

TeamWork Employee Guide

TeamWork Help Documentation

ScheduleSource Support

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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, time entries, and attendance. In addition, you can configure your language, notifications, and other personal settings.

1.2 Common Uses

You can use the Employee portal to:

- View your schedule in a [Calendar](#) or [List](#)
- [Clock](#) On or Off
- Enter hours on your [Time Card](#)
- Request [Leave](#)
- Pick up shifts from the [Swapboard](#)
- Set up [Notifications](#)

1.3 Getting Started

First, learn about [Navigation](#). Then, click on the various sections and pages to learn what is available. You can refer back to this documentation to learn about each page and its capabilities.

1.3.1 Top Pages

- [Home](#) - The home page shows a quick summary of "today" along with links to common sections.

- [Calendar](#) - The calendar page shows shifts, leave, time entries and more in a month, week, day, or list format.

1.3.2 Sections

Your sections will depend upon the organization's setup. Here's brief descriptions of what you can find in each section.

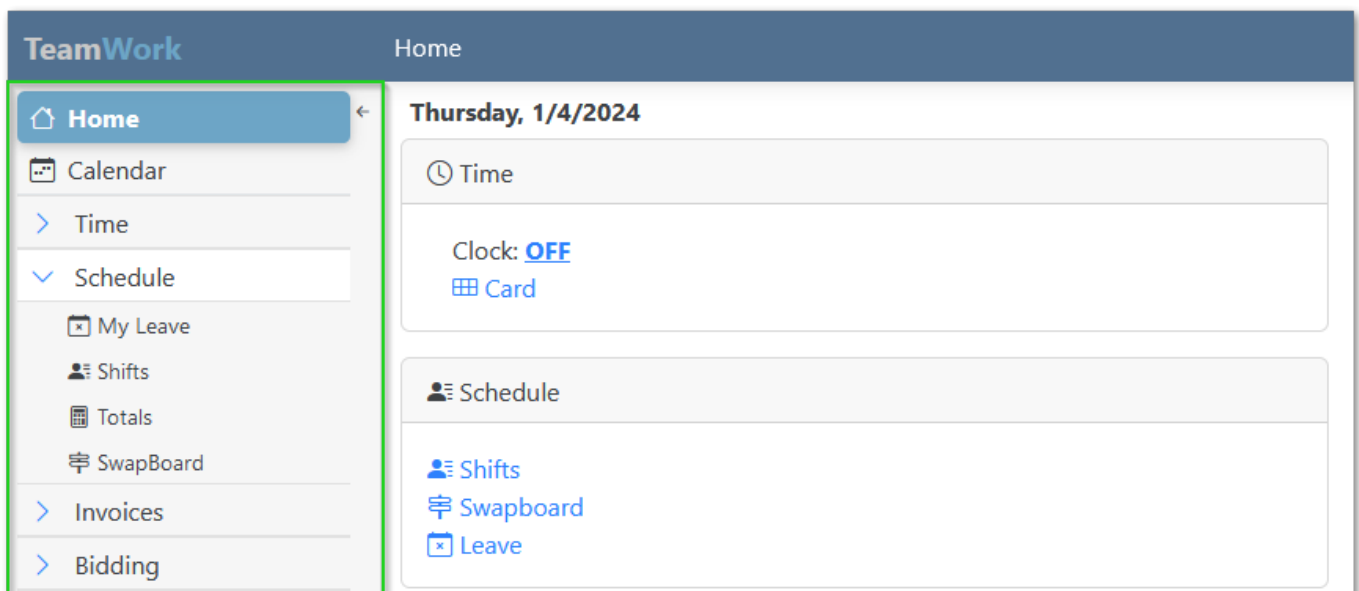
- Schedule - Your leave, shifts, total hours, and the swapboard.
- Time - The time clock, time card, timesheets, and attendance points.
- Organization - Company (or location) wide lists of Leave, Shifts, and Coworkers.
- [My Setup](#) - Settings, preferences, and notifications.
- Bidding - [Shift](#) and [Leave](#) bidding pages.
- [Events](#) - Event/Task management pages.
- [Invoices](#) - Invoice pages and reports.

2. Navigation

2.1 Main Menu

The TeamWork main menu is located on the left of the page. If the browser is smaller (or mobile) the menu will auto-hide and be accessible by clicking the menu button.

- Expand or collapse menu sections by clicking on the section title.
- Open a page by clicking the page icon/title.



When on a large screen (desktop) you have the option of hiding the menu and using the menu button, or leaving it always visible on the left.

- To hide menu, click the left-arrow (located at top-right of menu area)
- To always show the menu, click the right-arrow

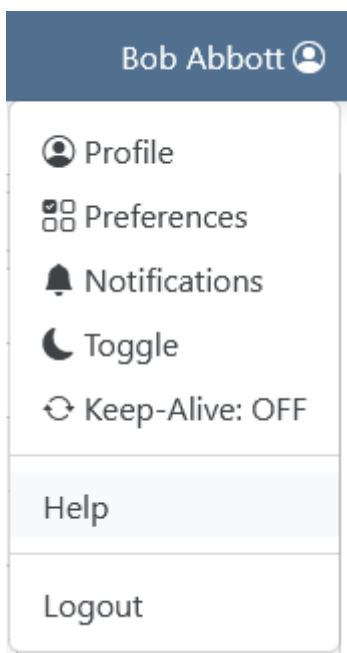
2.2 Quick Links

You can quickly open common pages using the quick links located at the right of the top title bar. The links present will depend on your organization's setup. Click one of the icons to open that page. Typical pages include: Calendar, Clock, Card, Leave, and Swapboard.



2.3 User Menu

The user menu is located at the far right of the title bar. Click your name to open the menu. The menu provides links to setup pages, help documentation, and the sign-out link. There's also an option to toggle between Light and Dark modes, as well as enable Keep Alive (for your session). The keep alive requires keeping the browser open and it will extend your session beyond the normal time-out period.



2.4 Date Ranges

Many pages present date-based data. These pages will have "date navigation" capabilities to quickly change the view based on desired time period.

The common options for date navigation are:

1. A Range (day, week, month)
2. A Date (the target)
3. Previous and Next arrows

2.4.1 Example 1

Simple date navigation

Week

1/4/2024

<

>

2.4.2 Example 2

Calendar layout

<

>

Dec 31 - Jan 6, 2024

Day

Week

Month

List

all day

12:00 AM

2:00 AM

4:00 AM

January 2024

SU

MO

TU

WE

TH

FR

SA

31

1

2

3

4

5

6

7

8

9

10

11

12

13

14

15

16

17

18

19

20

21

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10

Thursday, January 04, 2024

Tue 1/02

Wed 1/03

Thu 1/04

Fri 1/05

Sat 1/06

- 10/105 -

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3. Home

The Home page displays summary information and links to other pages in the application. Information and links vary based on the tools enabled by the configuration and can include Time, Schedule, Availability, Messages, Events and Settings.

The screenshot shows the Home page of the application. The header bar is dark blue with the word "Home" on the left and user information "David Hamm" with a profile icon on the right. Below the header, the date "Monday, 1/22/2024" is displayed. The main content area is divided into two columns. The left column contains three sections: "Time" with a clock icon, "Schedule" with a calendar icon, and "Availability" with a calendar icon. The right column contains three sections: "Messages" with a bell icon, "Events" with a calendar icon, and "Settings" with a person icon. Each section contains specific information and links.

Home 📅 ⌚ 🗒️ 📅 📧 David Hamm

Monday, 1/22/2024 🔄

Time 🕒

7:05 AM -

Clock: [ON](#)

[Card](#)

Schedule 📅

Shifts 👤

7am-3pm, Pharmacist @ Denver, Break: 10:45am-11:15am

[Swapboard](#)

[Leave](#)

Availability 📅

Denver: All Day

Maui: 1:00 PM - 12:00 AM

Messages 🔔

[Check shifts Friday 8/26](#)

[NOTIFY TEST](#)

Events 📅

Settings 👤

Name: Hamm, David

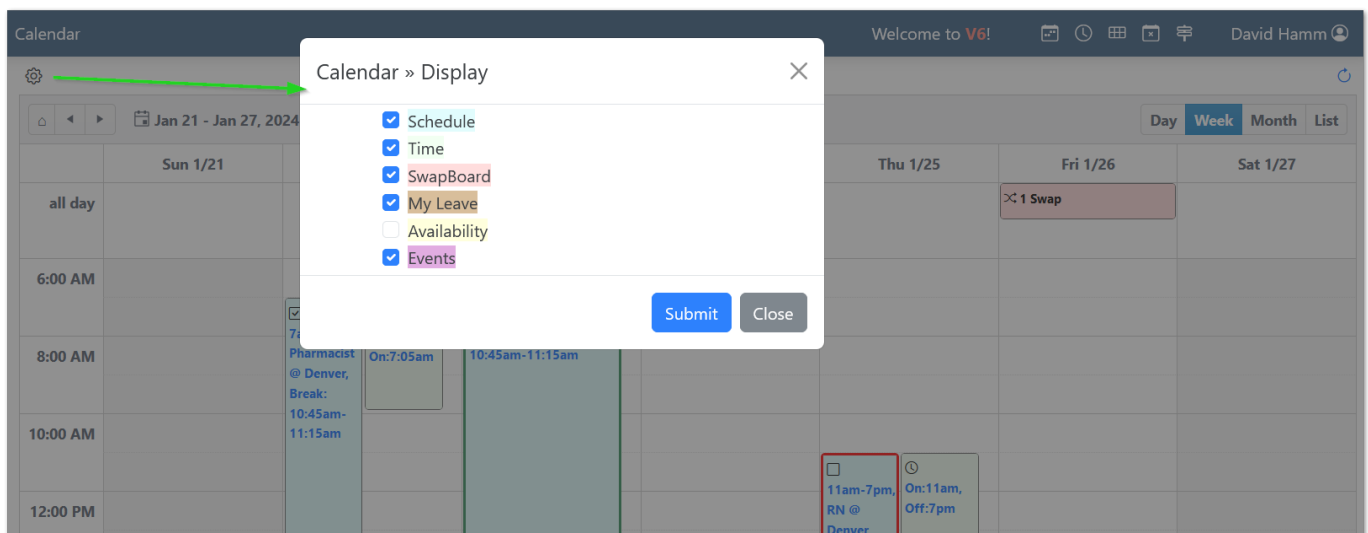
Email: scott@schedulesource.com

4. Calendar

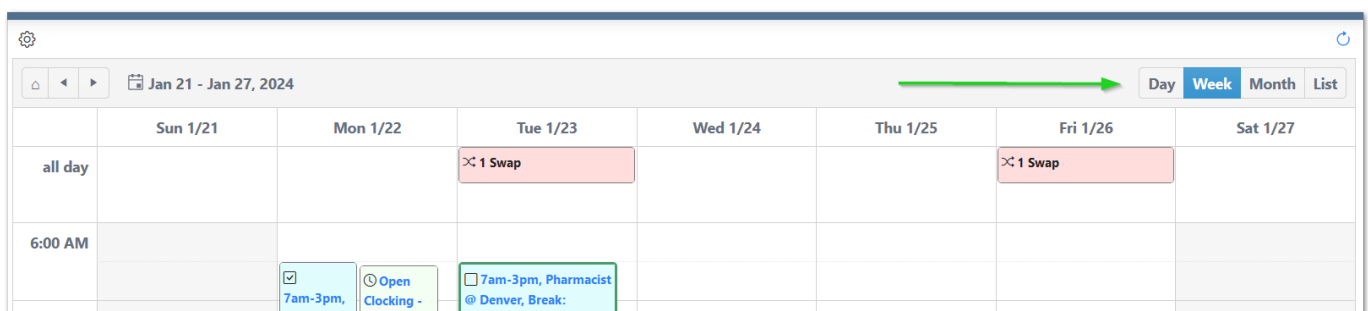
The Calendar displays your schedule for each of the stations and locations you are assigned to. Set display options (what will be visible), view your schedule and your availability.

4.1 Calendar Settings

Choose the options to display on your calendar by clicking the settings icon above calendar. The options to display include: Schedule, Time, SwapBoard, My Leave, Availability and Events.



Choose the time-frame to display in the upper right corner of the page: Day, Week Month or List.



4.2 Calendar Pop-Up

Click an item on the calendar to see options for editing, approving etc.

The screenshot shows a calendar pop-up window. At the top, it displays the shift details: **7am-3pm Pharmacist @ Denver** and **Break: 10:45am-11:15am**. Below this, there are four buttons: **OK?** (yellow), **Trade** (blue), **Open →** (grey), and **Card** (blue). A **Close** button is located at the bottom center of the pop-up. The pop-up is positioned over a calendar grid. In the grid, there is a green box on the left labeled **Open Clocking - On:7:05am** and a blue box on the right labeled **7am-3pm, Pharmacist @ Denver, Break: 10:45am-11:15am**. The blue box has a small square icon next to the text.

**7am-3pm
Pharmacist @ Denver
Break: 10:45am-11:15am**

OK? **Trade** **Open →**

Card

Close

Open Clocking - On:7:05am

☐ **7am-3pm, Pharmacist @ Denver, Break: 10:45am-11:15am**

5. Schedule

5.1 My Leave

To view the summary of your Leave Requests, select the year (top-left corner of the page). Your Leave Requests appear in order and include the status (Granted, Requested, Denied). You can amend or delete a Leave Request in Requested Status.

My Leave

David Hamm

2024

Add

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

Status	From	To	Month	Days	Hours	Time(s)	Type	Comment	Actions
REQUESTED	Jan 14 (Sun)	Jan 20 (Sat)	January	7	40.00	1:00 AM - 1:00 AM	PTO		<button>Open</button>
REQUESTED	Apr 07 (Sun)	Apr 13 (Sat)	April	7	56.00	1:00 AM - 1:00 AM	PTO		<button>Open</button>

My Leave Balances

Name	Check	Start	End	Quota (Hours)	Granted	Taken	Remaining	Quota (Days)	Granted	Taken	Remaining
PTO	No	1/2/2024	12/31/2024	120.00	0.00	0.00	120.00		0	0	

5.1.1 Requesting Leave

1. Click the **Add** button at top of page
2. Select a Leave Type
3. Select dates
4. (Optional) Select times if not "all day"
5. (Optional) Adjust hours per day
6. (Optional) enter notes
7. Click **Save**

Leave

×

Leave Type:

PTO

Dates:

1/22/2024

-

1/22/2024

Times:

-

Jan-22

8.00

Hours:

8.00

Comment:

Checks:

Ok

Save

Close

5.1.2 Editing Requests

If leave requests are not yet granted, they can be edited or deleted. Click the **Open** button in the row you wish to edit.

- 1. Make changes to values, click **Save**
- 2. Or, click **Delete** to remove the request

Leave

×

Leave Type:

PTO

Dates:

4/7/2024

-

4/13/2024

Times:

1:00 AM

-

1:00 AM

Apr-7	Apr-8	Apr-9	Apr-10	Apr-11
8.00	8.00	8.00	8.00	8.00
Apr-12	Apr-13			
0.00	0.00			

Hours:

40.00

Comment:

Checks:

Ok

Status:

REQUESTED

Save

Delete

Close

5.1.3 Leave Statuses

There are five statuses for leave requests:

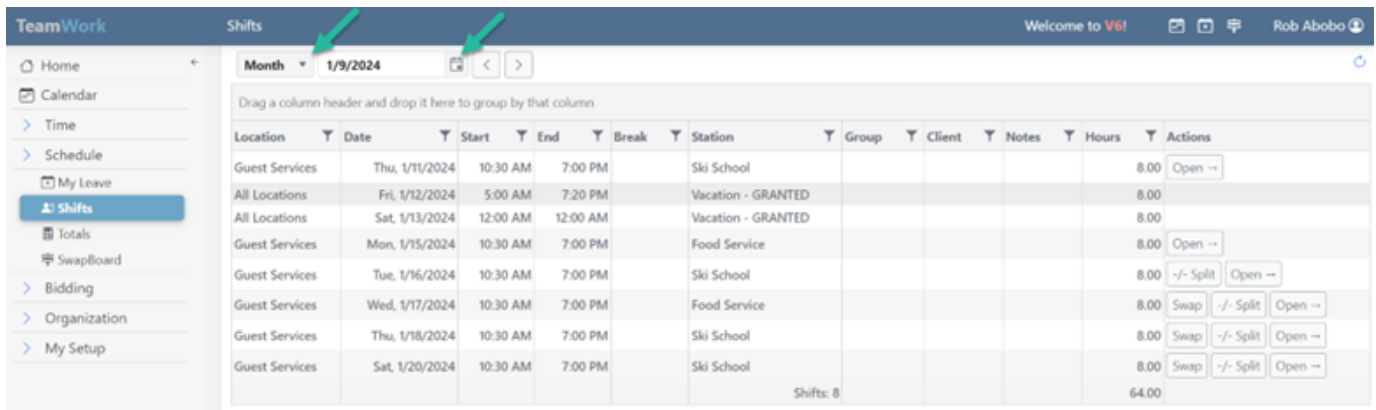
1. **Requested** - Waiting for approval.
2. **Granted** - Has been approved.
3. **Denied** - Not approved.
4. **Cancel Requested** - A granted leave with a cancellation request.
5. **Cancelled** - Approved cancellation of granted leave.

In some configurations, it's possible to have certain leave types auto-approve upon request. In addition, there may be additional constraints placed on leave availability that could impact auto-approve. Otherwise, most requests are reviewed and approved or denied by managers.

5.2 My Shifts

To view your Shift information, select the duration of time you want to view (day, week, month) in the upper left-hand corner of the page. Select the date you want to display information around. Shift information will display in chronological order and will include the Location, Date, Start, End, Breaks (if required), Station (Position), Hours and other relevant information.

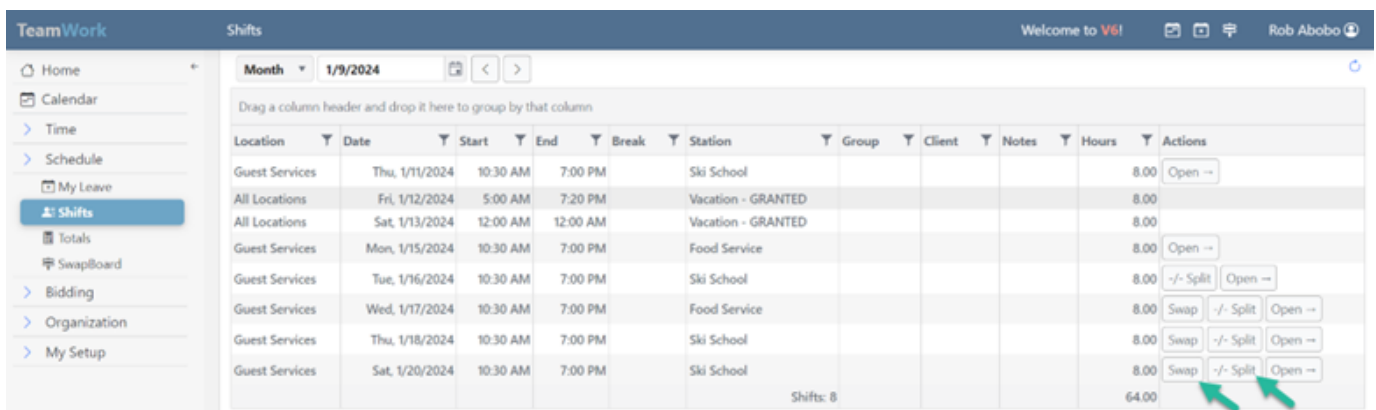
You can sort, filter, and group the shift data using the column headers.



The screenshot shows the TeamWork interface with the 'Shifts' tab selected. The view is set to 'Month' for the date '1/9/2024'. The table displays the following shifts:

Location	Date	Start	End	Break	Station	Group	Client	Notes	Hours	Actions
Guest Services	Thu, 1/11/2024	10:30 AM	7:00 PM		Ski School				8.00	Open →
All Locations	Fri, 1/12/2024	5:00 AM	7:20 PM		Vacation - GRANTED				8.00	
All Locations	Sat, 1/13/2024	12:00 AM	12:00 AM		Vacation - GRANTED				8.00	
Guest Services	Mon, 1/15/2024	10:30 AM	7:00 PM		Food Service				8.00	Open →
Guest Services	Tue, 1/16/2024	10:30 AM	7:00 PM		Ski School				8.00	Open →
Guest Services	Wed, 1/17/2024	10:30 AM	7:00 PM		Food Service				8.00	Swap -/- Split Open →
Guest Services	Thu, 1/18/2024	10:30 AM	7:00 PM		Ski School				8.00	Swap -/- Split Open →
Guest Services	Sat, 1/20/2024	10:30 AM	7:00 PM		Ski School				8.00	Swap -/- Split Open →
Shifts: 8									64.00	

Depending on your organization's rules, you may be able to Swap or Split an upcoming shift. Select your preferred Action in the last column of a shift.

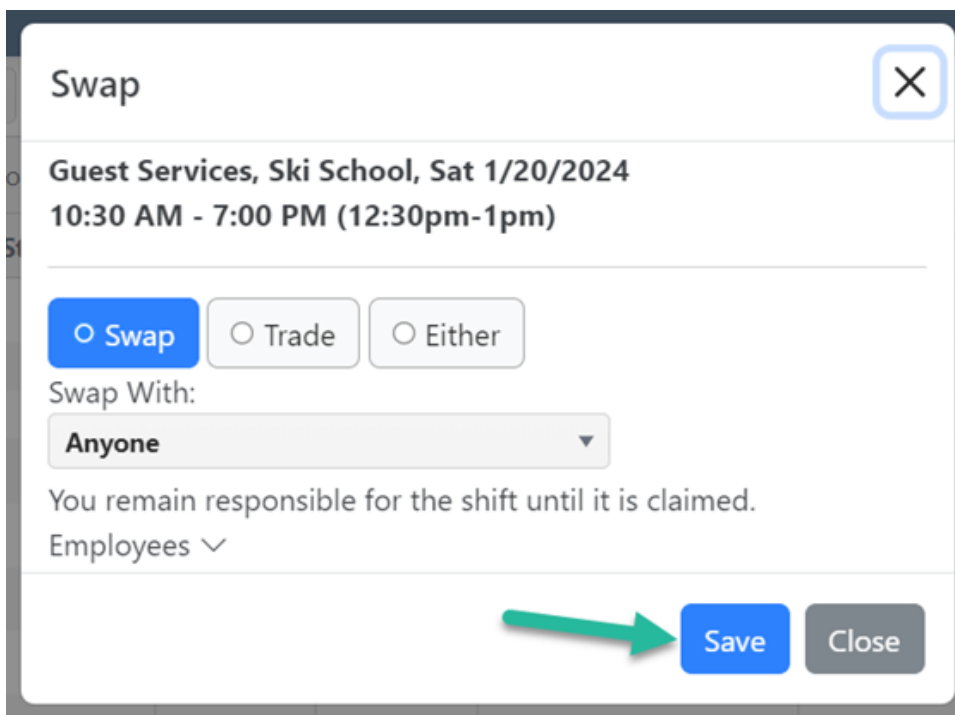


This screenshot is identical to the previous one, but with red arrows pointing to the 'Swap' and 'Split' buttons in the 'Actions' column for the last shift (Sat, 1/20/2024).

5.2.1 Swapping Shifts

Posting a shift to the Swapboard makes it available for others to claim. To exchange shifts with another employee, the posting must be designated a trade. When swapping or trading out shifts, they remain on your schedule until a swap is completed.

1. Click **Swap** in the Actions column
2. Select **Swap**, **Trade**, or **Either** for the type of swap
3. (Optional) Select a specific employee to offer shift to
4. Click **Save**



The screenshot shows a 'Swap' dialog box with a close button (X) in the top right corner. The main content area displays 'Guest Services, Ski School, Sat 1/20/2024' and '10:30 AM - 7:00 PM (12:30pm-1pm)'. Below this, there are three radio buttons: 'Swap' (selected), 'Trade', and 'Either'. Underneath the radio buttons is a 'Swap With:' label followed by a dropdown menu currently set to 'Anyone'. A message states 'You remain responsible for the shift until it is claimed.' Below this message is a label 'Employees' with a downward arrow. At the bottom right, there are two buttons: 'Save' (highlighted with a green arrow) and 'Close'.

5.2.2 Splitting Shifts

If you wish to give up a portion of a shift and retain the rest, the shift must be split. Splitting a shift creates one or two new shifts (depending on the split times). Any of the shifts can then be posted to swap independently of the others.

1. Click **Split** in the Actions column
2. Select a time to split (its the end and start time of the two shifts that will result)
3. Click **Save**

Split

<

Depending on configuration, several additional actions might be available from the Open Shift page. These include:

- **Cancel** - inactivate the shift
- **Remove** - unassign yourself from the shift

Back

Shift

Date:Thursday, 1/25/2024

Times:7:00 AM - 3:00 PM8 Hours

Break:-

Location:Denver

Position:LPN

Client:

Actions

OK?

Remove

Swap

-/- Split

5.3 Totals

The totals page summarizes hours per week for the selected year.

Totals

2024

<

>

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

Location	Week	Shifts	Hours
Denver	12/31/2023	3	17.00
Denver	1/7/2024	4	21.00
Denver	1/14/2024	2	12.00
Denver	1/21/2024	3	18.00
Denver	1/28/2024	3	18.00
		15	86.00

5.3.1 Filter Example

You can filter any of the columns of table to narrow down the data returned. The example below shows a filter to limit the list to weeks with 40 or more hours. Click **Filter** on the form to set the filter. Remember to **Clear** the filter to see all data again.

Hours

Show items with value that:

Is greater than or equal to

40

Filter

Clear

- 21/105 -

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5.4 Swapboard

The Swapboard's primary purpose is to list available shifts. These shifts can be claimed by employees, depending on additional checks and rules.

The Swapboard has three sections:

1. **Counts** - listing available shifts per day,
2. **My Shifts** - already assigned shifts, and
3. **Available Shifts** - open or posted shifts for claiming.

Clicking on any of the section headers will expand or collapse that section.

5.4.1 Viewing Counts

The **Counts** section has two views. One view shows three months of data in calendar form. The other view shows a single horizontal row with the same information.

The counts are color-coded in the views:

- **Blue** numbers are **My Shifts**
- **Orange** numbers and **Available Shifts**
- **Green** text represents **Granted Leave**
- **Red** alerts indicate swaps **directed to "me"**

Calendar View

SwapBoard

Welcome to V6!

Dave Fischer

Day

1/23/2024

Tuesday, January 23, 2024

COUNTS

Key: My Shifts

Available

Leave Partial

Directed To Me

January 2024

SU	MO	TU	WE	TH	FR	SA
		23 1	24 1	25 1	26	27
28	29	30 1	31 1			

February 2024

SU	MO	TU	WE	TH	FR	SA
				1 1	2	3
4 77	5 132	6 134	7 135	8 136	9 137	10 68
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29		

March 2024

SU	MO	TU	WE	TH	FR	SA
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

Single Row View

SwapBoard

Welcome to V6!

Dave Fischer

Day

1/23/2024

Tuesday, January 23, 2024

Counts

Key: My Shifts

Available

Leave Partial

Directed To Me

Mon Jan-23	Wed Jan-24	Thu Jan-25	Fri Jan-26	Sat Jan-27	Sun Jan-28	Mon Jan-29	Tue Jan-30	Wed Jan-31	Thu Feb-01	Fri Feb-02	Sat Feb-03	Sun Feb-04	Mon Feb-05	Tue Feb-06	Wed Feb-07	Thu Feb-08	Fri Feb-09	Sat Feb-10	Sun Feb-11	Mon Feb-12	Tue Feb-13	Wed Feb-14	Thu Feb-15
1	1	1					1	1	1			77	132	134	135	136	137	68					

5.4.2 My Shifts

This list offers the same information as the My Shifts page. It's provided for reference. However, you can perform the same actions on shifts including Swap and Split.

1 MY SHIFTS										
Location	Date	Position	Group	Client	Notes	Start	End	Break	Hours	Actions
Denver	1/23/2024 (Tue)	Pool				9:00 AM	3:30 PM	12:00 PM - 12:30 PM	6.00	<div><div>-/ Split</div><div>Open →</div></div>
		Shifts: 1							6.00	

5.4.3 Available Shifts

Available shifts can be **Claimed** and added to your schedule. Click the **Check** button to start the process. Organizational checks and rules must pass before the shift can be claimed. If allowed, shifts can be split/checked as well to see if a portion of a shift is available.

77 AVAILABLE SHIFTS											
Drag a column header and drop it here to group by that column											
Location	Date	Position	Group	Client	Start	End	Break	Hours	Notes	Assigned	Actions
Denver	2/4/2024 (Sun)	RN			7:00 AM	11:30 AM		4.50			<button>Check</button>
Denver	2/4/2024 (Sun)	RN			7:00 AM	11:30 AM		4.50			<button>Check</button>
Denver	2/4/2024 (Sun)	RN			7:00 AM	11:30 AM		4.50			<button>Check</button>
Denver	2/4/2024 (Sun)	RN			7:00 AM	11:30 AM		4.50			<button>Check</button>
Denver	2/4/2024 (Sun)	Tech			8:00 AM	11:30 AM		3.50			<button>Check</button>

5.4.4 Claiming a Shift

1. Click the **Check** button to open the swap checker
2. If enabled, click **Claim** to put the shift on your schedule

Claim

Denver, Pool, Sat 2/10/2024

2:00 PM - 6:00 PM

Check	OK
Is ([GLOBAL]) OK?	No
Times open in schedule?	Yes
Day-to-Day downtime OK?	Yes
Shift gaps OK?	Yes
Consecutive Hours OK?	Yes
Within max hours/day?	Yes
Within max hours/week?	Yes
Within max days/week?	Yes
Within max shifts/day?	Yes
Empty shift lead time buffer > 1?	Yes

-/- Split

Claim

Close

In the example above, the Global Availability shows a conflict but the shift can still be claimed. Other checks might prevent the shift from being claimable.

5.4.5 Split/Claim a Shift

For empty (unassigned) shifts on the Swapboard, you may choose to claim only a portion of the shift. To do this click the **Split** button on the initial check pop-up. This launches the Split/Claim pop up where you can choose the split time and the segment to claim.

1. Click **Split** to open new pop-up
2. Choose a Split Time in the first selector
3. Click **Check** for the portion you wish to claim
4. Click **Claim**

Split / Claim

Denver, RN, Sun 2/4/2024
6:00 AM - 10:30 AM

Split: 8:15 AM 10:30 AM

Shift #1: 6:00 AM - 8:15 AM 2.25 Check

Shift #2: 8:15 AM - 10:30 AM 2.25 Check

Close

After clicking **Check** the results are listed and either **Claim** button will claim the shift.

Split / Claim
✕

Denver, RN, Sun 2/4/2024
6:00 AM - 10:30 AM

Split:

8:15 AM ▼

10:30 AM ▼

Shift #1: 6:00 AM - 8:15 AM 2.25

Check

Shift #2: 8:15 AM - 10:30 AM 2.25

Check

Denver, RN, Sun 2/4/2024
6:00 AM - 8:15 AM

Claim

Check	Status
Is ([ROTATION]) OK?	Yes
Times open in schedule?	Yes
Within max hours/day?	Yes
Within max hours/week?	Yes
24 Hours	Yes
Within max days/week?	Yes
Within max shifts/day?	Yes
Empty shift lead time buffer > 1?	Yes

Claim

Close

6. Time

6.1 Time Clock

The time clock enables real-time tracking of time and attendance. Many organizational rules and configuration settings impact the time clock. Depending on these settings employees may need to be scheduled, at a particular location, or in certain groups to be able to clock.

To **Clock On** an employee selects a location, project/task, and optionally an activity or client. This creates an "open" time entry with the start time captured when submitted. From that point, an employee can **Transfer** or **Clock Off**. It is not necessary to remain signed in to TeamWork once clocked on. In some configurations, an auto-clock off job may end the time entry after a certain number of hours. In this case the entry is also marked as an **Error*.

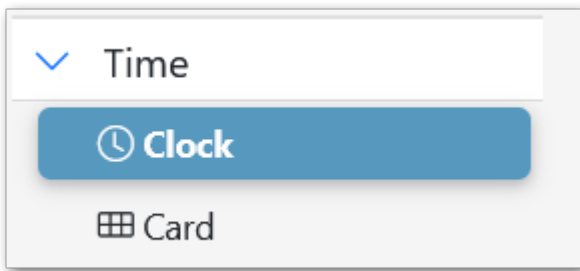
The time clock will ask for your geo-location, so that it can be logged. In some cases, the system may prevent clocking on or off if not within a pre-defined region for the location (or client).

The screenshot displays the 'Clock' interface with a dark blue header. Below the header, the date and time 'Thursday, March 07, 2024 4:40:24 PM' are shown. The interface is divided into four main sections:

- Status:** Shows a green clock icon and the text 'On'. Below it, a green bar indicates the start time '@ 4:40:17 PM' and a green bar indicates the duration '0:00:07'. A yellow 'Clock Off' button is on the right.
- Today:** A timeline view showing 'Entries' from 4 AM to 8 PM. A blue bar indicates the current entry starting at '0.00 4:40 PM - Denver / REG / Onsite'.
- Transfer:** A section with three dropdown menus: 'Location:' (set to 'Denver'), 'Project / Task:' (set to 'REG / Onsite'), and 'Activity:' (set to '--- Please Select ---'). A blue 'Transfer' button is at the bottom.
- GeoLocation:** Displays the current coordinates 'Lat: 39.959429 Long: -105.508894' and a 'View Map' button.

6.1.1 Opening the Clock

Navigate in the main menu to **Time > Clock**, or click **Clock** (or clock icon) in the top header.



6.1.2 Clocking On

To clock on:

1. Select a **Location**
2. (Optional) Select an **Client**
3. Select a **Project/Task**
4. (Optional) Select an **Activity**
5. Click **Clock On**

A screenshot of a 'Clock On' form. The form has a title bar 'Clock On'. Below the title bar, there are three dropdown menus: 'Location:' with 'Denver' selected, 'Project / Task:' with 'REG / Onsite' selected, and 'Activity:' with '--- Please Select ---' selected. Below the dropdowns is a blue button labeled 'Clock On'.

6.1.3 Clocking Off

If you are already clocked on, a **Clock Off** button is available in the "Status" section. Clicking **Clock Off** will end your time entry and reset the time clock.

Status

 On



@ 4:40:17 PM 0:03:08 0.05

6.1.4 Transferring

If you are already clocked on, you can **Transfer** to a new location, project/task, etc. This allows tracking detailed time within the day or shift.

To transfer:

1. Select a **Location**
2. (Optional) Select an **Client**
3. Select a **Project/Task**
4. (Optional) Select an **Activity**
5. Click **Transfer**

Transfer

Location:

Denver ▼

Project / Task:

REG / Office ▼

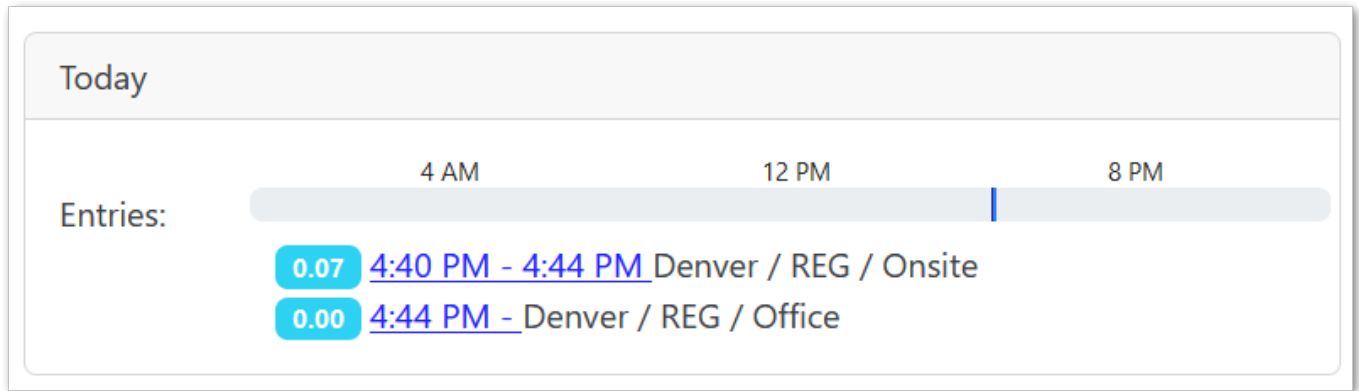
Activity:

--- Please Select --- ▼

Transfer

6.1.5 Viewing Today's Clockings

The "Today" section on the clock page lists any scheduled shifts along with time entries. You can click the times of a time entry to open an editor with more details. (Editing clockings is optional and depends on setup.)

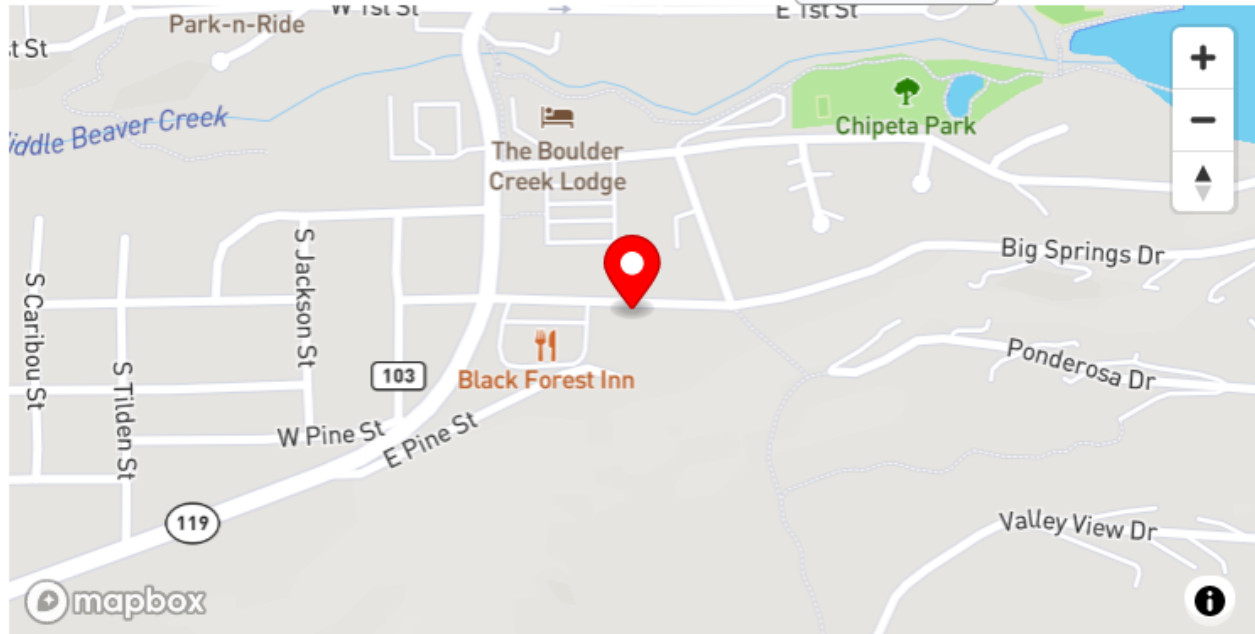



6.1.6 Viewing Geo-Location

The "GeoLocation" section on the clock page shows your coordinates as captured by the browser. You can click the **View Map** button to load a map with a marker for your location. (Viewing geo-location is optional and depends on setup.)

GeoLocation

Lat: 39.959429 Long: -105.508894

View Map 

6.2 Time Card

The time card enables management of time entries. Employees can enter time after-the-fact, or for the future (e.g. PTO). Many organizational rules and configuration settings impact time entries, but generally they can be added and edited for several weeks on the time card.

The top section of the card shows any scheduled shifts. The bottom section of the card shows time entries.

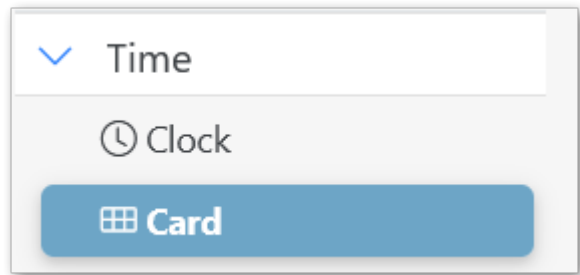
Card

3/7/2024

	Sun Mar 3	Mon Mar 4	Tue Mar 5	Wed Mar 6	Thu Mar 7	Fri Mar 8	Sat Mar 9	Totals
Denver, Pharmacist				7am-3pm				7.50
Denver, Pool						8am-1pm		5.00
Schedule	0.00	0.00	0.00	7.50	0.00	5.00	0.00	12.50
Denver, REG/Office					4:44pm-On On 0.00			0.00
Denver, REG/Onsite				7am-3pm 8.00	4:40pm-4:44pm 0.07			8.07
	Add	Add	Add	Add	Add	Add	Add	
Time	0.00	0.00	0.00	8.00	0.07	0.00	0.00	8.07

6.2.1 Opening the Card

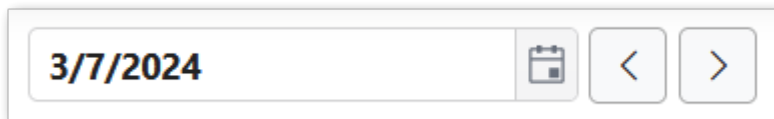
Navigate in the main menu to **Time > Card**, or click **Card** (or card icon) in the top header.



6.2.2 Navigating Weeks

The time card displays a week at a time.

- Use the arrow buttons to navigate to the previous or next week.
- Use the date-picker to go directly to a week (that contains the date).

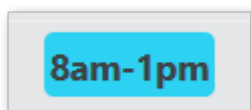


6.2.3 Adding Time

There are two ways to add time on the time card: 1) From a scheduled shift, 2) By day as needed. The benefit of adding from scheduled shifts is the times for the entry will be pre-populated with the times from the shift.

Add From Schedule

To add an entry from a scheduled shift, look in the scheduled shifts section of the card for shift times. A blue button indicates no time entry, whereas grey indicates there is a time entry for the shift.



1. Click the times button for the shift
2. Correct times if needed
3. (Optional) Enter break hours (decimal) to subtract from time span
4. Select **Location**, **Project/Task**, etc.
5. (Optional) Enter notes and select **Alert Manager** if there's a need to communicate something about this entry
6. Click **Add**

Entry » Add

Date:3/8/2024

Schedule:

Start	End	Hours
8:00 AM	1:00 PM	5

Times:8:00 AM - 1:00 PM

Break Hours:

Calculated Hours:5.00

*Project / Task:REG / Onsite

Activity:--- Please Select ---

Notes:

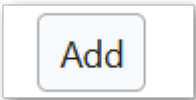
Alert Manager:No

AddClose

Add By Day

To add an entry to the time card on a specific day:

- 1. Click **Add** in the bottom row of the card
- 2. Enter **Start** and **End** Times
- 3. (Optional) Enter break hours (decimal) to subtract from time span
- 4. Select **Location**, **Project/Task**, etc.
- 5. (Optional) Enter notes and select **Alert Manager** if there's a need to communicate something about this entry
- 6. Click **Add**



6.2.4 Editing Time

In general, time entries on the card can be edited. In some cases, organization setup or locked pay periods can prevent editing.

To edit an existing entry on the card, click the hours link.

4:44pm-On

On

0.00

4:40pm-4:44pm

0.07

This opens the time entry editor. If editing is allowed, the times, break hours, etc. can be changed. If editing is not allowed, the **Employee Notes** and **Alert Manager** fields can still be changed and saved.

Entry » Edit

Status:

card: OK

*Date:

3/6/2024

*Times:

7:00 AM

-

3:00 PM

*Break Hours:

0.00

Calculated Hours:

8.00

*Location:

Denver

*Project / Task:

REG / Onsite

Employee Notes:

Alert Manager:

No

Manager Notes:

Save

Close

6.3 Timesheet

The timesheet summarizes the time and approvals for an employee's pay period. The "Summary" section lists approvals and totals. The "Details" section shows the time entries grouped by date. An optional third section, "Differentials", will show the differential hours calculations breakdown.

Several actions can be taken directly from the timesheet: Approval, Add, and Edit entries.

Timesheet

Pay Period:

3/2/2024

3/15/2024

<

>

Summary

Approve

Location	Local	Manager	Enterprise	Organization	Open	Error	Void	Valid	Regular	Total
Denver	Not Locked	Not Approved	Not Locked	Not Approved	0	0	0	3	8.83	8.83

Details

Add

Type	Location	Project	Task	Activity	On	Off	Regular	Total	Status	Actions
▼ Date: 3/6/2024 (Wed); Entries: 1; Total: 8.00										
card	Denver	REG	Onsite		7:00 AM	3:00 PM	8.00	8.00		Open
▼ Date: 3/7/2024 (Thu); Entries: 2; Total: 0.83										
clock	Denver	REG	Onsite		4:40 PM	4:44 PM	0.07	0.07		Open
clock	Denver	REG	Office		4:44 PM	5:30 PM	0.77	0.77		Open
					3		8.83	8.83		

6.3.1 Approving Time

If timesheet approvals are allowed, there will be a button for submitting approval. If you approve the timesheet, it becomes locked from editing. Do not submit an approval if any additions or edits might be needed.

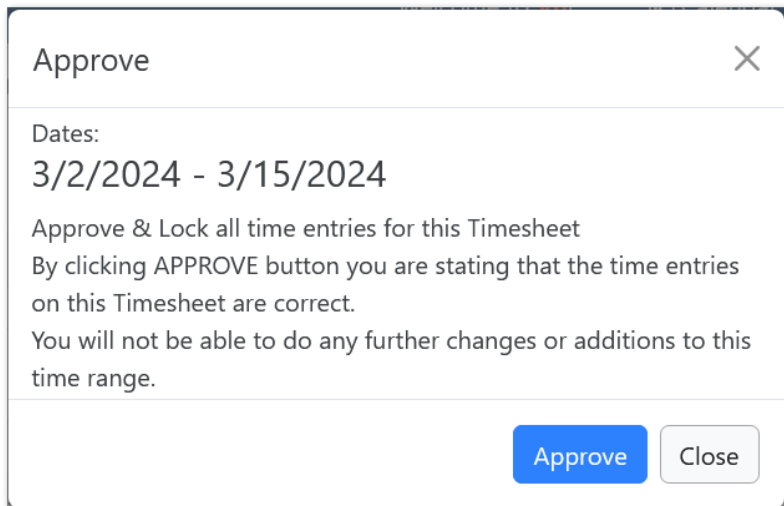
Summary

Approve

To approve the timesheet:

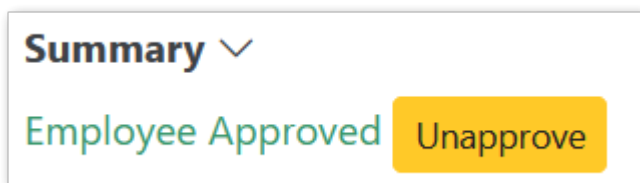
1. Click the **Approve** button
2. Review the dates to ensure the correct pay period
3. Click **Approve**

This action approves **all** time entries for the timesheet (pay period).



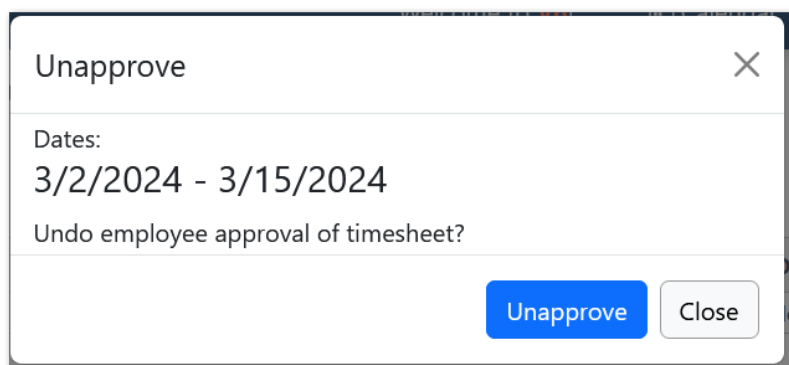
6.3.2 Unapproving Time

If you do need to make edits, and the organization has not yet locked or approved the pay period, you can undo your approval by clicking **Unapprove**.



To un-approve the timesheet:

1. Click the **Unapprove** button
2. Review the dates to ensure the correct pay period
3. Click **Unapprove**

A modal dialog box titled "Unapprove" with a close button (X) in the top right corner. The dialog contains the text "Dates:" followed by "3/2/2024 - 3/15/2024" and the question "Undo employee approval of timesheet?". At the bottom right, there are two buttons: a blue "Unapprove" button and a white "Close" button with a grey border.

Unapprove

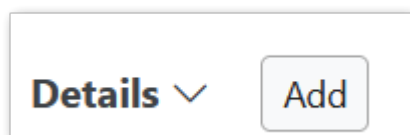
Dates:
3/2/2024 - 3/15/2024

Undo employee approval of timesheet?

Unapprove Close

6.3.3 Adding Time

To add an entry to the time sheet, click the **Add** button in the details section.

A horizontal bar containing two buttons. The first button is labeled "Details" with a downward-pointing chevron icon. The second button is labeled "Add".

Details ▾ Add

1. Enter **Start** and **End** Times
2. (Optional) Enter break hours (decimal) to subtract from time span
3. Select **Location**, **Project/Task**, etc.
4. (Optional) Enter notes and select **Alert Manager** if there's a need to communicate something about this entry
5. Click **Add**

Entry » Add

Date:

3/8/2024

Schedule:

Start	End	Hours
8:00 AM	1:00 PM	5

Times:

8:00 AM

-

1:00 PM

Break Hours:

Calculated Hours:

5.00

*Project / Task:

REG / Onsite

Activity:

--- Please Select ---

Notes:

Alert Manager:

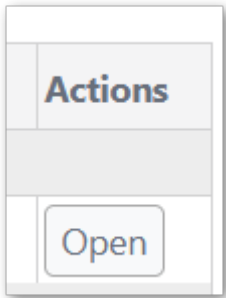
No

Add

Close

6.3.4 Editing Time

To edit an existing entry in the sheet, click the **Open** button in the "Actions" column.



This opens the time entry editor. If editing is allowed, the times, break hours, etc. can be changed. If editing is not allowed, the **Employee Notes** and **Alert Manager** fields can still be changed and saved.

Entry » Edit

Status:

card: OK

*Date:

3/6/2024

*Times:

7:00 AM

-

3:00 PM

*Break Hours:

0.00

Calculated Hours:

8.00

*Location:

Denver

*Project / Task:

REG / Onsite

Employee Notes:

Alert Manager:

No

Manager Notes:

Save

Close

6.4 Attendance

The attendance page lists issues with time entries over the past year or defined date range. Issues are created based upon organizational rules and constraints. Each issue may have a point value assigned. Points might represent the impact of the issue to the organization. If your organization uses Attendance, you should regularly review this page for your status.

Attendance

1

Year(s) From Date

1/12/2024

<

>

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

Location	Date	Message	Status	Points	Minutes	Notes
Denver	12/19/2023	Not Scheduled	Open	1	0	
Denver	12/19/2023	Not Scheduled	Open	1	0	
Denver	11/27/2023	Not Scheduled	Open	1	0	
Denver	11/20/2023	Clock Out Early	Open	2	295	
Denver	11/20/2023	Not Scheduled	Open	1	0	
Denver	11/18/2023	Not Scheduled	Open	1	0	
Denver	11/7/2023	Not Scheduled	Open	1	0	
Denver	11/7/2023	Not Scheduled	Open	1	0	
Denver	10/17/2023	Not Scheduled	Open	1	0	
Denver	10/11/2023	Clock Out Early	Open	2	186	

Use the [Date Navigator](#) at the top of the page to load data for different time periods.

6.4.1 Issues

Each issue is for a location and date. Issues are reviewed by manager and assigned a status of "Confirmed" or "Void". A status of "Open" indicates an issue not yet reviewed.

- **Message** - A short description of the issue.
- **Status** - The manager review status. "Open", "Confirmed", or "Void".
- **Points** - A system or manager assigned point value for the issue.
- **Minutes** - The duration of the issue. For example, late clock in might have "12" minutes if you clocked in 12 minute late.
- **Notes** - Manager entered notes about the issue.

7. Organization

7.1 Organization Shifts

To view all shifts, select the duration of time you want to display shifts for (Day, Week, Month) and select the Location that you want to view shifts for. Shift information returned includes the day and date, station, employee, start and end time and if the shift is available on the swapboard. Your own shifts will be highlighted, as shown in the image below.

Totals

Day 2/14/2024 Denver

↑ Date

Date	Position	Employee	Client	Group	Notes	Start	End	Break	Hours	SwapBoard
Date: Wed, 2/14/2024										
Wed, 2/14/2024	LPN	Abbott, Bob				6:00 AM	2:00 PM		8.00	
Wed, 2/14/2024	Pharmacist	Hamm, David				7:00 AM	3:00 PM	10:45 AM - 11:15 AM	7.50	
Wed, 2/14/2024	Pool	Bloom, Allison				8:00 AM	12:00 PM		4.00	
Wed, 2/14/2024	Pool	Fischer, Dave				8:00 AM	12:00 PM		4.00	
Wed, 2/14/2024	Tech	Barnaby, Red				9:30 AM	3:00 PM		5.50	
Wed, 2/14/2024	RN	Wetz, Jim				11:00 AM	7:00 PM	2:45 PM - 3:15 PM	7.50	
Wed, 2/14/2024	LPN	Semento-Smith, Johnny				12:00 PM	4:00 PM		4.00	
Wed, 2/14/2024	Pool	Hanson, Hank				1:00 PM	6:00 PM		5.00	
Wed, 2/14/2024	Pharmacist	Svendson, Ulla				2:00 PM	8:00 PM	5:15 PM - 5:45 PM	5.50	
Wed, 2/14/2024	Tech	Smith, Bob				3:00 PM	8:00 PM		5.00	
Shifts: 10									56.00	

The Organization pages show information for other employees, as allowed by the organization setup.

7.2 Organization Leave

To view all leave, select the location that you want to view leave for. You can navigate forward or back by month using the navigation arrows. Granted leave is shown by a green bar in the calendar, requested leave is shown by a yellow bar and denied requests are shown in red. The list of granted leave is shown below the calendar.

Leave

Denver

Today < > February, 2024

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
28	29	30 1 - DENIED	31	01	02	03
04	05	06	07	08	09	10
11	12	13	14	15	16	17
18	19 1 - GRANTED	20 1 - GRANTED	21 1 - GRANTED	22 1 - GRANTED	23 1 - GRANTED	24 1 - GRANTED
25 1 - GRANTED	26 1 - GRANTED	27 1 - GRANTED	28 1 - GRANTED	29	01	02
03	04	05	06	07	08	09

Key: Granted Requested Denied Cancelled

Granted Leave Requests

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

From	To	Leave Type	Days	Employee
Feb 19 (Mon)	Feb 28 (Wed)	PTO	10	Hamm, David

The Organization pages show information for other employees, as allowed by the organization setup.

7.3 Organization Coworkers

To view all of your coworkers and their contact information, select one of your locations. The page will list employees for that location and any contact information.

Coworkers							
Denver							
Drag a column header and drop it here to group by that column							
Name	Phone	Phone	Phone	Mobile	Crew	Email	
TEST DO_NOT_USE							
Abbott, Bob					Vol		
Barnaby, Red					FT		
Bloom, Allison					FT		
Dokken, Kip				202-494-8811	FT	kip@redrockhvac.com	
Fischer, Dave					PT		
Galloway, Alberto					PT		
Green, Paul	202-494-8811				FT		

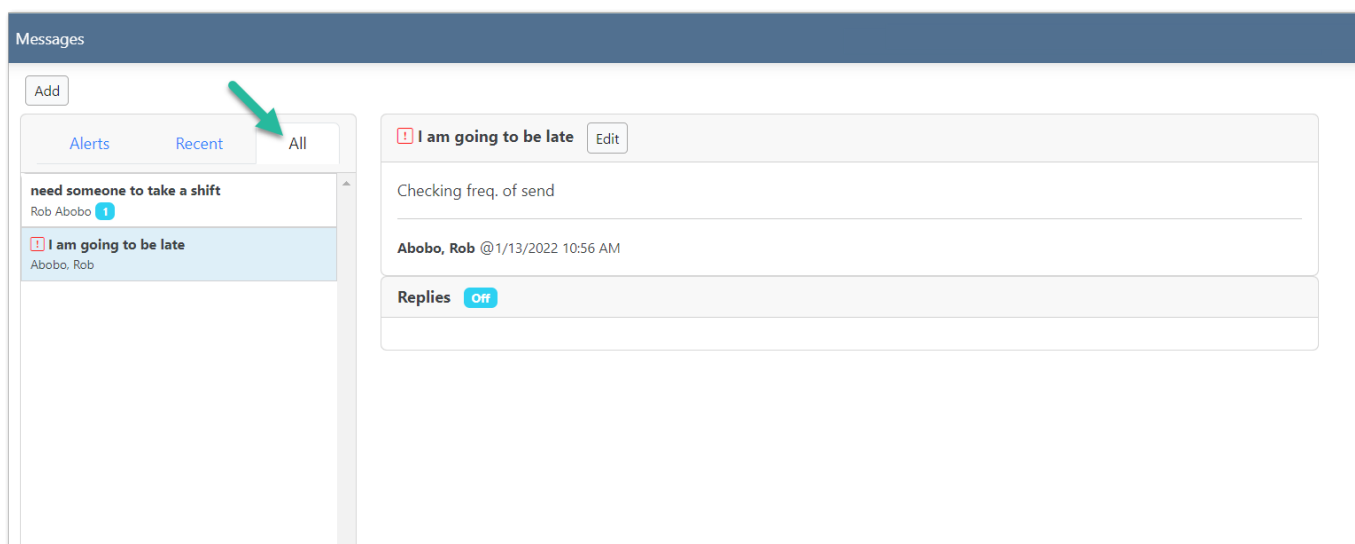
The Organization pages show information for other employees, as allowed by the organization setup.

7.4 Organization Messages

TeamWork supports creating, storing, and broadcasting messages via Email or Text. Messages can be flagged as "Alerts". Each message can be shared with a unique group of employees or managers. Messages have an effective date ranges so they may only be visible for some date span.

To view messages, open the menu **Organization > Messages**.

Use the tabs to filter the messages to **Alerts** only, **Recent** only, or **All**. Use **All** to see your own message that have expired.



7.4.1 Adding Messages

To add a message, click the **Add** button above the message list.

Then,

1. Enter **Effective Dates** (the message only appears in this range)
2. Enter **Title**
3. (Optional, recommended) Enter **Notes**
4. Select options
 - a. **Is Alert** marks this message as urgent
 - b. **Allow Replies** lets other submit a comment/reply to the message
 - c. **Enabled** toggles the message on/off for all shares
5. Click **Save**

The screenshot shows a 'Message' form with a close button (X) in the top right corner. Below the title bar are three tabs: 'Settings' (selected), 'Shares', and 'Broadcast'. The form contains the following fields and options:

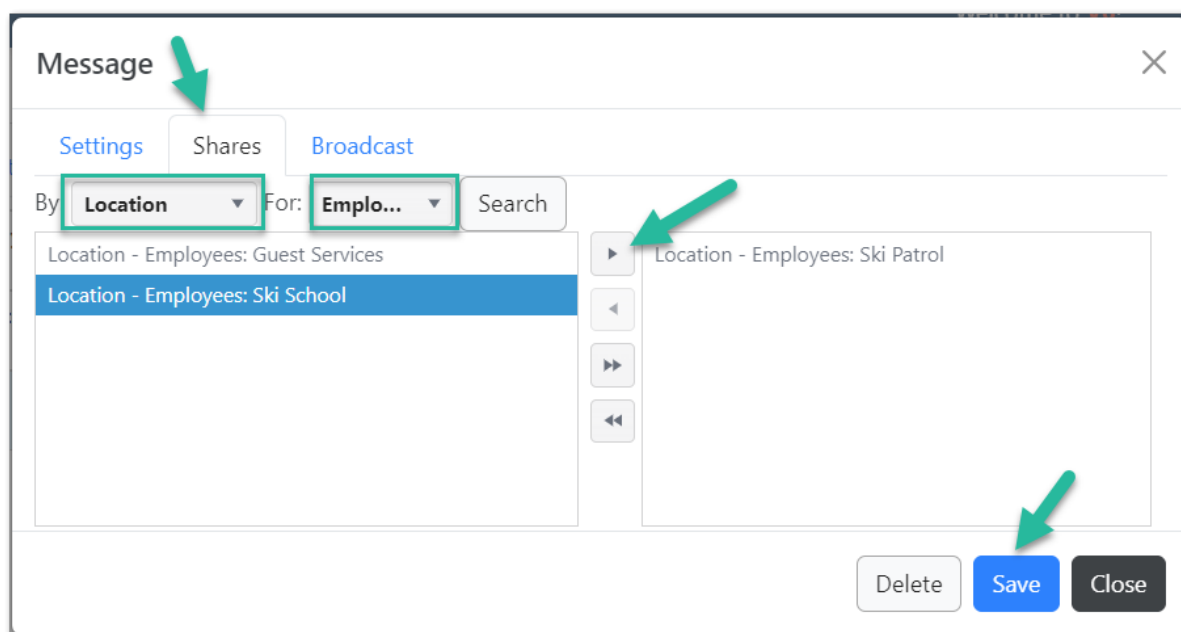
- Effective Dates:** A date range selector showing '2/8/2024' to '2/14/2024'. A green arrow points to the end date.
- *Title:** A text input field containing 'Valentine Cookies for everyone'. A green arrow points to the title.
- Notes:** A text area containing the text 'Let's have a cookie buffet on Valentine's. Bake and bring your favorite to share. Thanks everyone!'.
- Options:** Three checkboxes are visible: 'Is Alert' (checked), 'Allow Replies' (checked), and 'Enabled' (checked). A green arrow points to the 'Is Alert' checkbox.
- Buttons:** At the bottom right, there are three buttons: 'Delete', 'Save' (highlighted in blue), and 'Close'. A green arrow points to the 'Save' button.

7.4.2 Sharing

Messages are only visible to yourself unless you share them with others. The Shares tab let's you search for and select employees or managers.

To add shares to a message:

1. Click the "Shares" tab in the message editor
2. Use the **By:** and **For:** selectors to define an audience. Click **Search**.
3. Select items in the left list.
4. Click the single arrow to add items to the right list (the shares).
5. Use the double-arrow to add all items to the right list.
6. Click **Save**



7.4.3 Broadcasting

Messages can be sent to shares via Email or Text. Each recipient must have their Email or mobile number in the system to receive the message.

To broadcast a message:

1. Click the "Broadcast" tab in the message editor
2. Check the boxes for **Email** and/or **Text** under "Channels"
3. Click **Broadcast**

Message

SettingsSharesBroadcast

Channels:
☒ Email ☐ Text

Broadcasting a message will send an email to every user that:
1. Has share access to this message
2. Has a valid email address or mobile number

Broadcast

DeleteSaveClose

7.5 Organization Events

TeamWork supports creating, storing, and broadcasting events via Email or Text. Each event can be shared with a unique group of employees or managers. Events have date ranges and appear on the Event calendar.

To view events, open the menu **Organization > Events**.

Navigate to different date ranges using the arrows or the date-picker on the left. Change the view (date range) to **Day**, **Week**, or **Month** by clicking the ranges on the right.

Events						
<div> Add </div> <div> Today February, 2024 </div> <div> Day Week Month List </div>						
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
28	29	30	31	01	02	03
04	05	06	07	08	09	10
					Inventory of gear 4pm - 9pm OT eligible for those willing to help that already have 40 hours this week.	
11	12	13	14	15	16	17
			Cookies for all! 3pm - 6pm			
18	19	20	21	22	23	24
					All Staff Mtg. - Mandatory!! 9am - 11am	
25	26	27	28	29	01	02
03	04	05	06	07	08	09

7.5.1 Adding Events

To add an event, click the **Add** button above the event calendar.

Then,

1. Enter **Dates** (the event is on these dates)
2. (Optional) Select **Show On** to only show the event on a certain week day
3. (Optional) Enter times
4. Enter **Title**
5. (Optional, recommended) Enter **Notes**
6. (Optional) check **Allow Replies** to let others submit a comment/reply
7. Click **Save**

The screenshot shows a web form titled "Event" with a close button (X) in the top right corner. The form has three tabs: "Settings" (selected), "Shares", and "Broadcast". Under the "Settings" tab, there are several input fields and a checkbox. The "Dates:" field contains "2/8/2024" and a calendar icon, with a green arrow pointing to it. The "Times:" field contains "From" and "To" with clock icons, with a green arrow pointing to the "From" field. The "Title:" field is empty, with a green arrow pointing to it. The "Notes:" field is a large text area, also empty. Below the "Notes" field is a checkbox labeled "Allow Replies". At the bottom right of the form are three buttons: "Delete", "Save" (highlighted in blue), and "Close". A green arrow points to the "Save" button.

7.5.2 Sharing

Events are only visible to yourself unless you share them with others. The Shares tab let's you search for and select employees or managers.

To add shares to an event:

1. Click the "Shares" tab in the event editor
2. Use the **By:** and **For:** selectors to define an audience. Click **Search**.
3. Select items in the left list.
4. Click the single arrow to add items to the right list (the shares).
5. Use the double-arrow to add all items to the right list.
6. Click **Save**

(Showing Messages editor - they work the same)

The screenshot shows the 'Message' editor window. At the top, there are three tabs: 'Settings', 'Shares', and 'Broadcast'. The 'Shares' tab is active. Below the tabs, there are two dropdown menus: 'By' (set to 'Location') and 'For' (set to 'Emplo...'). To the right of these is a 'Search' button. Below the dropdowns, there are two lists. The left list contains 'Location - Employees: Guest Services' and 'Location - Employees: Ski School', with the latter selected. The right list contains 'Location - Employees: Ski Patrol'. Between the lists are four arrow buttons: a single right arrow, a single left arrow, a double right arrow, and a double left arrow. At the bottom right, there are three buttons: 'Delete', 'Save', and 'Close'. The 'Save' button is highlighted in blue. Green arrows point to the 'Message' title, the 'By' and 'For' dropdowns, the single right arrow button, and the 'Save' button.

7.5.3 Broadcasting

Events can be sent to shares via Email or Text. Each recipient must have their Email or mobile number in the system to receive the event.

To broadcast an event:

1. Click the "Broadcast" tab in the event editor
2. Check the boxes for **Email** and/or **Text** under "Channels"
3. Click **Broadcast**

(Showing Messages editor - they work the same)

Message

Settings

Shares

Broadcast

Channels:
☒ Email ☐ Text

Broadcasting a message will send an email to every user that:
1. Has share access to this message
2. Has a valid email address or mobile number

Broadcast

Delete

Save

Close

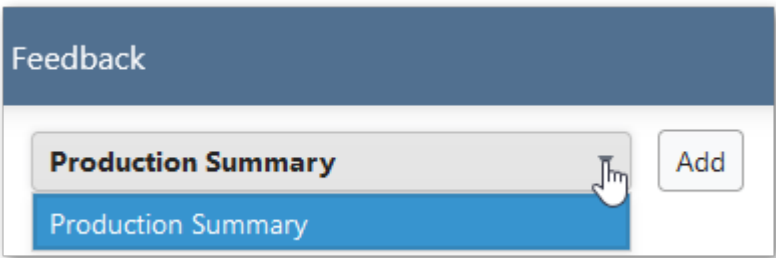
7.6 Organization Feedback

The Feedback page allows employees to submit responses to survey-like forms. These forms are designed by the organization and may be used for a variety of purposes. Each form can be submitted more than once enabling a tracking log of information. Your information is saved with the data such that responses can be tracked by employee.

Open the Feedback page from the menu **Organization > Feedback**

7.6.1 Viewing Responses

To view the data for a given survey form, select the name from the list:



This loads all the responses for that survey.


Feedback				
<div>Production Summary ▼ Add ↻</div>				
Time ▼	Throughput A ▼	Throughput B ▼	Task Types ▼	Note ▼
3/8/2024 10:57 AM	22	55	Other QA	Normal day

7.6.2 Adding a Response

To add a new response, click the **Add** button at the top of the page.

Then,

- 1. Enter or select values in the form.
- 2. (Optional) Add comments for this response.
- 3. Click **Save**

 Please Ensure Accuracy

Once the response is saved it is **not editable**.

Feedback




* Throughput A :

22.00

* Throughput B :

55.00

* Task Types :

QA  Other  | 

Comments:

Save

Close

8. My Setup

8.1 Profile

The Profile page allows you to update your password, view and update your contact information (subject to your organizations settings) and review your deployments that inform your schedule. You can see what Locations (schedule groups) you can be scheduled to, the time zone of that location, and what stations (positions) you can work.

The screenshot shows the 'Profile' page with a dark blue header. Below the header, there are two main sections: 'Name' and 'Contact Information'.

Name Section:

- Username: **bob** Password: **Change**
- First Name: **Bob**
- Last Name: **Abbott**
- Nick Name:

Contact Information Section:

Email:	<input type="text"/>	Address:	<input type="text"/>
Phone:	<input type="text"/>	Address 2:	<input type="text"/>
Mobile:	<input type="text"/>	City:	<input type="text"/>
Phone 2:	<input type="text"/>	State:	<input type="text"/>
Phone 3:	<input type="text"/>	Postal Code:	<input type="text"/>
Fax:	<input type="text"/>	Country:	<input type="text"/>

Save

8.1.1 Updating Password

To change your password, click the **Change** button at the top-right of the "Profile" page. Then,

1. Enter your **Current** password
2. Enter the **New** password (repeat in **Repeat New** box)
3. Click **Submit**

Password

Current:

Required

New:

Required

Repeat New:

Required

New Password Requirements

• Not a repeat of any previous password

• These characters are not allowed: < > ' "

• Case-Sensitive

Submit

Close

8.1.2 Updating Contact Information

If you organization allows editing, you can enter add or change your contact information. Simply enter new values in the **Contact Information** section and click **Save**.

8.1.3 Viewing and Editing Attributes

Attributes are additional values associated with an employee record. In some cases the organization may enable viewing and editing of attribute values.

To edit attributes, enter new values and click **Save**.

Attributes

Answer Time:

Availability:

Graduation Status:

mm / dd / yyyy

Save

8.1.4 Deployments

TeamWork supports cross-location scheduling as well as different deployment of skills per location. The Deployments section lists your locations and other information related to your assignment to that location.

Deployments

Location	Time Zone	Crew	Start	End	Positions
Denver <div>Default</div>	(UTC-07:00) Mountain Time (US & Canada)	FT			LPN , Pool , RN , Tech , Training

Clients

Name

University of Denver, 001

8.2 Preferences

You can set several options to change the look and feel of the user interface and default settings.

Preferences

Site

Default Page:

Home

Time Zone:

(UTC-05:00) Eastern Time (US & Canada)

Culture:

Time Format:

(Organization/Culture)

Week Start:

Sunday

Calendar

Default View:

Day

Hours Shown:

All Day

My Hours:

Start

8:00 AM

End

8:00 PM

Display:

☒ Schedule

☒ Time

☒ SwapBoard

☒ My Leave

☐ Availability

☐ Events

Save

Scheduling

Minimum Hours per week:

0

Desired Hours per week:

Maximum Hours per week:

40

Max Days:

7

Max Shifts Per Day:

4

Max Hours Per Day:

12

Public Pages

What is this for?

A Unique ID is another way to identify yourself to TeamWork. This ID is sent to our public page url's and is not secret. Do not create a Unique ID if you prefer to securely access your schedule information.

Unique Id:

Clear

Test your public page:

<http://tmwork.net/public/empsch?id=>

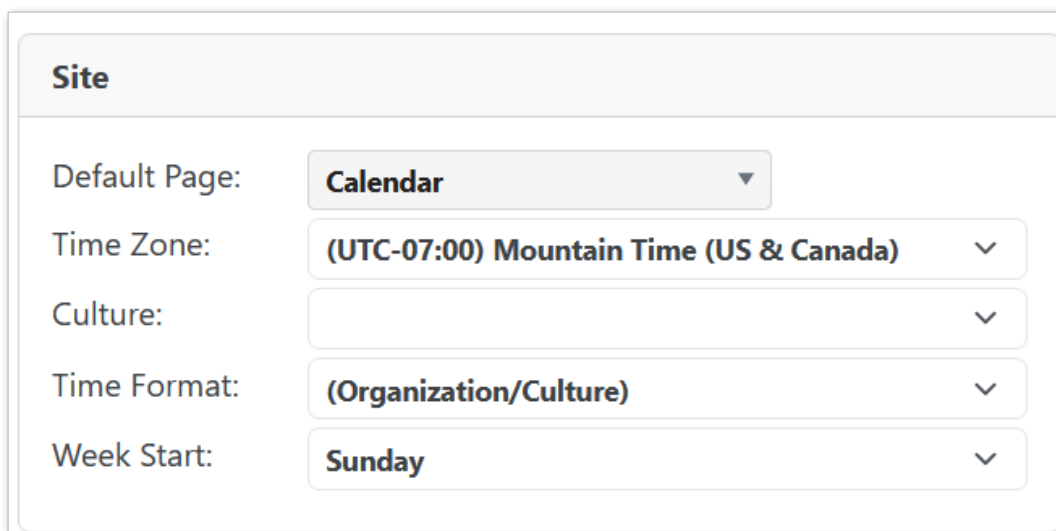
Link to iCal formatted data (copy and paste to other applications):

<http://tmwork.net/public/empsch?id=&format=ical>

8.2.1 Site Settings

In the "Site" section, you can change several settings that affect the portal.

- **Default Page** - this sets your landing page upon sign-in. Options are dependent on what your organization has enabled in TeamWork and can include: Home page, Calendar, Schedule, Swapboard, Time or Bidding.
- **Time Zone** - Specifies which time zone to use when displaying dates and times. This is useful if you work in a different time zone than the location(s) you are assigned.
- **Culture** - Allows you to specify a language preference as well as date, time, and number formats.
- **Time Format** - Use Time Format to choose 24 hour time.
- **Week Start** - Use Week Start if your prefer to change the view of your calendar to a different start of week than set by your organization.



The screenshot shows a 'Site' settings panel with the following configuration:

Site	
Default Page:	Calendar ▼
Time Zone:	(UTC-07:00) Mountain Time (US & Canada) ▼
Culture:	▼
Time Format:	(Organization/Culture) ▼
Week Start:	Sunday ▼

8.2.2 Calendar Settings

In the Calendar section, choose your default view for the calendar: day, week, month or list view. Choose whether to see all hours in a day, or just the time frame of your hours. Choose what to display on the calendar: Schedule, Time, Swapboard, My Leave, Availability and Events.

Calendar

Default View:

Month

Hours Shown:

All Day

My Hours:

Start

8:00 AM

End

8:00 PM

Display:

☒ Schedule

☒ Time

☒ SwapBoard

☐ My Leave

☐ Availability

☐ Events

8.2.3 Scheduling Settings

In the Scheduling section review the parameters that inform your schedule including your settings for:

- Minimum Hours per week
- Desired hours per week
- Maximum hours per week
- Max Days per week
- Max Shifts per day
- Max Hours per day

Scheduling

Minimum Hours per week:	<input type="text" value="10"/>	▲▼
Desired Hours per week:	<input type="text" value="18"/>	▲▼
Maximum Hours per week:	<input type="text" value="64"/>	▲▼
Max Days:	<input type="text" value="6"/>	▲▼
Max Shifts Per Day:	<input type="text" value="8"/>	▲▼
Max Hours Per Day:	<input type="text" value="8"/>	▲▼

Save

8.2.4 Public Pages

The Public Pages section (subject to your organizations settings) allows you to create a Unique Id which enables a public page. The public page is for viewing your schedule without having to sign in. This also creates a link for an iCal feed to import your schedule to another application (such as Outlook or Google Calendar).

Public Pages

What is this for?
A Unique ID is another way to identify yourself to TeamWork. This ID is sent to our public page url's and is not secret. Do not create a Unique ID if you prefer to securely access your schedule information.

Unique Id:

Clear

Test your public page: <http://tmwork.net//public/empsch?id=557bd517-287b-458a-9c33-030213e06e72>

Link to iCal formatted data (copy and paste to other applications):
<http://tmwork.net//public/empsch?id=557bd517-287b-458a-9c33-030213e06e72&format=ical>

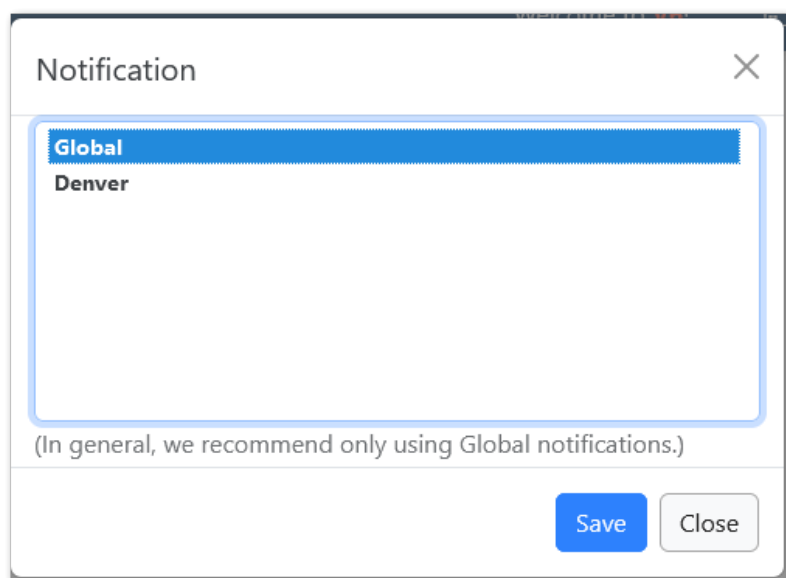
8.3 Notifications

The notifications page lets employees configure emails and text alerts from TeamWork. These settings are done in a profile that has a scope of either **Global** or a specific **Location**. In general, only a global profile is needed. You might consider a location profile only, if you are deployed to many locations but only want notifications from one of them.

8.3.1 Adding a Profile

To add a notifications profile:

1. Click the **Add** button at the top the page
2. Select a scope
3. Click **Save**



A screenshot of a 'Notification' dialog box. The dialog has a title bar with the word 'Notification' and a close button (X). Inside, there is a list with two items: 'Global' and 'Denver'. 'Global' is highlighted with a blue background. Below the list, there is a note in parentheses: '(In general, we recommend only using Global notifications.)'. At the bottom right, there are two buttons: 'Save' (blue) and 'Close' (white with a grey border).

To edit the notifications, simply make changes to selections and click **Save**.

Notifications
Calendar
Clock
Card
Leave
SwapBoard

Global
Save
Delete
Add

Email Report (Global)

Enabled: Yes - Send Reports

Send Every: Sun Mon Tue Wed Thu Fri Sat

Include: Calendar Schedule SwapBoard

Send Next:

Alerts (Global)

Notify me when:
Via:
☒ My Schedule in the next 7 days changes
☒ POSTED shifts are claimed or removed by manager
☐ Shifts are POSTED (Empty shifts not included) (Email only)
☒ Leave requests change status
☐ Events change
☐ Invoice status change
☒ Email ?
☐ Text ?

Text Messaging

☒ Opt-in to receive SMS notifications about scheduling, time and attendance.
Program: ScheduleSource TeamWork | Message and data rates may apply | Message frequency will vary | Text HELP for help, Text STOP to cancel | [Terms of Service](#), [Privacy Policy](#)

Reminders

Text Me:
60 Minutes
Prior to Shifts

8.3.2 Notification Options

The various notification options are grouped on the page. Everything is optional, but enabled notifications will require a valid email or mobile number in the system. Text messages also require a separate Opt-In to enable.

Email Report

TeamWork can send an overnight email on the days selected. The data in the email can include **Calendar Events**, **Scheduled Shifts**, and **Swapboard** shifts. The date range of the data is the date of the email plus the **Send Next** number of days in the future. Once days and data are configured, choose **Enabled = Yes** to start receiving emails.

Email Report (Global)

Enabled: Yes - Send Reports

Send Every: Sun Mon Tue Wed Thu Fri Sat

Include: Calendar Schedule SwapBoard

Send Next: 14 Days

Alerts

Alerts for certain changes can be delivered via text or email. In the example below, the employee does not have valid email or mobile values, so the **Via** options appear as "?".

Some options depend on the organization configuration.

Alerts (Global)

Notify me when:

☒ My Schedule in the next 7 days changes
☒ POSTED shifts are claimed or removed by manager
☐ Shifts are POSTED (Empty shifts not included) (Email only)
☒ Leave requests change status
☐ Events change
☐ Invoice status change

Via:

☒ Email ?
☐ Text ?

Reminders

TeamWork can send a text message either 30 minutes or 60 minutes prior to the start of your shift. Again, this requires both a valid mobile number and the Opt-In checked.

Reminders

Text Me:

60 Minutes

▼

Prior to Shifts

Text Messaging Opt-In

Text messages cannot be sent without checking Opt-In.

Text Messaging

☒ Opt-in to receive SMS notifications about scheduling, time and attendance.

Program: ScheduleSource TeamWork | Message and data rates may apply |

Message frequency will vary | Text HELP for help, Text STOP to cancel |

[Terms of Service](#), [Privacy Policy](#)

8.4 Availability

Availability describes days and hours when employees can work shifts. Availability can be entered as a weekly template, a date-based location template, or single-day overrides. Availability is separate from the Leave Management system where absences go through an approval process.

Availability is used as a guide during the scheduling process. Changing availability will not affect currently assigned shifts.

It's possible to limit availability too much such that no shifts are assignable. Do not attempt to restrict times down to a single shift length as changing work times and shift strategies by schedulers might cause there to be nothing available to work.

8.4.1 Availability Calendar

The availability calendar show the combined, effective availability of all templates, overrides, and granted leave. It does not allow editing. Users must edit on the templates or overrides pages.

Avail Calendar						
<div> <div>Today</div> <div> <div>February, 2024</div> <div>Day Week Month</div> </div> </div>						
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
28 (GLOBAL)	29 (GLOBAL)	30 12:30pm - 8pm	31 (GLOBAL)	01 *	02 *	03 1pm -
04 (GLOBAL)	05 (GLOBAL)	06 12:30pm - 8pm	07 (GLOBAL)	08 *	09 *	10 1pm -
11 (GLOBAL)	12 (GLOBAL)	13 12:30pm - 8pm	14 (GLOBAL)	15 *	16 *	17 1pm -
18 (GLOBAL)	19 (GLOBAL)	20 12:30pm - 8pm	21 (GLOBAL)	22 *	23 *	24 1pm -
25 (GLOBAL)	26 (GLOBAL)	27 12:30pm - 8pm	28 (GLOBAL)	29 *	01 *	02 1pm -
03 (GLOBAL)	04 (GLOBAL)	05 12:30pm - 8pm	06 (GLOBAL)	07 *	08 *	09 1pm -

8.4.2 Availability Templates

An availability template represents a generic, recurring 7-day week. Each template describes the available days **On/Off**, the day **Priority** (1 = lowest, 9 = highest), and optionally limited **Times** available to work. There's also optional preferred times that managers can use for scheduling.

There are two types of templates:

1. **Global** - applies the same rules to all locations
2. **Local** - applies to a single location

In addition, templates can be **Date-Based** so that they're only in effect on those dates.

The absence of a template simply defaults to all days/times as available. Setting up availability is optional and sometimes not needed according to how the organization schedules.

Details
Times: (UTC-07:00) Mountain Time (US & Canada)
Global availability does not adjust for time zones.

Day	On/Off	Priority	Available	Hours	Preferred	Hours
Sunday	Off	▼				
Monday	Off	▼				
Tuesday	On	1 ▼	12:30pm-8pm; ▼	7.50	All Day ▼	24.00
Wednesday	Off	▼				
Thursday	On	1 ▼	All Day ▼	24.00	All Day ▼	24.00
Friday	On	1 ▼	All Day ▼	24.00	All Day ▼	24.00
Saturday	On	1 ▼	1pm-; ▼	11.00	All Day ▼	24.00

Adding a Template

To add a new template:

1. Click the **Add** button at the top of the page
2. Select a **Scope** (Global or location)
3. Optionally enter a date-range for a date-based template
4. Click **Save**

Add - Template

Scope:

Denver

Denver (Date Based)

Name:

Denver (Date Based)

Dates:

Start

-

End

Save

Close

Editing a Template

Templates are edited using the template page. Select a template to view/edit from the drop-down at the top of the page.

Choose values in the drop-downs to toggle days **On/Off** or set **Priority**.

To edit the times, click the down-arrow in the **Available** column to reveal time entry boxes.

You can enter multiple blocks of available times. When editing, the page will always give you a few extra boxes in case you want to add another block.

Tuesday

On

1

12:30pm-8pm;

7.50

12:30 PM

8:00 PM


From

To

From

To

Time blocks can be open-ended by leaving the start or end time blank. For instance, if available until 3 PM, you might just enter the end time of 3 PM.

A horizontal time selection interface. It consists of a light gray rounded rectangle containing four elements: the word 'From' in bold black text, a circular clock icon, the text '3:00 PM' in bold black text, and another circular clock icon.

After making changes, you must click **Save** to update the template.

Deleting a Template

To delete a template:

1. Select/Open the template using the drop-down
2. Click **Delete** and confirm

8.4.3 Availability Overrides

Overrides act as date-based exceptions to the availability defined in the template(s). Each override is global or for a single location, is for a single date, and specifies if the override is On or Off availability. If an On override, blocks of time may be entered.

To add an override, go to the Overrides page, then

1. Click **Add**
2. Enter or select a **Date**
3. Specify the **Scope**
4. Choose **On** or **Off**
5. Optionally enter time blocks (if On)
6. Click **Save**

Override

Date:

Scope: **Global** ▼

On/Off: **Off** ▼

Times: (UTC-07:00) Mountain Time (US & Canada)

Global availability does not adjust for time zones.

Save

Close

Editing Overrides

To edit an override:

1. Click **Open** in the actions column of the overrides list
2. Make changes
3. Click **Save**

Deleting Overrides

To delete an override:

1. Click **Open** in the actions column of the overrides list
2. Click **Delete**

8.4.4 Volunteer Lists

A volunteer list is a simple sign-up list that helps managers limit scheduling to only those in the list. Volunteer lists are per location.

To see volunteer lists, select a **Location** from the drop-down at the top of the page.

Avail Volunteer

Calendar
Clock
Card
Leave
SwapBoard

Denver

List	Volunteer	Start	End	Actions
test	Yes			Open

To add or remove yourself from a list, click the **Open** button in the Actions column.

Choose **Yes** or **No** for the volunteer value, click **Save**.

Volunteer

×

List: test

Volunteer: Yes

Dates:
-

Save
Close

Some lists are date-based and will be limited to volunteering only on those dates.

8.5 Credentials

Credentials are records of qualifications, training, and formal credentials that may be required to fulfill certain positions or tasks. For some configurations, employees can enter credentials directly from the portal. In addition to tracking credentials, an organization might establish goals for training, etc. to be met over some period.

8.5.1 Viewing Credentials

In the main menu, navigate to **My Setup > Credentials > List**. This loads the full list of your credentials (past, present, pending, etc.).

My Credentials

Add

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

Name	Due	Start	End	Completed	Notes	Status	Files
Lift 50 Lbs		1/1/2011	12/31/2021	1/1/2011		<input checked="" type="checkbox"/> OK <div>Expired</div>	

Adding Credentials

To add a credential, click the **Add** button above the list.

In the pop-up:

1. Select a pre-defined credential type
2. (Optional) Enter the effective dates (for expiring credentials)
3. (Optional) Enter a due date (if pending completion)
4. Enter a completed date (Optional)
5. Enter a note
6. Click **Save**

Add

Credential:

Security Best Practices

Effective Dates:

Due:

Completed:

1/25/2024

Note:

Add
Close

8.5.2 Viewing Goals

To view your progress against an organization's goals, click **Goals** in the main menu (under Credentials).

This view lists goal programs on the left.

Click a program to load the progress report.

Goals
Paul Green

Cont. Education
1/1/2022 - 12/31/2022 Units: 4

Cont. Education / Green, Paul

Goal	Target	Approved	Percent
Units	4	0	0.0%

Credential	Units	Hours	Completed	Status Files
National Conference	3			Add
Security Best Practices	1			Add
Translation Certification	3			Add

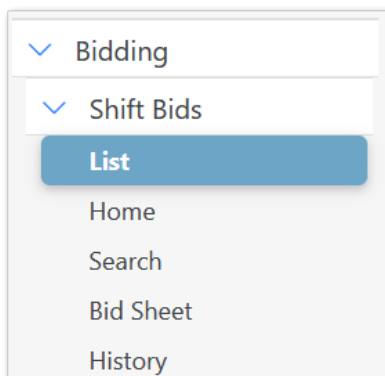
9. Bidding

9.1 Shift Bidding

Shift bidding is the process of selecting a recurring pattern of shifts for a time period. A single pattern of shifts is called a "Line" or a "Tour". In general, employees are ranked by seniority (or similar method) and lines are awarded in that order. Each line might have a capacity of one or more employees. Once assignments are made up to a line's capacity, it is no longer available.

Prior to the assignment process, employees enter their choices (bids) and establish their priority (first, second, third, etc.). Employees can enter as many bids as necessary to ensure a choice is awarded. Choices can be added, removed, or re-prioritized prior to the assignment process.

The start page for shift bidding is the **List** page, found in the menu under **Bidding > Shift Bids > List**.



9.1.1 Selecting a Bid

Using the menu, open the Shifts Bids **List** page. Then click on the name of the bid, or one of the page links (**Home**, **Search**, or **Bid Sheet**). Once a bid is selected, the other pages in the menu will load for that bid.

Shift Bids

Welcome to V6!

Paul Green

Shift Bids

Name	Start ↓	End ↓	Stage
▼ Status: Select			
2024 Full Bid	12/31/2023	12/28/2024	Select
▼ Status: Complete			
2021 Q1	1/3/2021	4/4/2021	Complete

9.1.2 Home Page

The home page for a bid shows setup information and any messages for the bid. Your overall rank is listed under "My Status".

Shift Bids

Paul Green

2024 Full Bid / Home

[Home](#) | [Search](#) | [Bid Sheet](#)

Bid

Name:

2024 Full Bid

Dates:

Dec 31, 2023 (Sun)- Dec 28, 2024 (Sat)

Stage:

Select

Assigned: (0 of 10 employees.)

Privileges:

My Status

Rank:

6

Status:

No Assignment

Messages

Bidding Timeline

On December 15th, you can start bidding on lines.

We will process the choices one week later on December 22nd.

Posted By: Hammers, Scott, 1/24/2024

9.1.3 Viewing Lines (Search)

The **Search** page lists all lines and related information. If the bid is accepting choices, then buttons are available for adding new choices and editing existing ones.

There are several links to click on for additional information. Each option is summarized below.

Shift Bids

Paul Green

2024 Full Bid / Search

Home | Search | Bid Sheet

Filters

Filter

View All

Name	Pattern	Position	Start Time	End Time	Hours	Capacity	Available	Bids	My Bids
A	S	Tech	8:00 AM	5:00 PM	40.00	1	1	0	Add
B	1 2 3 4 5 6 7 8 9 10 11 12	Pool	6:00 AM	5:00 PM	70.00	1	1	0	Add
c	1 2 3 4 5 6 7 8 9 10 11 12	Pool	6:00 AM	5:00 PM	70.00	1	1	0	Add
Count: 3						3	3		

3

items per page

1 - 3 of 3 items

Calendar View of Line

Click the button in the "Name" column or click the "Pattern" days to open a calendar view of the line's shifts.

View » Line : B

×

Calendar

List

Today

January, 2024

Week

Month

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
31	01 6am - 5pm 6a Pool	02 6am - 5pm 6a Pool	03 6am - 5pm 6a Pool	04	05	06 6am - 5pm 6a Pool
07 6am - 5pm 6a Pool	08 6am - 5pm 6a Pool	09 6am - 5pm 6a Pool	10	11	12	13 6am - 5pm 6a Pool
14 6am - 5pm 6a Pool	15 6am - 5pm 6a Pool	16	17	18 6am - 5pm 6a Pool	19 6am - 5pm 6a Pool	20 6am - 5pm 6a Pool
21 6am - 5pm 6a Pool	22	23	24	25 6am - 5pm 6a Pool	26 6am - 5pm 6a Pool	27 6am - 5pm 6a Pool
28	29	30 6am - 5pm 6a Pool	31 6am - 5pm 6a Pool	01 6am - 5pm 6a Pool	02 6am - 5pm 6a Pool	03
04	05	06 6am - 5pm 6a Pool	07 6am - 5pm 6a Pool	08 6am - 5pm 6a Pool	09	10

Other Choices

Click the button (with count) in the "Bids" column to see a list of other employee's choices. Depending on the settings, the names of other bidders may or may not be listed.

View Bids

X

B:

Capacity: 1 Assigned: 0 Higher Bids: 1

Bids:

Name	Rank	Choice
Fischer, Dave	4	3rd
Hamm, David	10	1st

Close

Add Choices

The "My Bids" column provides buttons to add or edit your choices. To add a new choice:

- 1. Click **Add** in the "My Bids" column for the line
- 2. (Optional) Select the choice number (priority)
- 3. Click **Save**

Bid

X

Name: A

Pattern: S M T W T F S

Positions: Tech

Times: 08:00 - 17:00

Hours: 40.00

Choice: 1


Save

Close

When added, the column updates to text with "Saved" and the choice number. The page will need to be refreshed to have the edit buttons show. The refresh link is at the top right of the page/toolbar.

Bids	My Bids
1	Saved (1)
2	Add
2	Add

The refresh link:

[Home](#) | [Search](#) | [Bid Sheet](#) 

Edit Choices

Existing choices and their priority are listed in the "My Bids" column. To edit or delete a choice, click the button for that link.

In this example, the blue button (1) is the employee's first choice.

Bids	My Bids
2	1st
2	Add
2	Add

To change the choice number (priority):

- 1. Select a new value from the drop-down (limited to valid values),
- 2. Click **Save**.

To delete the choice:

- 1. Click **Delete**

Bid

Name:

A

Pattern:

SMTWTFS

Positions:

Tech

Times:

08:00 - 17:00

Hours:

40.00

Choice:

1

Delete

Save

Close

View All

The View All page opens in a new tab and lists all lines across all dates, and summarizes the days that are OFF or have shifts. Clicking the links by "Text" will show or hide that text in the view. (Hiding station names helps the view if you only want to see days off).

2024 Full Bid

Text: [Station](#) | [Off](#)

December, 2023

	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31
	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun
A																														OFF	
B																														OFF	
c																														Pool	

January, 2024

	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31
	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed
A	Tech	Tech	Tech	Tech	Tech	OFF	OFF	Tech	Tech	Tech	Tech	Tech	OFF	OFF	Tech	Tech	Tech	Tech	Tech	OFF	OFF	Tech	Tech	Tech	Tech	Tech	OFF	OFF	Tech	Tech	Tech
B	Pool	Pool	Pool	OFF	OFF	Pool	Pool	Pool	Pool	OFF	OFF	OFF	Pool	Pool	Pool	OFF	OFF	Pool	Pool	Pool	Pool	OFF	OFF	OFF	Pool	Pool	Pool	OFF	OFF	Pool	Pool
c	OFF	OFF	OFF	Pool	Pool	Pool	Pool	OFF	OFF	Pool	Pool	Pool	OFF	OFF	OFF	Pool	Pool	Pool	Pool	OFF	OFF	Pool	Pool	Pool	OFF	OFF	OFF	Pool	Pool	Pool	Pool

February, 2024

	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29
	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu
A	Tech	Tech	OFF	OFF	Tech	Tech	Tech	Tech	Tech	OFF	OFF	Tech	Tech	Tech	Tech	Tech	OFF	OFF	Tech	Tech	Tech	Tech	Tech	OFF	OFF	Tech	Tech	Tech	Tech
B	Pool	Pool	OFF	OFF	OFF	Pool	Pool	Pool	OFF	OFF	Pool	Pool	Pool	Pool	OFF	OFF	OFF	Pool	Pool	Pool	OFF	OFF	Pool	Pool	Pool	Pool	OFF	OFF	OFF
c	OFF	OFF	Pool	Pool	Pool	OFF	OFF	OFF	Pool	Pool	Pool	Pool	OFF	OFF	Pool	Pool	Pool	OFF	OFF	OFF	Pool	Pool	Pool	Pool	OFF	OFF	Pool	Pool	Pool

Favorites

Favorites provide a way to define a filter/query to select a subset of lines. If you define a filter it can be used in two ways: 1) filter the Search list for readability, and 2) add a Favorite Choice.

Favorites are optional, and are an advanced option. (More help pending...)

9.1.4 Bid Sheet

The bid shift page lists your bids in priority order. The first three columns provide links to edit the choice and/or view the line in a calendar.

The summary at the top lists the total lines in choices (individual lines plus favorites) and the remaining lines available (after some assignments have been made).

The **PDF** button at the bottom generates a PDF file for download of the page. This is useful to save a non-editable record of the final bid sheet.

Shift Bids

Paul Green

2024 Full Bid / Bid Sheet

[Home](#) | [Search](#) | [Bid Sheet](#)

Lines: 1 Available: 1

Lines

Choice	Name	Pattern	Position	Start Time	End Time	Hours	Capacity	Available
1st	A	SMTWTFS	Tech	8:00 AM	5:00 PM	40	1	1

Favorites

Choice	Name	Lines	Available
No records available.			

1/24/2024, 11:01:03 AM

PDF

9.1.5 History

The history page lists edits to employee data and choices. This page is read-only and provides a log the changes that might affect the results of bidding. The timestamp fields at the top allow filtering to certain time spans. The "By" and "For" fields allow limiting to certain text (names) in the history.

Paul Green

2024 Full Bid / History

Timestamp

1/24/2024 12:00 AM

Action By

Maximum

For

Name

Apply Clear

Timestamp	Action	Source	Summary	By	For
1/24/2024 10:36 AM	ChoiceAdd	A		Paul Green	Green, Paul
1/24/2024 9:12 AM	RankAssign			Hammers, Scott	

1

25

items per page

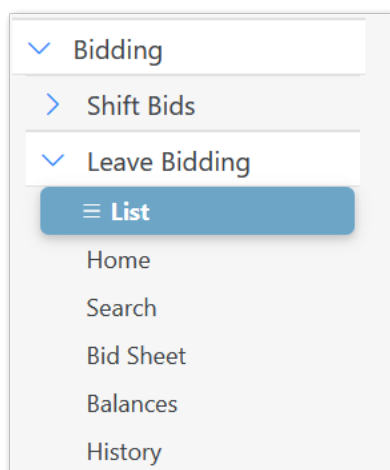
1 - 2 of 2 items

9.2 Leave Bidding

Leave bidding is the process of selecting dates for vacation or other leave in advance, with an award process (or processes) governed by organizational or union rules. Employees are ranked by seniority (or similar method) and leave is awarded in that order. An organization might award leave in several "rounds", each with different rules or constraints. Availability of leave dates can be constrained by limits on the day, the leave type, or the employee's available balance.

Employees may choose to enter "alternate" choices such that two choices are either/or in the assignment process. For example, having a first choice of the 2nd week in July, with the alternate choice being the 3rd week in July. The system could assign the first OR second, but not both.

The start page for leave bidding is the **List** page, found in the menu under **Bidding > Leave Bids > List**.



9.2.1 Selecting a Bid

Using the menu, open the Leave Bids **List** page. Then click on the name of the bid, or one of the page links (**Home**, **Search**, or **Bid Sheet**). Once a bid is selected, the other pages in the menu will load for that bid.

Leave Bidding

Paul Green

Leave Bidding

	Location	Name		Start	End	Stage
▼ Status: Select						
	Denver	2024 Date List	Home Search Bid Sheet	12/31/2023	12/28/2024	Select
▼ Status: Assign						
	Denver	2023 Date List	Home Search Bid Sheet	1/1/2023	12/30/2023	Assign
▼ Status: Complete						
	Denver	Dept 1 - 2021 Vacation Bid	Home Search Bid Sheet	1/1/2021	12/31/2021	Complete
	Denver	TEST FEB	Home Search Bid Sheet	2/1/2017	2/28/2017	Complete

9.2.2 Home Page

The home page for a bid shows setup information and any messages for the bid. Your overall rank is listed under "My Status". Please note the "round rules" located at bottom-left. (In this case there's one round: R1.) This section will describe what the constraints for awards are for each round.

Leave Bidding

Paul Green

2024 Date List / Home

[Home](#) | [Search](#) | [Bid Sheet](#)

Bid

Name:

2024 Date List

Dates:

Dec 31, 2023 (Sun)- Dec 28, 2024 (Sat)

Notes:

test

Stage:

Select Assigned: (0 of 10 employees.)

Current Round:

R1

Privileges:

1) R1

Date range unit is DAY. Each range must be between (1) & (28) days.

My Status

Rank:

6

Balances

PTO

120.00 / 160.00 hours remaining

Messages

Bidding Dates

Please enter PTO choices the first week of December.

We will assign Round 1 the Friday of the 2nd week of December. Round 2 will be assigned the next Friday.

Posted By: Hammers, Scott, 1/24/2024

9.2.3 Viewing Dates (Search)

The **Search** page lists all lines and related information. If the bid is accepting choices, then buttons are available for adding new choices and editing existing ones.

Depending on the settings, you may be able to view by **Week** or **Day**, or by **List**. The "List" view is based on a pre-defined list of date ranges available for leave. For Week and Day, the organization may allow week-at-a-time or even employee-selected date ranges.

- 83/105 -

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There are several links to click on for additional information. Each option is summarized below.

Leave Bidding

2024 Date List / Search

[Home](#) | [Search](#) | [Bid Sheet](#)

PTO 120.00 / 160.00 hours remaining

Week	Day	List									
Start	End	Name	Capacity	Granted	Available	Bids	My Bids				
12/31/2023 (Sun)	1/7/2024 (Sun)		3	0	3					Add	
1/7/2024 (Sun)	1/14/2024 (Sun)		3	2	1	1				Add	
1/14/2024 (Sun)	1/21/2024 (Sun)		3	3	0					Add	
1/21/2024 (Sun)	1/28/2024 (Sun)		3	0	3	1	1st				
1/28/2024 (Sun)	2/4/2024 (Sun)		3	3	0					Add	
2/4/2024 (Sun)	2/11/2024 (Sun)		3	0	3	1				Add	
2/11/2024 (Sun)	2/18/2024 (Sun)		3	0	3	2	2nd				
2/18/2024 (Sun)	2/25/2024 (Sun)		3	0	3					Add	

Other Choices

Click the button (with count) in the "Bids" column to see a list of other employee's choices. Depending on the settings, the names of other bidders may or may not be listed. If you have bid on those dates, your name will appear in the list.

Date: Sunday, February 11, 2024

Capacity: 3 Granted: 0 Available: 3

Rank	Name	Choice
6	Green, Paul	2nd
9	---	1st
9	---	2nd

Close

Add Choice

The last column provides buttons to add choices. To add a new choice:

1. Click **Add** button in last column
2. Select dates or a date range
3. Select a Leave Type
4. (Optional) Select the choice number (priority)
5. (Optional) Enter an alternate choice number
 - If using alternates, the primary choice number should match an existing choice
6. Click **Save**

Add » Choice [X]

Date Range: 1/28/2024 (Sun) - 2/4/2024 (Sun) ▼

Leave Type: PTO ▼

Choice.Alternate: 3 . [] ▼

Add

Close

Edit Choice

The "My Bids" column provides buttons to edit or delete your choices. To edit a choice:

1. Click the **1st**, **2nd**, etc. button in the "My Bids"
2. (Optional) Select the choice number (priority)
3. (Optional) Enter an alternate choice number
 - If using alternates, the primary choice number should match an existing choice
4. Click **Save**

To delete the choice, click the **Delete** button.

Edit » Choice

Dates
Check Rules
Check Availability

Select dates and click Save to include in the choice.
All date ranges combine for a single choice and will be awarded all or nothing.

Start	End	Type
2/11/2024	2/18/2024	PTO

Choice# . Alternate#

2

Save
Delete

Close

9.2.4 Bid Sheet

The bid shift page lists your bids in priority order. The first column provides links to edit the choice.

The summary at the top lists the leave type(s) and hours remaining of the total hours available.

The **PDF** button at the bottom generates a PDF file for download of the page. This is useful to save a non-editable record of the final bid sheet.

Leave Bidding

2024 Date List / Bid Sheet

Home | Search | Bid Sheet

Add

PTO 120.00 / 160.00 hours remaining

Choice	Alternate	Dates	Weeks	Days	Hours
1st		Jan-21 (Sun) - Jan-28 (Sun) PTO	1.6	8.0	64.0
2nd		Feb-11 (Sun) - Feb-18 (Sun) PTO	1.6	8.0	64.0

1/25/2024, 4:43:51 PM

PDF

9.2.5 Balances

The balance page provides details about leave types and the total (**Quota**) available. The Granted, Taken (granted dates in past), and Remaining values are listed for both Hours and Days (if enabled).

Leave Bidding

2024 Date List / Balances

2023

<

>

Paul Green

Name	Check	Start	End	Quota (Hours)	Granted	Taken	Remaining	Quota (Days)	Granted	Taken	Remaining
PTO	No	1/1/2023	12/30/2023	160	40	40	120		0	0	

9.2.6 History

The history page lists edits to employee data and choices. This page is read-only and provides a log the changes that might affect the results of bidding. The timestamp fields at the top allow filtering to certain time spans. The "By" and "For" fields allow limiting to certain text (names) in the history.

2024 Date List / History

Paul Green

Timestamp

1/25/2024 12:00 AM

-

Maximum

Action By

For

Name

Name

Apply

Clear

Timestamp	Action	Source	Summary	By	For
1/25/2024 4:33 PM	DateRangeAdd	2		Paul Green	Green, Paul
1/25/2024 4:33 PM	ChoiceAdd	2		Paul Green	Green, Paul
1/25/2024 4:33 PM	DateRangeAdd	1		Paul Green	Green, Paul
1/25/2024 4:33 PM	ChoiceAdd	1		Paul Green	Green, Paul

1

25

items per page

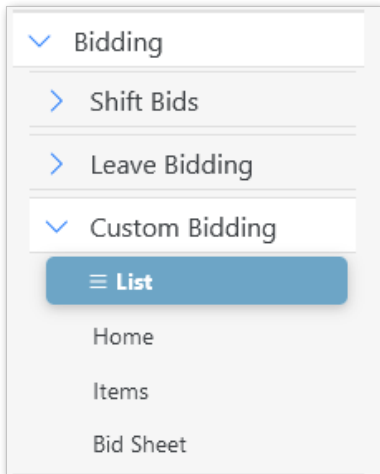
1 - 4 of 4 items

9.3 Custom Bidding

Custom bidding is the process of selecting items with an award process (or processes) that utilizes custom rules and logic. An organization might award items in several "rounds", each with different rules or constraints. The customizable logic and data attributes on employees and items provides maximum flexibility to the organization.

Employees can view items based upon a filter. The filter is set by the organization and helps to limit the scope of items to only those the employee is qualified to bid on.

The start page for custom bidding is the **List** page, found in the menu under **Bidding > Custom Bids > List**.




9.3.1 Selecting a Bid

Using the menu, open the Custom Bids **List** page. Then click on the name of the bid, or one of the page links (**Home**, **Items**, or **Bid Sheet**). Once a bid is selected, the other pages in the menu will load for that bid.

Custom Bidding		
Custom Bidding		
Name	Stage	
▼ Status: Assign		
2024 Q2 Training	Home Items Bid Sheet	Assign
2024 Q3 Training	Home Items Bid Sheet	Assign

9.3.2 Home Page

The home page for a bid shows setup information and any messages for the bid. Your attributes for the bid are listed under "My Attributes". This information is used by the custom logic to filter, sort, and rank you among all other bidders.

Custom Bidding		
2024 Q3 Training / Home		Home Items Bid Sheet 
Information		Bid
Organization: _SSI Enterprises_		Name: 2024 Q3 Training
Employee: David Hamm		Notes:
My Attributes		Stage: Assign
name	key	value
Level		3
Region	West	
		Privileges: Bid Rankings
		Messages

9.3.3 Viewing Items

The **Items** page lists all items and related information. If the bid is accepting choices, then buttons are available for adding new choices and editing existing ones.

Depending on the settings, you may be able to choose different **Layouts** of the data. From the items page you can click an item "Title" to view more information, click in the "Bids" column to see other bidder's choices, or click "Add" to enter your own choice.

There are several links to click on for additional information. Each option is summarized below.

Custom Bidding

2024 Q3 Training / Items

[Home](#) | [Items](#) | [Bid Sheet](#)

Layout: List

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

Title	Quantity	Level	Region	Week	Bids	Bid
Course 101, NYC (7/6)	1	1.00	East	W28	4	Add
Course 101, Dallas (7/20)	1	1.00	South	W30	2	Add
Course 101, Austin (8/3)	1	1.00	South	W32	2	Add
Course 101, San Francisco (8/17)	1	1.00	West	W34	2	Add
Course 101, London (8/31)	1	1.00	Europe	W36	4	Add
Course 101, Atlanta (9/14)	1	1.00	East	W38	2	10
Course 101, Paris (9/28)	1	1.00	Europe	W40	6	8

Add Bid

The last column provides buttons to add your bids. To add a new bid:

1. Click **Add** button in last column
2. Verify the item information
3. Select a choice number (either for a current choice to insert, or at the end of list)
4. Click **Save**

Add » Bid

Course 101, Dallas (7/20)

ExternalId	Quantity
C101W30	1

attribute	key	value
City	Dallas	
Level		1
Region	South	
Week	W30	

My Bid

Rank	Item
<input type="radio"/> #1	Course 300, Austin (9/7)
<input type="radio"/> #2	Course 400, Denver (8/24)
<input type="radio"/> #3	Course 500, Austin (7/20)
<input type="radio"/> #4	Course 400, San Francisco (8/31)
<input type="radio"/> #5	Course 300, Denver (8/3)
<input type="radio"/> #6	Course 210, Denver (7/20)
<input type="radio"/> #7	Course 200, Denver (7/6)
<input type="radio"/> #8	Course 101, Paris (9/28)
<input type="radio"/> #9	Course 500, Denver (9/21)
<input type="radio"/> #10	Course 101, Atlanta (9/14)
<input type="radio"/> #11	Course 210, NYC (9/14)
<input type="radio"/> #12	

Save

Close

Edit Bid

The "My Bids" column provides buttons to edit or delete your bids. To edit a bid:

1. Click the **1st**, **2nd**, etc. button in the "My Bids"
2. (Optional) Select a new choice number (priority)
3. Click **Save**

To delete the bid, click the **Delete** button.

Edit » Bid

Course 101, Paris (9/28)

ExternalId	Quantity
C101W40	1

attribute	key	value
City	Paris	
Level		1
Region	Europe	
Week	W40	

My Bid

Rank	Item
<input type="radio"/> #1	Course 300, Austin (9/7)
<input type="radio"/> #2	Course 400, Denver (8/24)
<input type="radio"/> #3	Course 500, Austin (7/20)
<input type="radio"/> #4	Course 400, San Francisco (8/31)
<input type="radio"/> #5	Course 300, Denver (8/3)
<input type="radio"/> #6	Course 210, Denver (7/20)
<input type="radio"/> #7	Course 200, Denver (7/6)
<input checked="" type="radio"/> #8	Course 101, Paris (9/28)
<input type="radio"/> #9	Course 500, Denver (9/21)
<input type="radio"/> #10	Course 101, Atlanta (9/14)
<input type="radio"/> #11	Course 210, NYC (9/14)
<input type="radio"/> End	

Delete
Save
Close

Other Bids

Click the button (with count) in the "Bids" column to see a list of other employee's bids.

Depending on the settings, the names of other bidders may or may not be listed. If you have bid on those items, your name will appear in the list.

Bids

Course 101, NYC (7/6)

ExternalId	Quantity
C101W28	1

Count **4**

Close

9.3.4 Bid Sheet

The bid shift page lists your bids in priority order. The first column provides a links to edit the choice. The "Title" can be click to see the item's detailed information.

The **PDF** button at the bottom generates a PDF file for download of the page. This is useful to save a non-editable record of the final bid sheet.

Custom Bidding

2024 Q3 Training / Bid Sheet

[Home](#) | [Items](#) | [Bid Sheet](#)

Layout: **List**

Bid	Title	Quantity	Level	Region	Week	Bids
1	Course 300, Austin (9/7)	1	3.00	South	W37	1
2	Course 400, Denver (8/24)	2	3.00	West	W35	3
3	Course 500, Austin (7/20)	2	3.00	South	W30	1
4	Course 400, San Francisco (8/31)	2	3.00	West	W36	2
5	Course 300, Denver (8/3)	1	3.00	West	W32	2
6	Course 210, Denver (7/20)	1	2.00	West	W30	3
7	Course 200, Denver (7/6)	1	2.00	West	W28	4
8	Course 101, Paris (9/28)	1	1.00	Europe	W40	6
9	Course 500, Denver (9/21)	2	3.00	West	W39	3
10	Course 101, Atlanta (9/14)	1	1.00	East	W38	2
11	Course 210, NYC (9/14)	1	2.00	East	W38	2

3/6/2024, 5:36:24 PM

PDF

10. Events

10.1 Events

TeamWork provides an optional event (task) management system. Events are created independently of shifts. If an event is attached to a shift, it is consider the responsibility of the employee working the shift. In this way events can be requested and planned independently of scheduling, and the linking of events to shifts completes their assignment.

Employees can manage their events by entering status (**Cancelled**, **Complete**, etc.) and optionally tracking time spent on the event. There are two pages for viewing/managing events: **My Events** and **By Shift**.

10.1.1 My Events

This page lists events in chronological order for a day, week, or month at a time (see [Date Navigation](#)). You can group the events by dragging a column header up to the group bar.

You can open the event and edit status, etc. by clicking the **Open** button. The fields available to edit are defined by the organization.

Events / My List

David Hamm

Week

1/19/2024

<

>

↑ Client

Scheduled	Name	Position	Client	Start	Hours	Note	Status	Actions
Client: University of Denver, 001								
Tue, 1/16/2024	Task A	Tech	University of Denver, 001	9:00 AM				Open
Wed, 1/17/2024	Task A	Tech	University of Denver, 001	8:45 AM				Open
Wed, 1/17/2024	Task B	Tech	University of Denver, 001	1:00 PM				Open
Tue, 1/16/2024	Task B	Tech	University of Denver, 001	1:00 PM			Cancelled	Open

10.1.2 By Shift

This page groups the events by assigned shifts. Click the name of the event to open the editor.

Events / By Shift

David Hamm

Week

1/19/2024

Tuesday, 1/16/2024 9:00 AM | University of Denver, 001 | Tech

[Task A](#)

Tuesday, 1/16/2024 1:00 PM | University of Denver, 001 | Tech

[Task B](#)

Cancelled

10.2 Other Events

This page shows the events for the selected date that are assigned to yourself and others. You can change dates with either the date-picker or the previous/next arrows. If you are not scheduled on the date, no events are listed.

This view allows employees to understand the distribution of events/tasks. Under some configurations, a lead employee can re-assign events to better optimize the workload.

Events / Other

1/17/2024

<

>

↑ Client

	Date	Name	Position	Client	Start	Employee	Hours	Status	Actions
▼ Client: University of Denver, 001									
	1/17/2024	Task A	Tech	University of Denver, 001	8:45 AM	Hamm, David			
	1/17/2024	Task D	Pharmacist	University of Denver, 001	9:00 AM				
	1/17/2024	Task B	Tech	University of Denver, 001	1:00 PM	Hamm, David			
	1/17/2024	Task C	Tech	University of Denver, 001	3:30 PM				

10.3 Unassigned Events

This page shows the unassigned events for today. The events may or may not have an associated shift. In either case, the event has no assignment.

This view allows employees to understand availability of events/tasks in real time. Under some configurations, a lead employee can re-assign events to better optimize the workload.

Events / Unassigned

David Hamm

Today's Unassigned:

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

Client	Position	Name
University of Denver, 001	Tech	Task A
University of Denver, 001	Tech	Task B

11. Invoices

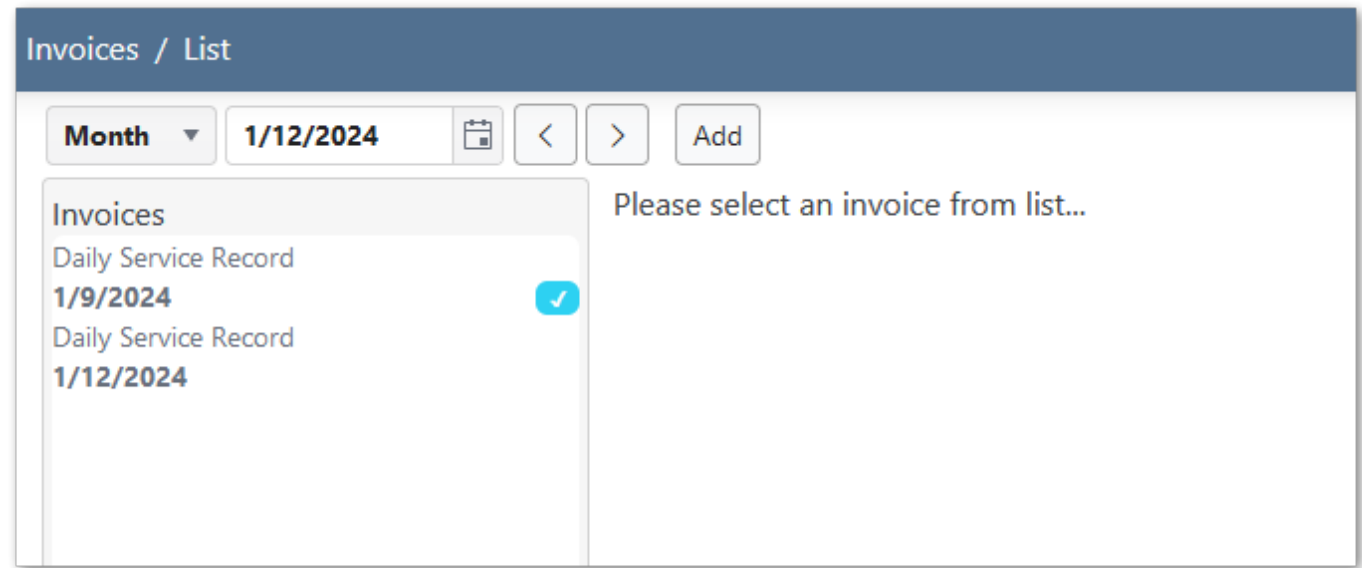
11.1 Using Invoices

The invoices page allows entering organization-defined invoice forms. Each form have fields and values to enter or select. Some fields might be required while others are optional. You can add, edit, and approve invoices from the "List" page.

11.1.1 List Invoices

The invoice list shows every invoice entered for the selected date range. Use the [Date Navigator](#) at the top of the page to load data for different time periods.

Each invoice is for a date or date range. Invoices are optionally linked to a Client record (per invoice setup). The invoice type, date(s), client, and approval status are shown in the list.

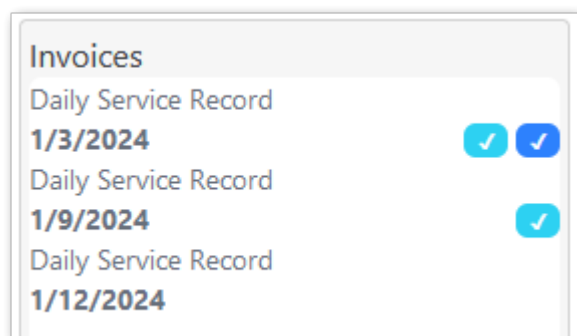


Click on an invoice in the list to open the [invoice editor](#).

Approvals

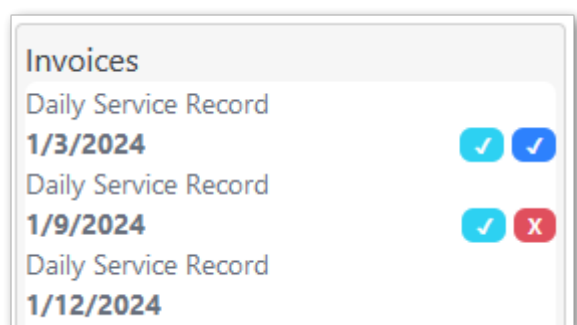
The status of each invoice is shown in the list. A **light-blue check** indicates "Employee Approved". A **dark-blue check** indicates "Manager Approved". In the example below, the first

invoices has both Manager and Employee approval. The second invoice has an Employee approval. The third invoice has no approvals.



Declined

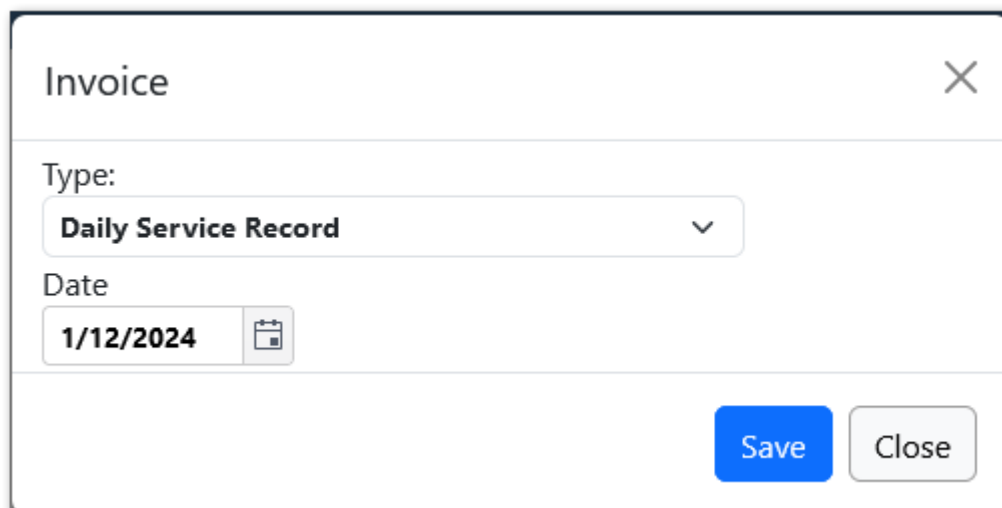
Invoices can also be "Manager Declined" if there are reasons for rejecting the invoice. The Declined status is indicated with a **red-x**. A "Declined" invoice must be corrected (changed and re-saved) prior to another Employee approval. In the example below, the second invoice has been "Manager Declined".



11.1.2 Add Invoice

To add an invoice, click the add button at the top of the page. This will open a pop-up with the new invoice options. On the pop-up:

1. Select an **Invoice Type**
2. (Optional) Select a **Client** for the invoice
3. Enter a **Date** or date range
4. Click **Save**



Invoice

Type:

Daily Service Record

Date


1/12/2024


Save Close

11.1.3 Edit Invoice

Open the invoice editor by clicking an invoice in the list. The editor has three sections. The first section (**Activity**) lists shifts and events on the invoice's date. The second section (**Invoice**) contains the input fields for all invoice values. The third section (**Files**) allows you to upload attachments to the invoice.

To edit the invoice values, fill out the fields in the Invoice section and click "Save". If required fields are not entered, a warning will be displayed and no values are saved. After a successful save, the **Timestamp** value will be populated.

Invoice 

* Hours Interpreting :	<input type="text" value="5.50"/>
* With Lunch :	<input type="radio"/> No <input checked="" type="radio"/> Yes
Travel Expense :	<input type="text" value="15.75"/>
Total Compensation =	0
Comments:	<div>I completed on time.</div>
Timestamp:	1/12/2024 11:57:22 AM
<div>Save</div>	



You can edit and re-save the invoice as needed if there are no approvals.

11.1.4 Files

Each invoice can have one or more files (receipts, photos, etc.) attached. The list of attachments is in the **Files** section.

Files 

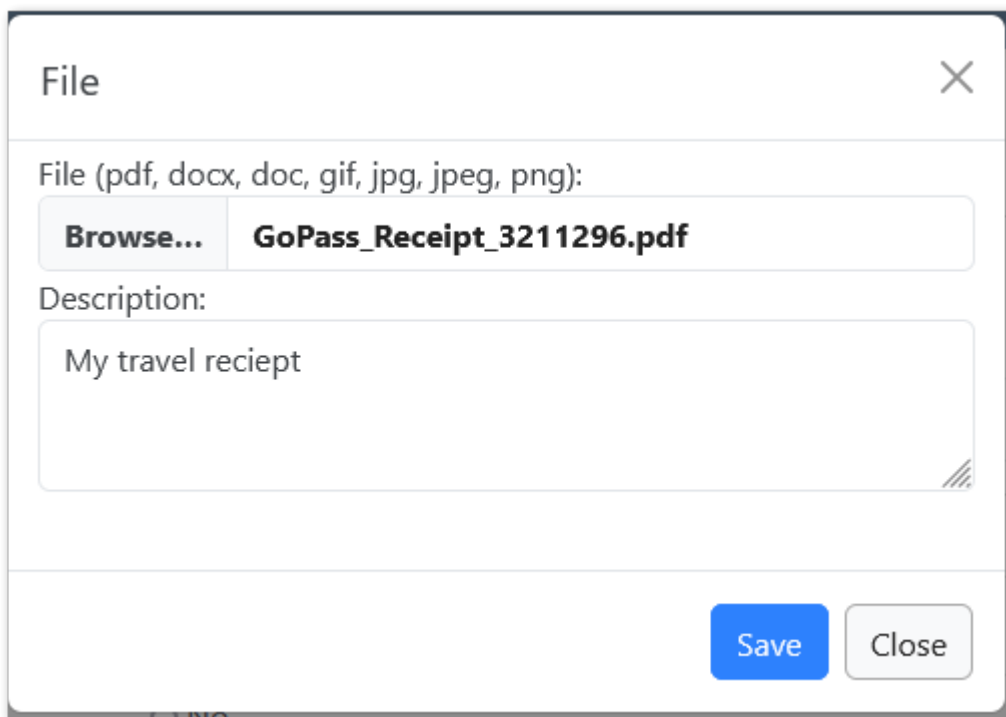
Add

 [_gopass_receipt_3211296.pdf](#) (My travel receipt) 

Attach File

To attach a file,

1. Click the **Add** button in the files section
2. Click **Browse** to find a file to upload
3. (Optional) Enter a **Description**
4. Click **Save**

A modal dialog box titled "File" with a close button (X) in the top right corner. The dialog contains a text input field for the file name, preceded by the label "File (pdf, docx, doc, gif, jpg, jpeg, png):". The input field contains the text "GoPass_Receipt_3211296.pdf" and a "Browse..." button to its left. Below this is a "Description:" label followed by a text area containing the text "My travel reciept". At the bottom right of the dialog are two buttons: "Save" (blue) and "Close" (grey).

File

File (pdf, docx, doc, gif, jpg, jpeg, png):

Browse... GoPass_Receipt_3211296.pdf

Description:

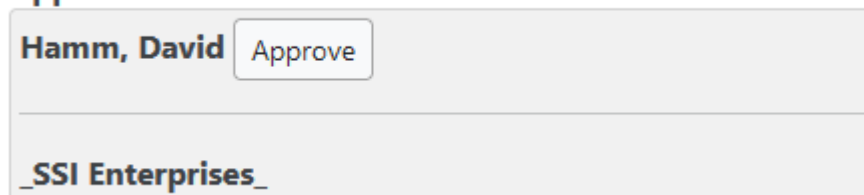
My travel reciept

Save **Close**

11.1.5 Approve Invoice

The approval status of an invoice is shown at the right side of the page. There are two sections, one for Employee approval and one for Manager approval.

Approvals

A grey rectangular box representing the approval section. It contains the name "Hamm, David" followed by an "Approve" button. Below this, separated by a horizontal line, is the text "_SSI Enterprises_".

Hamm, David Approve

SSI Enterprises

To submit an approval,

1. Click the **Approve** button in the approvals section with your name
 - (If undoing, to make corrections, click **Undo**)
2. This will open the invoice Status pop-up
3. (Optional) Enter a **Note**
4. Click **Save**

Status

Invoice: **Daily Service Record**

Date: **1/12/2024**

Status: Employee:
Organization:

Change: ☒ Approve ☐ Undo ☐ Add Note Only

Note:

Save

Close

Approval History

Below the approvals section, there is an approval history list. This list show each status change and/or note entered. The list is sorted from most recent to oldest. In the example below, the invoice was Approved, Declined, Unapproved (remains in declined status while editing), then Approved. Since the invoice went through a Declined/Undo/Corrected process, the second approval is also marked with "Corrected".

History**Corrected** **Approved**

Hamm, David

1/12/2024 1:09 PM

DeclinedHamm, David
will fix

1/12/2024 1:09 PM

Approved **Declined**

Hammers, Scott

1/12/2024 12:29 PM

Approved

Hamm, David

1/12/2024 11:57 AM

11.2 Invoice Reports

Organization may define reports summarizing invoice data. These reports can be shared with the employee portal. If any reports have been created and shared, they will appear on the Invoice Reports page.

11.2.1 Viewing Reports

To view report data,

- 1. Select a report definition in the first dropdown
- 2. Select a date to query on (default: Invoice date)
- 3. Select date range (using the [Date Navigator](#))
- 4. Move to past date ranges using the navigation arrows

Invoices / Reports

Totals_Approved

Invoice Date

1

Month

1/12/2024

Export

Invoice: **Daily Service Record**

(Invoice Date) Dates: **1/1/2024 - 1/31/2024**

Date	EmpApproved	OrgApproved	Total_Compensation
1/12/2024 12:00:00 AM			0
1/3/2024 12:00:00 AM	1/12/2024 12:08:47 PM	1/12/2024 12:10:49 PM	264.75
1/9/2024 12:00:00 AM	1/12/2024 1:09:26 PM		466.25

11.2.2 Exporting Data

To export the current report data,

- 1. Click the **Export** button
- 2. Select a file type (CSV can be opened in Excel)

