: Your administrator provides your Code and User name, as well as your initial password. We recommend changing the initial password to create your own when you first sign in. A strong password is 8 or more characters, containing both letters and numbers, and is not a variation of your User name.

3. Enter your Code, User, and Password. Select the check box to Remember Me if you want the computer you are working on to remember your account code and user name.  
Note: If you select the check box to Remember Me, you must still enter your password in the future log-ins.
4. Click Sign In. A Home Page displays.  
Note: Go to Settings > Preferences and select the window you want to display as your Home page. Select one of the following.





5. To begin working, click on a top menu selection and the related window displays.



## 2.3 Navigating TeamWork

Each of the sections in the Employee portal displays a toolbar with further menu selections. Common functions are described in the following table.

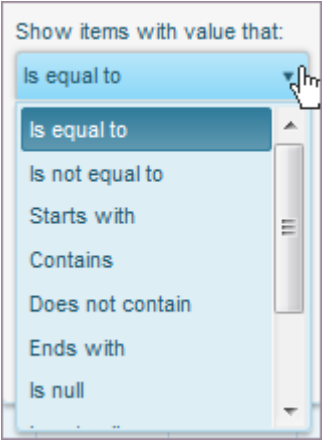
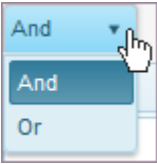
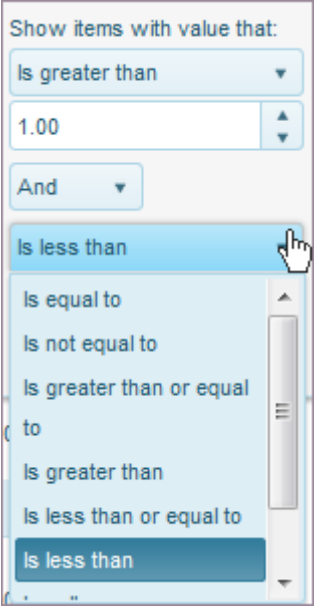
| Menu Selection                                   | Description of Actions   |
|--|--|
| Additional tabs                                  | <p>Additional tabs display next to the main section toolbar. For example, the following tabs displays when you select Availability.</p>  |
| Save button:                                     | <p>You must select the <b>Save</b> button after entering information. If you do not, your work is NOT SAVED.</p>                          |
| * Indicates a Required Field:                    | <p>Entry is required when the field is highlighted and preceded with an asterisk. For example: <b>*Reason</b> or <b>*-Required Field</b></p>   |
| Print a window that is open                      | <ul style="list-style-type: none"> <li>• CTRL P opens your browser print window.</li> <li>• Use Preview or Browser commands to resize and format a page before printing.</li> </ul>  |
| Exit on the top menu and TeamWork drop-down list | <p>Select the Exit link to sign out of the Employee portal. We recommend that you use <b>Exit</b> to end your session. Do not just close the browser.</p>  |

## 2.4 Using Filters

You can use filters to quickly locate information in your schedule and the SwapBoard. For example, you may want to show only a portion of your schedule that relates to one location or station or shifts that start and end at a certain time. Use letters in the alphabet or numbers to limit the amount of information that displays, i.e., the name of a station or a date or time.

Refer to the following example that shows how you:

- Set a filter to hone in on something specific
- Include or exclude another factor using And or Or
- Select Filter to get the information you are looking for
- Select Clear to display all information

| Filter Type                                 | Displays   |
|---|--|
| First factor:<br>Show items with value that |  <p>                         Show items with value that:<br/>                         Is equal to<br/>                         Is not equal to<br/>                         Starts with<br/>                         Contains<br/>                         Does not contain<br/>                         Ends with<br/>                         Is null                     </p>  |
| Include or Exclude<br>Chose And...Or        |  <p>                         And<br/>                         Or                     </p>   |
| Second factor                               |  <p>                         Show items with value that:<br/>                         Is greater than<br/>                         1.00<br/>                         And<br/>                         Is less than<br/>                         Is equal to<br/>                         Is not equal to<br/>                         Is greater than or equal to<br/>                         Is greater than<br/>                         Is less than or equal to<br/>                         Is less than                     </p> |
| Example                                     |  |

|                                       |                                      |
|---------------------------------------|--------------------------------------|
|                                       | Show items with value that:          |
|                                       | Is greater than ▼                    |
|                                       | 1.00 ▲▼                              |
|                                       | And ▼                                |
|                                       | Is less than ▼                       |
|                                       | 9.00 ▲▼                              |
| <input type="button" value="Filter"/> | <input type="button" value="Clear"/> |

## 3. Employee Portal Definitions

---

The following definitions relate to TeamWork and the Employee portal.

- **Collaboration** — Collaboration functions in TeamWork 5 allow you to easily work with other employees and schedules in your organization. Use a common organizational calendar, list and add messages and alerts, receive notifications such as when swapped shifts are available to claim, and provide feedback on surveys.  
Note: Some notifications may be established for you by your Administrator in the Enterprise portal and are in place when you log in to your Employee portal account. See [Collaboration Section Overview](#).
- **Leave** — Leave functions in TeamWork allow you to request and manage your time away from work. Administrators frequently require that an employee selects a leave reason. Employees may choose to be notified when a leave request is acted on. See [Adding a Leave Request](#), [Viewing a Leave Request](#), and [Reviewing and Adding Notifications](#).
- **Location** — a Location is a distinct physical area or position in space where tasks are performed or a function is occurring. Work is performed at a Location. See [Viewing Deployments](#) for a list of locations and stations at which you are assigned to work.
- **Privileges** — Privileges for Employee Access, SwapBoard Rules, and other functionality are established for each Location by the Scheduler or Manager of the Location. They determine what each employee can view, edit, and approve. Privileges expand or limit tasks that can be performed and information that can be displayed in an Employee portal window.
- **Schedule** — a schedule is a collection of shifts at locations and stations that are worked during a defined period of time on a specific date. See [Calendar Section Overview](#) and [Schedule Section Overview](#).
- **Shift** — a period of time during which an employee is assigned to work at a station in a location. See [Calendar Section Overview](#) and [Schedule Section Overview](#).
- **Station** — a Station is a place or position where specific tasks are performed. Shifts are scheduled in a location at a station. See [Viewing Deployments](#).
- **Swap Board** — SwapBoard is a function in TeamWork that allows employees to designate an assigned shift as available for another employee to work. The assigned employee is responsible for covering the shift until another employee is assigned. Swapped shifts can be exchanged, traded, or offered to one specific employee or any employee who is available and has comparable skills. Administrators may or may not require that an employee select a swap reason. Each location can have unique administrative privileges for SwapBoard Rules. Employees may choose to be notified when a shift becomes available or when a shift is claimed. See [Swapping & Managing Your Shifts](#) and [Reviewing and Adding Notifications](#).



## 4. Employee Portal Workflow

---

The Employee portal makes it easy to keep track of your schedule and make adjustments when necessary. The Employee portal workflow includes the following tasks.

- Review the Calendar window and make note of the shifts you are scheduled to work. Go to the [Calendar Section Overview](#).  
Note: Settings provides a list of your deployments and scheduling information. Go to [Settings Section Overview](#).
- Approve all shifts (if required) to indicate that you know when you are scheduled to work. Go to [Approving All Shifts](#).
- Place shifts you cannot work on the swapboard. Go to [Placing a Shift on the SwapBoard](#). In case your schedule changes and you can work the shift after all, go to [Reclaiming Your Swapped Shift](#).
- Ensure your personal information is current and contains required and necessary contact information. Go to [Editing Information](#).
- Ensure your preferences are helpful for keeping you on track. Go to [Editing Preferences](#). This includes designating your Home Page.
- Ensure your availability reflects the times you can work. In some organizations, schedulers enter this information. In other organizations, employees enter this information. Still other organizations do a combination of both, i.e., a university might allow employees to enter availability at the beginning of a semester, but have schedulers make changes once the initial schedule is set. Go to [Adding a Template](#).
- Ensure your notifications let you know when swapped shifts are available to claim. Go to [Reviewing and Adding Notifications](#).
- Claim shifts posted to the swapboard as your schedule permits. Go to [Claiming a Shift](#).
- Enter leave requests and submit them for approval. Go to [Adding a Leave Request](#) and [Viewing a Leave Request](#).
- Review a complete schedule and contact information of coworkers. Go to [Displaying Coworkers Contact Info](#) and [Displaying All Schedule Info](#).
- Review the status of your leave requests and view the leave information of all employees. Go to [Viewing a Leave Request](#) and [Listing All Leave](#).

## 5. Calendar

---

### 5.1 Calendar Overview

---

#### 5.1.1 Using the Calendar

---

The Calendar page displays your scheduled shifts for each of the stations and locations you are assigned to. You can also display time entered. Calendar Options allow you to display shifts available for swap, company events, your leave, and your availability in one consolidated view. If you would like to refer to window examples, see [Calendar](#). Refer to the following How To's:

- [Setting Calendar Options](#) — Use Calendar Options to select the information you would like to display on your calendar window. Choose a format that works for you such as a Day, Week, Month, or List. Change it at any time.
- [Approving All Shifts](#) — Use the Approve All link if your organization requests that you approve all shifts.
- [Performing Actions From Calendar](#) — Use Calendar to view [Events](#) and [Messages](#). You can also use Calendar to enter time and manage and swap shifts.
- [Viewing or Changing Your Availability](#) — Use Calendar to view or change your availability.
- [Viewing and Claiming SwapBoard Shifts](#) — Use Calendar to view shifts available for claiming and claim those you are eligible to claim.
- [Viewing Leave Requests](#) — Use Calendar to track the status of a Leave Request.
- [Exporting Calendar to iCal](#) — Use the Export Calendar to iCal to export your schedule to Microsoft Outlook or download the iCal file and import into other calendar applications.

#### 5.1.2 Display Options

---

Go to Calendar > Options to select from the list of options you can display.

- Schedule — blue indicates a shift you are scheduled to work.
- Time — green indicates you have submitted time for a shift you worked.
- SwapBoard — rose indicated the number of shifts available to claim on the SwapBoard. To claim, you must pass a check.
- My Leave — brown indicates you submitted a leave request and indicates its status.
- Availability — yellow indicates the times when you are available to work.
- Events — purple indicates an event is scheduled.

### 5.1.3 Shift Borders

---

Borders highlight shifts in your Calendar so you can quickly distinguish the following:

- Gold — you placed a shift on the SwapBoard and it has not yet been claimed. If you split a shift into two shifts and then swap each shift, a gold border displays around each of the split shifts. When one or both shifts are claimed, they no longer display on your Calendar.
- Green — you are trying to trade a shift you are assigned to work and have placed it on the SwapBoard. A green border displays around a shift that you are willing to either swap or trade.
- No Border — you are scheduled to work a shift and have approved it. When you approve the shift, a check displays in the check box in left corner and the border disappears.
- Red — you are assigned to work a shift but have not yet approved it.

Note: While most organizations require that you approve shifts you are scheduled to work, not all organizations do so. If your organization does not, a shift displays in your Calendar as already approved, i.e., no border and a check in the check box it indicate it is automatically approved.

## 5.2 Setting Calendar Options

---

Configure the Calendar window to display the information you would like to see. Options include: Schedule, Time, SwapBoard, My Leave, Availability, and Events.

To Set Calendar Options:

1. Select the Calendar link on the top menu or TeamWork drop-down list.

Your calendar displays options selected in the default format, i.e., Day, Week, Month, or List.

Note: Set the default format in Settings > Preferences.

2. Select Calendar > Options.

Calendar Options window displays.

Important: When you display the options on your Calendar window, you can select them to quickly perform other actions in the Employee portal. See [Performing Actions from Calendar](#).

3. Select the check boxes of the information you would like to view and select Submit.

Selected items display in the Calendar window. Information is color-coded by type.

## 5.3 Performing Actions from Calendar

---

The Calendar window provides quick access to time entry, viewing swaps and empty shifts, swapping and trading shifts, changing availability, overriding availability for a specific date, and keeping track of leave. You can also split a shift into two shifts, putting one shift on the SwapBoard, and merge a split shift.

To perform actions from Calendar:

1. Select the Calendar link on the top menu or TeamWork drop-down list.  
Calendar displays options you select in the default format, i.e., Day, Week, Month, or List.
2. To display all options, go to Calendar > Options. Under Display, select all check boxes and select Submit.  
Calendar window displays your schedule, time information entered, swaps available, leave requests, availability, and events. They are all color-coded as shown in the Options window.
3. To use Calendar to perform actions, select an option.  
A pop-up window displays possible actions. They may include:
  - o [Creating a Time Card](#)
  - o [Viewing or Changing Availability](#)
  - o [Viewing and Claiming SwapBoard Shifts](#)
  - o [Viewing Leave Requests](#)
  - o [Placing a Shift on the SwapBoard](#)
  - o [Claiming an Empty Shift](#)
  - o [Splitting a Shift](#)
  - o [Merging a Split Shift](#)
  - o [Reclaiming Your Swapped Shift](#)
  - o [Trading a Shift](#)
  - o [Reclaiming Your Traded Shift](#)

## 5.4 Approving All Shifts

---

If your organization requires you to approve shifts, use Calendar > Approve All to quickly acknowledge you have reviewed your schedule and approve the shifts you are assigned to work. If you would like to make changes, see the [Swapping & Managing Your Shifts](#).

To Approve All Shifts:

1. Select the Calendar link on the top menu or TeamWork drop-down list.  
Your calendar displays options selected in the default format, i.e., Day, Week, Month, or List. Unapproved shifts are highlighted with a red border.
2. To approve all shifts, select Calendar > Approve All.  
Pop-up window prompts: Approve all shifts?
3. Select Submit.

## 5.5 Viewing and Claiming SwapBoard Shifts

---

Display shifts that are available on the SwapBoard to claim or trade. Use Calendar to check for your availability, and based on the results, you can claim a shift or make an offer to trade.

To View and Claim Swap Board Shifts:

1. Select the Calendar link on the top menu or TeamWork drop-down list.  
Your calendar displays options selected in the default format, i.e., Day, Week, Month, or List.  
Note: You must select the check box for SwapBoard under Calendar > Options.
2. Select Swaps and select either Details or SwapBoard.
3. If you select SwapBoard, the SwapBoard window displays. See [Claiming a Shift](#).
4. If you select Details, Calendar displays available shifts in pink.
5. Select an available shift. A prompt displays for Check or Check Trade, depending on the type of shift.
6. To check your availability for the shift, select the Check or Check Trade button.  
Claim window or Trade window displays. Reason you cannot claim displays or Claim button or Make an Offer button displays.
7. To claim, select Claim.
8. To Trade, select Make an Offer. See [Trading a Shift](#).

## 5.6 Viewing Leave Requests

---

The Calendar window displays leave requests and their status.

To View Leave Request Status:

1. Select the Calendar link on the top menu.

Calendar window displays.

Note: You must select the check box for My Leave under Calendar > Options.

2. To view a Leave Request, select a leave request and select Open.

Leave window displays leave request status.



## 5.7 Viewing or Changing Availability

---

Use the Calendar window to view and make changes to your availability. This includes viewing availability and overriding availability for a specific date.

To View or Change Availability:

1. Select the Calendar link on the top menu or TeamWork drop-down list.  
Your calendar displays options selected in the default format, i.e., Day, Week, Month, or List.  
Note: You must select the check box for Availability under Calendar > Options.
2. Select an Available time or Not Available time.  
Available or Not Available window displays a prompt to Open.
3. Select Open.  
Windows display for the type of availability you selected.
4. If you selected an Available time, the Availability > Templates window displays. To make changes to your global or location-specific availability, see [Maintaining a Template](#).
5. To change availability for several dates, select Availability > Templates > Add.  
Add Template window displays. See [Adding a Date-Based Template](#).
6. To change availability for one day, select Availability > Overrides > Add.  
Overrides window displays. See [Adding a Single-Day Override](#).
7. If you selected a Not Available time, My Leave window displays.
8. If a leave request has not been granted, you can delete it. If it has been granted, you cannot change it or delete it.  
See [Canceling a Leave Request](#).

## 5.8 Exporting Calendar to iCal

---

Download your calendar information in an iCalendar file and open it in Google Chrome, Microsoft Outlook, or another software. You can also save it to use in a different application.

To Export Calendar to iCal:

1. Select the Settings link on the top menu or TeamWork drop-down list.  
Information window displays.
2. Select Public Pages.
3. To export your Calendar, locate the Link to iCal formatted data. Copy and paste it into a browser and select Enter.  
Opening EmployeeSchedule.ics window displays.
4. Select an option: Open with Google Chrome, Microsoft Outlook, Other or Save File to downloads.
5. Select OK.

## 6. Availability

---

### 6.1 Availability Section Overview

---



The Availability section shows your overall availability as well as your availability at specific locations. You can use templates to create global availability and availability specific to a location. In addition, you can add availability using a date-based template or override availability for a single day. If you would like to review window examples, see [Availability](#). Refer to the following How To's.

- [Viewing My Availability](#) — Use the My Availability window to display the times you are available to work in any given day, week, or month. To review availability specifics for a location, select the location availability and then select Open. Or select the Templates tab and select a location using the drop-down list.
- [Adding a Template](#) — Use the Templates window to set availability for all locations, i.e., global or one location.
- [Maintaining a Template](#) — Use the Templates window to maintain your availability.
- [Adding a Date-Based Template](#) — Use the Add Template window to change your availability for a specific time period.
- [Adding a Single-Day Override](#) — Use the Override window to change your availability for a single day.
- [Selecting Volunteer Pools](#) — Use the Volunteer window to select Volunteer Pool membership.
- [Deleting a Template or Override](#) — Use the Templates window or Overrides window to delete a template or override.
- [Adding a Leave Request](#) — Use the My Leave window to add a leave request.
- [Viewing a Leave Request](#) — Use the My Leave window to view the status of leave requests you have submitted.
- [Canceling a Leave Request](#) — Use the My Leave window to cancel a leave request that has not yet been approved.
- [Listing All Leave](#) — Use the All window to display all leave requests for a location, including Granted Leave Requests.

## 6.2 Viewing My Availability

---

Use the My Availability window to display a combined Calendar window that includes your global availability as well as your availability for all of the locations you are assigned to.

To View My Availability:

1. Go to Availability > My Availability.  
My Availability window displays.
2. Use the arrow buttons to display future and previous years and months, weeks, and days. Select Today to return to the present.  
Today's date is highlighted.
3. Select the availability for a specific date and location.  
Availability > Templates display for the location selected.
4. To change availability, see [Maintaining a Template](#), [Adding a Date-Based Template](#), and [Adding a Single-Day Override](#).

## 6.3 Adding a Template

Use the Templates window to establish when you are available to work. If you work in more than one location, use the global template or add a different availability template for each location. Once you have added a template, you can maintain it using the Templates window.

To Add a Template:

1. Go to Availability > Templates.

Availability Templates window displays. Scope is Global by default.

2. If a template is for only one location, select the location from the drop-down list.

Use the following guidelines to help you decide whether a template should be global or local.

| Global Template   | Local Template   |
|---|--|
| Use a Global template when availability is the same at most or all locations you are assigned to. This quickly puts your availability into all locations at one time.   | Use a Local template when availability is specific to just one location. Local availability overrides Global availability for that one location. |
| <p><b>Example:</b> You are assigned to work at multiple locations and you do not want to work on Sundays at most locations. There is one location that is convenient to work at on Sunday afternoons, so you change availability for Sunday afternoons at that one location.</p> <p>Add a <b>Global</b> template and select <b>Off</b> for Sunday. Add a <b>Local</b> template for that one location and enter the <b>times you are available</b>. See the steps below.</p> |  |

1. Select the check boxes of the days you are available. If you can work every day, select check boxes for all days.
2. Select a Priority using the drop-down list. 1 indicates a low interest in working and 9 indicates it is a high priority, i.e., you would especially like to work this day.
3. Enter Available times. If not available ALL DAY, select From and To times you are available in each day.  
Note: Your chances of being scheduled to shifts are greater the more available you are for work and the higher the priority.
4. (Optional) Enter Preferred times.  
Remember: You can set Global availability as well as availability at each location.
5. Select Save.  
Templates window displays. See the following:

- o [Maintaining a Template](#)

- o [Adding a Date-Based Template](#)
- o [Adding a Single Day Override](#)
- o [Deleting a Template or Override](#)

## 6.4 Maintaining a Template

---

Use the Templates window to make changes to your global availability as well as to edit location availability. Once you establish availability for a location, you can edit the information in the Templates window. The automatic scheduling process uses your availability when it assigns you to shifts in a schedule.

Note: Some organizations have schedulers enter availability in the Location portal. Other organizations have employees enter their availability in the Employee portal. Some organizations, such as colleges and universities, do a combination of both to accommodate employee changing schedules as semester class schedules change.

If you cannot enter or edit your availability, contact your scheduler to have changes or corrections made.

To Maintain a Template:

1. Go to Availability > Templates.  
Templates window displays. Scope is Global by default.
2. To edit availability for a specific location, select the location using the drop-down list.  
Scope displays either Global or Local to indicate you are editing Global availability or availability for a location.
3. Select the check boxes of the days you are available. If you can work every day, select check boxes for all days.
4. Select a Priority using the drop-down list. 1 indicates a low interest in working and 9 indicates it is a high priority, i.e., you would especially like to work this day.
5. Enter Available times. If not available ALL DAY, select From and To times you are available in each day.  
Remember: Your chances of being scheduled to shifts are greater the more available you are for work and the higher the priority.
6. (Optional) Enter Preferred times.  
Remember: You can set Global availability as well as availability at each location.
7. Select Save. See the following:
  - o [Adding a Date-Based Template](#)
  - o [Adding a Single Day Override](#)
  - o [Deleting a Template or Override](#)

## 6.5 Adding a Date-Based Template

---

Use **Templates > Add** to launch the Add Template window. Using this window, you can add a Date-Based template for location-based availability for a time period. Once you have added a template, make changes using the Templates window.

Example: A college or university may have different scheduling needs around exams and your availability may change for this period of time.

Note: A Date-Based Template changes availability only for the location and dates identified. When the Date-Based Template is no longer needed, simply delete it. See [Deleting a Template or Override](#).

To Add a Date-Based Template:

1. Go to **Availability > Templates > Add**.  
Add Template window displays. Name displays as Date Based.
2. Select Scope using the drop-down list to identify the location. Each location has a selection with a (Date Based) option in parenthesis.
3. Enter a Name for the Date-Based Template. (Date Based) remains in the name for the location selected.
4. Select the Date Range: start and end dates.  
Note: This availability only overrides the Location-specific availability during the date range you select.
5. Select Save.  
Availability > Templates window displays. NA displays in the Available column, indicating 0 hours available.
6. If you are available for some of the time, select the arrow next to NA and add hours on the days you are available. Otherwise, leave NA to indicate you are not available.
7. Select Save.  
Saved message displays highlighted in green with a timestamp.
8. To verify your Date-Based template, go to the My Availability window. The dates indicated display Not Available or some availability, depending on what you entered. Select the location for that day and select Open to see the Date-Based template and make changes.



## 6.6 Adding an Single-Day Override

---

Use the Override window to override your templates for a single day. You can choose to be off for that entire day at all locations, i.e., global, or part of the day at only one location. Once you have added the Single-Day Override, you can verify it by [Viewing My Availability](#) for that single day.

Note: If you create a Single-Day Override for your global availability, it changes your availability for scheduling in ALL locations for that one date. You can also choose to change availability for only one location for a single day. In addition, you can have two Single-Day Overrides, one as global to be unavailable for an entire day and the other for limited availability at one location. Remember, local availability overrides global availability for the location specified.

To Add a Single-Day Override:

1. Go to Availability > Overrides > Add.  
Override window displays.
2. Select Scope: either Global or a Location.
3. Select a Date.
4. To be unavailable the entire day, select Save at this time.
5. To be available for part of the day, select the Enabled check box.
6. Enter Available Time Ranges and Preferred Time Ranges for the single day.
7. Select Save.
8. To verify your Single-Day Override, go to the My Availability window. The date indicated displays Not Available or some availability, depending on what you entered. Select the location for that day and select Open to see the Single-Day Override.
9. To make changes, select Open under the Actions column.  
Override window displays.
10. Make desired changes and select Save.

## 6.7 Selecting Volunteer Pools

---

Use the Volunteer window to join a volunteer group for scheduling purposes. When a schedule is filled, your scheduler can specify a pool of employees to work the shifts.

To Select a Volunteer Pool:

1. Go to Availability > Volunteer.  
Volunteer window displays the names and information related to volunteer pools.
2. Review Start and End dates.
3. The Volunteer pools you are assigned to list Yes under the Volunteer column.
4. To join a Volunteer pool, select Open and complete the information.  
Volunteer window displays.
5. Select Save.

## 6.8 Deleting a Template or Override

---

When you are no longer using a template or override, we recommend that you delete it.

To Delete a Template or Override:


1. Go to Availability.  
My Availability window displays.
2. Select the Templates tab or the Overrides tab.  
The Templates window or Overrides window displays.
3. If this is a template, select the template you would like to delete using the drop-down list.  
Template window displays.
4. If this is an override, locate the override you would like to delete and select Open.  
Note: Use the arrows or date selector to change years.  
The Override window displays.
5. Select the Delete button.  
Prompt displays: Delete?
6. Select OK to delete the template or override.

## 6.9 Adding a Leave Request

---

Use the My Leave window to request time off and submit the request to your scheduler. Check and see the status of your leave request. Read comments related to the request. Click on the Add button, complete the required information, and save it. The request is sent to your scheduler.

To Add a Leave Request:

1. Go to Availability > My Leave.  
My Leave window displays.
2. Select Add.  
Leave window displays.
3. Select Leave Type using the drop-down list. If a Leave Type list does not display, your organization does not require it.
4. Enter the Start Date and End Date. Click on the calendar  link to scroll through the calendar and select the dates.
5. The Days in Range automatically displays the number of days. If you change the number, the End Date automatically adjusts.
6. The Total Hours automatically displays based on 8 hours per day times the number of days. Sync Hours check box is selected by default and is used to automatically calculate the hours.
7. If this request is for less than one full day, enter the Times for Start Time and End Time. Otherwise, do not enter times, i.e., it is for a full day.  
Example: If you request three mornings off, enter 8 AM - 12 PM. TeamWork 5 automatically displays 12 Total Hours. If you request three days off, TeamWork 5 automatically displays 24 Total Hours.
8. Type any comments related to this leave request.
9. Select Save.

## 6.10 Viewing a Leave Request

---

Use the My Leave window to view the status of your leave request. Current leave request information is also posted in the Home window and Calendar window.

To View a Leave Request:

1. Go to Availability > My Leave.  
My Leave window displays.
2. Scroll down the window to review the leave requests you have submitted this year.  
Default display is the current year.
3. Use the next and previous arrows or date selector to change years.  
Leave requests display for the selected years.

## 6.11 Canceling a Leave Request

---

Use the My Leave window to cancel a leave request that has not yet been approved. Once it is approved, you must request that your scheduler cancel it.

To Cancel a Leave Request:

1. Go to Availability > My Leave.  
My Leave window displays.
2. Scroll down the window to the leave request you would like to cancel.
3. If the leave request status is Requested, select the Open button at the end of the row.  
Leave window displays.
4. Select Delete.  
Window prompts: Delete?
5. Select OK.  
Leave request is canceled from your window and your scheduler's window.
6. If the leave request status is Granted, you cannot cancel it.
7. Contact your scheduler and ask that the leave request be canceled. See [Collaboration Section Overview](#) and [Adding a Message](#).

## 6.12 Listing All Leave

---

The All tab displays a summary of the number and type of leave requests for all employees by location. Listed by day are totals for requested, denied, and cancelled leave for each month. Granted leave displays the dates and employee who is out on leave. This is helpful if the organization restricts the number of employees who can take leave on one day.

To list All leave info:

1. Go to Availability > All. It is the tab after My Leave.  
My Leave window displays.
2. Select the Location using the drop-down list.  
Leave window displays leave requests for one month for the location selected. Each location you are assigned to is in the Location drop-down list.
3. Use the next and previous arrows or date selector to change years or days.  
Today's date is highlighted.
4. Scroll down to view a table of Granted Leave Requests.  
Dates of leave, number of days off, and the employees who request and are granted leave display.

# 7. Schedule

## 7.1 Schedule Section Overview

**My Schedule** - Week ▾ 4/4/2017

| Date ×                  | Location ▾      | Date ▾   | Station ▾        | Group ▾          | Notes ▾ | Start ▾ | End ▾    | Break ▾            | Hours ▾      | Actions  |
|-------------------------|-----------------|----------|------------------|------------------|---------|---------|----------|--------------------|--------------|--|
| <b>▲ Date: 4/4/2017</b> |                 |          |                  |                  |         |         |          |                    |              |  |
|                         | Dining Services | 4/4/2017 | Cashier          |                  |         | 2:00 PM | 10:00 PM |                    | 8.00         | <span style="background-color: #f4a460; padding: 2px 5px;">OK?</span> <span style="border: 1px solid #ccc; padding: 2px 5px;">Swap</span> <span style="border: 1px solid #ccc; padding: 2px 5px;">-/-</span> |
| <b>▲ Date: 4/5/2017</b> |                 |          |                  |                  |         |         |          |                    |              |  |
|                         | Dining Services | 4/5/2017 | Cook             | Food Preparation |         | 8:00 AM | 4:00 PM  | 12:00 PM - 1:00 PM | 7.00         | <span style="background-color: #f4a460; padding: 2px 5px;">OK?</span> <span style="border: 1px solid #ccc; padding: 2px 5px;">Swap</span> <span style="border: 1px solid #ccc; padding: 2px 5px;">-/-</span> |
| <b>▲ Date: 4/6/2017</b> |                 |          |                  |                  |         |         |          |                    |              |  |
|                         | Dining Services | 4/6/2017 | Prep Cook        | Food Preparation |         | 8:00 AM | 4:00 PM  |                    | 8.00         | <span style="background-color: #f4a460; padding: 2px 5px;">OK?</span> <span style="border: 1px solid #ccc; padding: 2px 5px;">Swap</span> <span style="border: 1px solid #ccc; padding: 2px 5px;">-/-</span> |
|                         |                 |          | <b>Shifts: 3</b> |                  |         |         |          |                    | <b>23.00</b> |  |

Approve All

The Schedule section shows you all scheduling information. You can display it by Day, Week, or Month and start it on any date. If you would like to review window examples, see [Schedule](#). Refer to the following How To's:

- [Using My Schedule](#) — Use the My Schedule window to display the shifts in your schedule. Information includes location, date, station, group, notes, start and end times, break, hours and actions.
- [Swapping & Managing Your Shifts](#) — Use the SwapBoard to adjust your schedule to meet your needs.
- [Displaying Schedule Totals](#) — Use the Totals window to see total hours worked for a year. Information is broken down by location, date, shifts, and hours.
- [Displaying All Schedule Info](#) — Use the All window to list the location schedule of all employees for a specific day, week, or month.
- [Displaying Coworkers Contact Info](#) — Use the Coworkers window to list contact information for each employee.



## 7.2 Using My Schedule

---

Use My Schedule to display and manage your shifts. Drag and drop any column header to the left corner of the table. The window displays information sorted by that column. To fully use the Schedule section windows, review [Using Filters](#).

Tasks you can perform include:

- [Approving one shift or all shifts](#)
- [Placing a shift on the SwapBoard](#)
- [Reclaiming your swapped shift](#)
- [Trading a shift](#)
- [Reclaiming your traded shift](#)
- [Splitting a shift](#)
- [Merging a split shift](#)
- [Saving My Schedule](#)



## 7.3 Approving One Shift or All Shifts

---

When your organization requires that you approve a shift you are scheduled to work, you can approve all shifts in the schedule at once, or if you are going to try to swap or trade a shift, approve them one at a time. You can do this from the My Schedule window or the Calendar window.


To Approve One Shift or All Shifts:

1. To approve one shift, select OK?

 changes to green, i.e., . This indicates you have approved the shift.

2. To approve all shifts, select the Approve All button at the bottom of the window.  
Approve All window displays.

3. Select Submit.

 displays for all shifts.

## 7.4 Placing a Shift on the SwapBoard

---

Use the My Schedule or Calendar windows to place a shift that you are assigned to work, but do not want to work, on the SwapBoard. By doing so, you can try to find another employee to work the shift instead of you. The transaction is a swap.

To Place a Shift on the Swap Board:

1. Go to Schedule> My Schedule and locate the shift you want to swap.

My Schedule window displays.

OR

Go to Calendar and select a shift.

Pop-up window displays

2. Select .

Swap window displays.

Note: You can choose to swap a shift whether or not it is approved. However, you are responsible for the shift until another employee claims it.

3. Select the radio button for Swap. It is the default.

Note: If you selected the radio button for Either or Trade, see [Trading a Shift](#).

4. On the Swap Shift window, select a Reason using the drop-down list. If this drop-down list displays, you must select a reason, but only the Scheduler sees the reason. Employees do not see the reason on their SwapBoard when they see the shift is available.

5. Select Swap With: anyone or a specific employee.

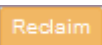
Explanation:

Anyone - puts the shift on the SwapBoard of all employees who are able to work at that station.

Choose one Employee - the organization controls whether you can do this type of direct swap. If you are allowed, you select one employee name from the drop-down list. It contains only the names of other employees who are able to work at that station. Then, once an employee name is selected, the shift is placed on that employee's SwapBoard. Only that employee sees it.

Note: The Schedules section provides two useful tabs: Coworkers lists of employees by location and their contact information so you can contact a potential replacement. All shows you the full schedule so you can see which employees are already scheduled to work.

6. Select Save to place the shift on the SwapBoard.

 displays in the Actions column. The shift is still on your schedule. When it is claimed, it no longer displays in your schedule.

7. To Reclaim the shift, see [Reclaiming Your Swapped Shift](#).

## 7.5 Reclaiming Your Swapped Shift

---

Use the SwapBoard to reclaim a shift you placed on the SwapBoard. If it has not been claimed by another employee, you can easily reclaim it.

To Reclaim Your Swapped Shift:

1. Go to Swap.

SwapBoard window displays.

2. Select  in the Actions column.

Reclaim window displays and prompts: Remove from the Swap Board?

3. To remove the shift from the swap board and reclaim it, select Submit.

The shift no longer displays on the SwapBoard. The shift displays on the My Schedule window and on your Calendar.

## 7.6 Trading a Shift

---

Use the SwapBoard window to trade your shift or offer to trade for another shift an employee has placed on the SwapBoard. When you arrange a trade, each employee works the other employee's shift. The transaction is a trade.

Important: You place a shift on the SwapBoard from either the My Schedule window or the Calendar window. Once a shift for trade displays on the SwapBoard, you can check and see whether or not you can accept a trade.


To Offer a Shift for Trade:

1. Go to the My Schedule window or the Calendar window and select Swap for the shift you would like to trade.


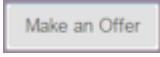
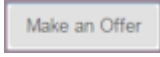

Swap window displays.

Note: You can choose to trade a shift whether or not it is approved. However, you are responsible for the shift until it is traded or claimed.





2. Select the radio button for Trade or Either, highlighting the button.  
Note: If you select Either, it means you will swap the shift or trade it.
3. Select a Reason using the drop-down list.
4. Type a Comment.
5. Select a time to Offer a Deadline or accept the default that displays.
6. Select Swap With: Anyone or a specific employee.
7. Select Save.

 displays in the Actions column for the shift you want to trade. The shift is added to the SwapBoard, but it is still your responsibility until you accept a trade.

## To Offer to Trade Shifts:

1. From the SwapBoard window, select .  
Trade window displays shift information and checks to see whether you can offer a trade.  
If Yes,  displays.
2. Select .  
The Make an Offer window expands and displays your shifts.
3. Select Specific Shift using the drop-down list.  
Offer Check criteria display to see whether this offer works for the other employee's schedule.  
Note: If the checks are not positive, i.e., NO instead of YES, you should search for a better match. Keep selecting shifts until you find one that is positive, where all answers are Yes.
4. If Yes, select .  
Note: Before there is a change to your schedule or to the employee's schedule who is offering to trade, the employee must accept the trade.

## To Accept a Traded Shift:

1. Go to one of the following windows and select the shift you want to trade: Calendar, SwapBoard, or My Schedule.
2. Select .  
My Trade window displays the shift you want to trade and details of the employee's Offer.
3. From this window, you can either  the shift or  the offer.
4. Select  to continue with the trade.  
Offer window displays and checks the offer.
5. If checks are positive, you can either Swap to accept the offer or Decline.
6. If you select Swap, an Offer window displays Completed.
7. Select Close and Refresh Screen.

## 7.7 Reclaiming Your Traded Shift

---

Reclaim a traded shift from Calendar, My Schedule, or the SwapBoard windows. If it has not been claimed by another employee, you can easily reclaim it.


To Reclaim Your Swapped Shift:

1. Select the button to Trade.  
My Trade window displays.
2. Select Reclaim.  
The shift displays on the My Schedule window and on your Calendar.

## 7.8 Splitting a Shift

---

When you cannot work an entire shift, you can split the shift and place part of it on the SwapBoard for another employee to claim. If you are assigned the shift, you are responsible for working it unless it is claimed. You can also split an empty shift and work the part of the shift you are able to work.

Use the  icon to launch the Split Shift window

To Split a Shift:

1. Select .

Split Shift window displays with a suggested split.

2. Select .

Both shifts display. You can:


- Approve one shift you can work.
- Merge the shifts back into one shift.
- Swap or trade either shift or both shifts.



## 7.9 Merging a Split Shift

---

When you can work a shift you have previously split, you can merge the shift into one shift.

Use the  icon to launch the Merge window.

To Merge Split Shifts:

1. Select .

Merge window displays with prompt: Merge with previous back-to-back shift?

2. Select Submit.

The shift displays as one shift.

## 7.10 Saving My Schedule

---

You can save your schedule as a PDF or Excel file.

To Save My Schedule:

1. Go to Schedule > My Schedule.  
My Schedule window displays.
2. Select My Schedule > Save As PDF.  
MySchedule.pdf window displays.
3. Open the Schedule with Adobe Acrobat or Save the file.  
My Schedule converts to PDF format.
4. Select My Schedule > Save As Excel.  
MySchedule.xlsx window displays.
5. Open the Schedule with Microsoft Excel or Save the file.  
My Schedule converts to Microsoft Excel format.

## 7.11 Displaying Schedule Totals

---

The Totals link provides you with an up-to-date view of one year's employment for each week you are scheduled to work. It lists hours worked by location, date, and number of shifts.

To review Totals:

1. Go to Schedule > Totals.

Totals window displays.

Note: The default is to display the current year for all published schedules in all locations you are assigned to.

2. Scroll down the window to review your number of shifts and hours for the weeks you were scheduled to work in the year you select.
3. Use the next and previous arrows or date selector to change the year that displays.

## 7.12 Displaying All Schedule Info

---

The All tab displays schedules for each employee at each station for each location. Listed is the following shift information: date, station, employee name, group, notes, start and end times, breaks, total hours, and whether or not you can use the SwapBoard to claim an empty shift. In addition, the rows of employees who are swapping shifts are highlighted in yellow.

To display All Schedule info:

1. Go to My Schedule > All.  
Schedules window displays. Use the Location drop-down list to select each location you are assigned to.
2. Click on Day, Week, or Month to select the schedule time frame.
3. Use the next and previous arrows or date selector to change the time frame.
4. Select a different location to display the full schedule for that location.

## 7.13 Displaying Coworkers Contact Info

---

The Information employees enter in the Employee portal Settings section displays in the Coworkers window. It lists the employees who are assigned to each location and includes phone numbers, crew assignments, and an email address.

To display Coworkers contact info:

1. Go to Schedule > Coworkers.

CoWorkers window displays. Use the Location drop-down list to select each location you are assigned to.

2. Select a different location to display the Coworkers information for that location.

## 8. SwapBoard

---

### 8.1 Swapping & Managing Your Shifts

---



The SwapBoard helps you adjust your schedule to meet your needs. Access Swap on the top menu, through My Schedule, or under the TeamWork drop-down menu. Use the arrows at the top of the window to scroll backwards and forwards to view scheduled and available shifts on a day-by-day basis.

There are two windows in the SwapBoard: My Shifts and Available. Reconfigure them by dragging and dropping any column header to the left corner of the table. The window displays information sorted by that column.

Important: The types of Swapping and Trading available to you as an employee are controlled by your organization.

How To's for SwapBoard functions, also available from the My Schedule window and Calendar, are as follows:

- [Placing a Shift on the Swap Board](#) — Use My Shifts to see your schedule and place one of your scheduled shifts on the SwapBoard.
- [Reclaiming Your Swapped Shift](#) — Use the SwapBoard to reclaim a shift you placed on the SwapBoard.
- [Claiming a Shift](#) — Use the SwapBoard window to check and see if you can claim a shift another employee has placed on the SwapBoard.
- [Claiming an Empty Shift](#) — Use the SwapBoard window to see if you can claim an Empty Shift. You can also split an empty shift into two parts and then claim one part.
- [Splitting a Shift](#) — Use the SwapBoard to split a shift that another employee placed on the SwapBoard or an empty shift. Once a shift is split, claim a portion of the shift to work.
- [Merging a Split Shift](#) — Use My Shifts to merge a split shift that you placed on the SwapBoard.
- [Trading a Shift](#) — Use My Shifts to see your schedule and trade one of your scheduled shifts. Use the Available window to see if you can trade a shift or accept a trade offer.
- [Reclaiming Your Traded Shift](#) — Use the SwapBoard to reclaim a traded shift you placed on the SwapBoard.

## 8.2 Placing a Shift on the SwapBoard

---

Use the My Schedule or Calendar windows to place a shift that you are assigned to work, but do not want to work, on the SwapBoard. By doing so, you can try to find another employee to work the shift instead of you. The transaction is a swap.

To Place a Shift on the Swap Board:

1. Go to Schedule> My Schedule and locate the shift you want to swap.

My Schedule window displays.

OR

Go to Calendar and select a shift.

Pop-up window displays

2. Select .

Swap window displays.

Note: You can choose to swap a shift whether or not it is approved. However, you are responsible for the shift until another employee claims it.

3. Select the radio button for Swap. It is the default.

Note: If you selected the radio button for Either or Trade, see [Trading a Shift](#).

4. On the Swap Shift window, select a Reason using the drop-down list. If this drop-down list displays, you must select a reason, but only the Scheduler sees the reason. Employees do not see the reason on their SwapBoard when they see the shift is available.

5. Select Swap With: anyone or a specific employee.


Explanation:

Anyone - puts the shift on the SwapBoard of all employees who are able to work at that station.

Choose one Employee - the organization controls whether you can do this type of direct swap. If you are allowed, you select one employee name from the drop-down list. It contains only the names of other employees who are able to work at that station. Then, once an employee name is selected, the shift is placed on that employee's SwapBoard. Only that employee sees it.

Note: The Schedules section provides two useful tabs: Coworkers lists of employees by location and their contact information so you can contact a potential replacement. All shows you the full schedule so you can see which employees are already scheduled to work.

6. Select Save to place the shift on the SwapBoard.

 displays in the Actions column. The shift is still on your schedule. When it is claimed, it no longer displays in your schedule.

7. To Reclaim the shift, see [Reclaiming Your Swapped Shift](#).

## 8.3 Reclaiming Your Swapped Shift

---

Use the SwapBoard to reclaim a shift you placed on the SwapBoard. If it has not been claimed by another employee, you can easily reclaim it.

To Reclaim Your Swapped Shift:

1. Go to Swap.

SwapBoard window displays.

2. Select  in the Actions column.

Reclaim window displays and prompts: Remove from the Swap Board?

3. To remove the shift from the swap board and reclaim it, select Submit.

The shift no longer displays on the SwapBoard. The shift displays on the My Schedule window and on your Calendar.



## 8.4 Claiming a Shift

---

Use the SwapBoard window to claim a shift another employee has placed on the SwapBoard or an empty shift.

To Claim a shift:

1. Go to Swap.

SwapBoard window displays available shift details.

Note: You can drag and drop any column header to the left corner of the table. The window displays information sorted by that column. Also, to further refine the display, see [Using Filters](#).

2. Select  in the Actions column.

Claim window displays. It checks whether or not you could claim this shift.

If NO displays, it is not possible.

If YES displays, a Claim button displays.

3. On the Claim window, select Claim.

Claim window displays Completed if your organization does not require Scheduler approval.

4. Select the Close and Refresh Screen button.

Shift displays in your schedule as an approved shift.

Note: If you cannot claim the shift, but could work a portion of the shift, see [Splitting a Shift](#) and [Claiming an Empty Shift](#).

## 8.5 Claiming an Empty Shift

---

Use the SwapBoard window to claim an empty shift. First you check whether or not you are allowed to claim the shift. If you cannot claim the entire shift, you can split it and check whether you are allowed to claim one of the split shifts. Then you can claim the portion that works for your schedule.

Note: An empty shift displays as a SwapBoard shift on the Calendar window and you can claim it from there or from the SwapBoard window. If your manager requires approval for swaps, they also approve claiming empty shifts.

To Claim an Empty Shift:

1. Go to Swap.  
SwapBoard window displays.
2. Under Available shifts, select .
3. Claim window displays. It checks whether or not you could claim this shift.
3. If NO displays under all of the checks, it is not possible to claim the entire shift. You can try to split the shift.
4. If YES displays under all of the checks, select Claim if you want the entire shift. Claim window displays Completed.
5. You can also split the shift. See [Splitting a Shift](#).

## 8.6 Splitting a Shift

---

When you cannot work an entire shift, you can split the shift and place part of it on the SwapBoard for another employee to claim. If you are assigned the shift, you are responsible for working it unless it is claimed. You can also split an empty shift and work the part of the shift you are able to work.

Use the  icon to launch the Split Shift window

To Split a Shift:

1. Select .

Split Shift window displays with a suggested split.

2. Select .


Both shifts display. You can:

- Approve one shift you can work.
- Merge the shifts back into one shift.
- Swap or trade either shift or both shifts.

## 8.7 Merging a Split Shift

---

When you can work a shift you have previously split, you can merge the shift into one shift.

Use the  icon to launch the Merge window.

To Merge Split Shifts:

1. Select .

Merge window displays with prompt: Merge with previous back-to-back shift?

2. Select Submit.

The shift displays as one shift.

## 8.8 Trading a Shift

---

Use the SwapBoard window to trade your shift or offer to trade for another shift an employee has placed on the SwapBoard. When you arrange a trade, each employee works the other employee's shift. The transaction is a trade.

Important: You place a shift on the SwapBoard from either the My Schedule window or the Calendar window. Once a shift for trade displays on the SwapBoard, you can check and see whether or not you can accept a trade.

To Offer a Shift for Trade:

1. Go to the My Schedule window or the Calendar window and select Swap for the shift you would like to trade.

Swap window displays.

Note: You can choose to trade a shift whether or not it is approved. However, you are responsible for the shift until it is traded or claimed.

2. Select the radio button for Trade or Either, highlighting the button.  
Note: If you select Either, it means you will swap the shift or trade it.
3. Select a Reason using the drop-down list.
4. Type a Comment.
5. Select a time to Offer a Deadline or accept the default that displays.
6. Select Swap With: Anyone or a specific employee.
7. Select Save.

 Trade

displays in the Actions column for the shift you want to trade. The shift is added to the SwapBoard, but it is still your responsibility until you accept a trade.

## To Offer to Trade Shifts:

1. From the SwapBoard window, select **Check Trade**.  
Trade window displays shift information and checks to see whether you can offer a trade.  
If Yes, **Make an Offer** displays.
2. Select **Make an Offer**.  
The Make an Offer window expands and displays your shifts.
3. Select Specific Shift using the drop-down list.  
Offer Check criteria display to see whether this offer works for the other employee's schedule.  
Note: If the checks are not positive, i.e., NO instead of YES, you should search for a better match. Keep selecting shifts until you find one that is positive, where all answers are Yes.
4. If Yes, select **Make an Offer**.  
Note: Before there is a change to your schedule or to the employee's schedule who is offering to trade, the employee must accept the trade.

## To Accept a Traded Shift:

1. Go to one of the following windows and select the shift you want to trade: Calendar, SwapBoard, or My Schedule.
2. Select **Trade**.  
My Trade window displays the shift you want to trade and details of the employee's Offer.
3. From this window, you can either **Reclaim** the shift or **Check** the offer.
4. Select **Check** to continue with the trade.  
Offer window displays and checks the offer.
5. If checks are positive, you can either Swap to accept the offer or Decline.
6. If you select Swap, an Offer window displays Completed.
7. Select Close and Refresh Screen.  
My Schedule window and Calendar window display the switched shift in your schedule as approved and remove the traded shift.

## 8.9 Reclaiming Your Traded Shift

---

Reclaim a traded shift from Calendar, My Schedule, or the SwapBoard windows. If it has not been claimed by another employee, you can easily reclaim it.

To Reclaim Your Swapped Shift:

1. Select the button to Trade.  
My Trade window displays.
2. Select Reclaim.  
The shift displays on the My Schedule window and on your Calendar.

## 9. Time

---

### 9.1 Time Section Overview

---



The Time section helps you manage your timekeeping. If you would like to refer to window examples, see [Time](#). Refer to the following How To's:

- [Clocking On and Off](#) — Use the Time Clock to clock on at the beginning of your shift and clock off at the end your shift. You can transfer the amount of time worked to your timesheet.
- [Creating a Time Card](#) — Use the Time Card to document the time you worked and add it to your timesheet.
- [Using the Timesheet](#) — Use the Timesheet to approve your timesheet and review time submitted at each station and location you worked.



## 9.2 Clocking On and Off

---

You can clock on and clock off using the Employee portal Clock feature. It displays on the Home page under Time and in the Time section.

To Clock On:

1. Go to Time > Clock or select the Clock link on the Home page.  
Clock window displays.
2. Location for the shift you are scheduled displays. Your default settings display in the drop-down list. Select a different Project/Task and Activity as required.
3. Select Clock On.
4. To transfer time worked to a different Location, Project/Task or activity, open the Clock, change the drop-down lists, and select Transfer.

Note: This clocks you off at the original Location/Project/Activity and begins a new time entry with the new information.

To Clock Off:

1. Go to Time > Clock.  
Time Clock displays.
2. Select Clock Off.  
Successful clock off message displays.

## 9.3 Creating a Time Card

---

There are several ways to submit a Time Card using the Employee portal.

To create a Time Card:

1. Go to Calendar and select a shift. Select Card.

Card window displays.

OR

Go to Time > Card. On the Card window, select the time in a date you are scheduled to work or the Add button for that date.

Card window displays.

OR

Go to Time > Timesheet and select Timesheet > Add.

Card window displays.

2. On the Card window, select the Date and enter start and end Times.
3. Location for the shift you are scheduled to work displays. To change the location, use the drop-down list.
4. Select the Project/Task and Activity as required.
5. Add a Note for your Manger to see. Your Manager can also leave you a note.
6. Select Yes to Alert Manager or leave No selected (default). This flags your time entry for the Manager to review.
7. Select Add.

## 9.4 Using the Timesheet

---

Use the Timesheet window to review and approve your timesheet for a Pay Period. Many organizations require employees to approve their timesheets before time is submitted to payroll.

To Review your Timesheet:

1. Go to Time > Timesheet.

Timesheet displays a Summary of hours worked and Details.

2. Select each card or clock type to view an individual time entry.

Note: You cannot edit a clock or card entry on the Timesheet window. If there is an error, select Open. On the Card or Clock window, select Alert Manager: Yes. Select Save.

3. Refer to Total on upper right to see the total number of hours worked for this pay period.

4. To add an additional time entry, Unapprove the timesheet, add the new time entry, and Approve the Timesheet again.

See [Editing an Approved Timesheet](#).

To Approve your Timesheet:

Note: You cannot approve your timesheet until the pay period has ended Once finished, the Approve button displays.

1. Go to Time > Timesheet.

Timesheet displays a Summary of hours worked as well as a breakdown of each type of time entry, the location, and other organizational information such as project, task and activity.

2. Select a card or clock entry type to view details.

Card or Clock window displays.

Note: While you can make changes to the Card using the Card window, you cannot make changes to the Clock.

3. Select Approve.

Approve window displays requesting you verify the action.

4. Select Approve.

Note: You cannot edit the Card Entry window once you have approved your timesheet unless you first Unapprove the timesheet. See [Editing an Approved Timesheet](#).

### Editing an Approved Timesheet

1. Go to Time > Timesheet.  
Timesheet displays a Summary of hours worked.
2. Select Unapprove.  
Prompt displays: Undo employee approval of timesheet?
3. To Unapprove, select Unapprove.
4. Make desired changes and select Approve to approve the timesheet again.  
Approve window displays requesting you verify the action.
5. Select Approve.

## 10. Collaboration

---

### 10.1 Collaboration Section Overview

---



The Collaboration section helps you create notifications, review and add messages and alerts, review events, and create feedback on surveys. If you would like to refer to window examples, see [Collaboration](#). Refer to the following How To's.

- [Reviewing and Adding Events](#) — Use the Events window to view the upcoming events in your organization.
- [Reviewing and Adding Messages and Alerts](#) — Use the Messages window to list messages and add a message.
- [Creating Feedback on Surveys](#) — Use the Feedback window to list the surveys your company has sent to collect information from employees. Select a survey to respond to it.
- [Reviewing and Adding Notifications](#) — Use the Notify window to set up your profile for both global (organization-wide) and location-related messages. Receive a daily report as well as instant alerts when new schedules are published or shifts are posted to the SwapBoard. Check this email address often.

## 10.2 Reviewing and Adding Events

---

Use the Events window to create or view your organization's calendar of events. Use either a calendar view or a list view. Add an event and share it with employees and managers. Edit or delete an event you created. Refer to the following How To's.

- [Reviewing Events](#)
- [Adding an Event](#)
- [Editing an Event](#)
- [Deleting an Event](#)

To Review Events:

1. Go to Collaboration > Events.  
Events Calendar displays.
2. To view the information in a list view, select the List tab.

To Add an Event:

1. Go to Collaboration > Events.  
Events Calendar displays.
2. Select the Add tab or Events > Add.  
Event window displays. Settings tab is active.

## 10.3 Reviewing and Adding Messages and Alerts

---

Use the Messages window to create and send out a Message or Alert. You can also use this section to reply to a message and edit or delete a message you have created. Refer to the following How To's.

- [Adding a Message](#)
- [Replying to a Message](#)
- [Editing a Message](#)
- [Deleting a Message](#)

### To Add a Message:

1. Go to Collaboration > Messages.  
Messages window displays Recent and All Messages and Alerts.
2. Select Messages > Add.  
Add Message window displays. Settings tab is active.
3. Select Effective Dates.
4. Type a Title for the Message.
5. Type Notes to display as part of the message.
6. Select Is Alert if the message is an alert.
7. Select Allow Replies to allow message recipients to reply to you about the message. All replies are listed with a timestamp.
8. Select Enabled to display the message immediately.  
Note: The message must be enabled to be displayed. You can disable the message to save it for future use.
9. Select Save.  
Message window is saved. Sharing and Broadcast tabs display along with a timestamp.
10. To place the Message or Alert on User or Employee Calendars, select the Shares tab.  
Shares window for the Message or Alert displays.
11. Select By: Individual or Location. Folders-is not applicable.  
Note: If you select a Location, the message is delivered to everyone in that Location. If you select Individuals, you can individually choose the employees and users with whom to share the message or alert.
12. Select With: Any, Employee, or Manager.
13. Select List.  
The window refreshes and displays a list of names, either employees, managers, or locations depending on your earlier selection.
14. Select Names to share this event with and select Add.  
Names display in Shared window.
15. Use the Remove or Remove All buttons to remove selected or all names.
16. Select Save.  
The window refreshes and the Message or Alert is posted in the calendar of those identified in the Shared text box.
17. To send this Message or Alert, select the Broadcast tab.  
Broadcast window displays.
18. Select Broadcast.  
An email is sent to everyone listed in the Shared text box and a timestamp displays.  
Note: Users and Employees must have an email address entered in TeamWork 5 or they cannot receive a message or alert that is broadcast.



### To Reply to a Message:

1. Go to Collaboration > Messages.  
Messages window displays Recent and All Messages and Alerts.
2. Select the Message or Alert you would like to reply to.  
Message summary information displays.
3. Under Replies, select Add.  
Reply window displays.
4. Type the Reply information in the text box provided.
5. Select Save.  
Your reply is received by the person who posted the message. It includes a date and timestamp.

### To Edit a Message:

1. Go to Collaboration > Messages.  
Messages window displays Recent and All Messages and Alerts.
2. Select the Message or Alert you would like to edit. You need to have been the message creator to edit a message.  
Message summary information displays.
3. Select Edit.  
Message Edit window displays.
4. Make the changes you would like to make. Any changes you make to the Message or Alert display on the calendars of those identified in the Shared text box.
5. Select Save.

### To Delete a Message:

1. Go to Collaboration > Messages.  
Messages window displays Recent and All Messages and Alerts.
2. Select the Message or Alert you would like to delete. You need to have been the message creator to delete a message.  
Message summary information displays.
3. Select Edit.  
Message Edit window displays.
4. Select Delete.

## 10.4 Creating Feedback on Surveys

---

Use the Feedback window to list surveys and respond to them.

To create Feedback on Surveys:

1. Go to Collaboration > Feedback.  
List Surveys window displays.
2. Select the Survey you want to respond to.  
Survey displays.
3. Enter the requested information.
4. Select Save.

## 10.5 Reviewing and Adding Notifications

---

Use the Notifications window to request that an email notification or instant alert be sent to you when certain changes occur in your Schedule, SwapBoard, or Leave requests.

You can create a global profile so that you get the same notifications from all locations you are assigned to. In addition, you can create a location-specific notification. Delete a notification you created when it is no longer useful. Refer to the following How To's.

- [Adding a Notification](#)
- [Editing a Notification](#)
- [Deleting a Notification](#)

Note: When you log in to your account, there may already be notifications that were set up for you by your scheduler or administrator. You can edit them at any time.

To Add a Notification:

1. Go to Collaboration > Notifications.  
My Settings window displays. Recent and All Active messages window displays.
2. Select Add or Notifications > Add.  
Add Notification window displays.
3. Select the location this notification applies to or Global, i.e., it applies to all locations.
4. Select Save.  
Notifications window displays. The first day of your work week has a check box selected by default.
5. Select whether or not you would like to receive a Daily Report: Yes - send reports or No.  
Note: It includes the information you select and arrives by email on the day or days you request.
6. Select the day or days of the week you want to receive a report.
7. Select the content to include: Calendar, Schedule, and SwapBoard.
8. Select the amount of information you want included: 7 Days, 14 Days, 21 Days, or 28 days.
9. Select the check boxes of events that should trigger an instant email notification. You will receive an email notification.
10. Select Save.  
The Notification displays in the drop-down list. When you select a location or Global, the settings you chose display. Reports that include the selected information are sent to the email you enter in Settings > Information.  
Remember: Use an email address that you check regularly.

To Edit a Notification:

1. Go to Collaboration > Notifications.  
Notifications window displays.
2. Select the location or Global notification to display settings.
3. Make changes to the settings.
4. Select Save.

To Delete a Notification:

1. Go to Collaboration > Notifications.  
Notifications window displays.
2. Select the location or Global notification you would like to delete.  
Notification window displays with selected settings.
3. Select Delete.

# 11. Settings

---

## 11.1 Settings Section Overview

---



The Settings section gives you many tools for managing your Employee portal account. If you would like to refer to window examples, see [Settings](#). Refer to the following How To's.

- [Editing Information](#) — Use the Information window to view and edit your contact information and change your password.
- [Editing Preferences](#) — Use the Preferences window to set your default home page, default calendar view, and the options you would like your calendar to display.
- [Viewing Deployments](#) — Use the Deployments window to view your assigned work locations as well as the stations where you can be assigned to work.
- [Viewing Scheduling](#) — Use the Scheduling window to view your scheduling parameters.
- [Viewing Credentials](#) — Use the Credentials window to view your credentials. Not all organizations use credentials, but if your organization does use them, this is where you can keep track of effective dates, status, certifications, and training.
- [Using Public Pages](#) — Use the Public Pages window to view and sync your schedule without logging into the Employee portal. To do so, you use the Public Pages Unique ID.

## 11.2 Editing Information

---

Use the Information window to capture important personal and contact information. Keeping this information up-to-date ensures you can be contacted and asked to work when other employees need to make schedule changes. If you have permission to edit the information in this window, make changes at any time and save them. If you cannot make changes, contact your scheduler and request that the information be corrected.

To Edit Information:

1. Go to Settings > Information.  
Information window displays.
2. Edit your First Name and Last Name and add or change any Nick Name you use.  
Note: You cannot change your Username. Contact your scheduler or your TeamWork 5 administrator if it is incorrect.
3. Leave the Time Zone setting as displayed unless you are physically working at a different location. If so, use the drop-down list to select that location.
4. Change your Password if you have not already done so. Select the Change button.  
Change Password window displays.  
Important: Change your password immediately if you believe it has been compromised.
5. Change the password information and select Submit.  
Important: Adhere to the password requirements outlined.
6. Enter or edit your contact information.  
Important: Ensure your email address is correct so you can receive notifications and messages from your scheduler.
7. Select Save.

## 11.3 Editing Preferences

---

Use the Preferences window to set up your personal view of the Employee portal. You can select your Home page, i.e., the window that displays when you log in. You can select the options you would like to display on your calendar in this window or in Calendar > Options.

To Edit Preferences:

1. Go to Settings > Preferences.  
Preferences window displays.
2. Select the Home Page using the drop-down list: Home, Calendar, Schedule, SwapBoard, Clock, or Card.
3. Select the Default View for the Calendar window: Day, Week, Month, or List.
4. Select Hours Shown: All Day or My Hours.
5. Enter My Hours start and end times.  
Note: Hours shown and My Hours fields only apply to Day or Week views.
6. Select the check boxes of the Display items you would like to see displayed on your Calendar. You can also select these item in the Calendar window. See [Setting Calendar Options](#).
7. Do not change the Time Zone or Culture selections if living in the U.S.
8. Select Save.  
Note: None of the Preferences apply to receiving nightly emails or alerts. To receive emails and alerts, see [Creating Notifications](#).

## 11.4 Viewing Deployments

---

Use this window to view the locations and stations you are assigned to work. For more information on these terms, see [Employee Portal Definitions](#).

To View Deployments:

1. Go to Settings > Deployments.

Deployments window displays Locations and Stations.

2. Select a Location name.

It is highlighted and the stations where you can be assigned to work at that location are also highlighted.

Note: Crew assignments and Start Dates also display.

3. Contact your Scheduler if you feel information needs to be changed.



## 11.5 Viewing Scheduling

---

Use this window to view scheduling. In most organizations, your scheduler controls these scheduling parameters. Thus, the limits display as gray and cannot be changed.

To View Scheduling:

1. Go to Settings > Scheduling.  
Scheduling window displays.
2. Contact your scheduler if the information needs to be changed. Review the following definitions.  
Hour/Week - Minimum number of hours per week and maximum number of hours per week  
Days/Week - Maximum number of days per week  
Shifts/Day - Maximum number of shifts per day  
Hours/Day - Maximum number of hours per day

## 11.6 Viewing Credentials

---

Use this window to view credentials such as certifications, qualifications, and training. This link displays when your organization uses the Credentials module. It helps you keep track of your certification, qualification, and training dates so that you know when you need to schedule further training or recurring certification.

To View Credentials:

1. Go to Settings > Credentials.  
Credentials window displays.
2. Contact your scheduler or administrator if information needs to be changed or updated.

## 11.7 Using Public Pages

---

Use this window to create a Unique ID that allows you to view your schedule from a custom URL without logging in to the Employee portal. While this is not a secret ID, it does allow you to quickly access your account in HTML. You can also email the URL to yourself or family members so they can view your current schedule at any time.

You can use the link to iCal formatted data to embed your schedule into other applications such as Microsoft Outlook and Google Calendar.

To Use Public Pages:

1. Go to Settings > Public Pages.  
Public Pages window displays.
2. Select Add to automatically create a Unique ID.  
Unique ID displays as well as a link to Test your public page.
3. Select Clear to delete a Unique ID.  
Unique ID is blank.  
Note: Select Add to generate a new Unique ID at any time.
4. Click on the link to Test your public page.  
Your schedule displays in your default browser.
5. Copy this link to paste into emails or save in a data phone.
6. Copy and paste the link to iCal formatted data for other applications. Contact your application provider if you need specific instructions on where to use this link in the application.