TeamWork Employee Guide

TeamWork Help Documentation

ScheduleSource Support

Contents

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.

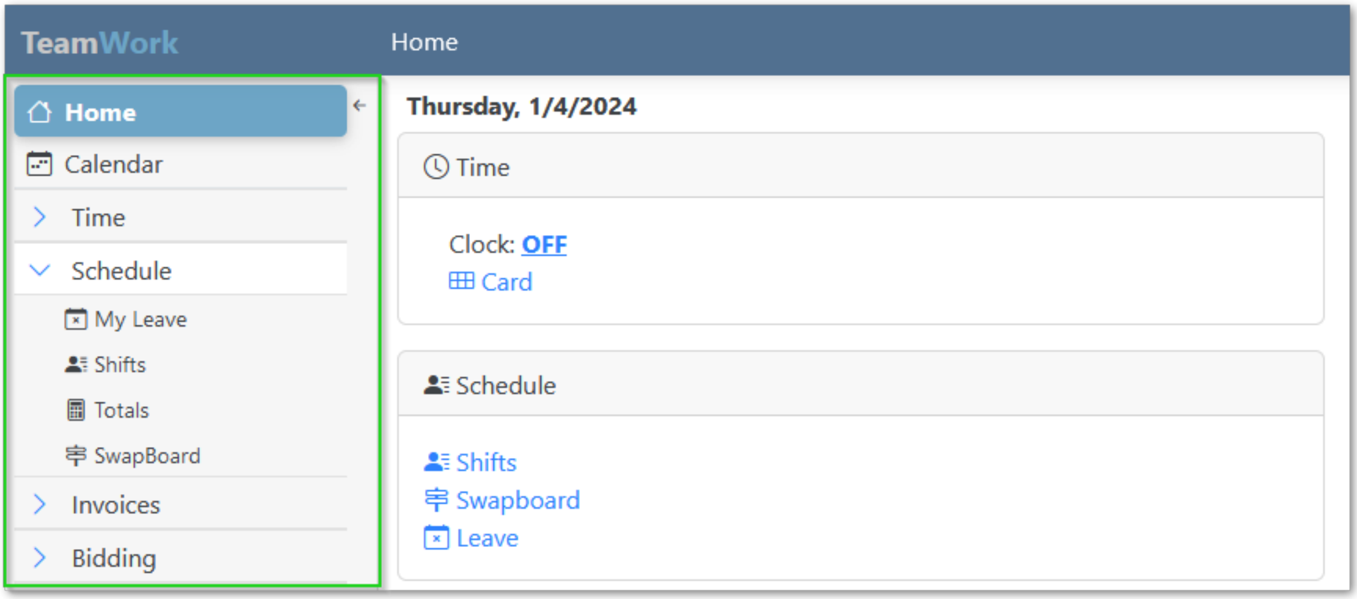
2. Navigation

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.



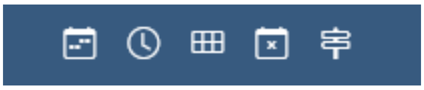
When on a large screen (desktop) you have the option of hiding the menu and using the menu button, or leaving it always visible on the left.

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

• To always show the menu, click the right-arrow

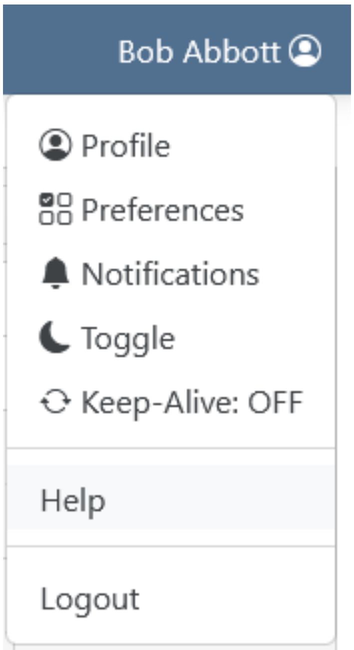
2.2 Quick Links

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

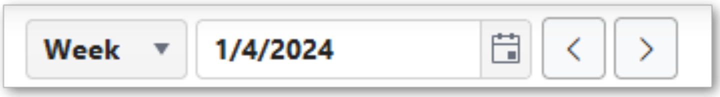
Many pages present date-based data. These pages will have "date navigation" capabilities to quickly change the view based on desired time period.

The common options for date navigation are:

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

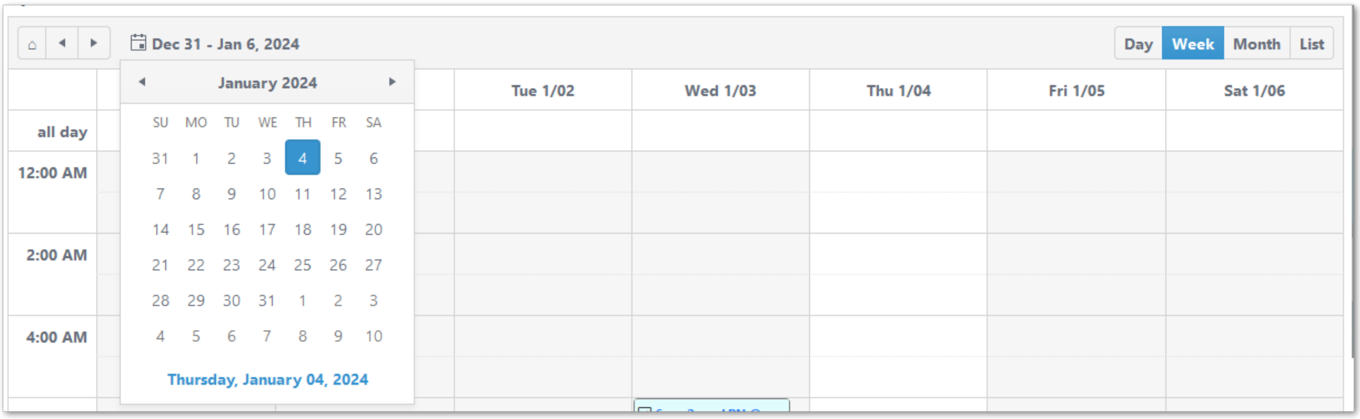
2.4.1 Example 1

Simple date navigation



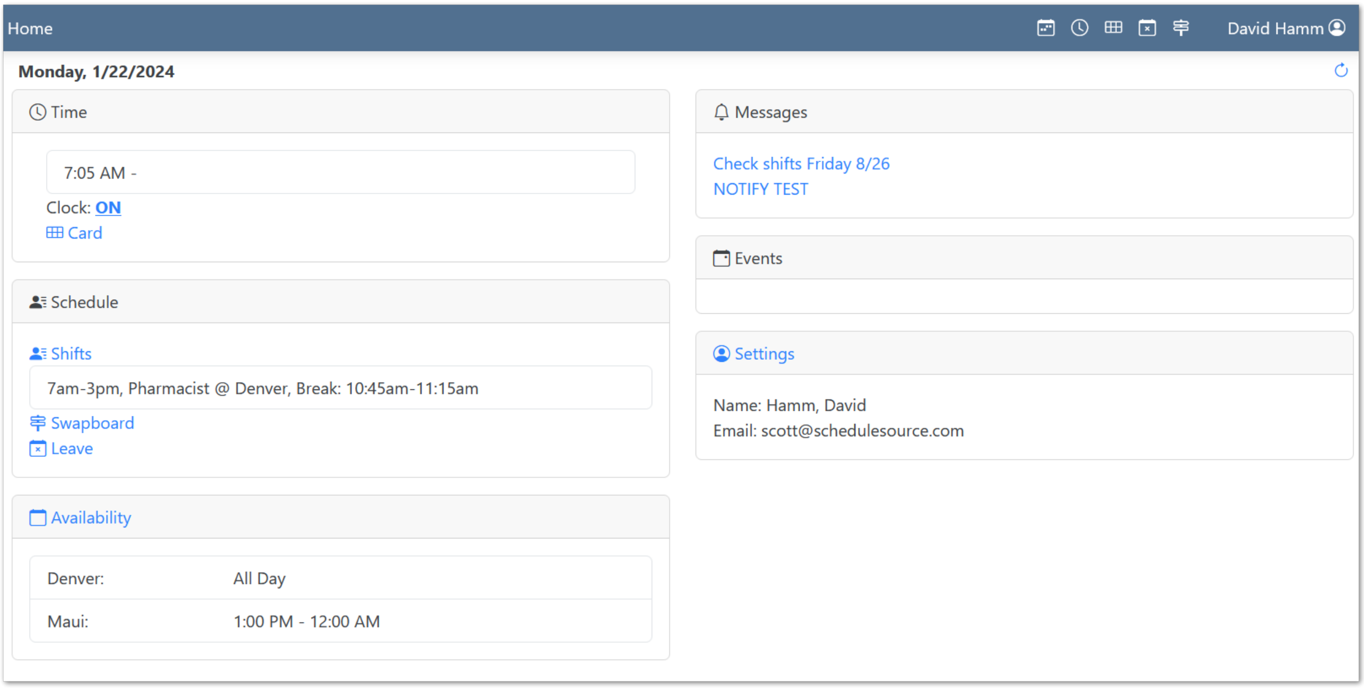
2.4.2 Example 2

Calendar layout



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.

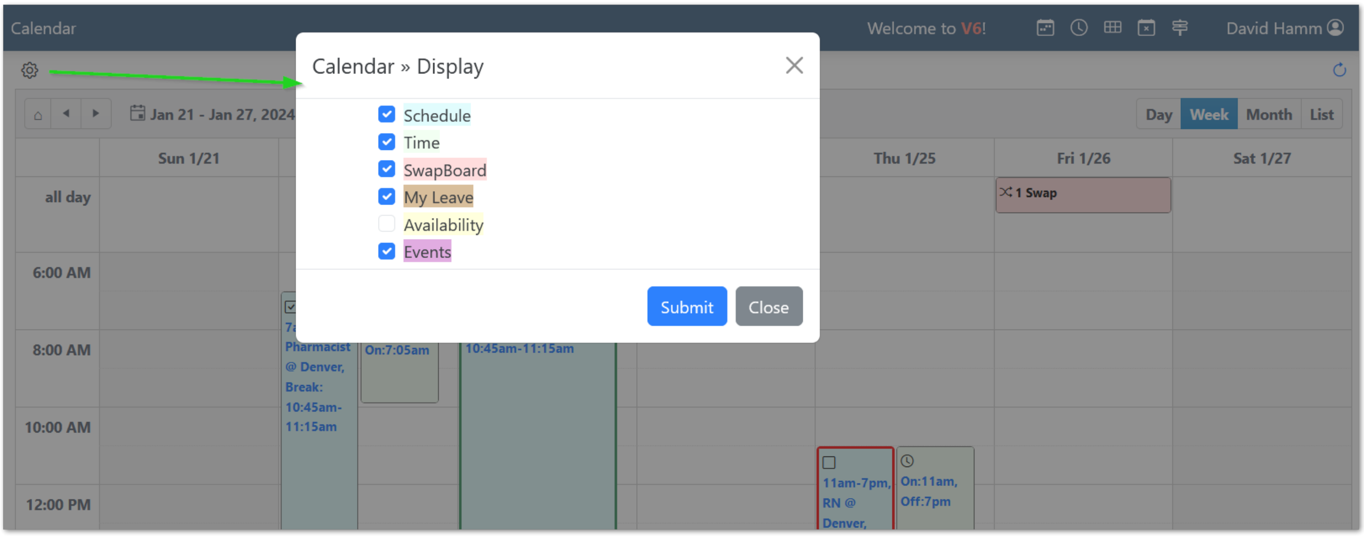


4. Calendar

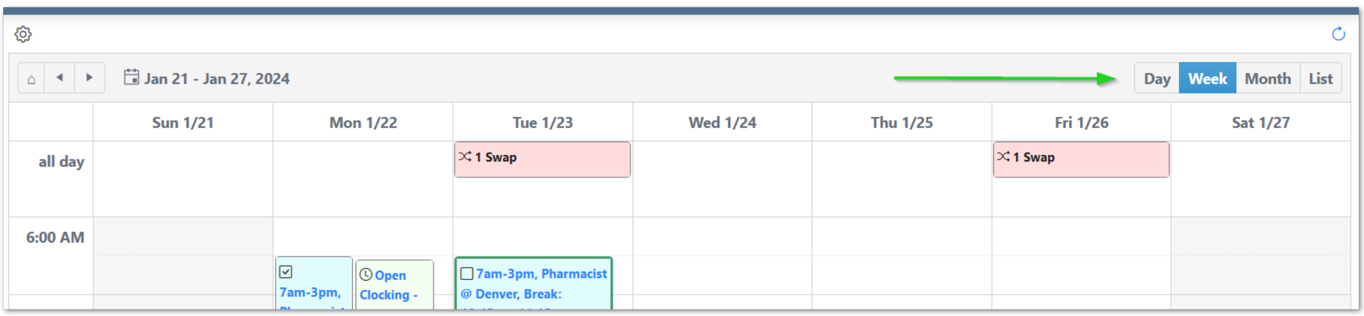
The Calendar displays your schedule for each of the stations and locations you are assigned to. Set display options (what will be visible), view your schedule and your availability.

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.

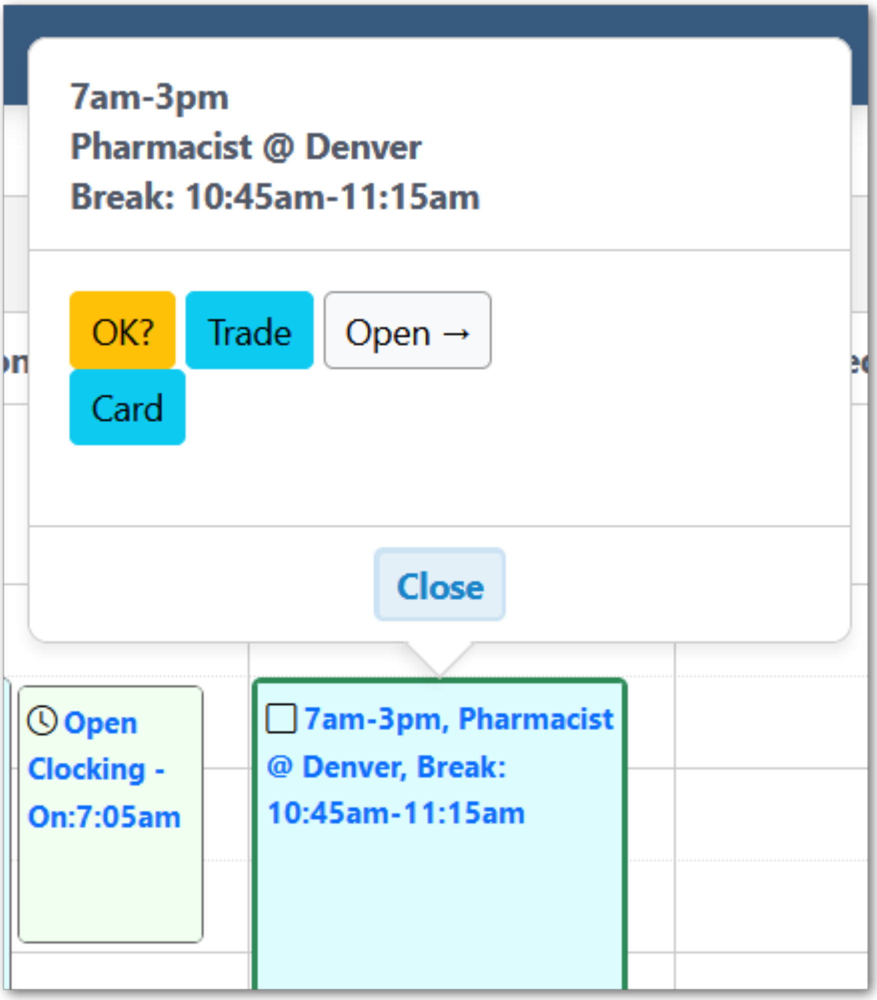


Choose the time-frame to display in the upper right corner of the page: Day, Week Month or List.



4.2 Calendar Pop-Up

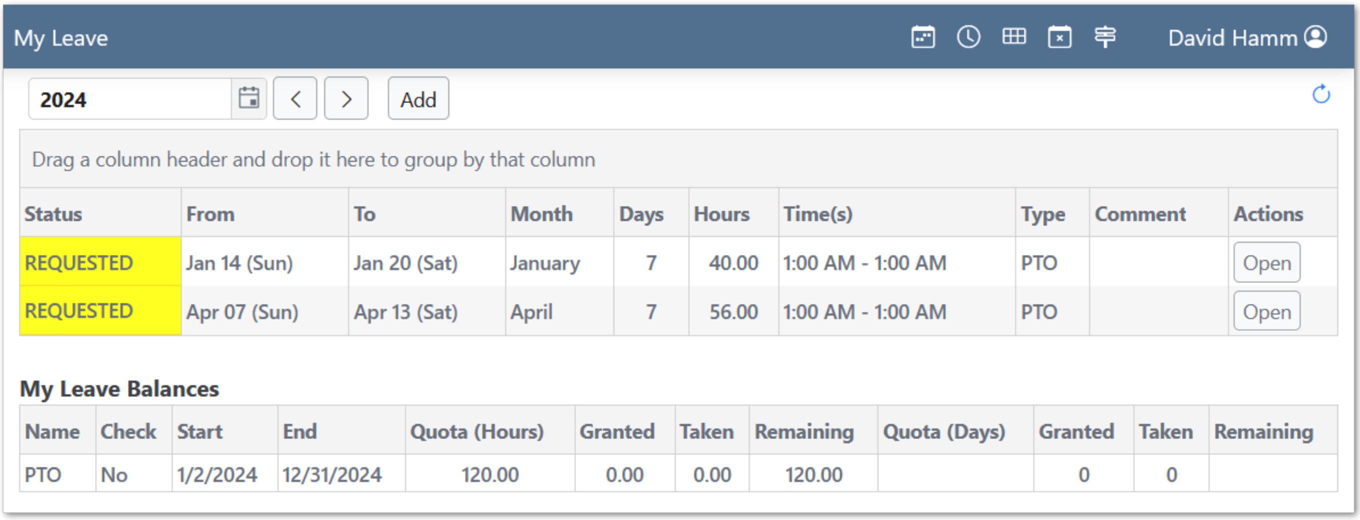
Click an item on the calendar to see options for editing, approving etc.


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.

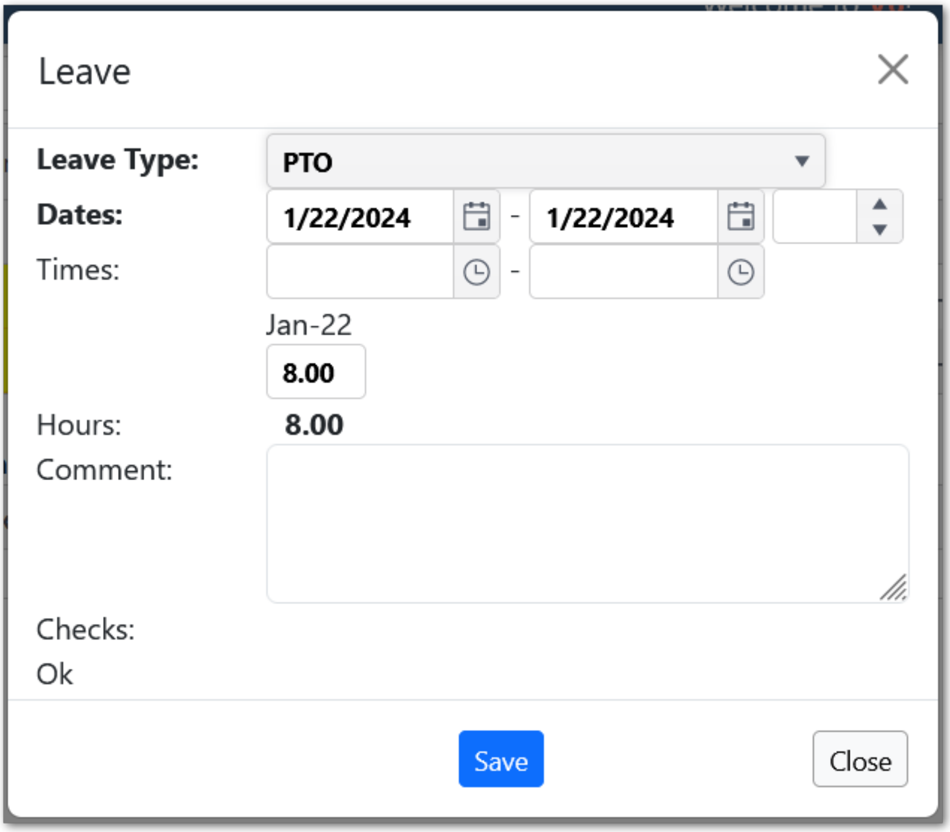


Status	From	To	Month	Days	Hours	Time(s)	Type	Comment	Actions
REQUESTED	Jan 14 (Sun)	Jan 20 (Sat)	January	7	40.00	1:00 AM - 1:00 AM	PTO		Open
REQUESTED	Apr 07 (Sun)	Apr 13 (Sat)	April	7	56.00	1:00 AM - 1:00 AM	PTO		Open

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

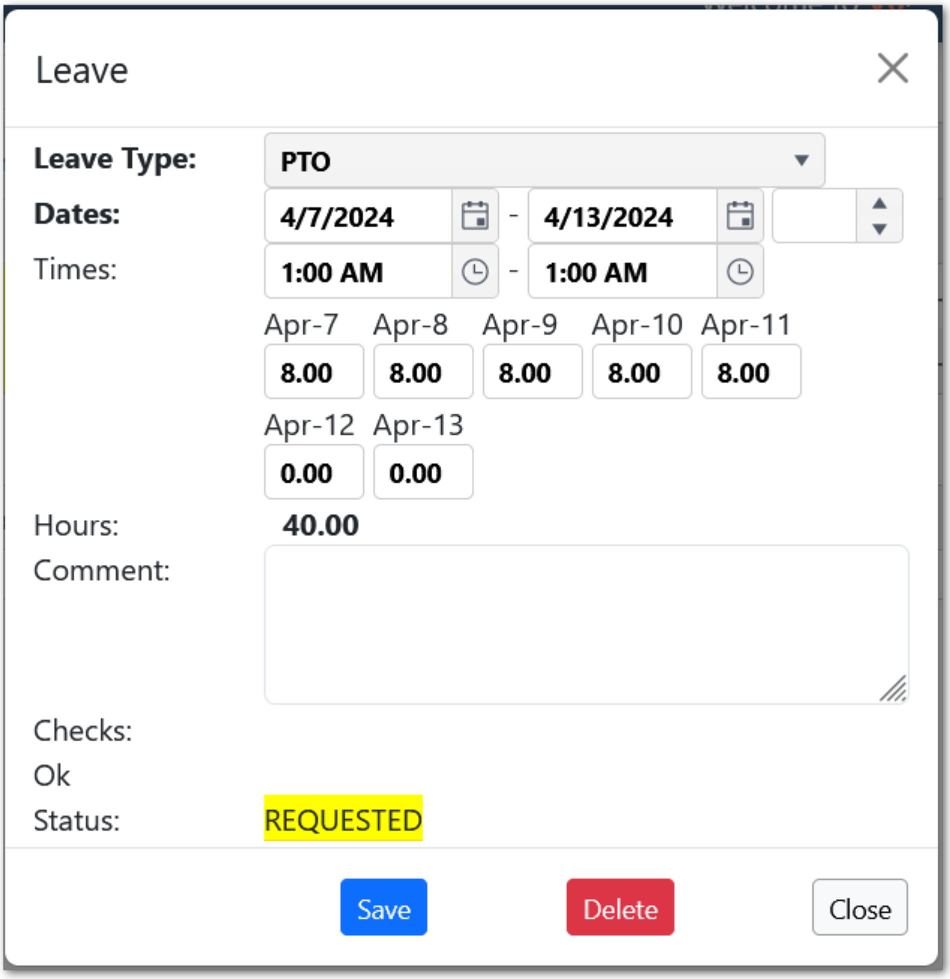
1. Click the **Add** button at top of page
2. Select a Leave Type
3. Select dates
4. (Optional) Select times if not "all day"
5. (Optional) Adjust hours per day
6. (Optional) enter notes
7. Click **Save**



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



5.1.3 Leave Statuses

There are five statuses for leave requests:

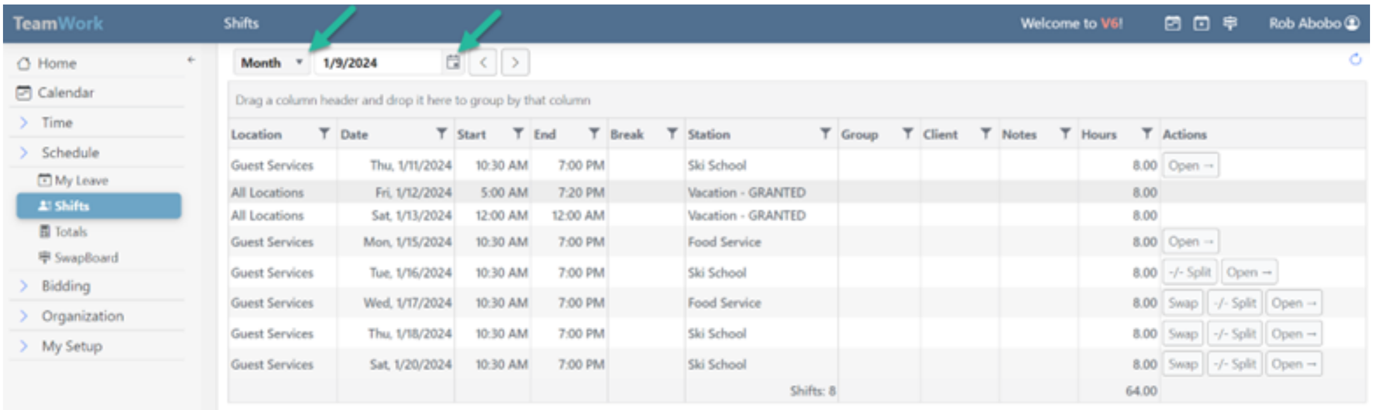
1. **Requested** - Waiting for approval.
2. **Granted** - Has been approved.
3. **Denied** - Not approved.
4. **Cancel Requested** - A granted leave with a cancellation request.
5. **Cancelled** - Approved cancellation of granted leave.

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.

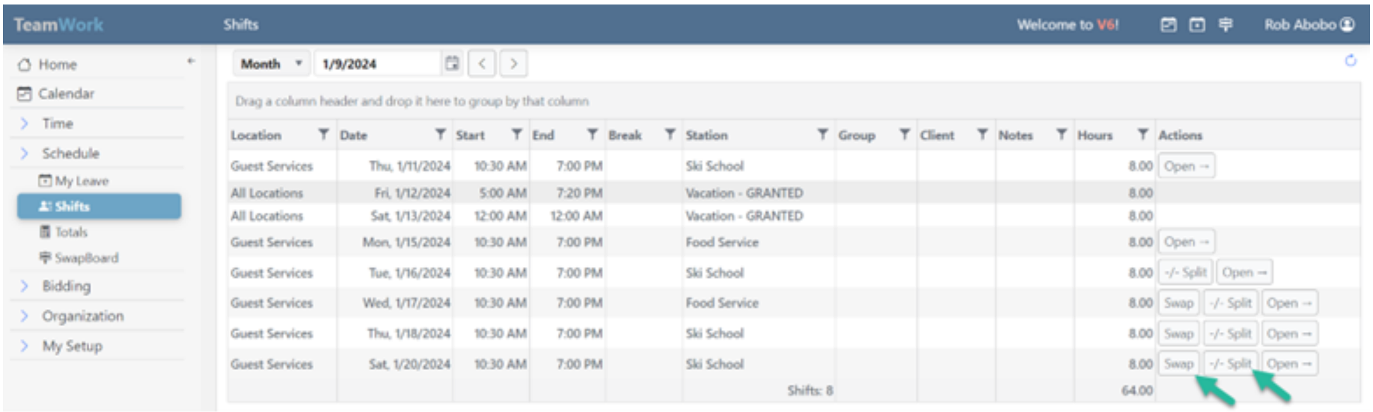
5.2 My Shifts

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.



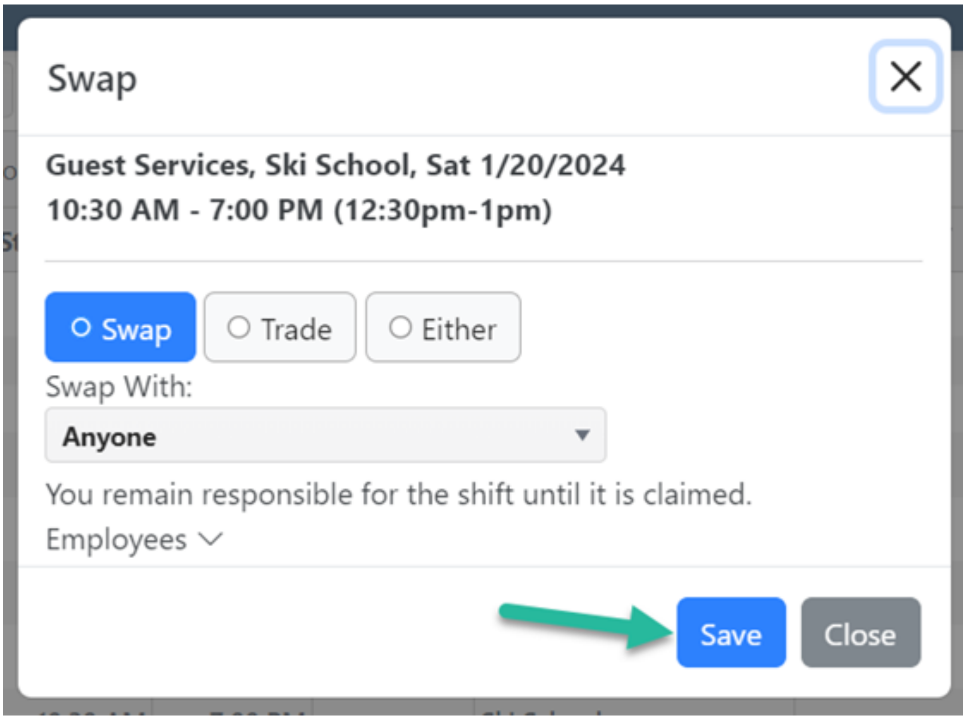
Depending on your organization’s rules, you may be able to Swap or Split an upcoming shift. Select your preferred Action in the last column of a shift.



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 you schedule until a swap is completed.

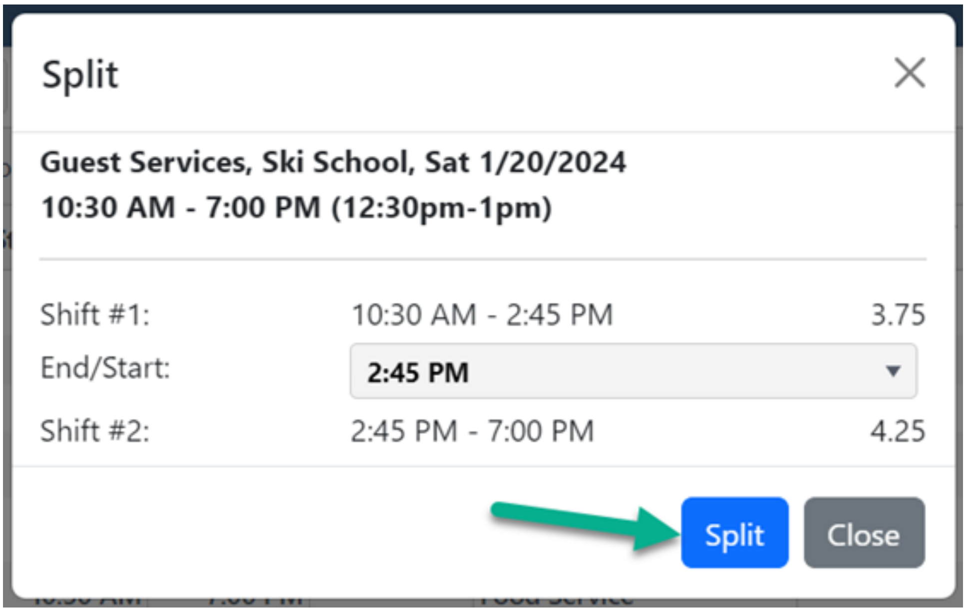
1. Click **Swap** in the Actions column
2. Select **Swap**, **Trade**, or **Either** for the type of swap
3. (Optional) Select a specific employee to offer shift to
4. Click **Save**



5.2.2 Splitting Shifts

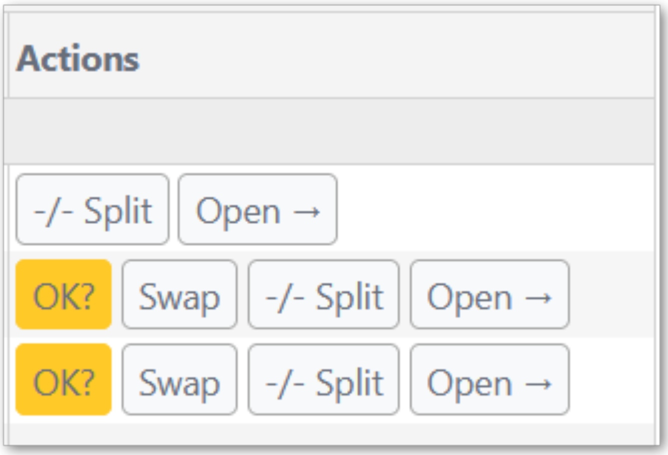
If you wish to give up a portion of a shift and retain the rest, the shift must be split. Splitting a shift creates one or two new shifts (depending on the split times). Any of the shifts can then be posted to swap independently of the others.

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**



5.2.3 Approving Shifts

If shift approvals are enabled, you can click the **OK?** button to approve the shift. This marks the shift with an OK tag for managers to see. Once a shift is approved it cannot be un-approved.

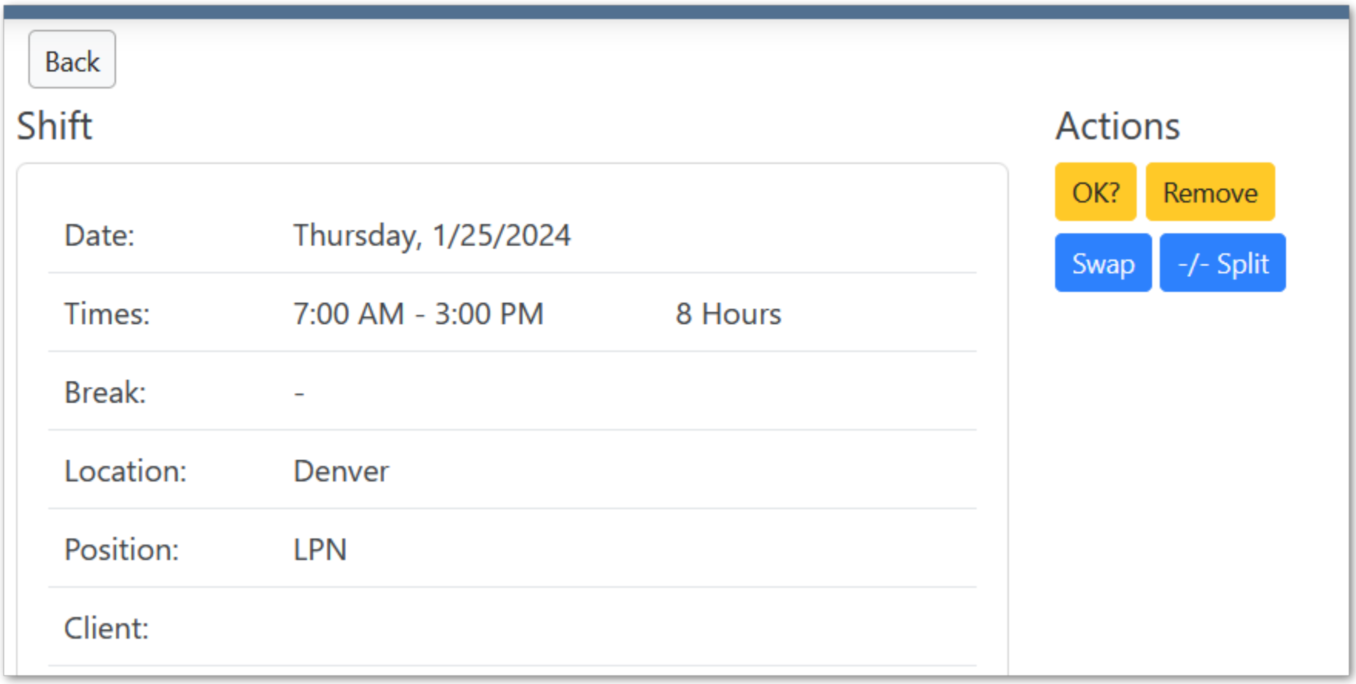


5.2.4 Open a Shift

Click the **Open** button in the Actions column to load a new page with shift information. If the shift's location or client has address information, it will be listed.

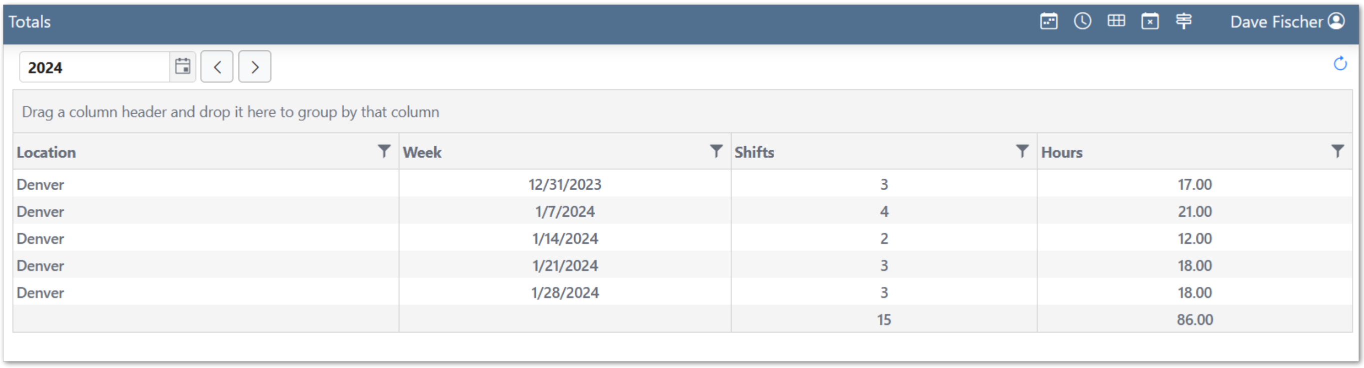
Depending on configuration, several additional actions might be available from the Open Shift page. These include:

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



5.3 Totals

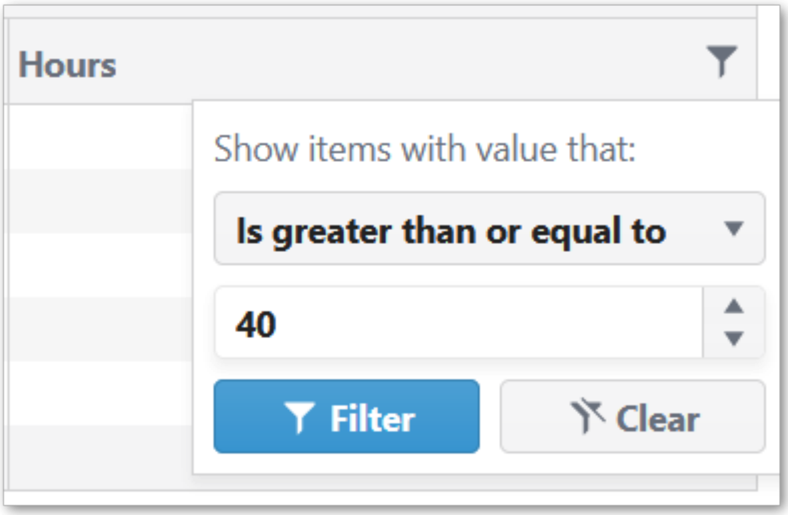
The totals page summarizes hours per week for the selected year.



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.



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.

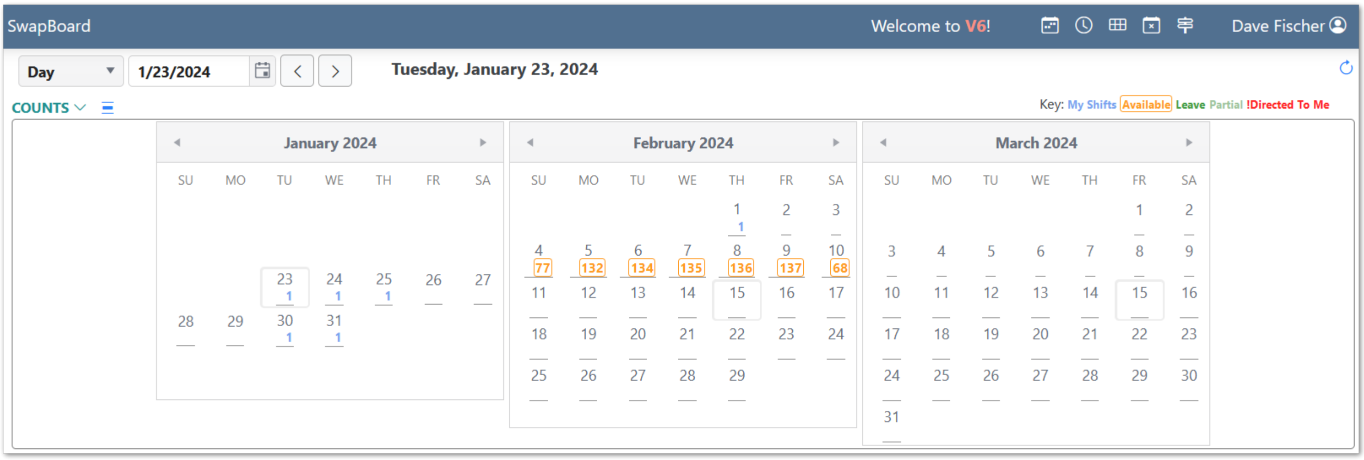
5.4.1 Viewing Counts

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.

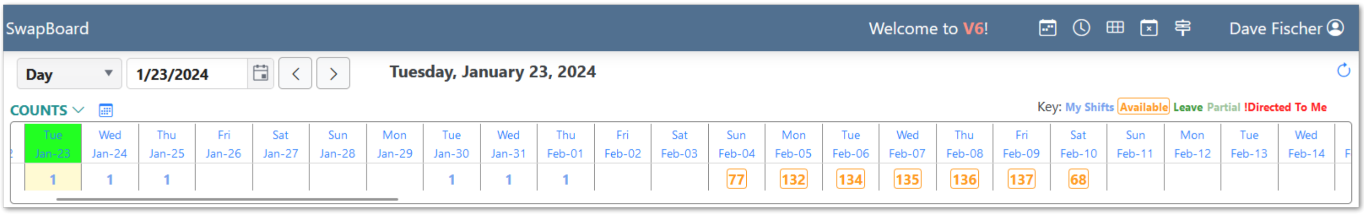
The counts are color-coded in the views:

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

Calendar View

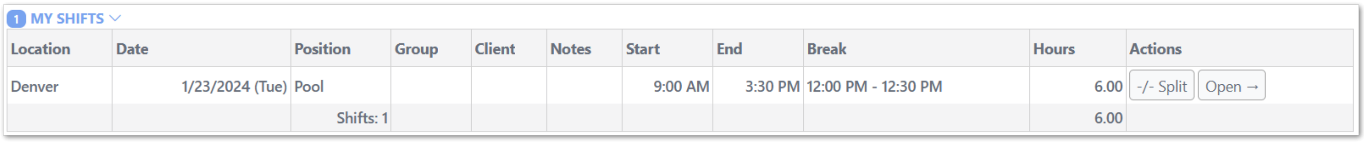


Single Row View



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.

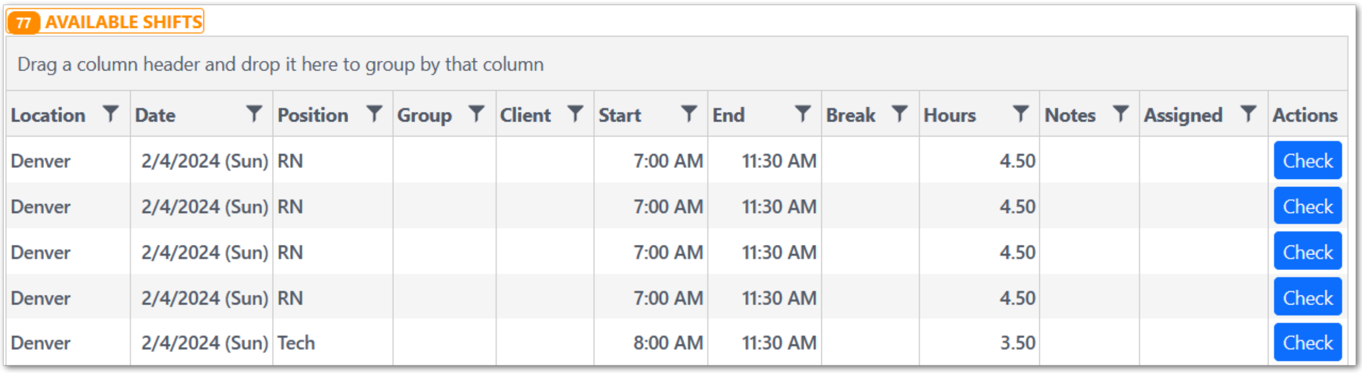


1 MY SHIFTS

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	-/- Split Open →
		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.

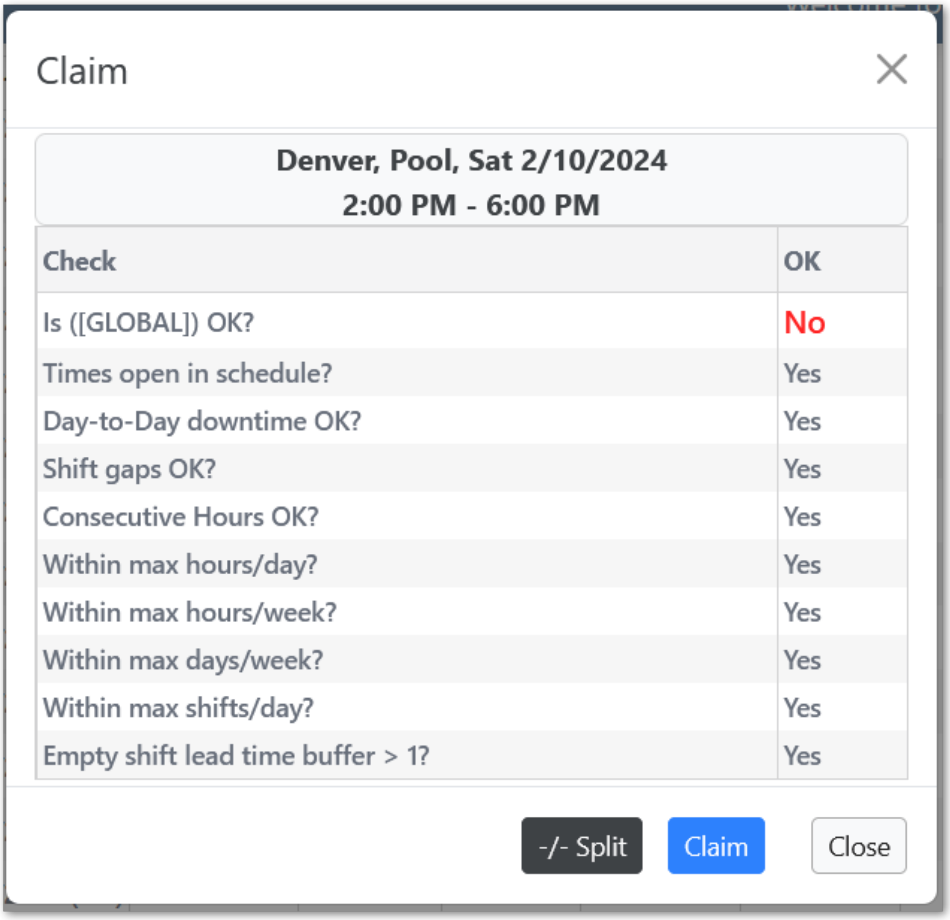

77 AVAILABLE SHIFTS

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			Check
Denver	2/4/2024 (Sun)	RN			7:00 AM	11:30 AM		4.50			Check
Denver	2/4/2024 (Sun)	RN			7:00 AM	11:30 AM		4.50			Check
Denver	2/4/2024 (Sun)	RN			7:00 AM	11:30 AM		4.50			Check
Denver	2/4/2024 (Sun)	Tech			8:00 AM	11:30 AM		3.50			Check

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

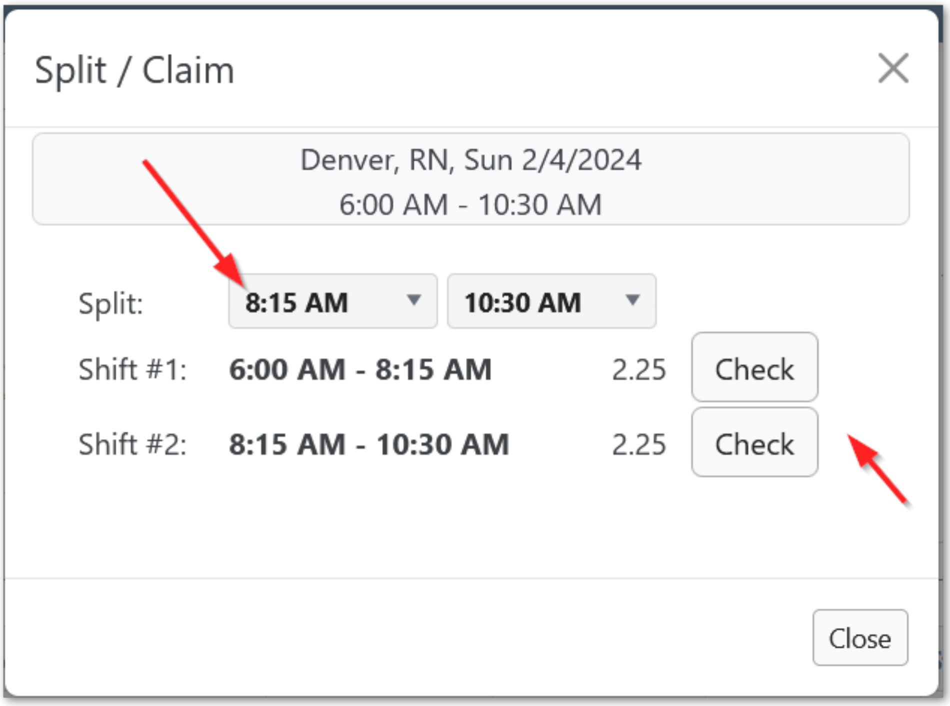


In the example above, the Global Availability shows a conflict but the shift can still be claimed. Other checks might prevent the shift from being claimable.

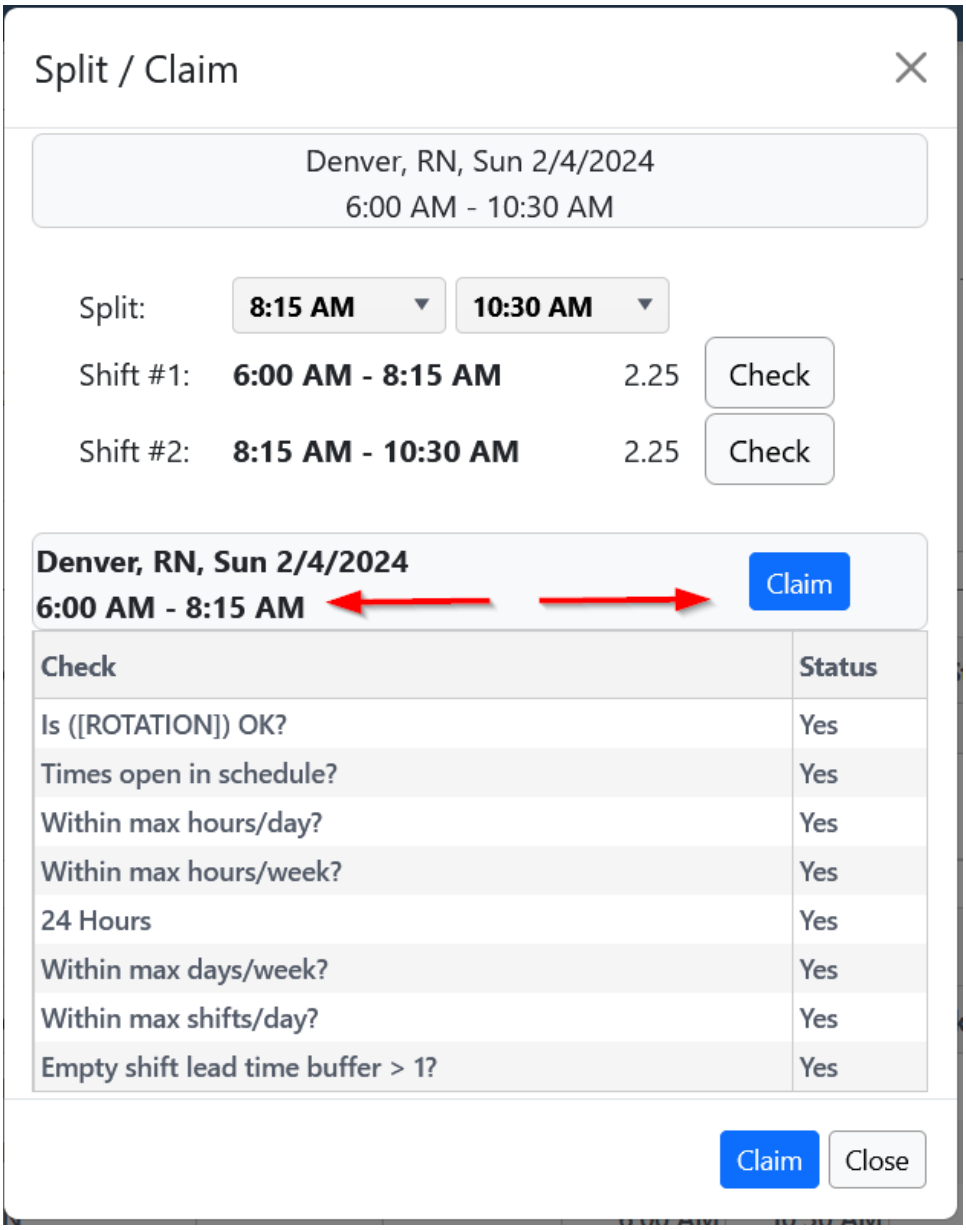
5.4.5 Split/Claim a Shift

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**



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

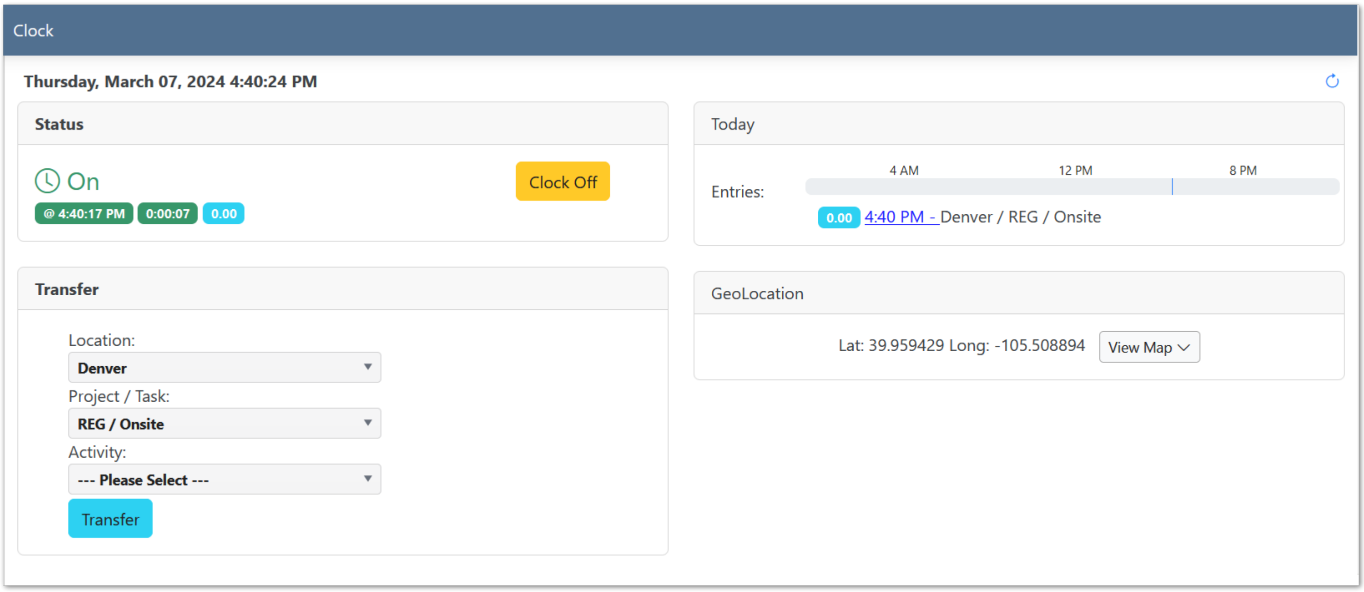
6. Time

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.

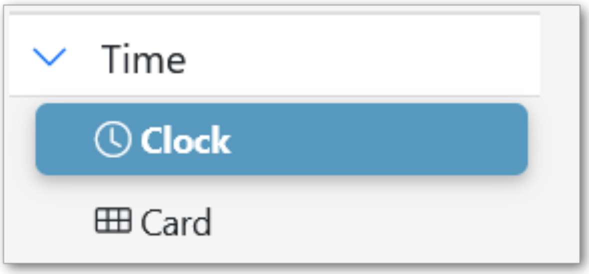
To **Clock On** an employee selects a location, project/task, and optionally an activity or client. This creates an "open" time entry with the start time captured when submitted. From that point, an employee can **Transfer** or **Clock Off**. It it not necessary to remain signed in to TeamWork once clocked 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).



6.1.1 Opening the Clock

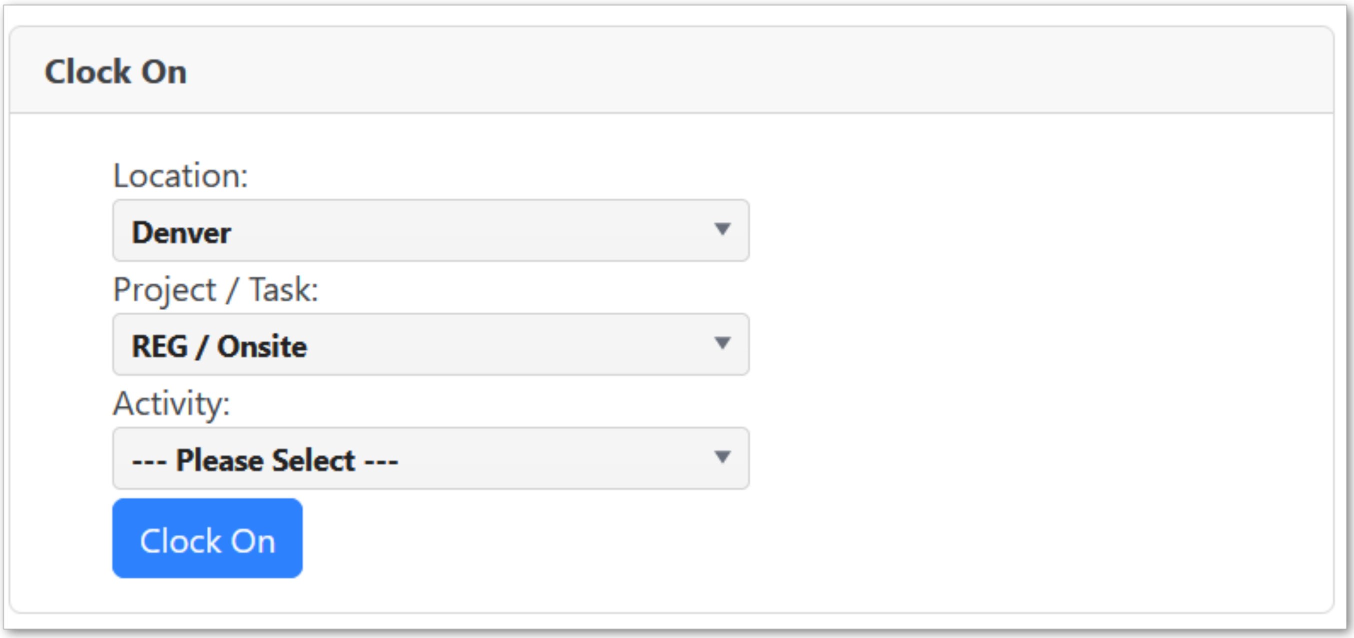
Navigate in the main menu to **Time > Clock**, or click **Clock** (or clock icon) in the top header.



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**



6.1.3 Clocking **Off**

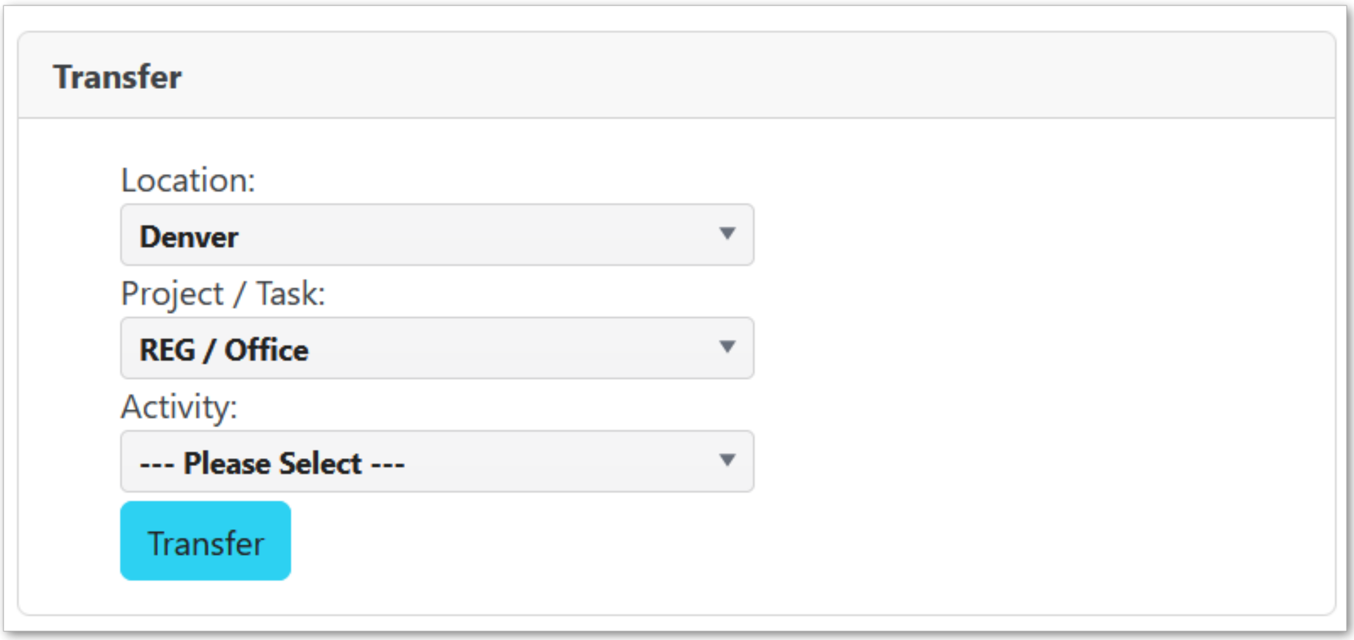
If you are already clocked on, a **Clock Off** button is available in the "Status" section. Clicking **Clock Off** will end your time entry and reset the time clock.

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.

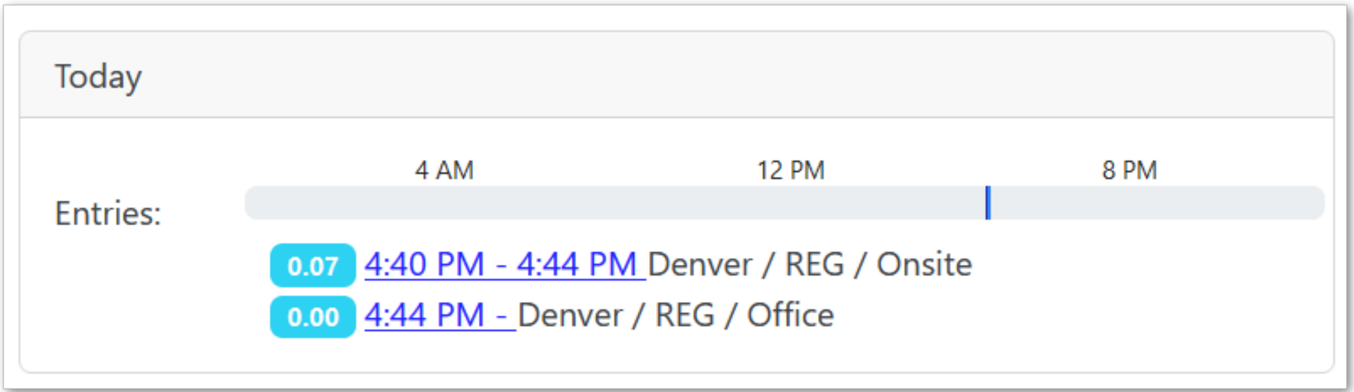
To transfer:

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



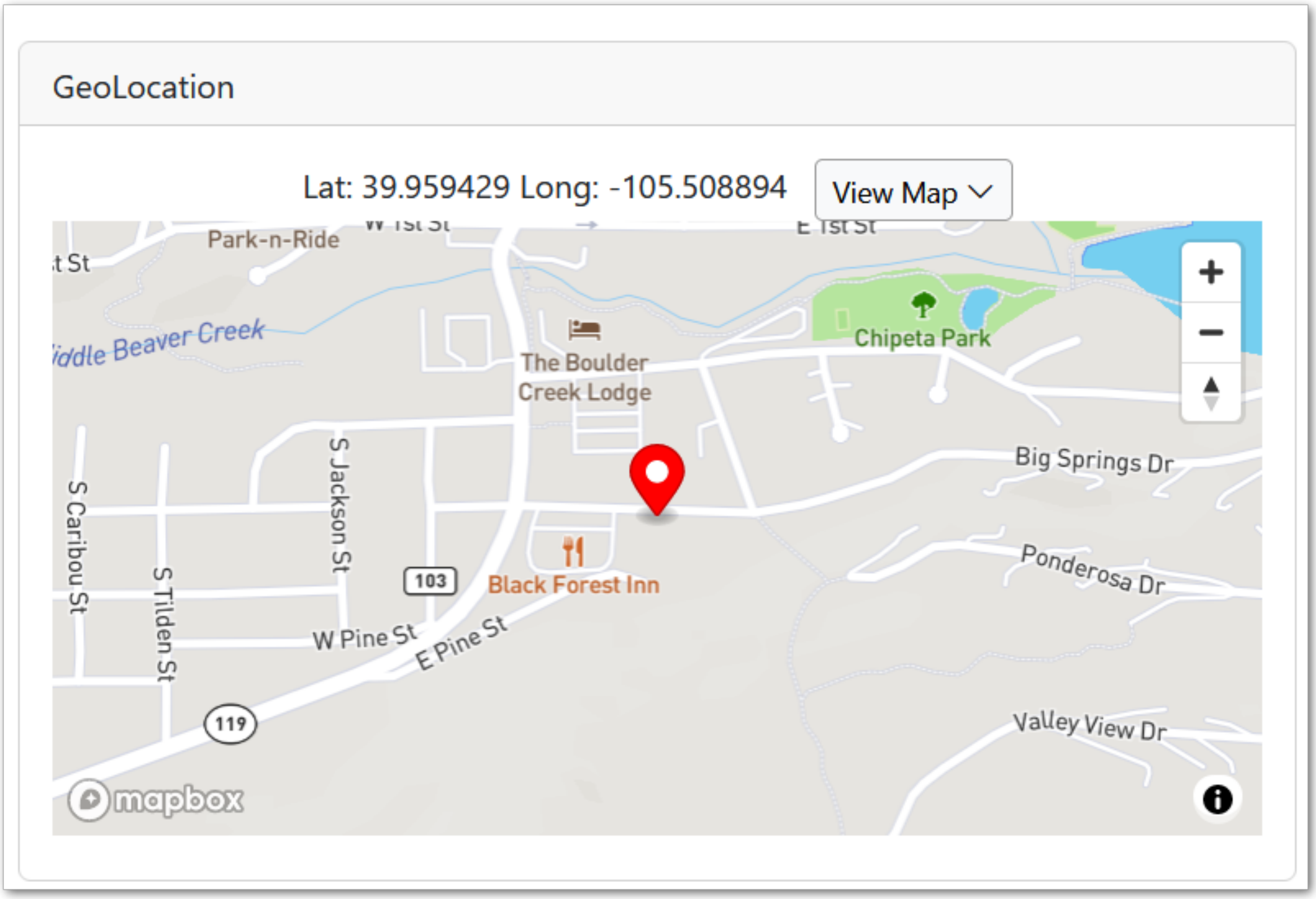
6.1.5 Viewing Today's Clockings

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

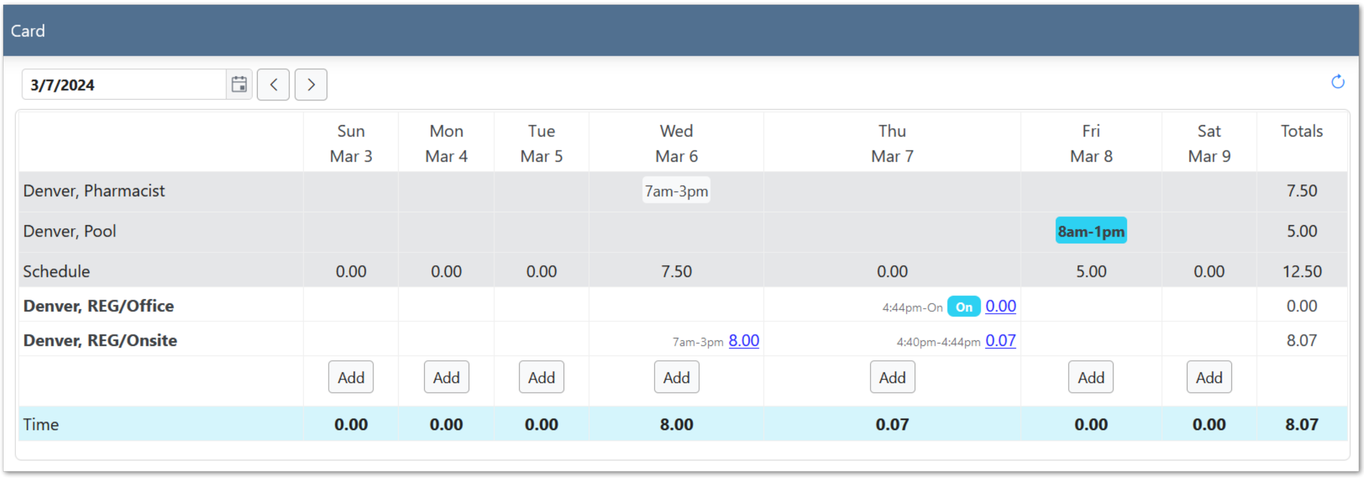
The "GeoLocation" section on the clock page shows your coordinates as captured by the browser. You can click the **View Map** button to load a map with a marker for your location. (Viewing geo-location is optional and depends on setup.)


GeoLocation
Lat: 39.959429 Long: -105.508894
View Map
Park-n-Ride
W 1st St
E 1st St
Chipeta Park
The Boulder Creek Lodge
Big Springs Dr
S Caribou St
S Jackson St
S Tilden St
103
Black Forest Inn
Ponderosa Dr
W Pine St
E Pine St
119
Valley View Dr
mapbox

6.2 Time Card

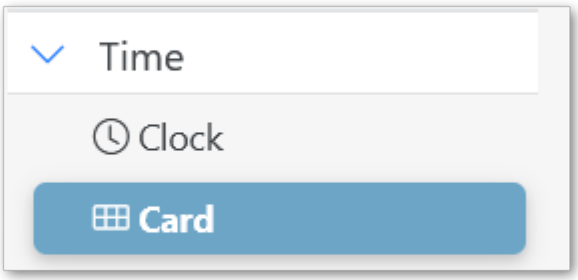
The time card enables management of time entries. Employees can enter time after-the-fact, or for the future (e.g. PTO). Many organizational rules and configuration settings impact time entries, but generally they can be added and edited for several weeks on the time card.

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



6.2.1 Opening the Card

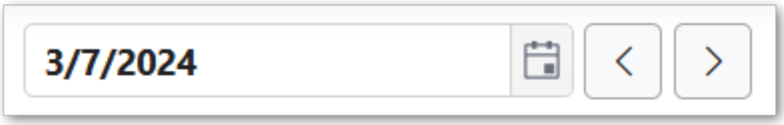
Navigate in the main menu to **Time > Card**, or click **Card** (or card icon) in the top header.



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).

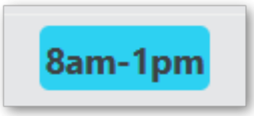


6.2.3 Adding Time

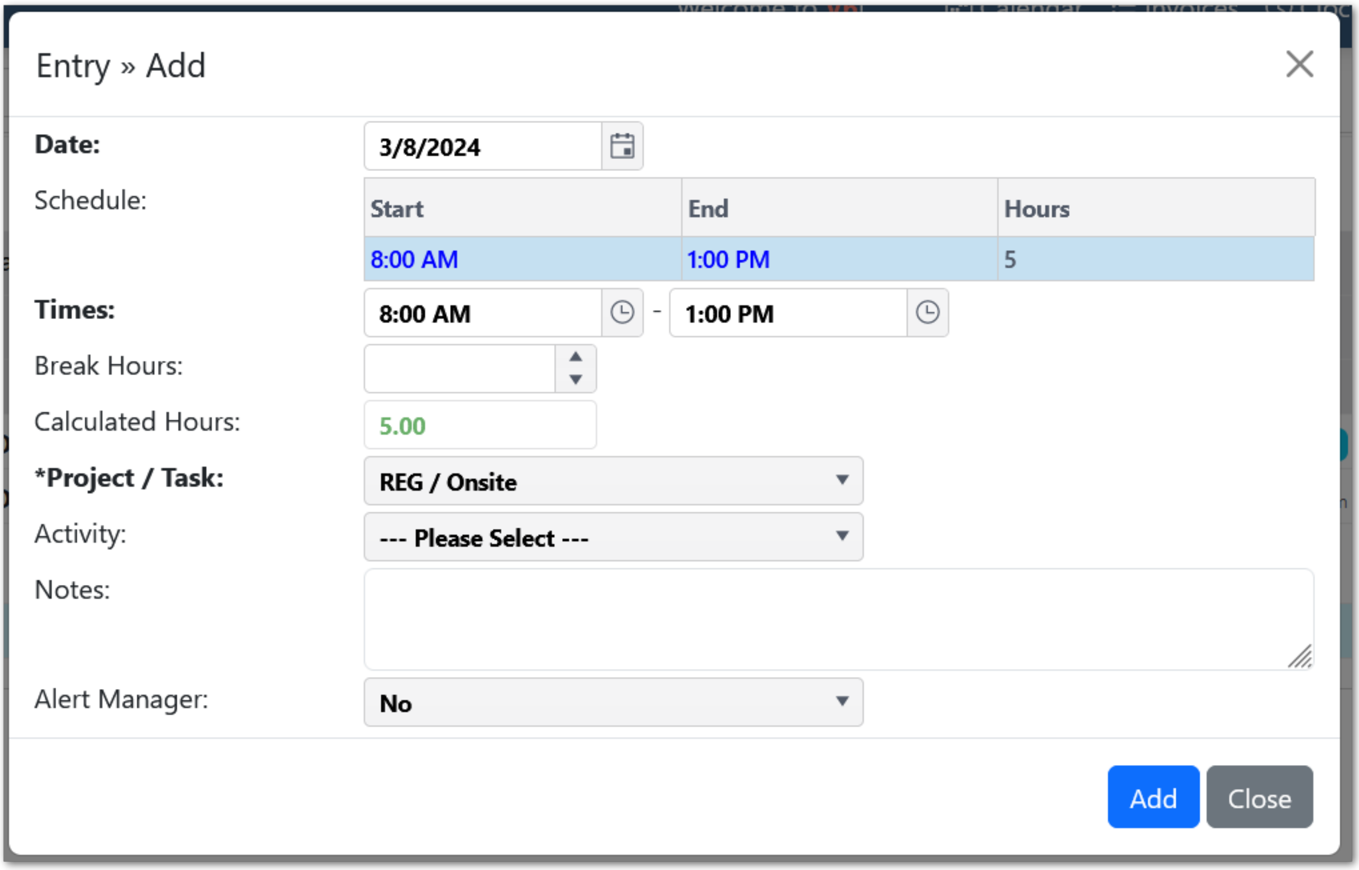
There are two ways to add time on the time card: 1) From a scheduled shift, 2) By day as needed. The benefit of adding from scheduled shifts is the times for the entry will be pre-populated with the times from the shift.

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.



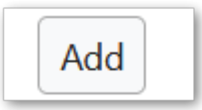
1. Click the times button for the shift
2. Correct times if needed
3. (Optional) Enter break hours (decimal) to subtract from time span
4. Select **Location**, **Project/Task**, etc.
5. (Optional) Enter notes and select **Alert Manager** if there's a need to communicate something about this entry
6.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



Add By Day

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

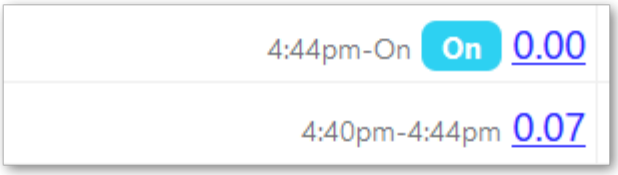
1. Click **Add** in the bottom row of the card
2. Enter **Start** and **End** Times
3. (Optional) Enter break hours (decimal) to subtract from time span
4. Select **Location**, **Project/Task**, etc.
5. (Optional) Enter notes and select **Alert Manager** if there's a need to communicate something about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



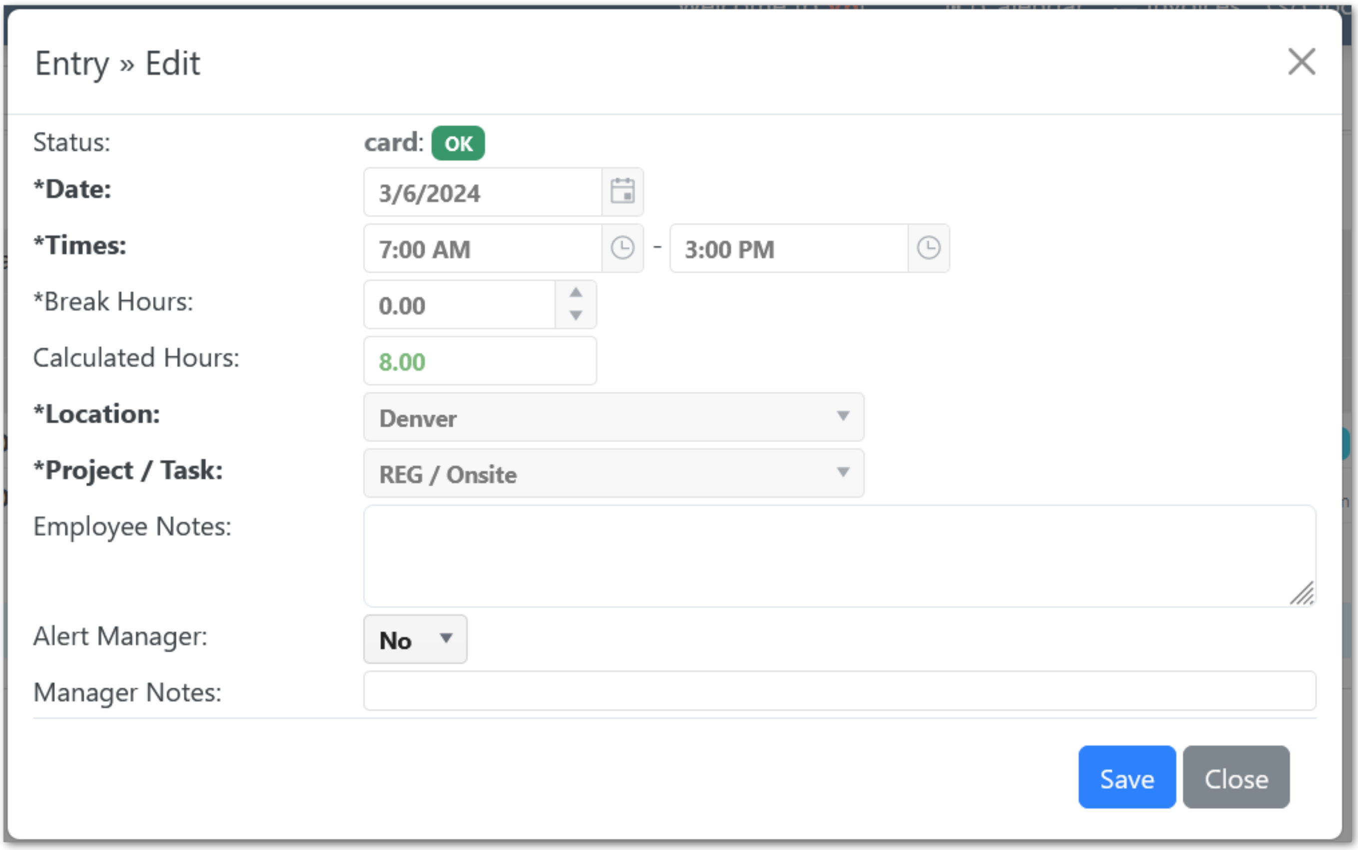
6.2.4 Editing Time

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.



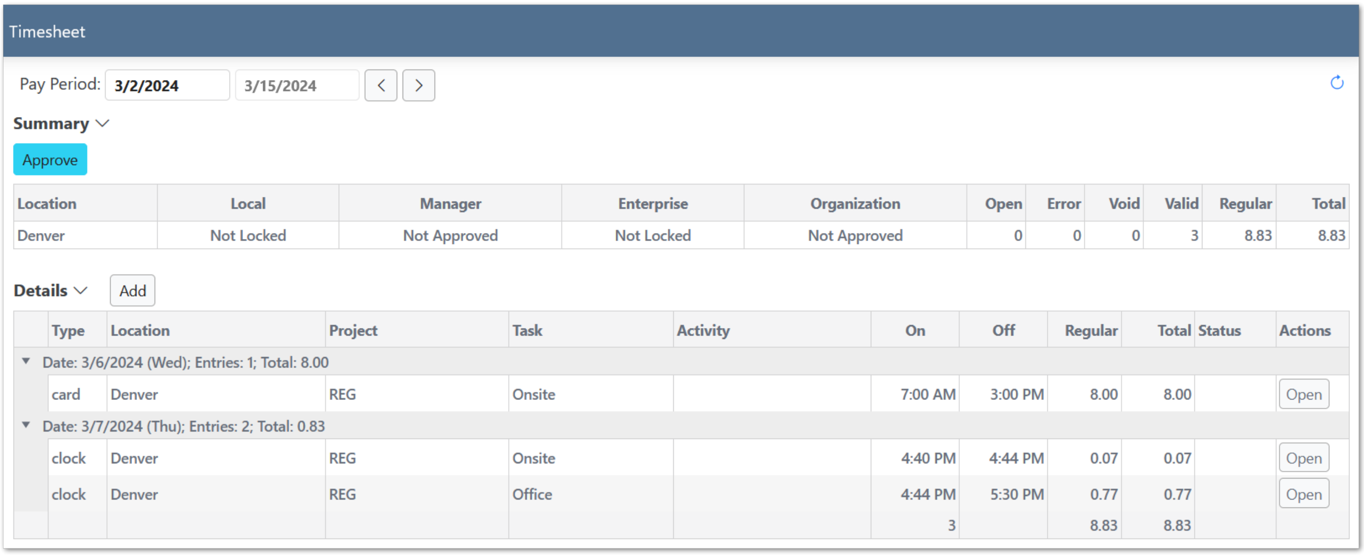
This opens the time entry editor. If editing is allowed, the times, break hours, etc. can be changed. If editing is not allowed, the **Employee Notes** and **Alert Manager** fields can still be changed and saved.



6.3 Timesheet

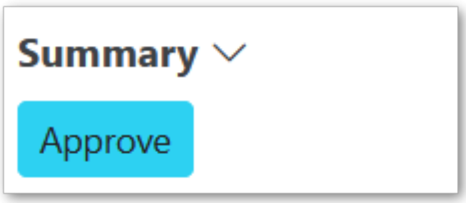
The timesheet summarizes the time and approvals for an employee's pay period. The "Summary" section lists approvals and totals. The "Details" section shows the time entries grouped by date. An optional third section, "Differentials", will show the differential hours calculations breakdown.

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



6.3.1 Approving Time

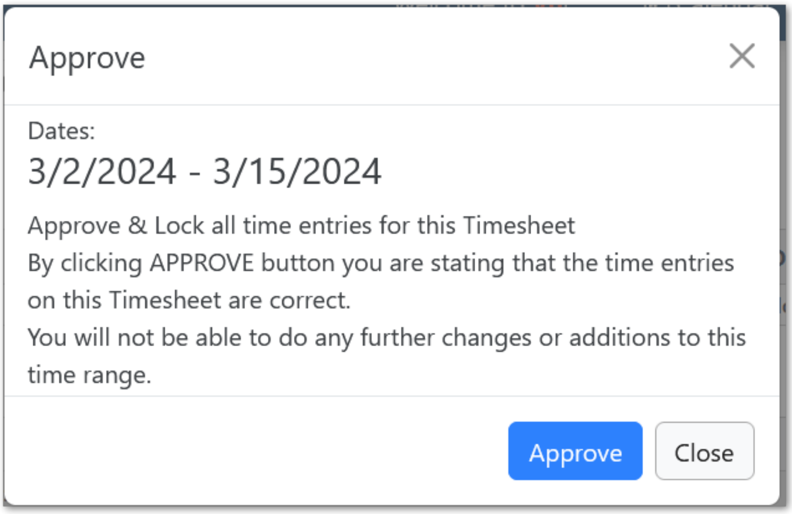
If timesheet approvals are allowed, there will be a button for submitting approval. If you approve the timesheet, it becomes locked from editing. Do not submit an approval if any additions or edits might be needed.



To approve the timesheet:

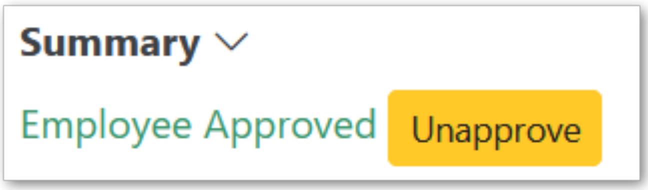
1. Click the **Approve** button
2. Review the dates to ensure the correct pay period
3. Click **Approve**

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



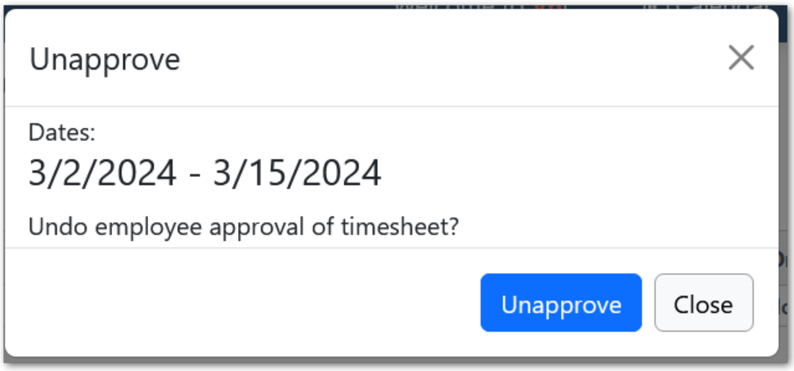
6.3.2 Unapproving Time

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**.



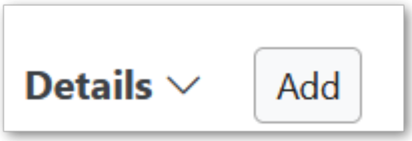
To un-approve the timesheet:

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

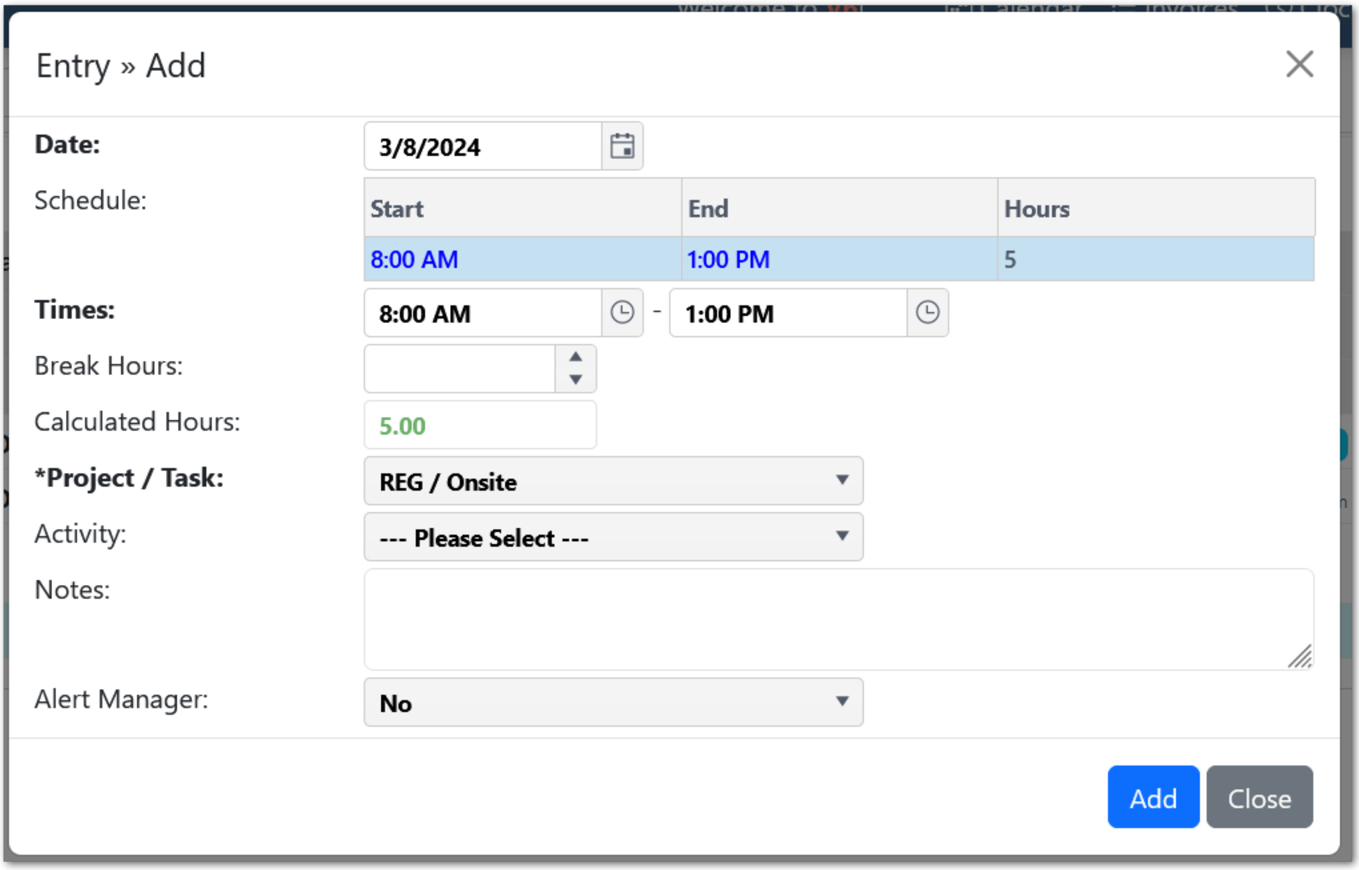


6.3.3 Adding Time

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

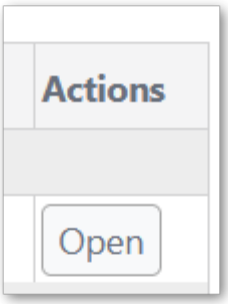


1. Enter **Start** and **End** Times
2. (Optional) Enter break hours (decimal) to subtract from time span
3. Select **Location**, **Project/Task**, etc.
4. (Optional) Enter notes and select **Alert Manager** if there's a need to communicate something about this entry
5. Click **Add**

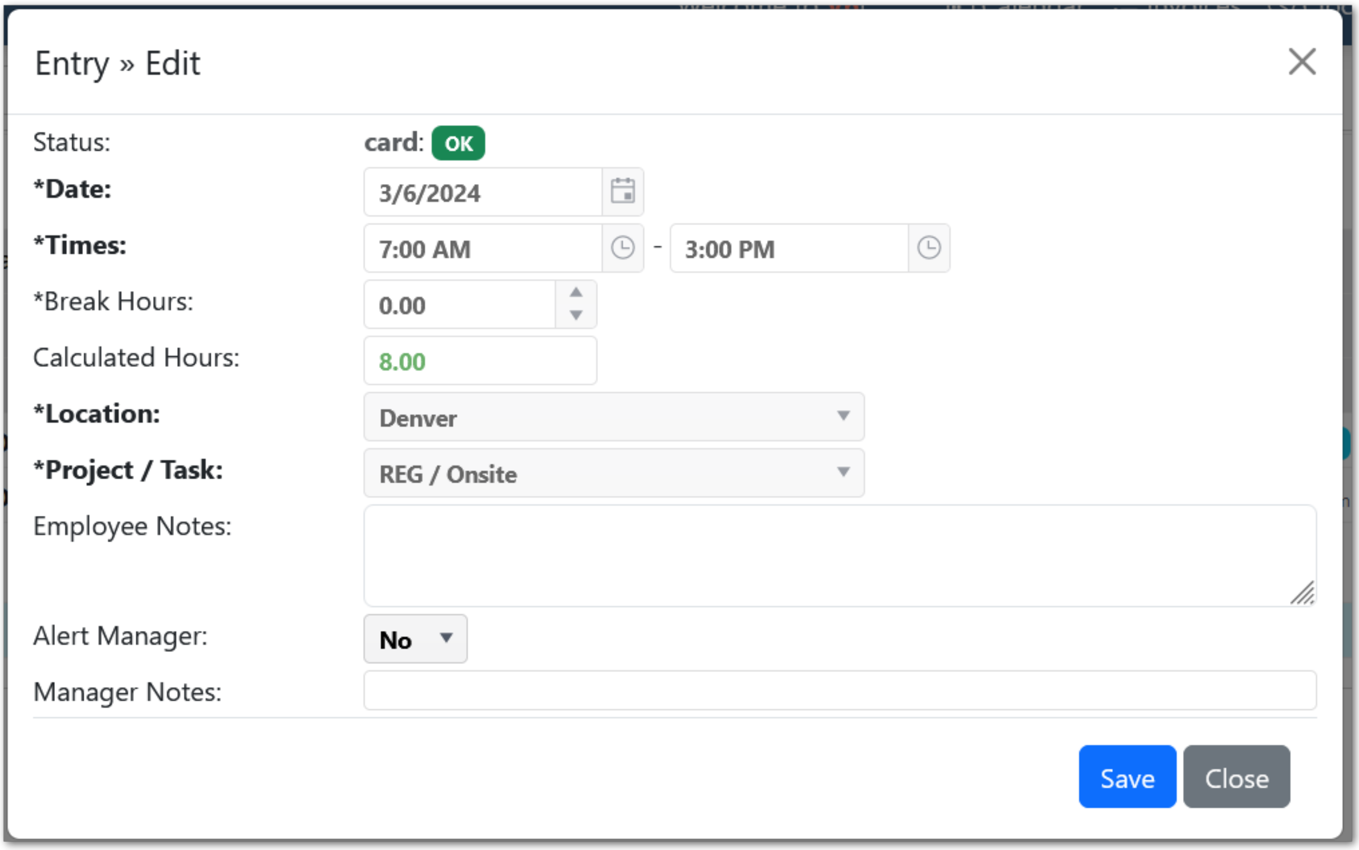


6.3.4 Editing Time

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

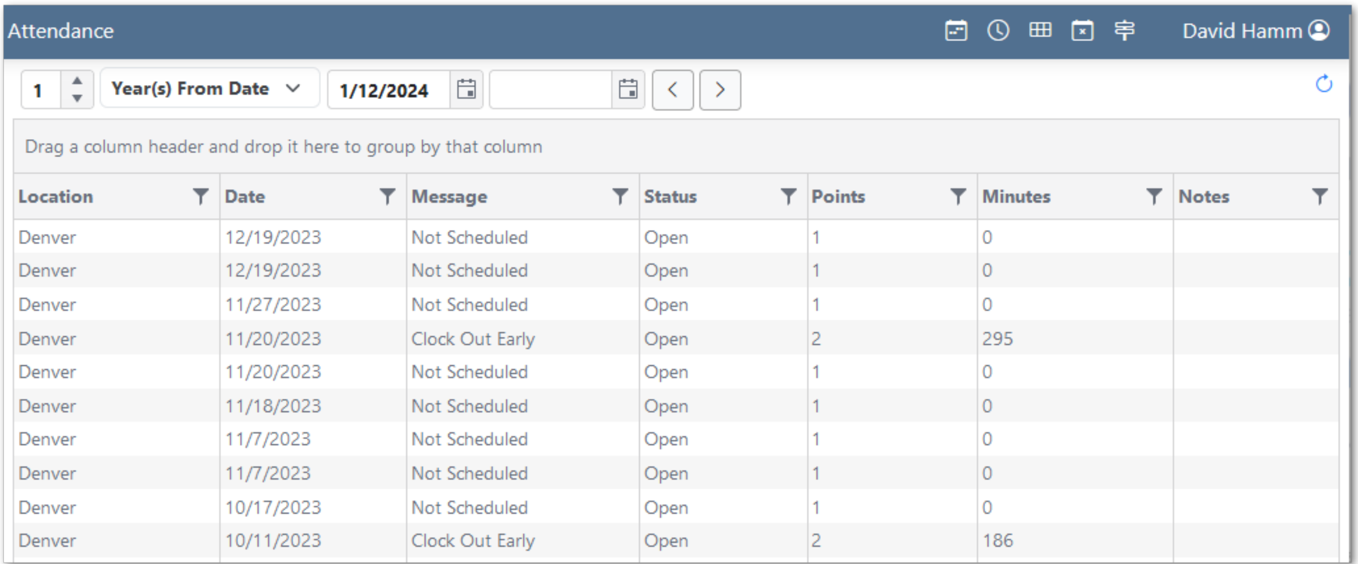


This opens the time entry editor. If editing is allowed, the times, break hours, etc. can be changed. If editing is not allowed, the **Employee Notes** and **Alert Manager** fields can still be changed and saved.


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.



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

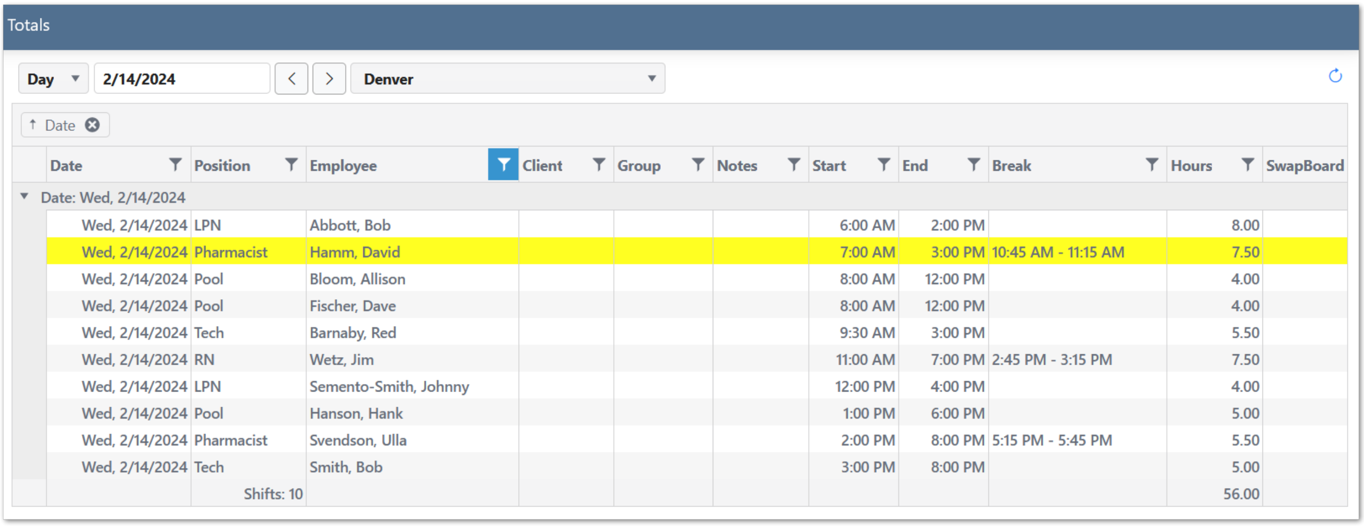
Each issue is for a location and date. Issues are reviewed by manager and assigned a status of "Confirmed" or "Void". A status of "Open" indicates an issue not yet reviewed.

- **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.

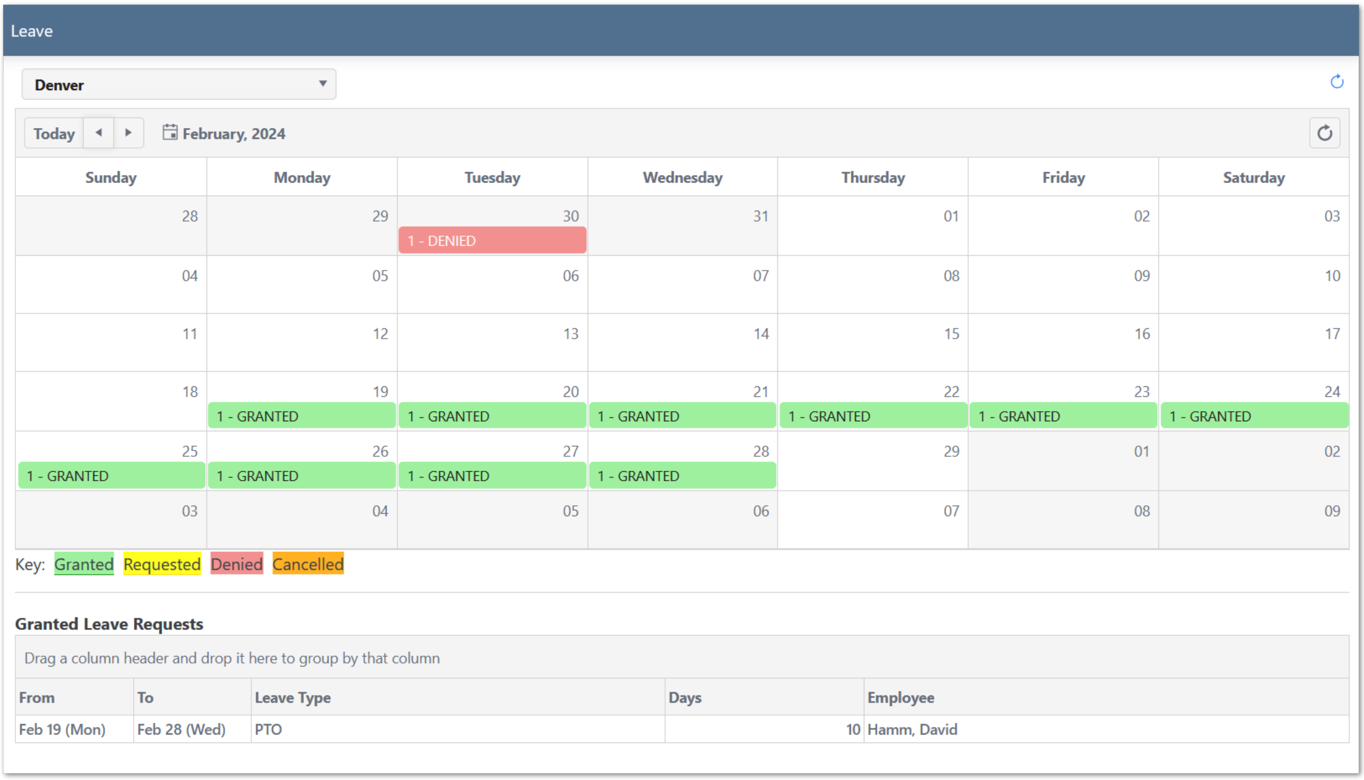


Date	Position	Employee	Client	Group	Notes	Start	End	Break	Hours	SwapBoard
Wed, 2/14/2024	LPN	Abbott, Bob				6:00 AM	2:00 PM		8.00	
Wed, 2/14/2024	Pharmacist	Hamm, David				7:00 AM	3:00 PM	10:45 AM - 11:15 AM	7.50	
Wed, 2/14/2024	Pool	Bloom, Allison				8:00 AM	12:00 PM		4.00	
Wed, 2/14/2024	Pool	Fischer, 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

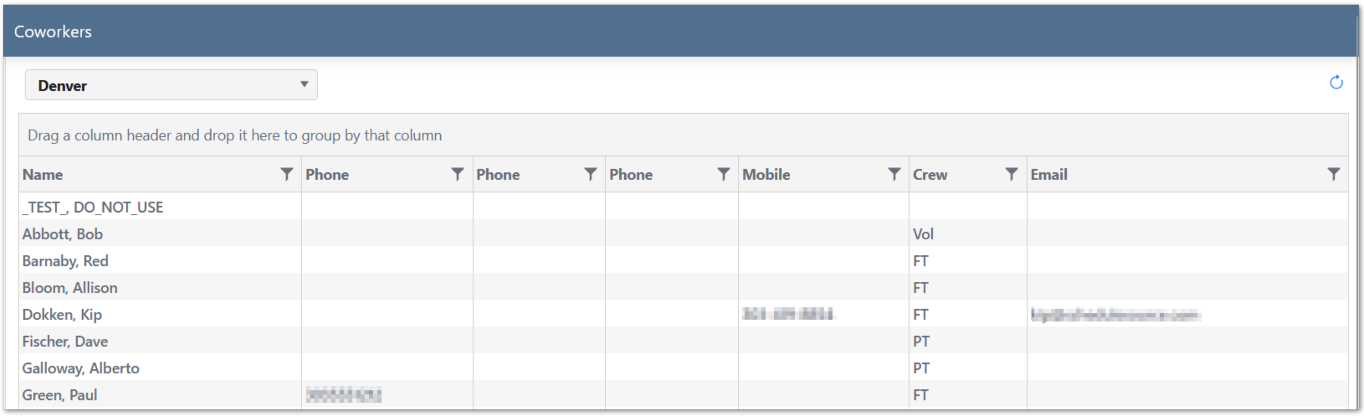
To view all leave, select the location that you want to view leave for. You can navigate forward or back by month using the navigation arrows. Granted leave is show by a green bar in the calendar, requested leave is shown by a yellow bar and denied requests are shown in red. The list of granted leave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



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				[illegible]	FT	[illegible]
Fischer, Dave					PT	
Galloway, Alberto					PT	
Green, Paul	[illegible]				FT	

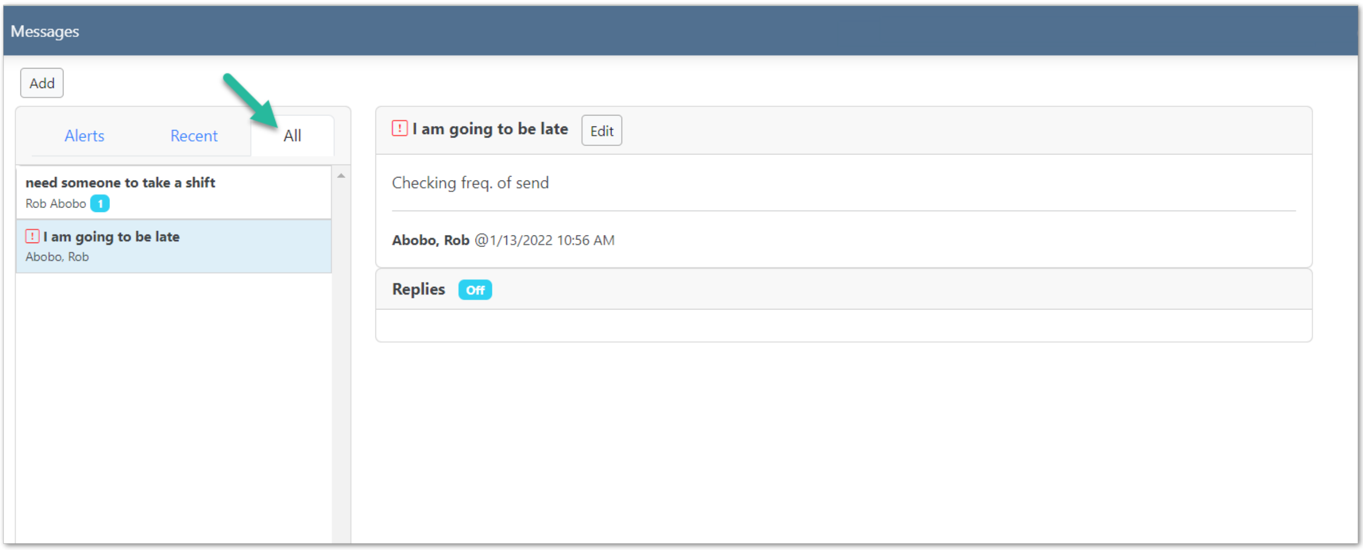
> The Organization pages show information for other employees, as allowed by the organization setup.

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,

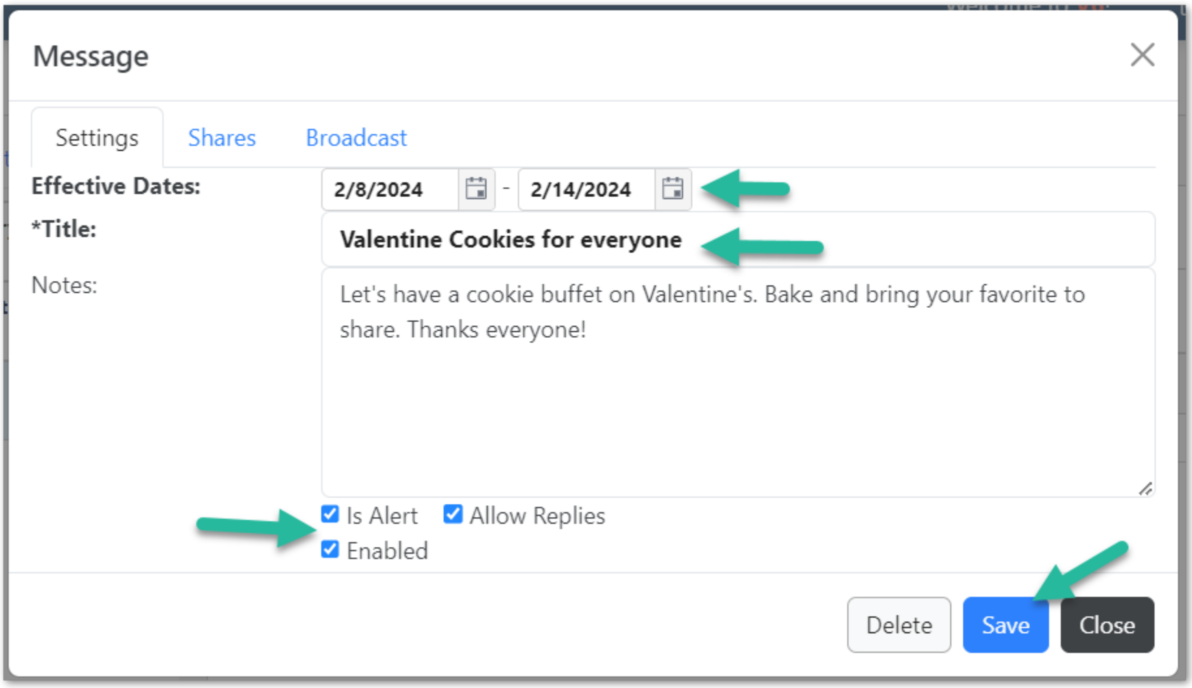
1. Enter **Effective Dates** (the message only appears in this range)
2. Enter **Title**
3. (Optional, recommended) Enter **Notes**
4. Select options

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**

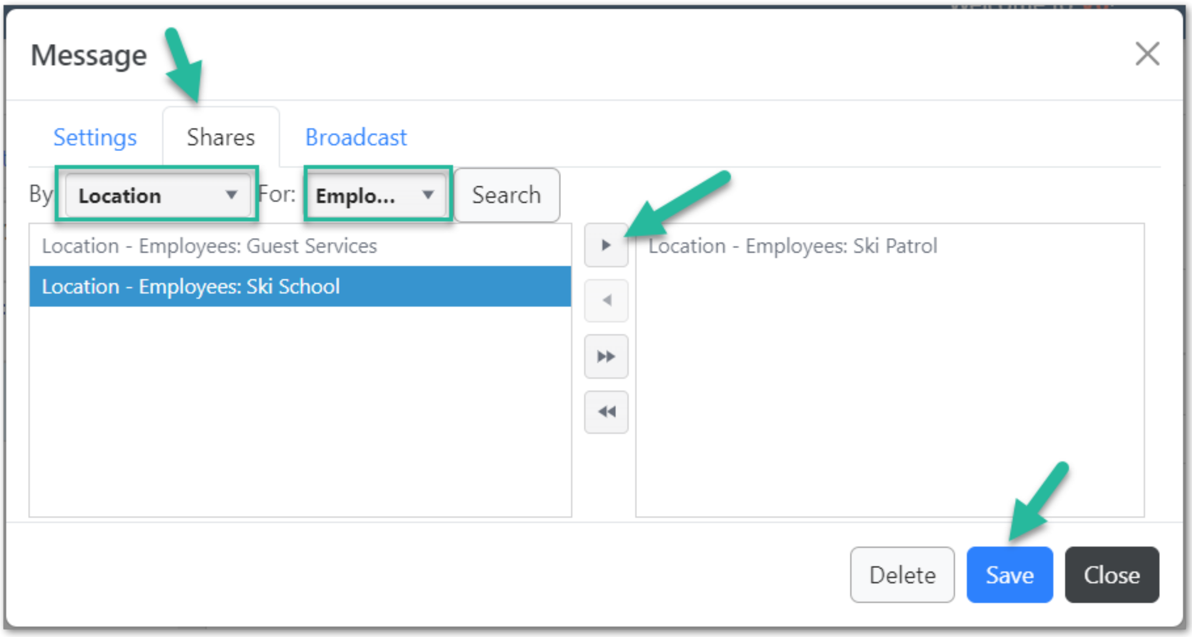


7.4.2 Sharing

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**

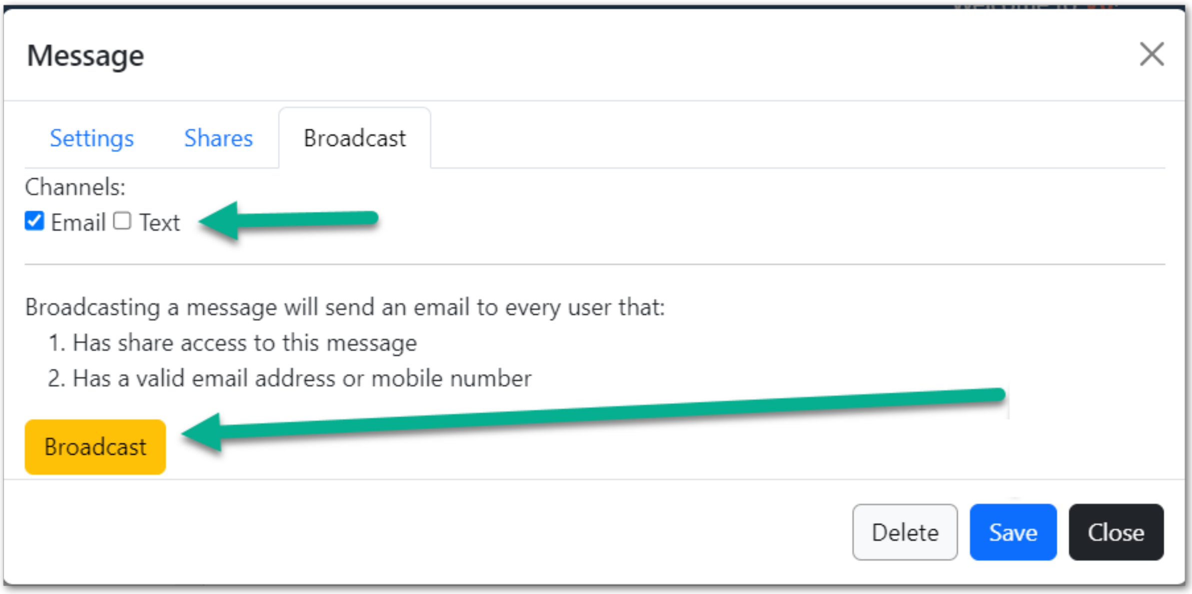


7.4.3 Broadcasting

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**

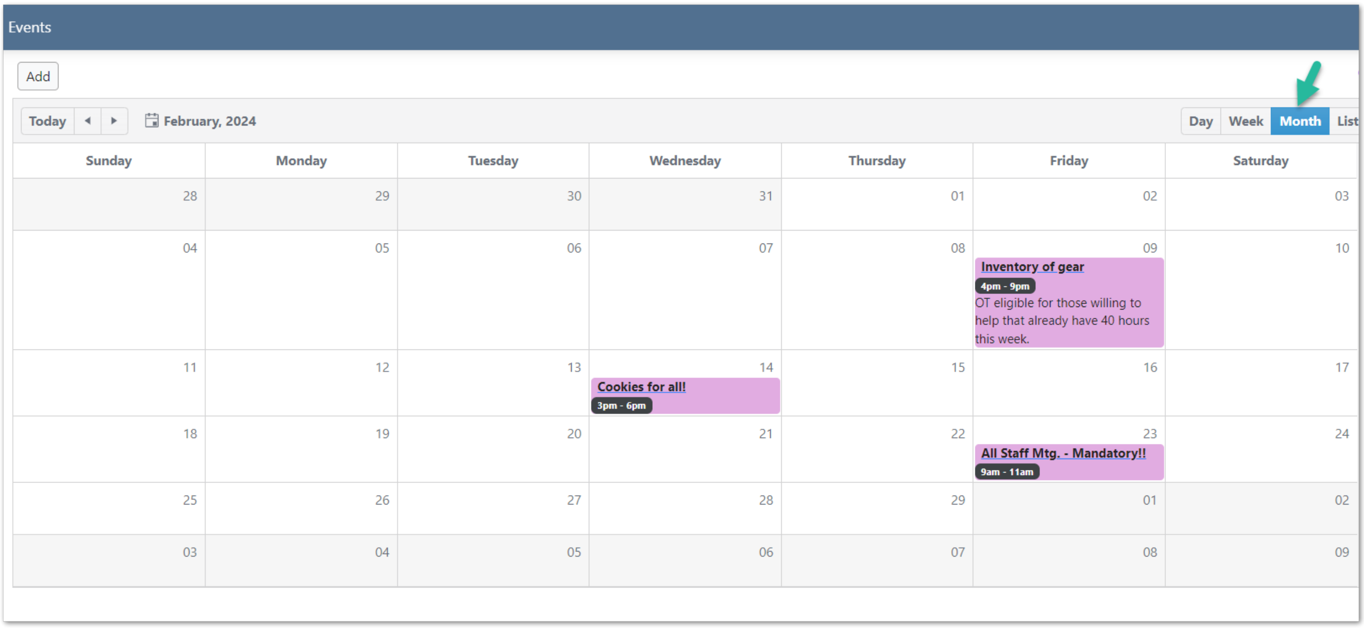

Message
Settings
Shares
Broadcast
Channels:
Email
Text
Broadcasting a message will send an email to every user that:
1. Has share access to this message
2. Has a valid email address or mobile number
Broadcast
Delete
Save
Close

7.5 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.

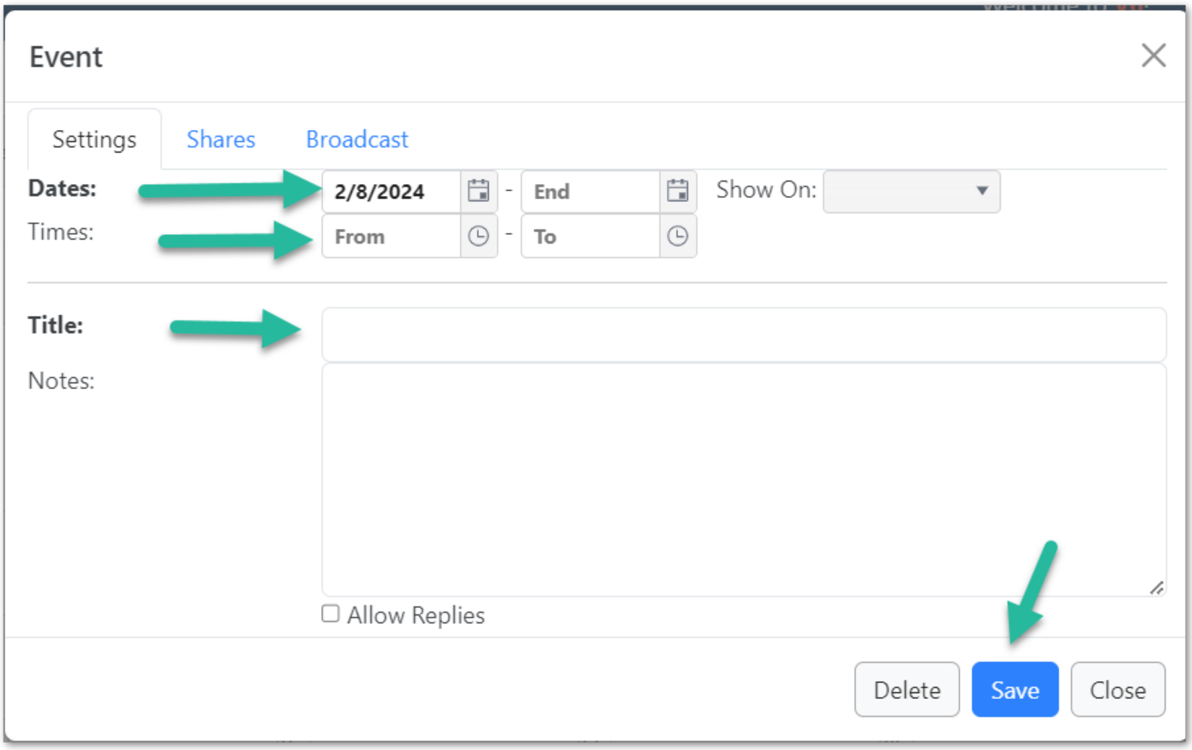


7.5.1 Adding Events

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**



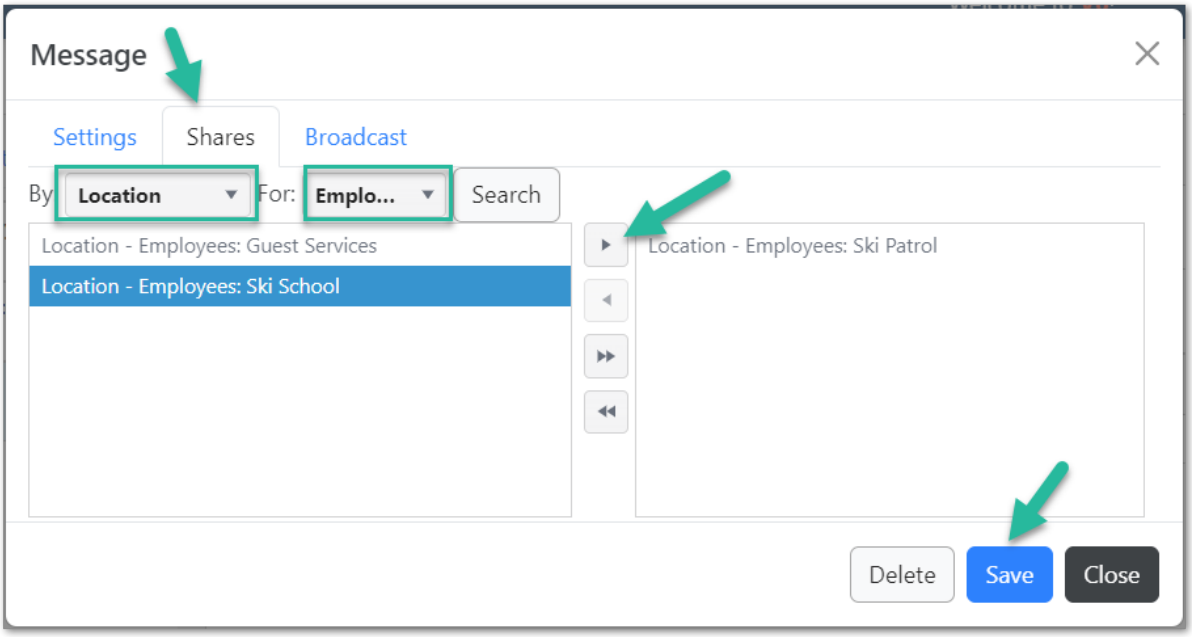
7.5.2 Sharing

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)



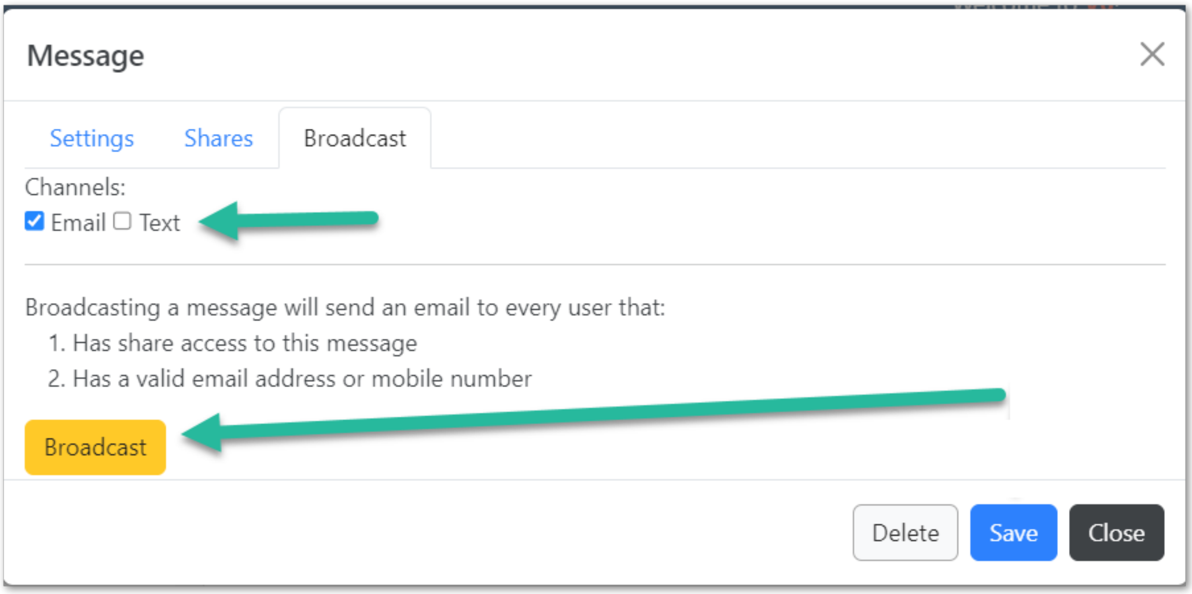
7.5.3 Broadcasting

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)



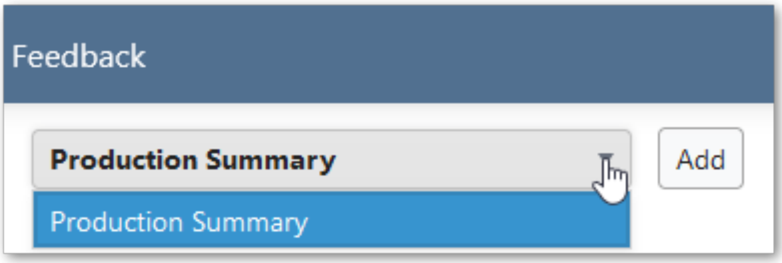
7.6 Organization Feedback

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.

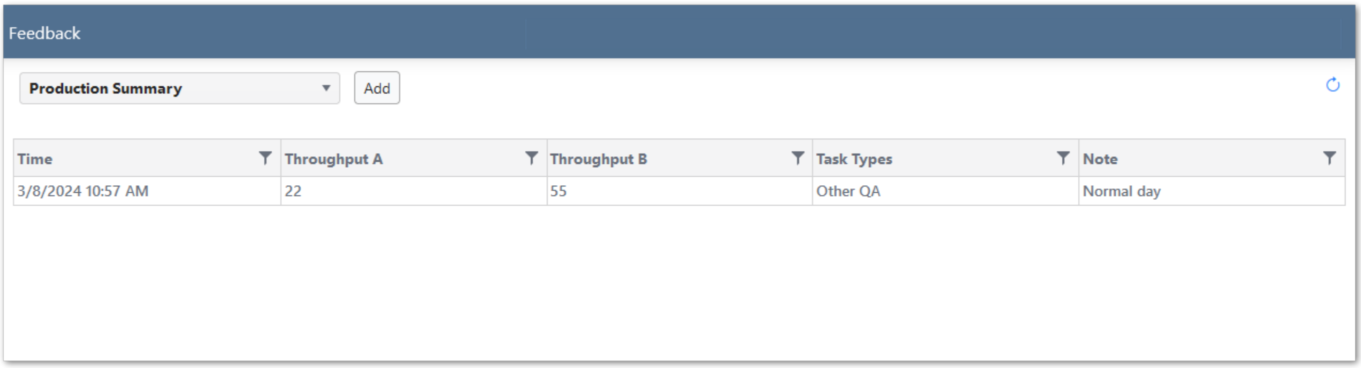
Open the Feedback page from the menu **Organization > Feedback**

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.



7.6.2 Adding a Response

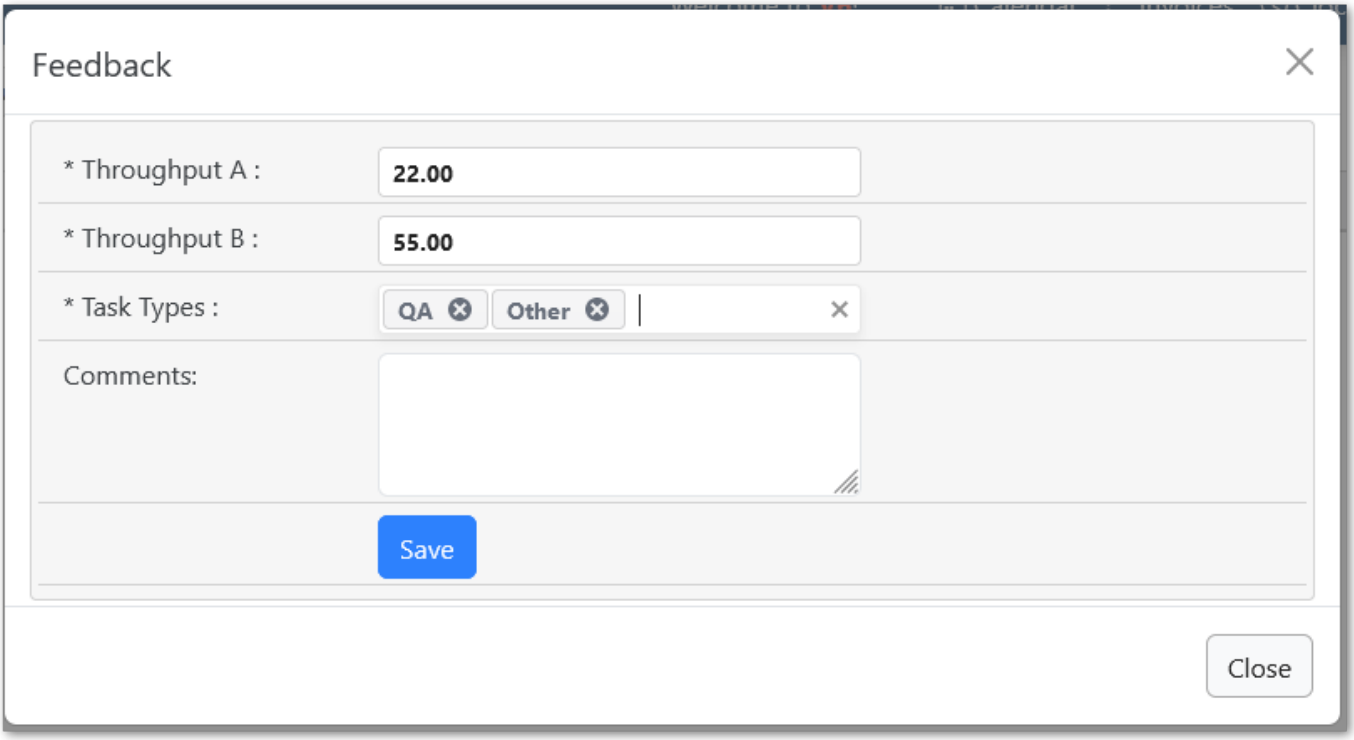
To add a new response, click the **Add** button at the top of the page.

Then,

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

Please Ensure Accuracy

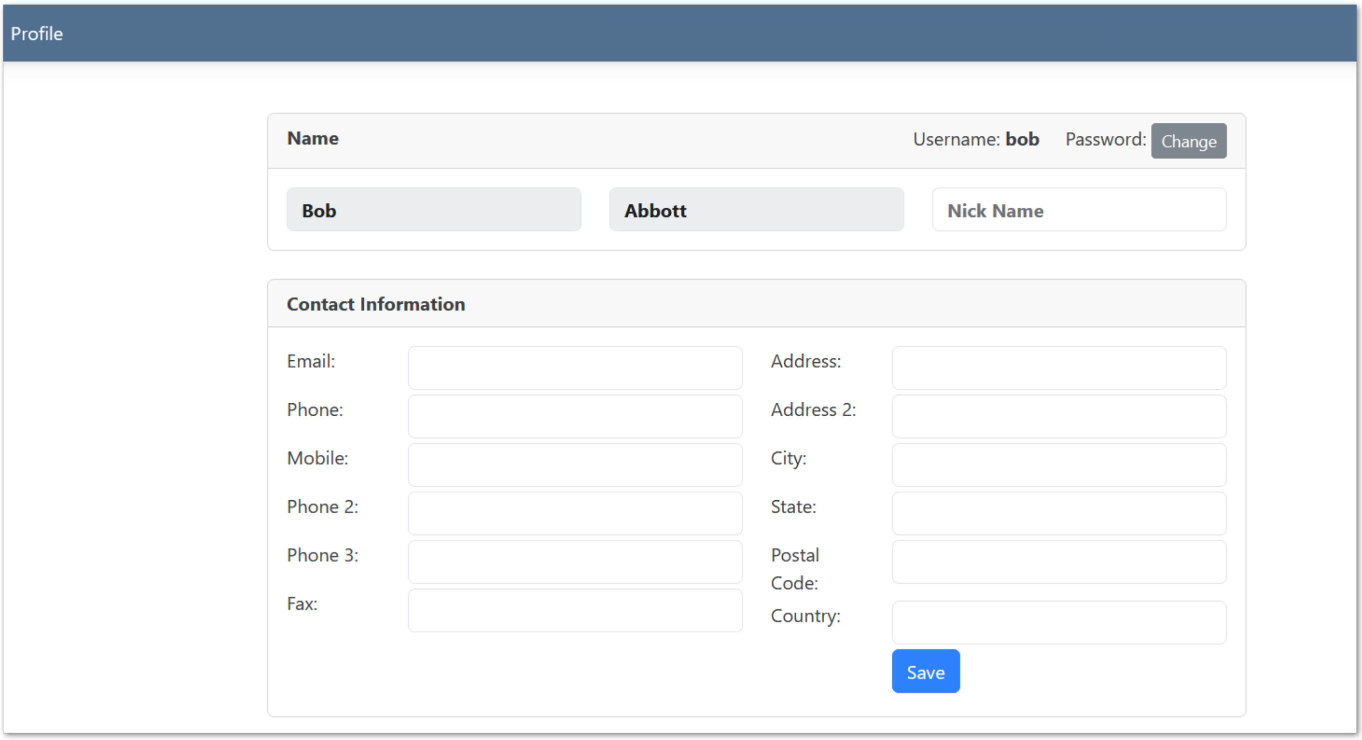
Once the response is saved it is **not editable**.



8. My Setup

8.1 Profile

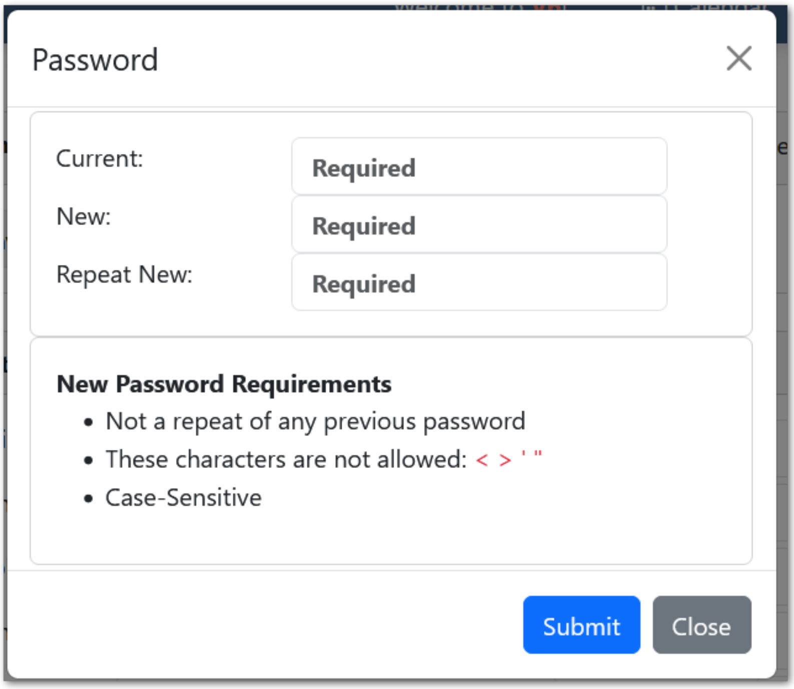
The Profile page allows you to update your your password, view and update your contact information (subject to your organizations settings) and review your deployments that inform your schedule. You can see what Locations (schedule groups) you can be scheduled to, the time zone of that location, and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



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**



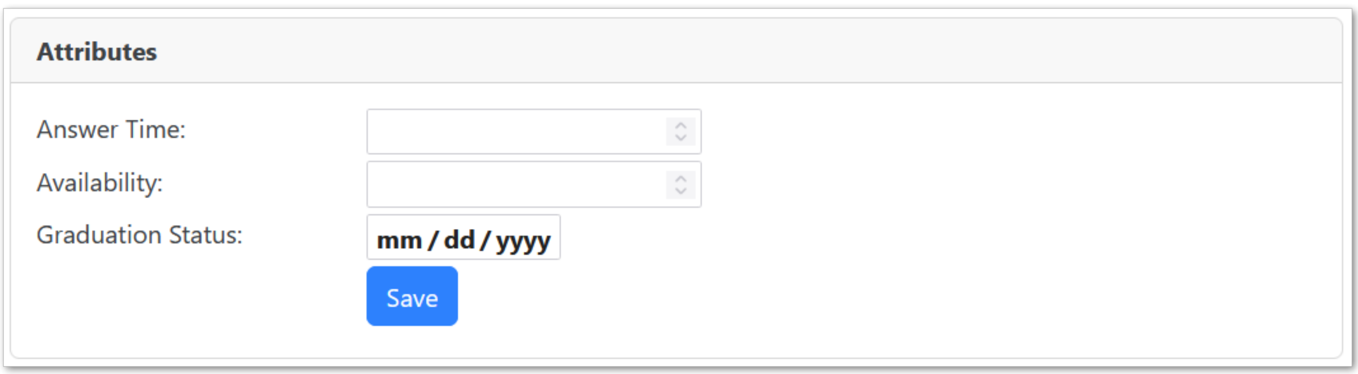
8.1.2 Updating Contact Information

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

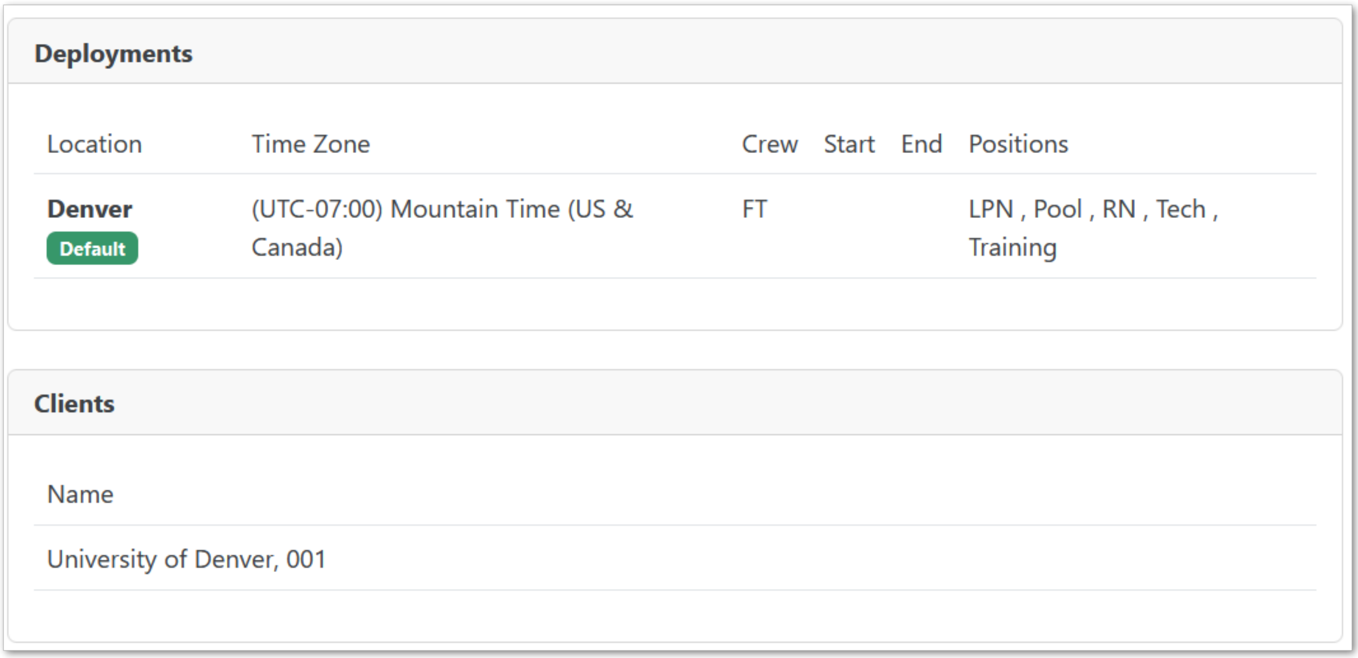
Attributes are additional values associated with an employee record. In some cases the organization may enable viewing and editing of attribute values.

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



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

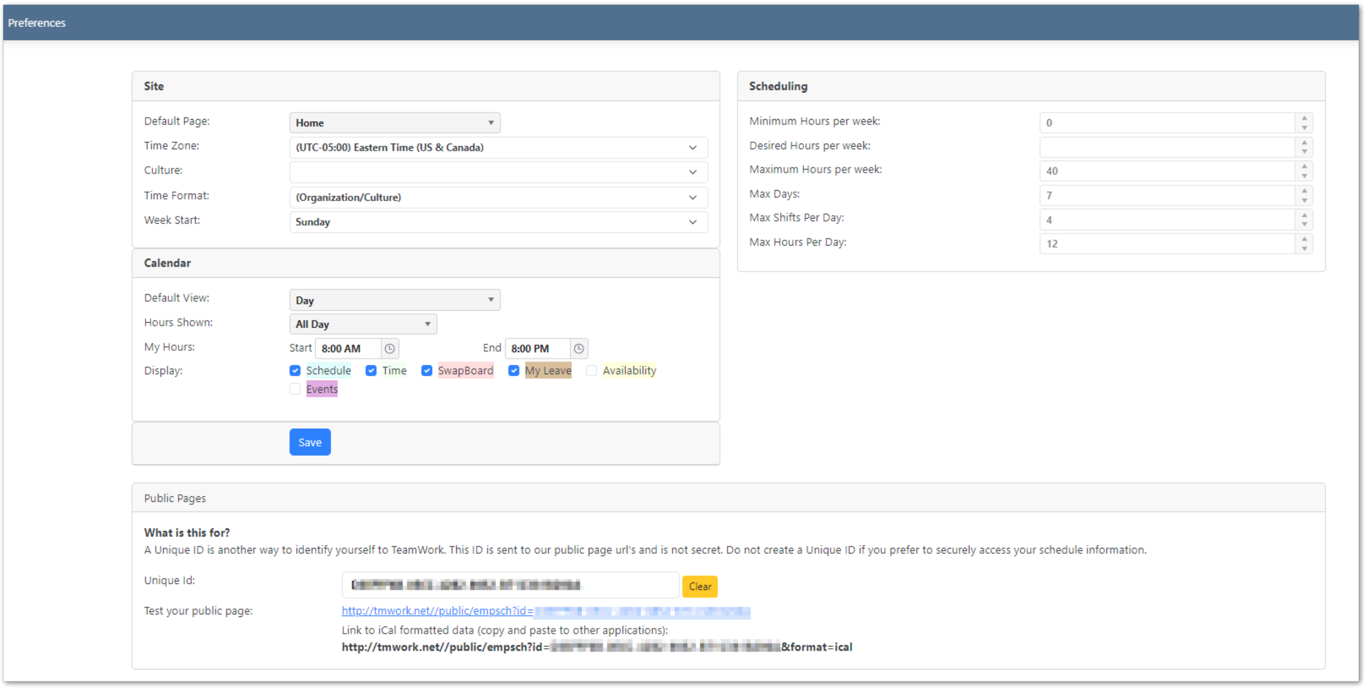
Location	Time Zone	Crew	Start	End	Positions
Denver Default	(UTC-07:00) Mountain Time (US & Canada)	FT			LPN , Pool , RN , Tech , Training

Clients

Name
University of Denver, 001

8.2 Preferences

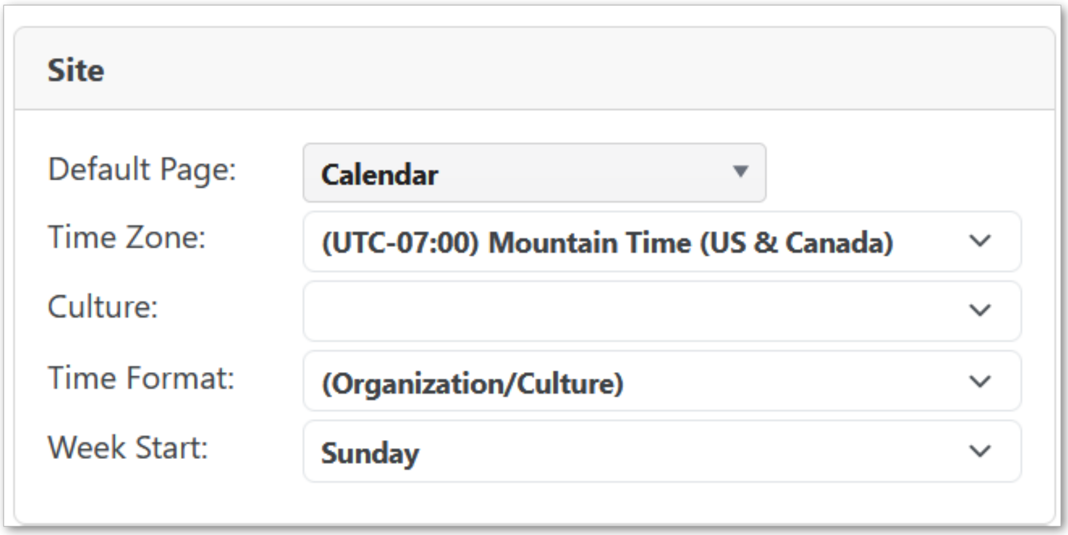
You can set several options to change the look and feel of the user interface and default settings.



8.2.1 Site Settings

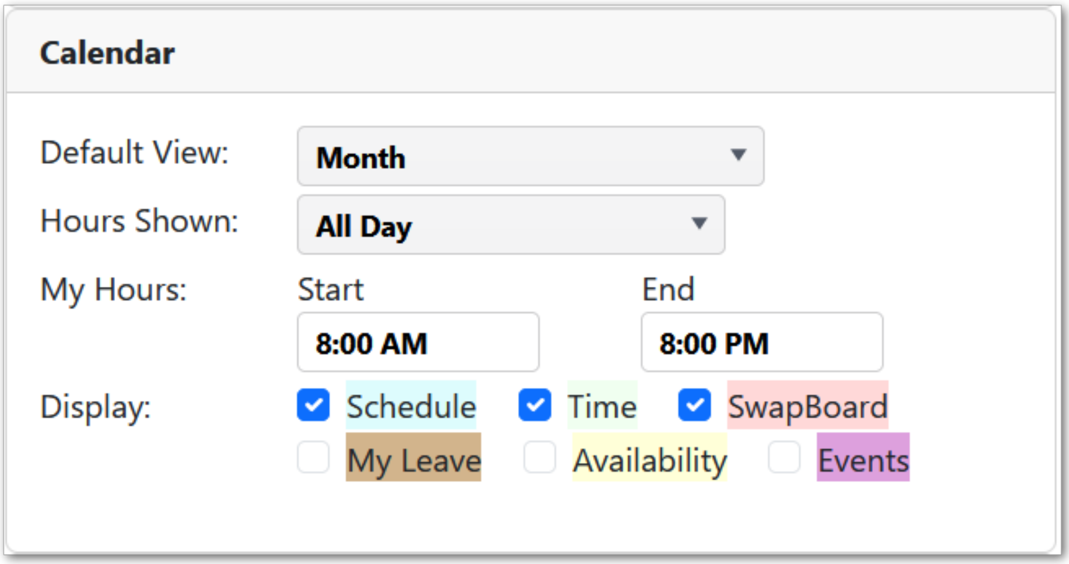
In the "Site" section, you can change several settings that affect the portal.

- **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.



8.2.2 Calendar Settings

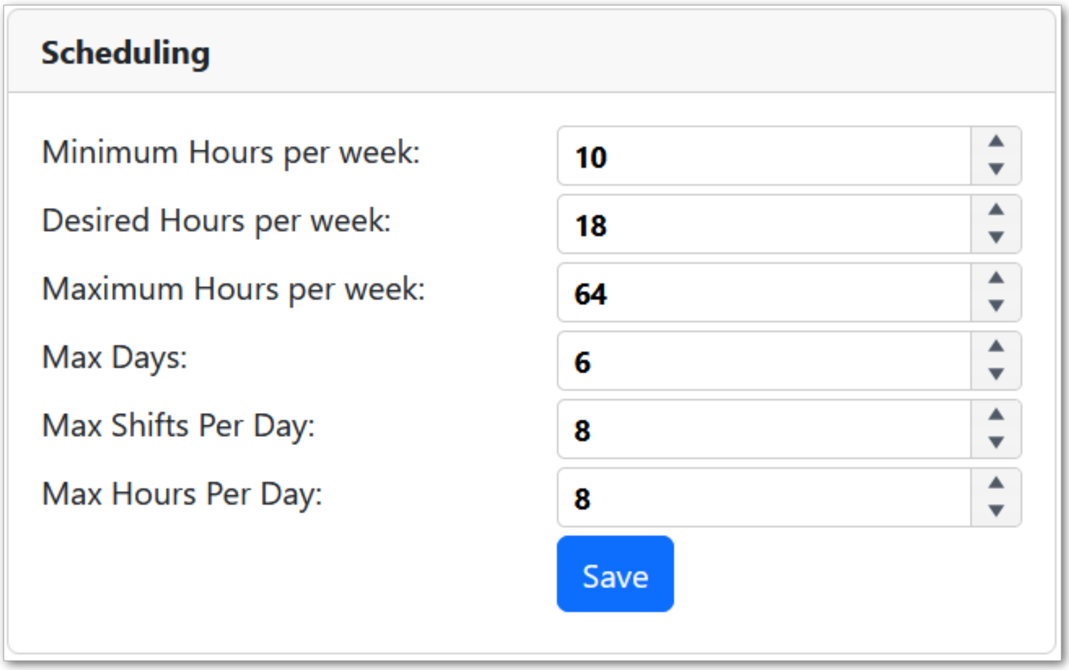
In the Calendar section, choose your default view for the calendar: day, week, month or list view. Choose whether to see all hours in a day, or just the time frame of your hours. Choose what to display on the calendar: Schedule, Time, Swapboard, My Leave, Availability and Events.



8.2.3 Scheduling Settings

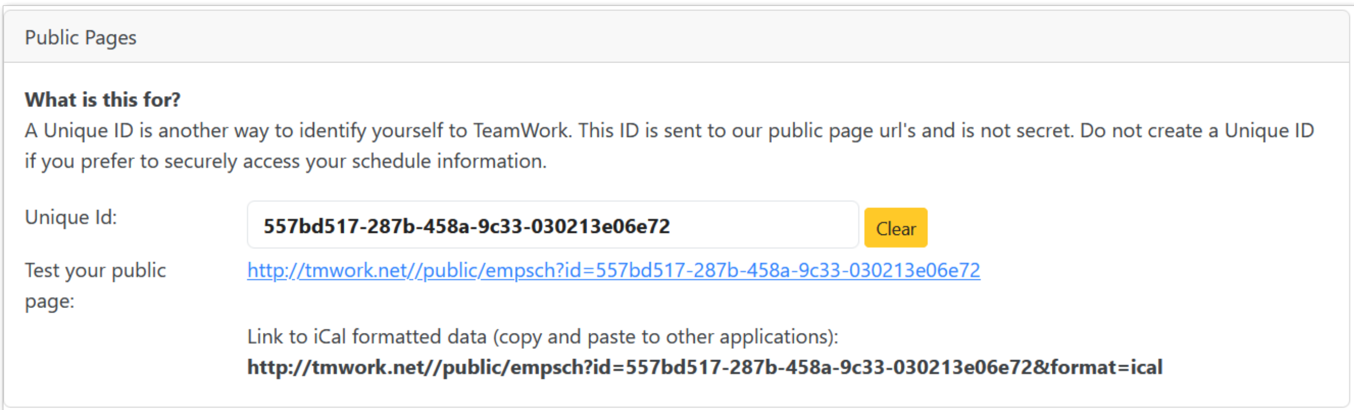
In the Scheduling section review the parameters that inform your schedule including your settings for:

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



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).



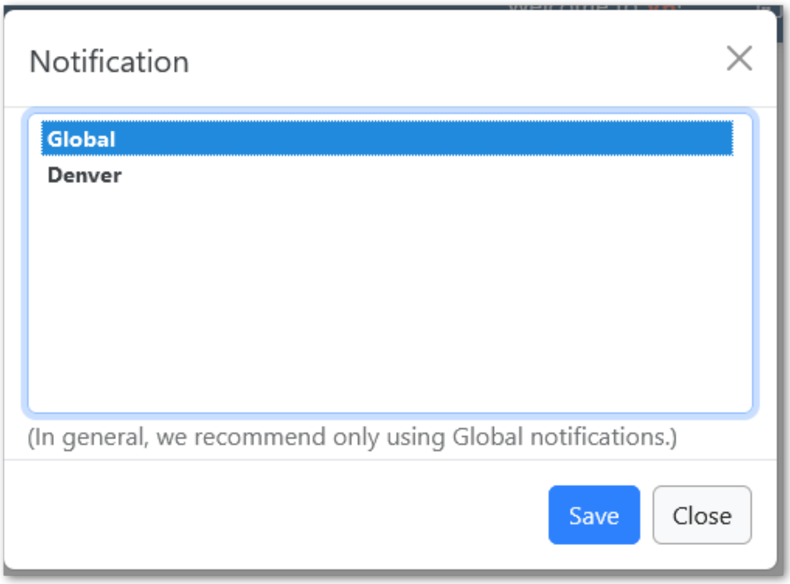
8.3 Notifications

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.

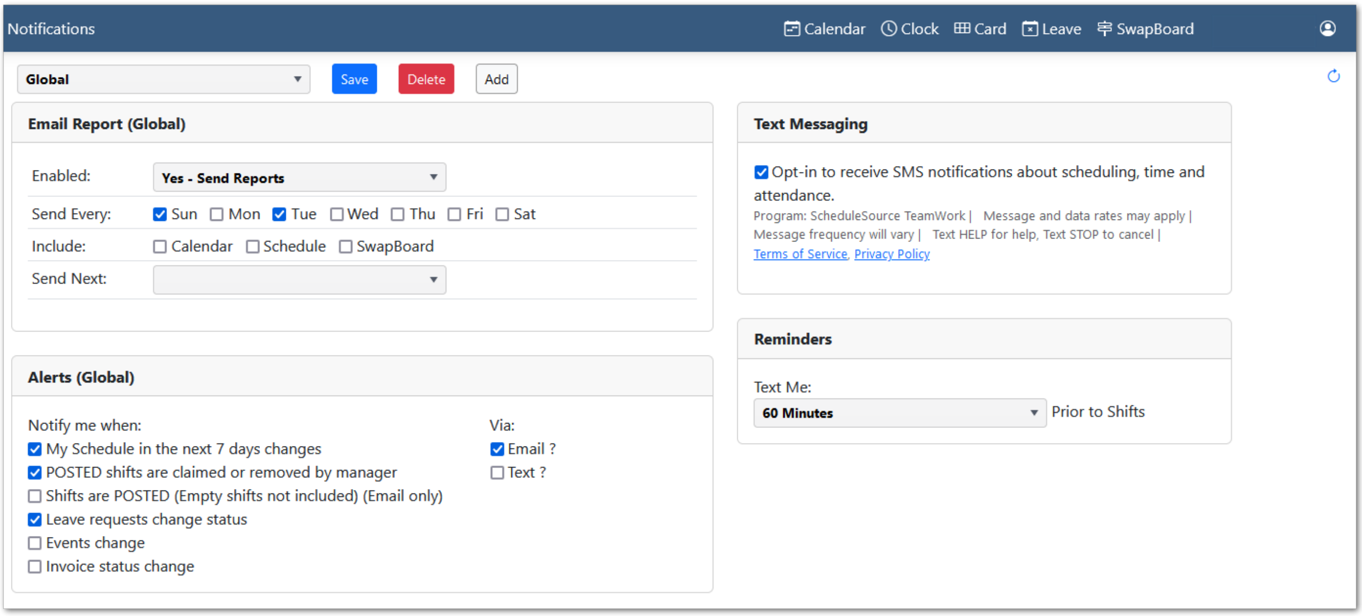
8.3.1 Adding a Profile

To add a notifications profile:

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



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

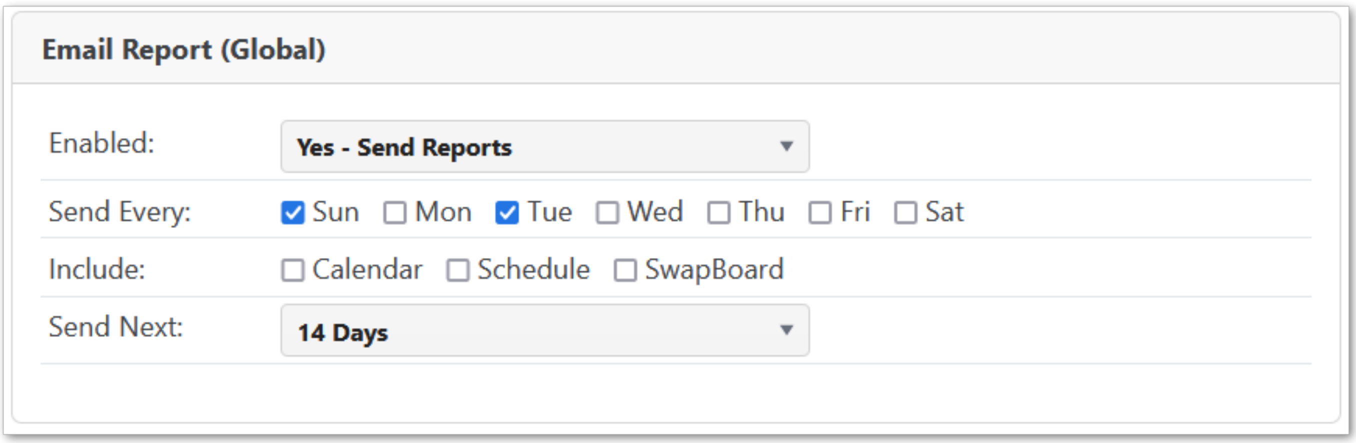


8.3.2 Notification Options

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

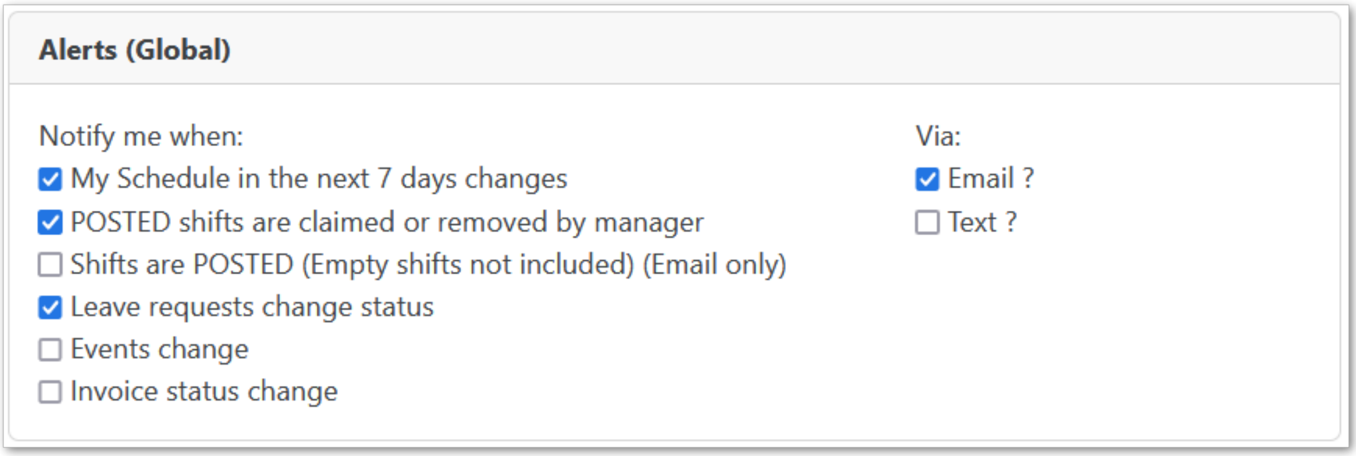
TeamWork can send an overnight email on the days selected. The data in the email can include **Calendar Events**, **Scheduled Shifts**, and **Swapboard** shifts. The date range of the data is the date of the email plus the **Send Next** number of days in the future. Once days and data are configured,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



Alerts

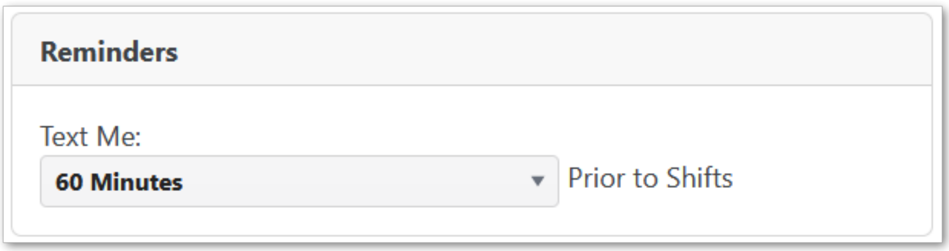
Alerts for certain changes can be delivered via text or email. In the example below, the employee does not have valid email or mobile values, so the **Via** options appear as "?".

Some options depend on the organization configuration.



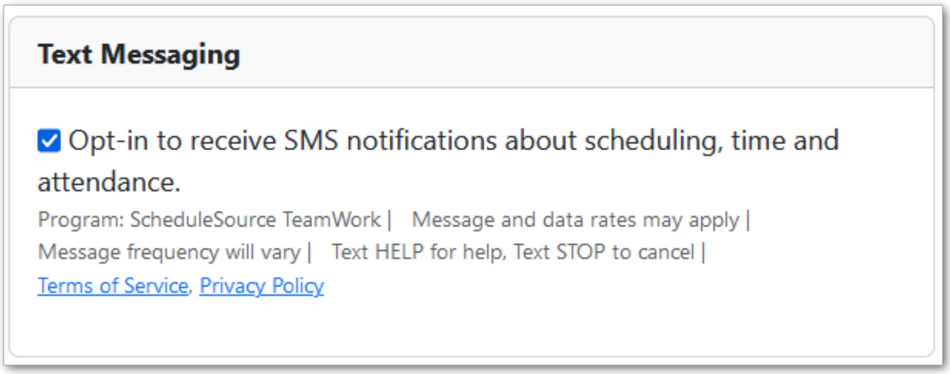
Reminders

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.



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

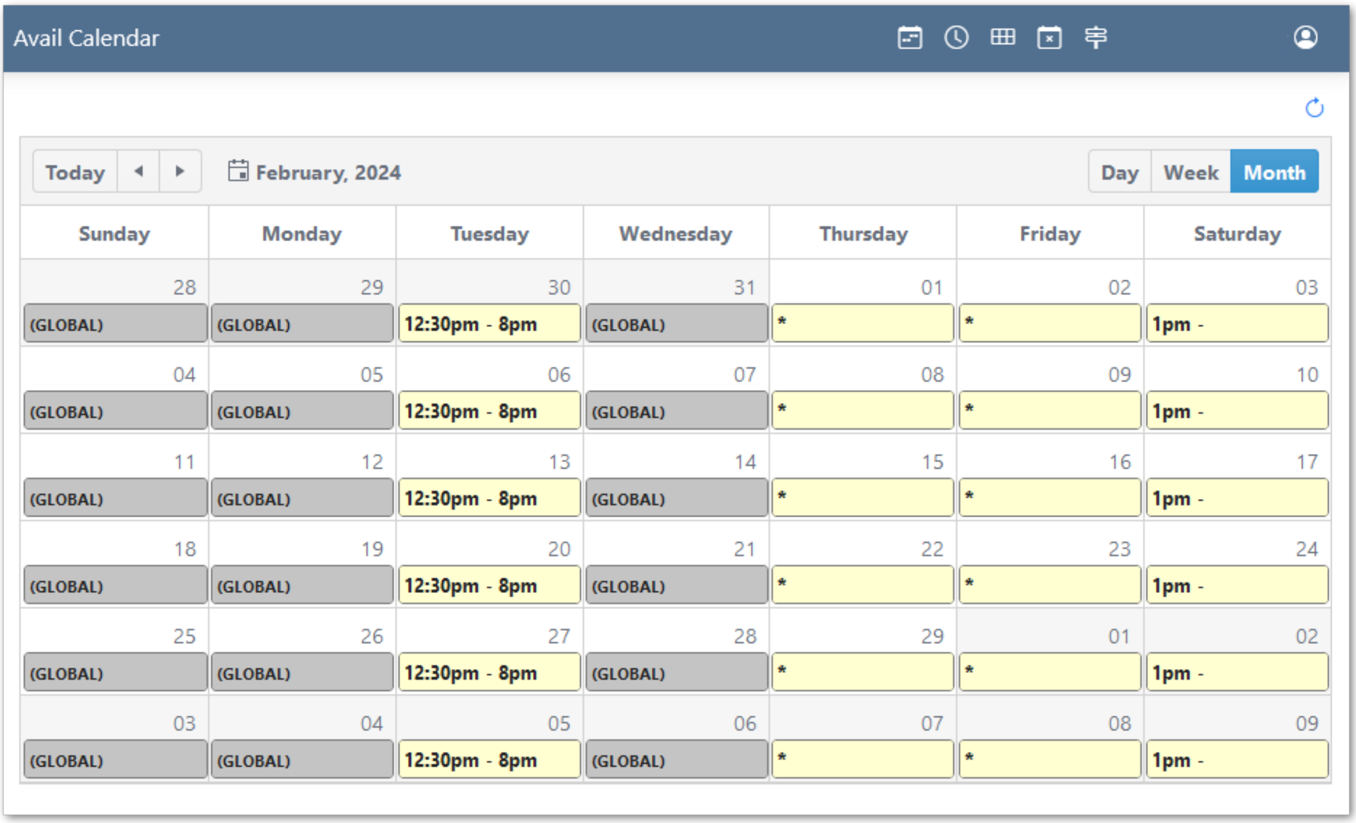
Availability describes days and hours when employees can work shifts. Availability can be entered as a weekly template, a date-based location template, or single-day overrides. Availability is separate from the Leave Management system where absences go through an approval process.

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.



8.4.2 Availability Templates

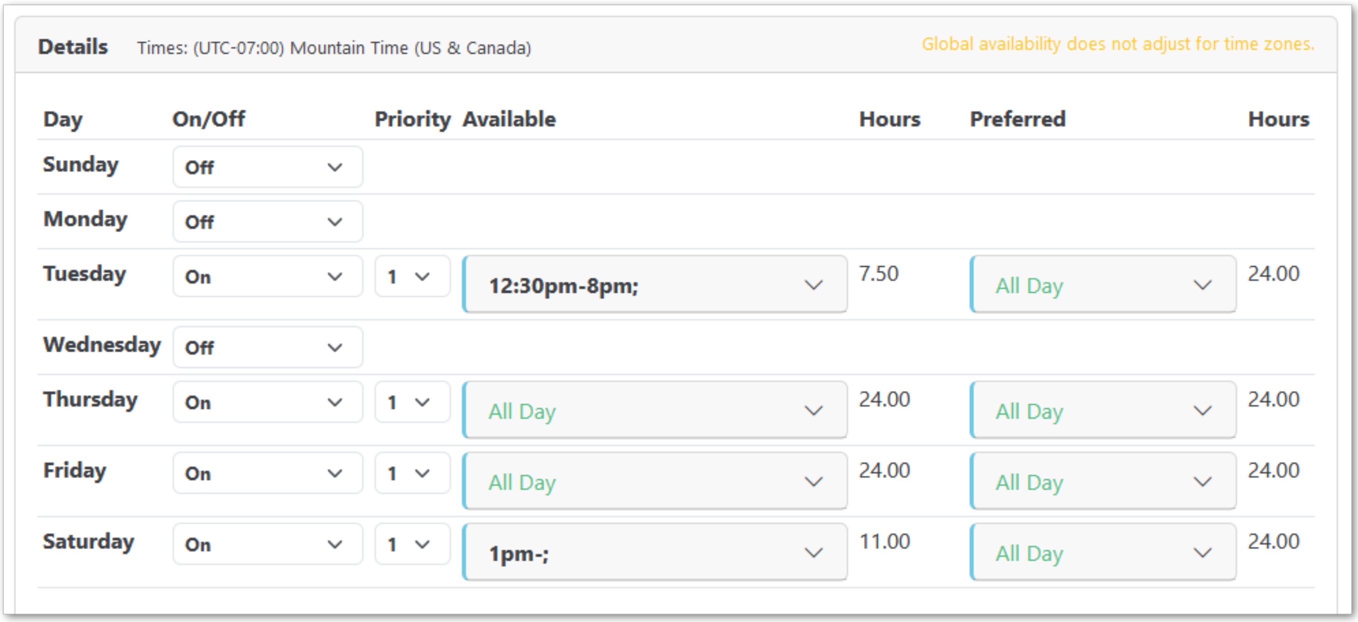
An availability template represents a generic, recurring 7-day week. Each template describes the available days **On/Off**, the day **Priority** (1 = lowest, 9 = highest), and optionally limited **Times** available to work. There's also optional preferred times that managers can use for scheduling.

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.

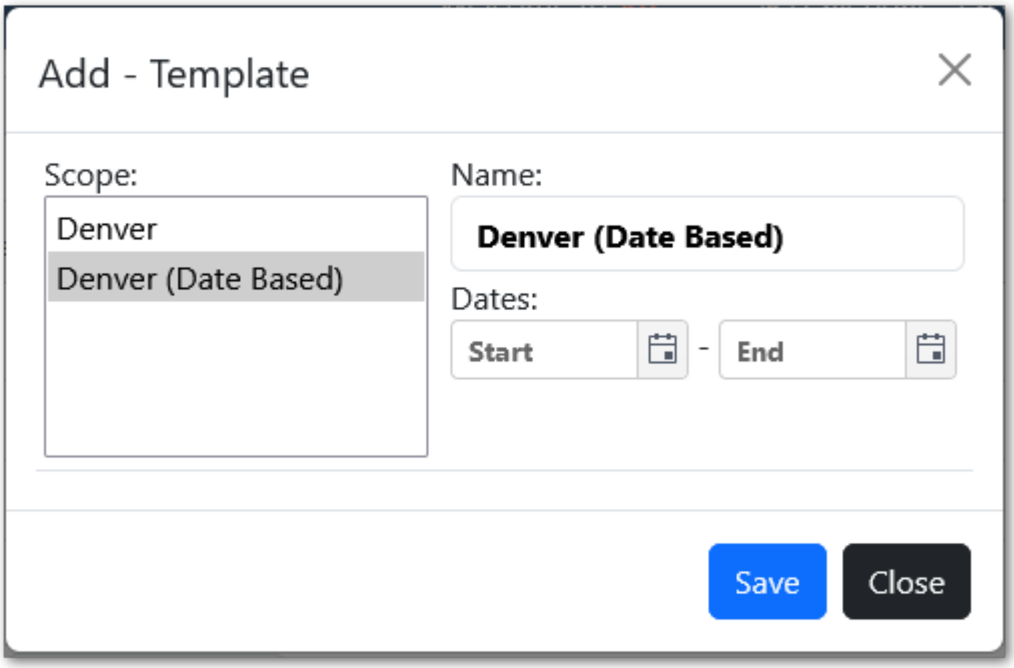
The absence of a template simply defaults to all days/times as available. Setting up availability is optional and sometimes not needed according to how the organization schedules.



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**



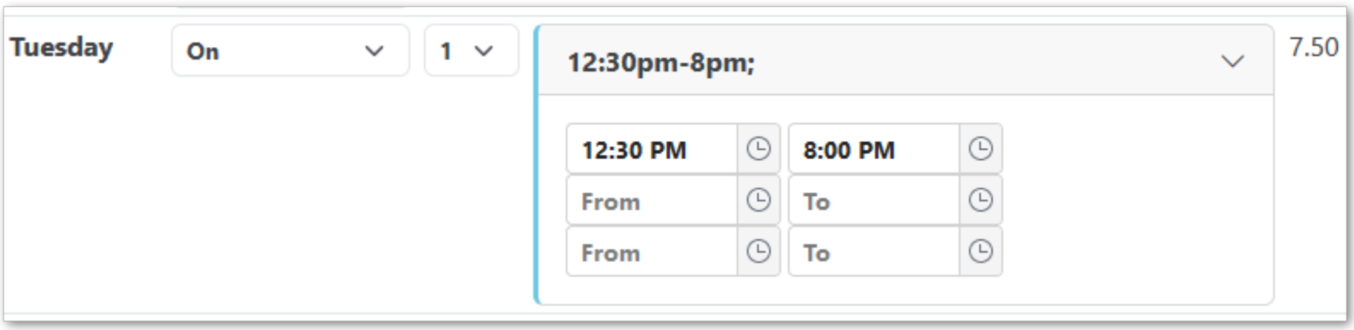
Editing a Template

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.



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.

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

Deleting a Template

To delete a template:

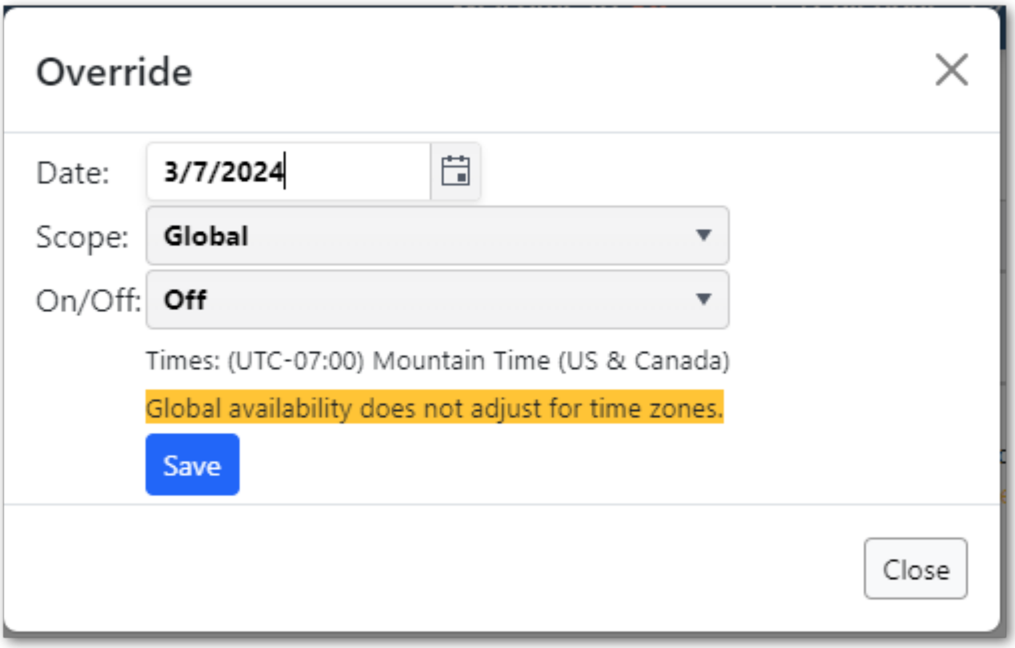
1. Select/Open the template using the drop-down
2. Click **Delete** and confirm

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**



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

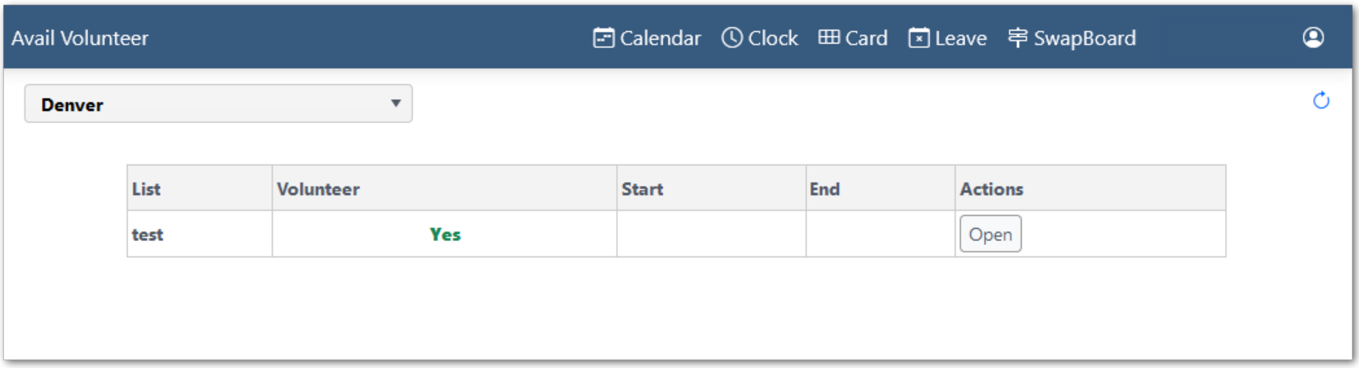
To delete an override:

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

8.4.4 Volunteer Lists

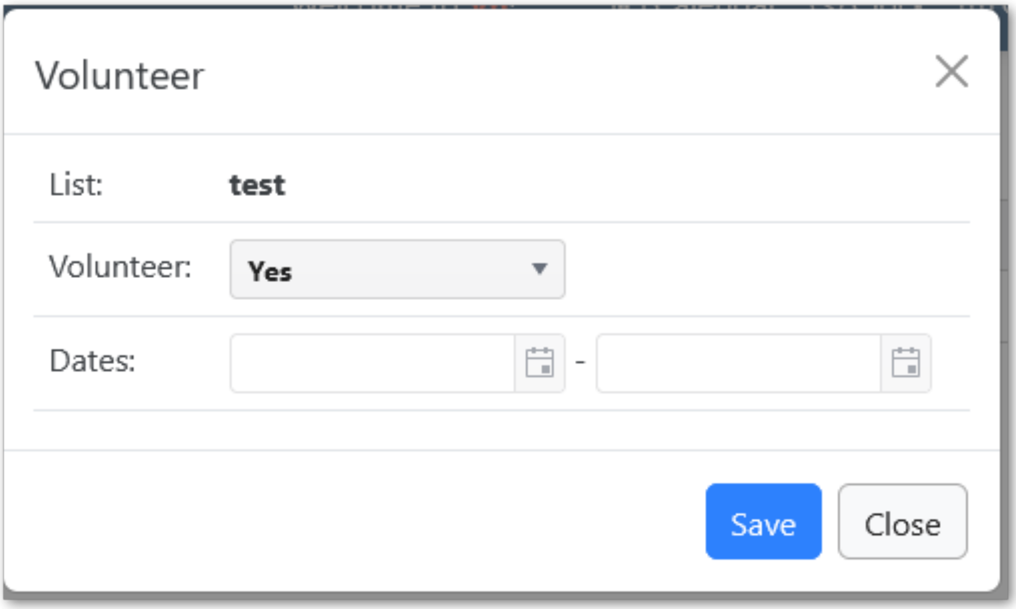
A volunteer list is a simple sign-up list that helps managers limit scheduling to only those in the list. Volunteer lists are per location.

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



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**.



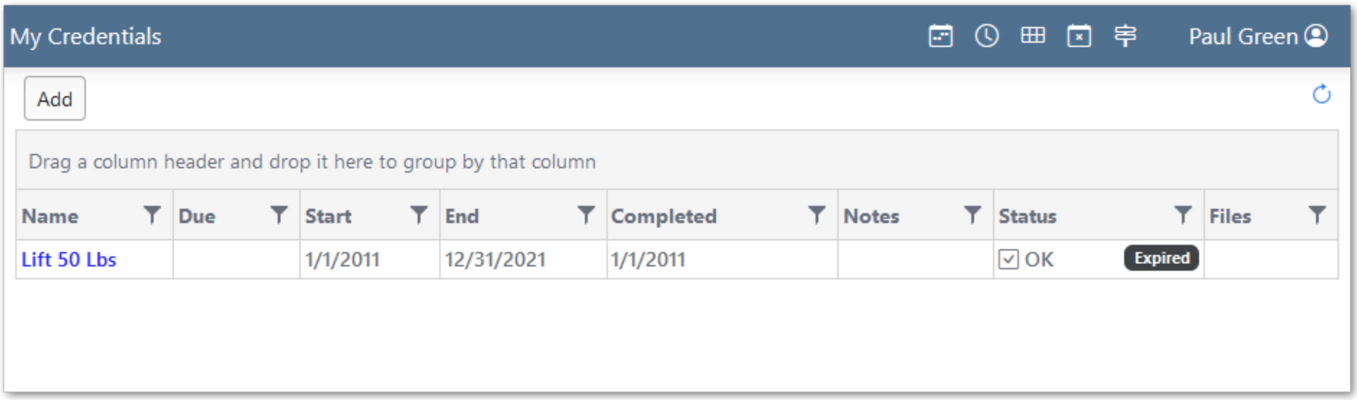
Some lists are date-based and will be limited to volunteering only on those dates.

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.).

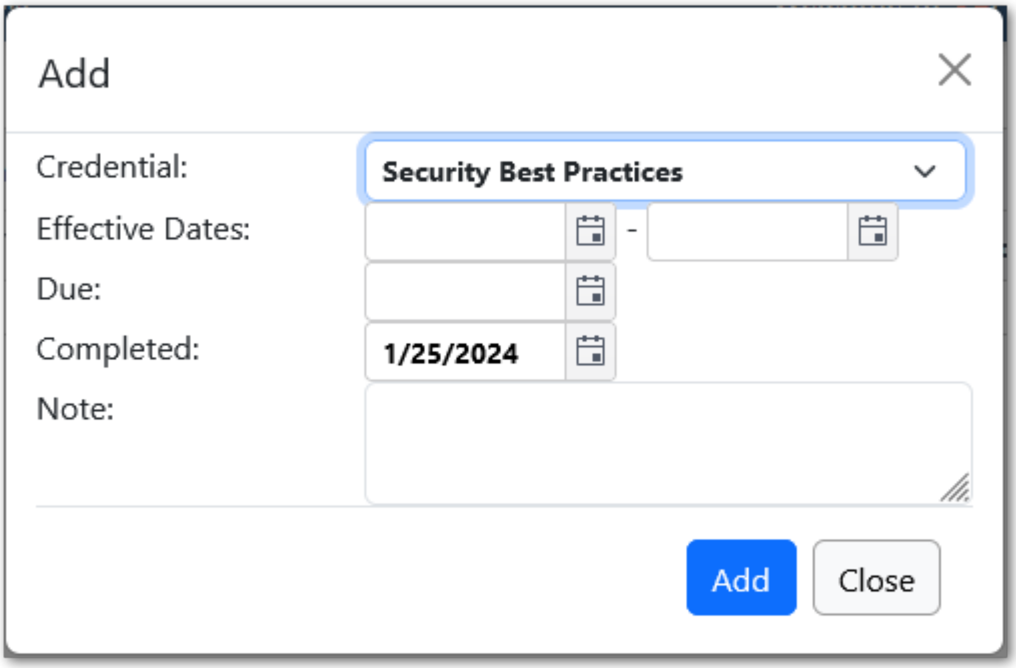


Adding Credentials

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**

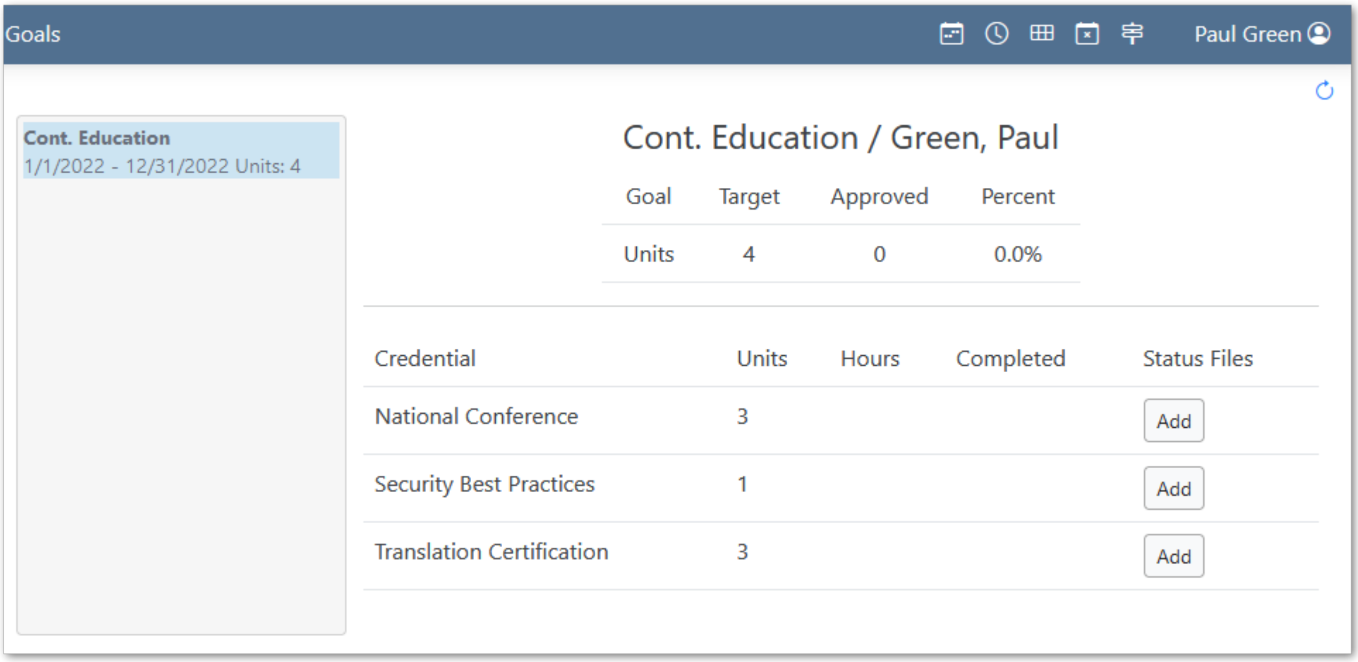


8.5.2 Viewing Goals

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.



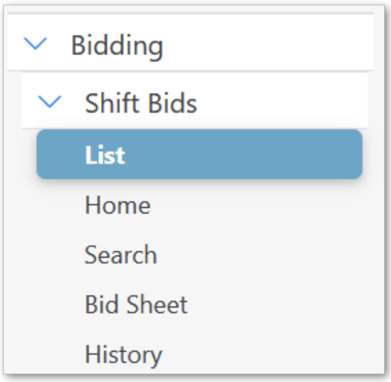
9. Bidding

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.

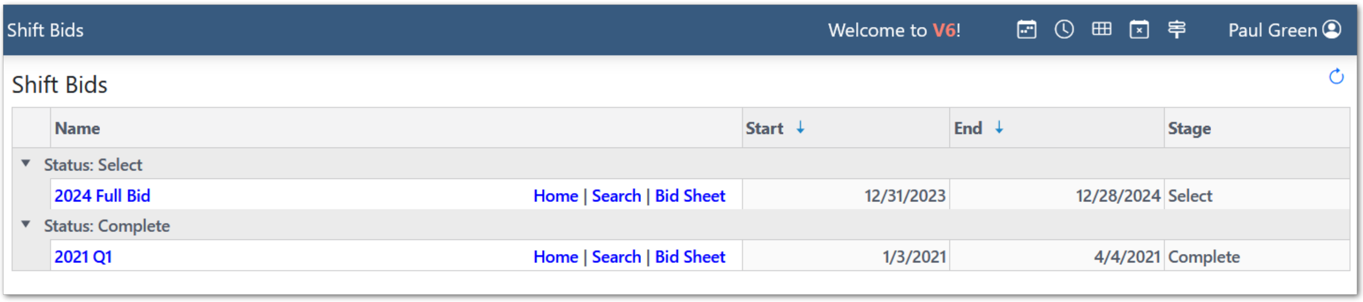
Prior to the assignment process, employees enter their choices (bids) and establish their priority (first, second, third, etc.). Employees can enter as many bids as necessary to ensure a choice is awarded. Choices can be added, removed, or re-prioritized prior to the assignment process.

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



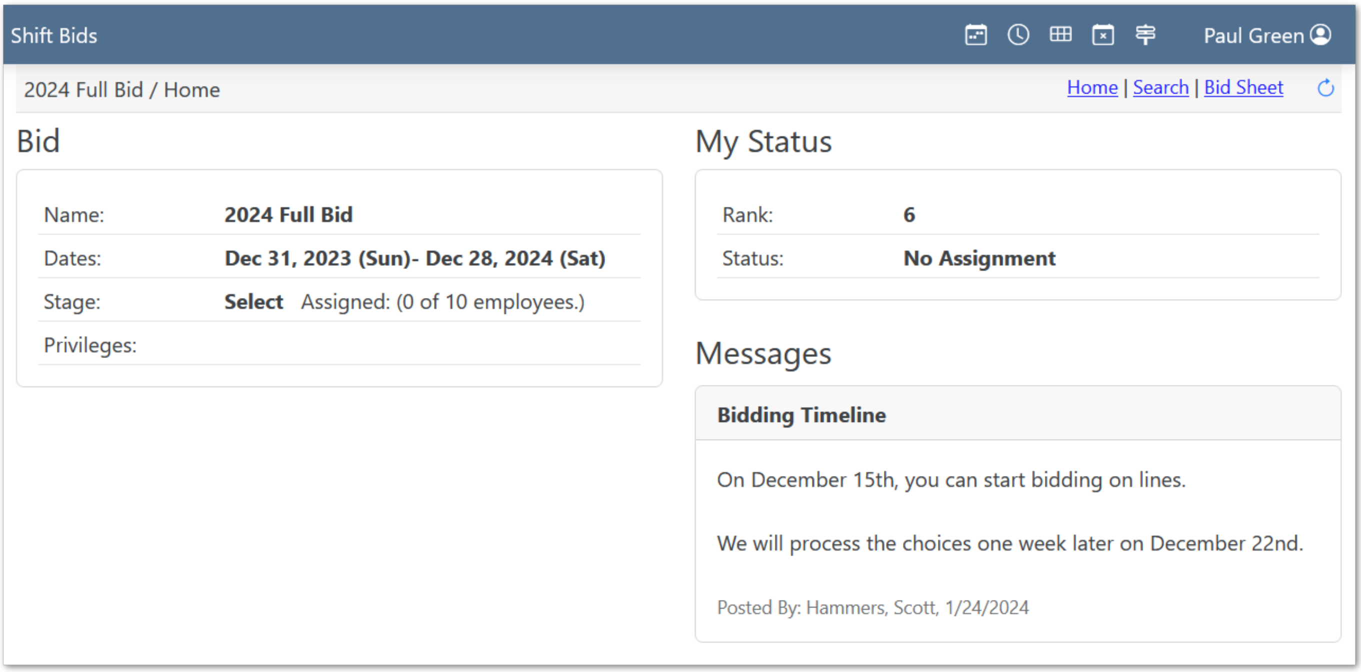
9.1.1 Selecting a Bid

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.



9.1.2 Home Page

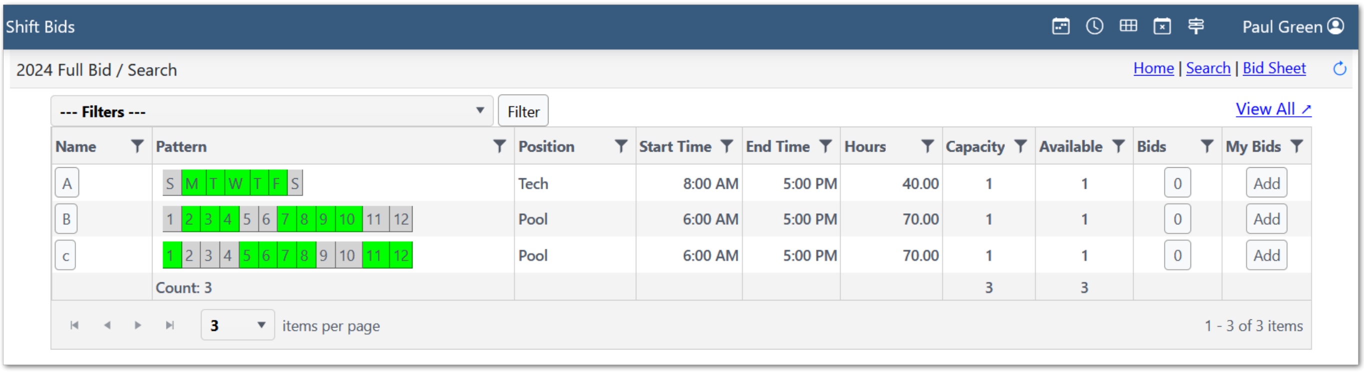
The home page for a bid shows setup information and any messages for the bid. Your overall rank is listed under "My Status".



9.1.3 Viewing Lines (Search)

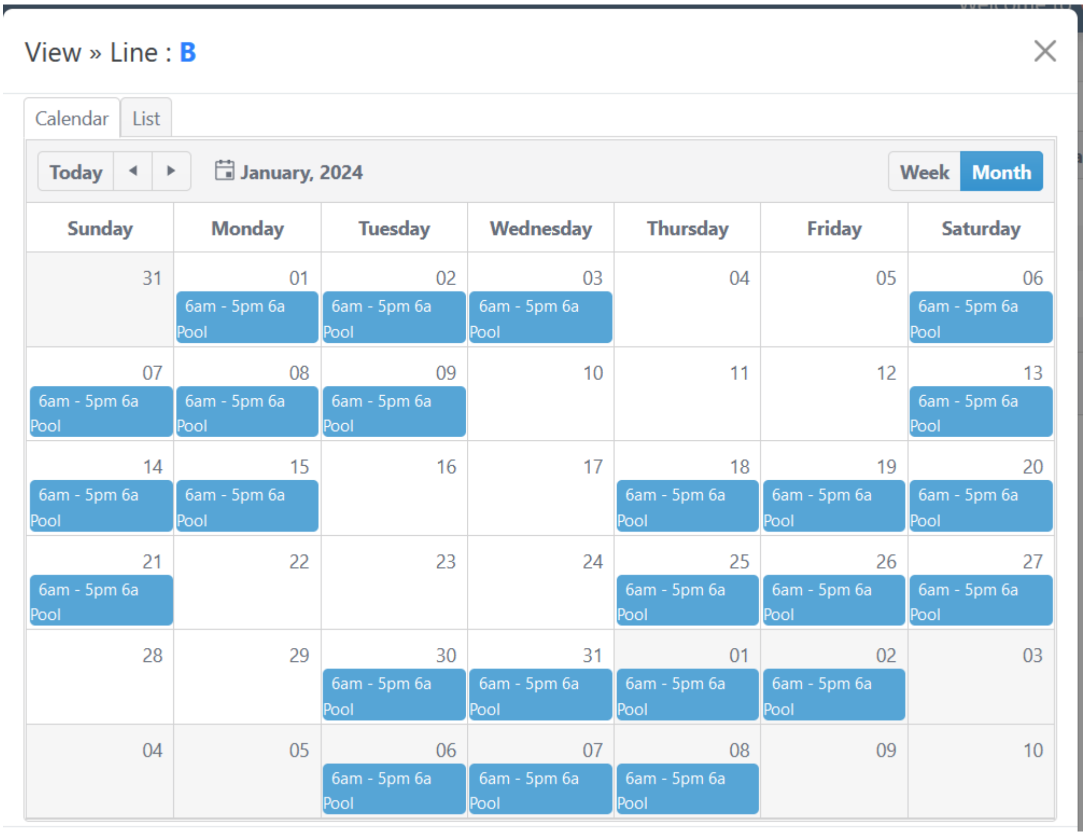
The **Search** page lists all lines and related information. If the bid is accepting choices, then buttons are available for adding new choices and editing existing ones.

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



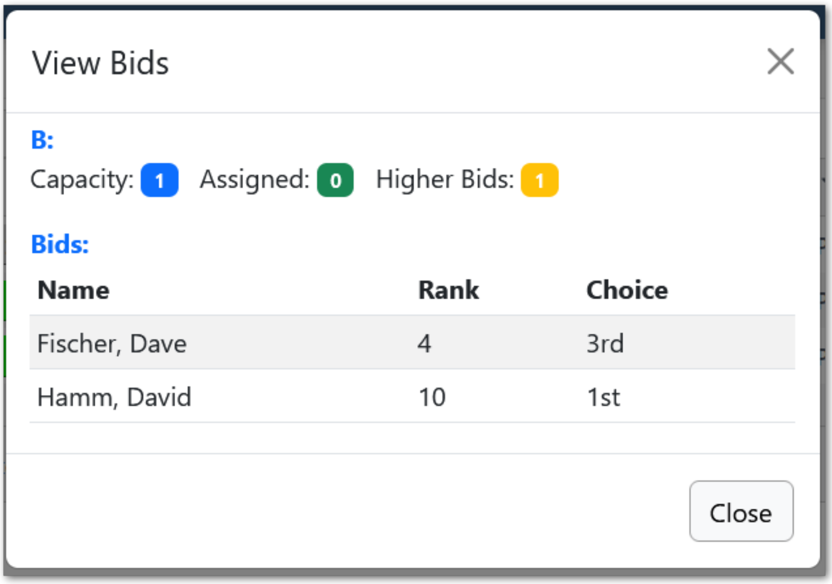
Calendar View of Line

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



Other Choices

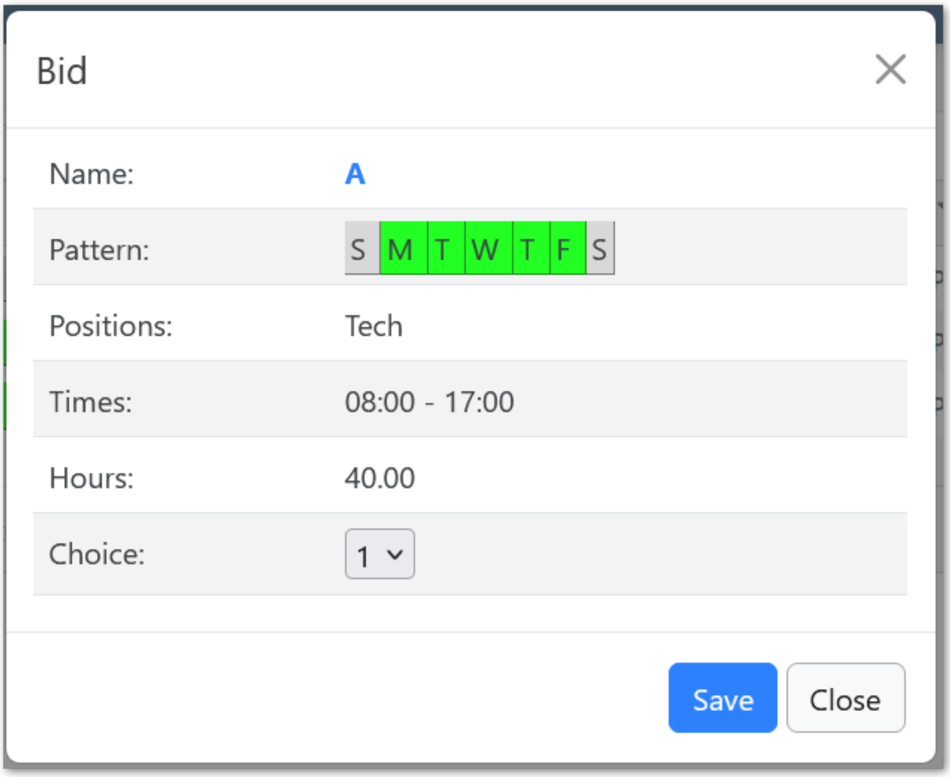
Click the button (with count) in the "Bids" column to see a list of other employee's choices. Depending on the settings, the names of other bidders may or may not be listed.



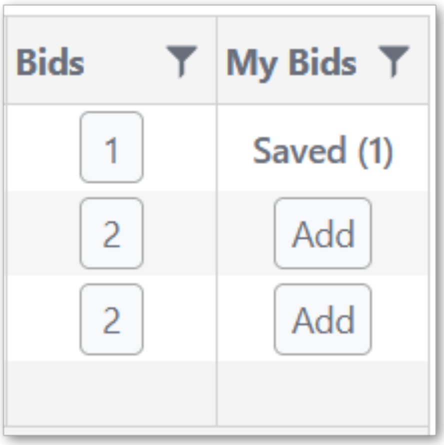
Add Choices

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

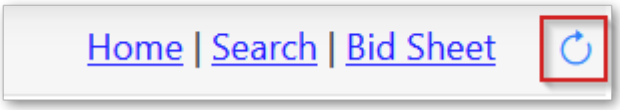
1. Click **Add** in the "My Bids" column for the line
2. (Optional) Select the choice number (priority)
3. Click **Save**



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.



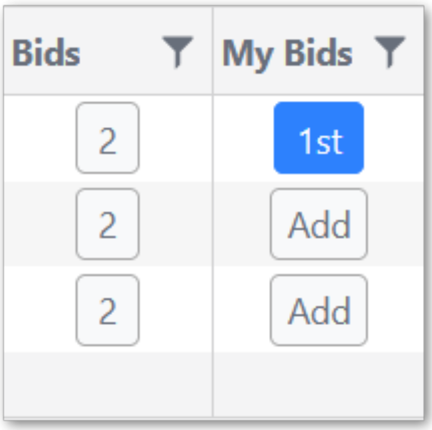
The refresh link:



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.

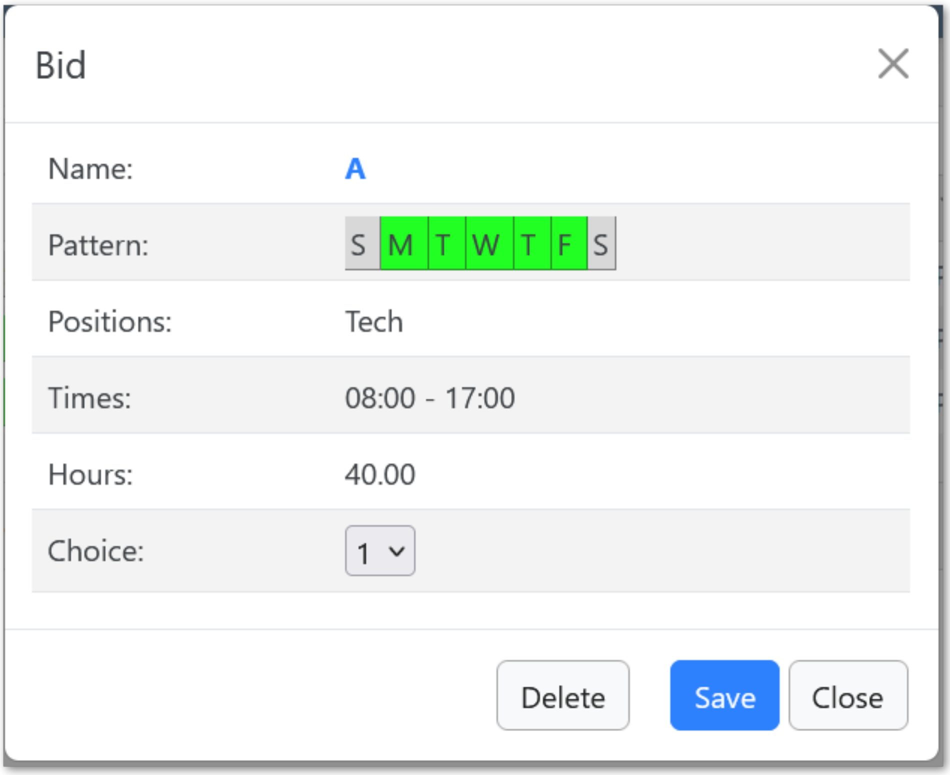


To change the choice number (priority):

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

To delete the choice:

1. Click **Delete**



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.

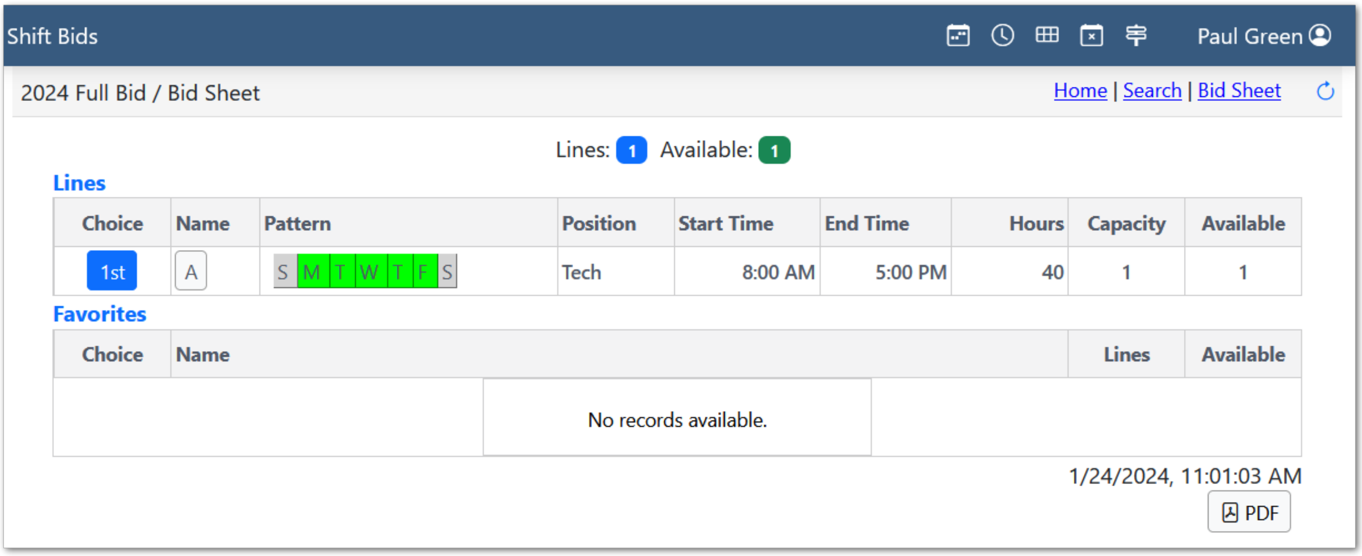
Favorites are optional, and are an advanced option. (More help pending...)

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.

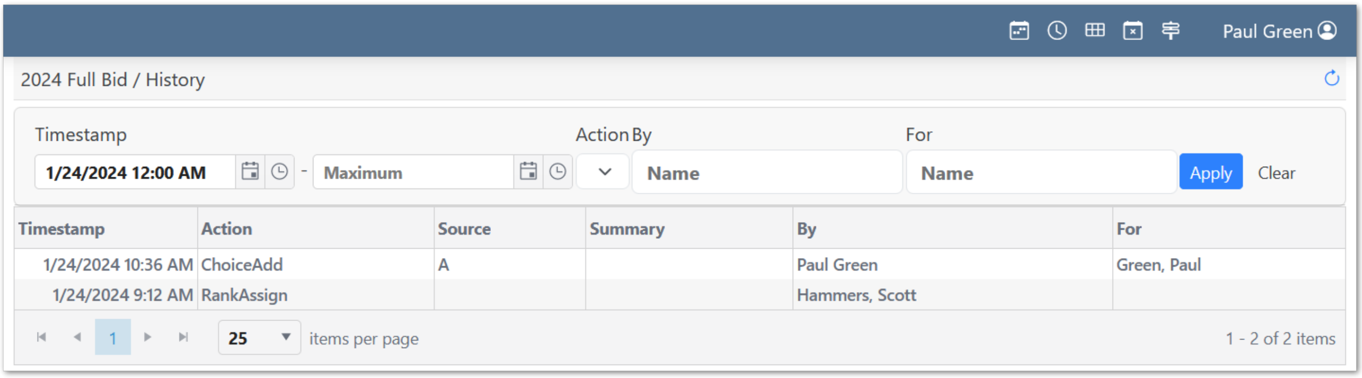
The summary at the top lists the total lines in choices (individual lines plus favorites) and the remaining lines available (after some assignments have been made).

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.



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.

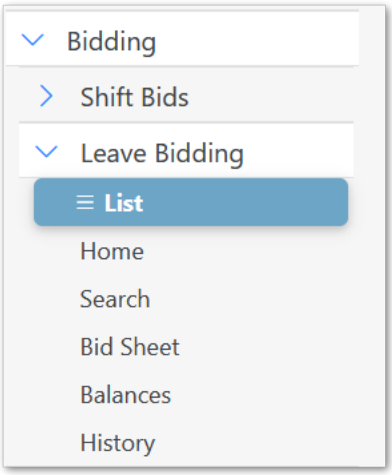


9.2 Leave Bidding

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.

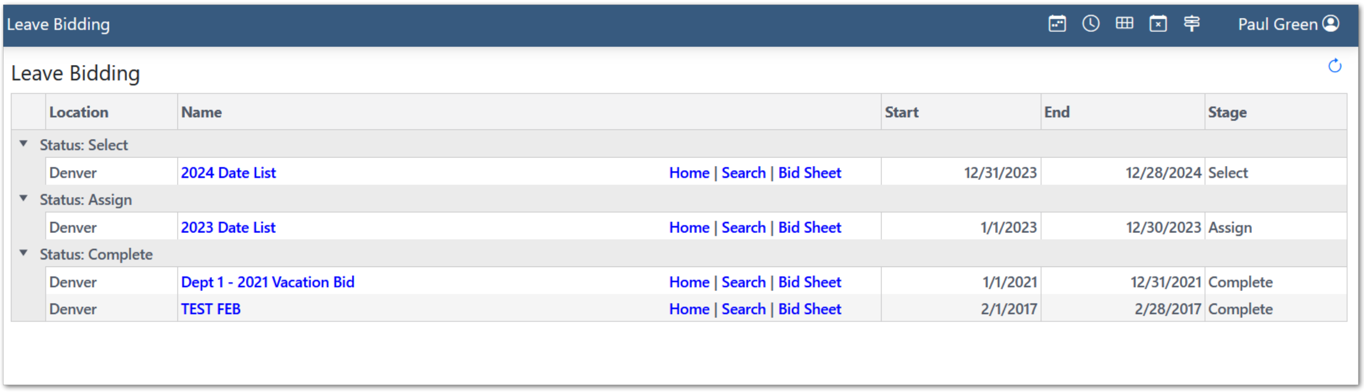
Employees may choose to enter "alternate" choices such that two choices are either/or in the assignment process. For example, having a first choice of the 2nd week in July, with the alternate choice being the 3rd week in July. The system could assign the first OR second, but not both.

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



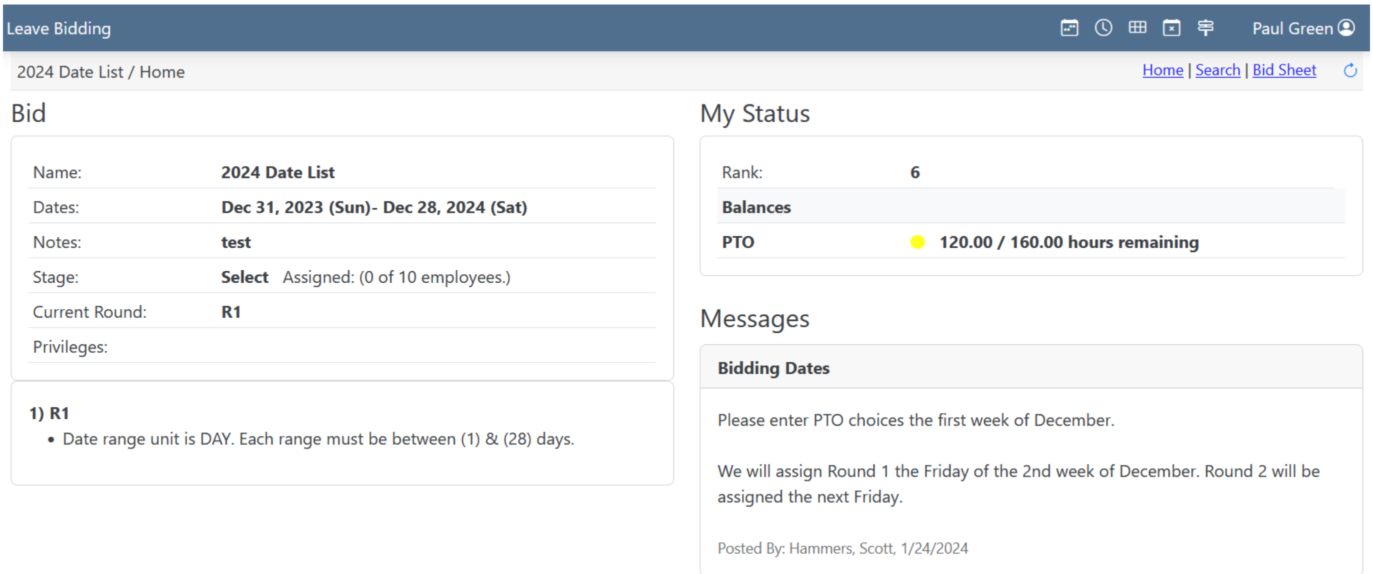
9.2.1 Selecting a Bid

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.



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.

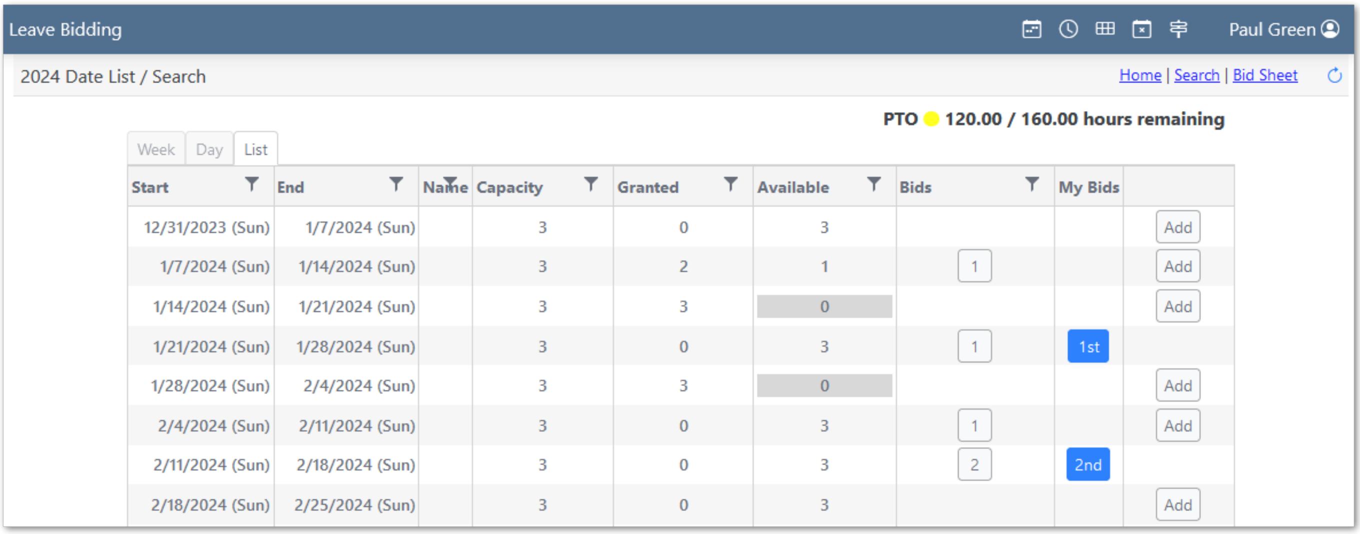


9.2.3 Viewing Dates (Search)

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.

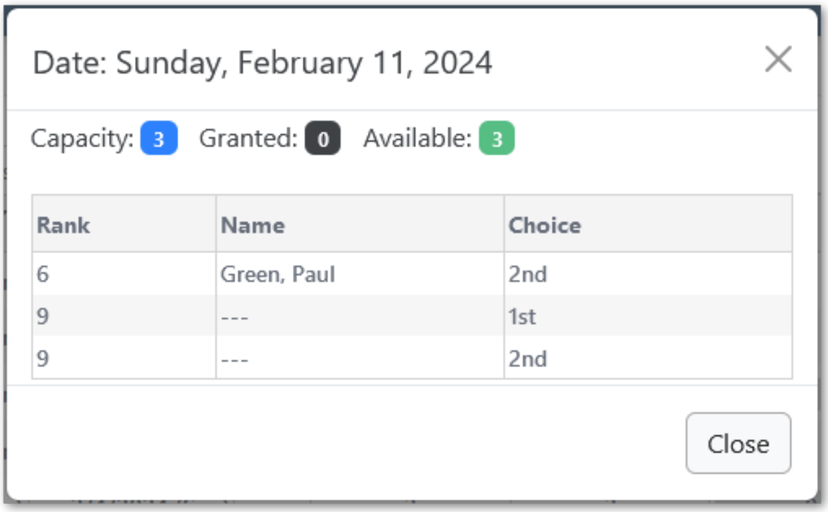
There are several links to click on for additional information. Each option is summarized below.



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.

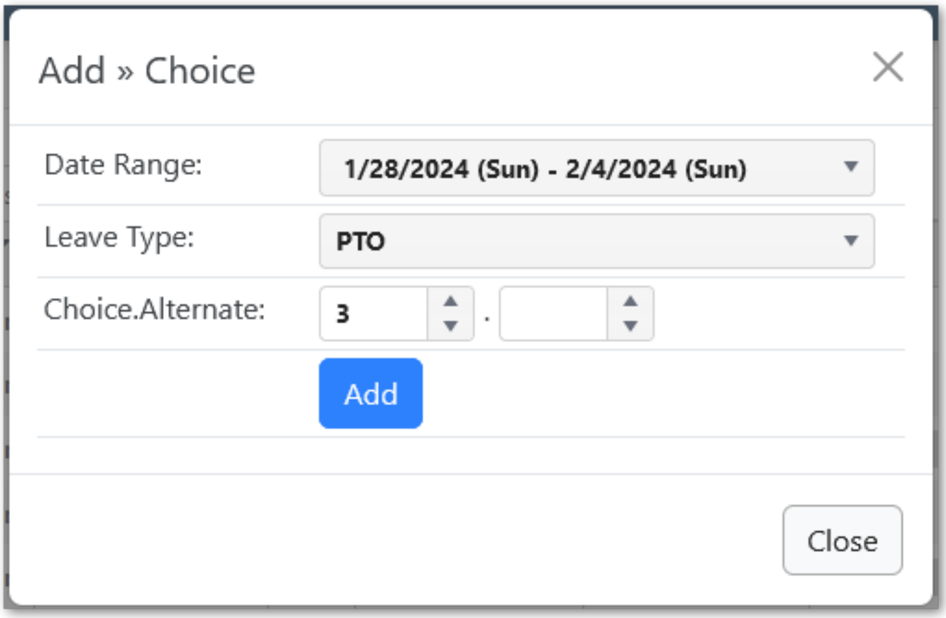


Rank	Name	Choice
6	Green, Paul	2nd
9	---	1st
9	---	2nd

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**

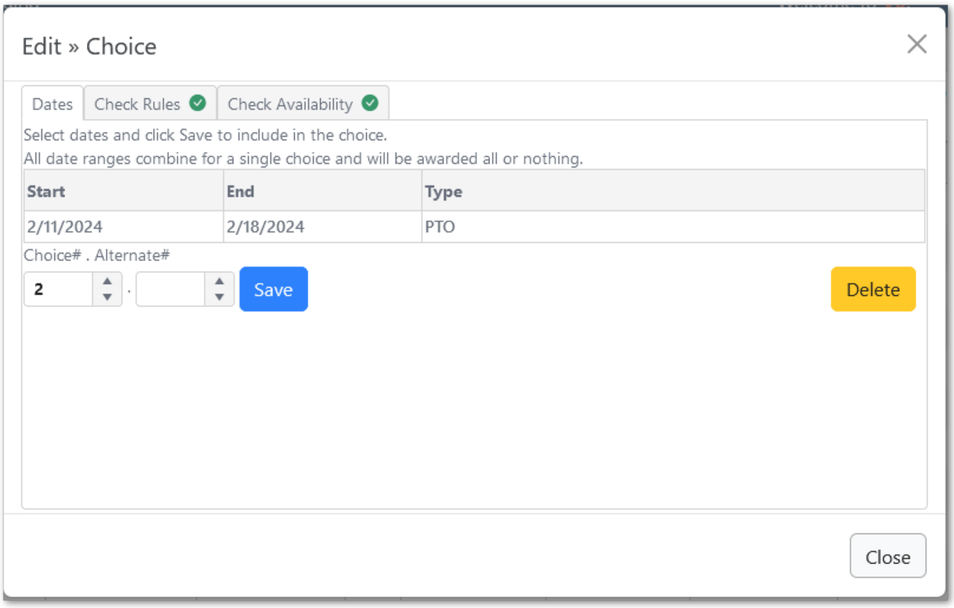


Edit Choice

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.

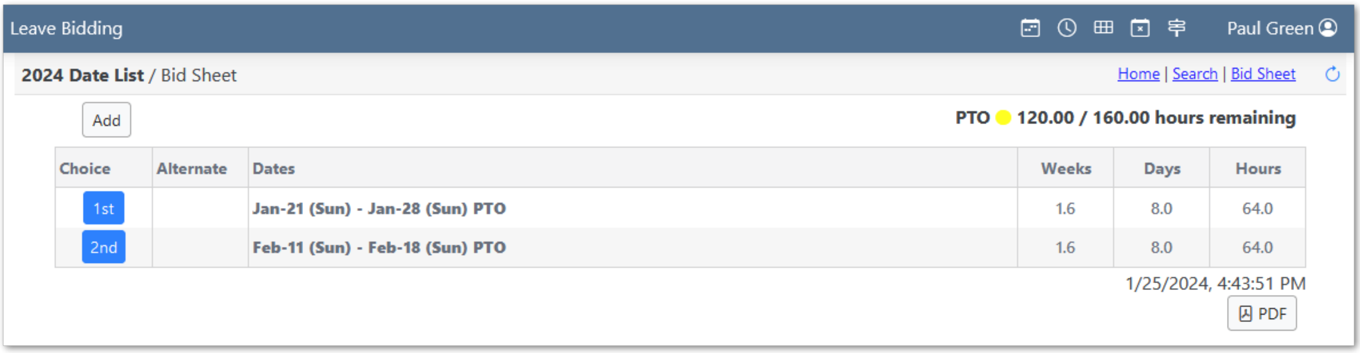


9.2.4 Bid Sheet

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

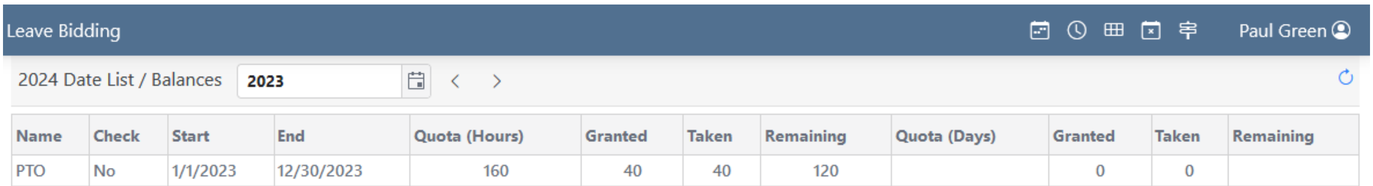
The summary at the top lists the leave type(s) and hours remaining of the total hours available.

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.



9.2.5 Balances

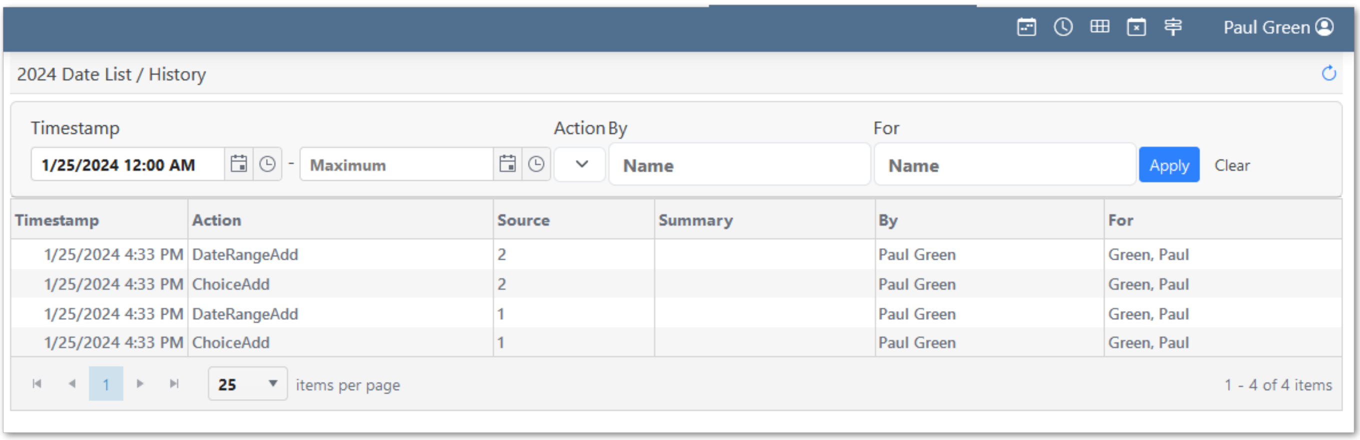
The balance page provides details about leave types and the total (**Quota**) available. The Granted, Taken (granted dates in past), and Remaining values are listed for both Hours and Days (if enabled).



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.



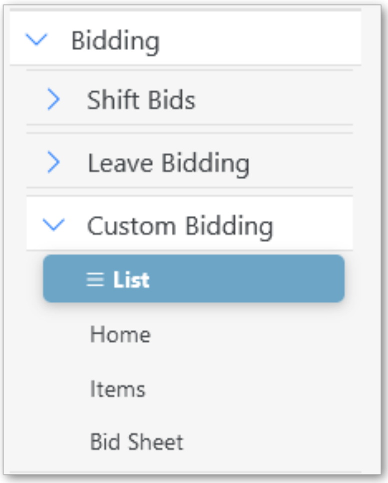
Timestamp	Action	Source	Summary	By	For
1/25/2024 4:33 PM	DateRangeAdd	2		Paul Green	Green, Paul
1/25/2024 4:33 PM	ChoiceAdd	2		Paul Green	Green, Paul
1/25/2024 4:33 PM	DateRangeAdd	1		Paul Green	Green, Paul
1/25/2024 4:33 PM	ChoiceAdd	1		Paul Green	Green, Paul

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.

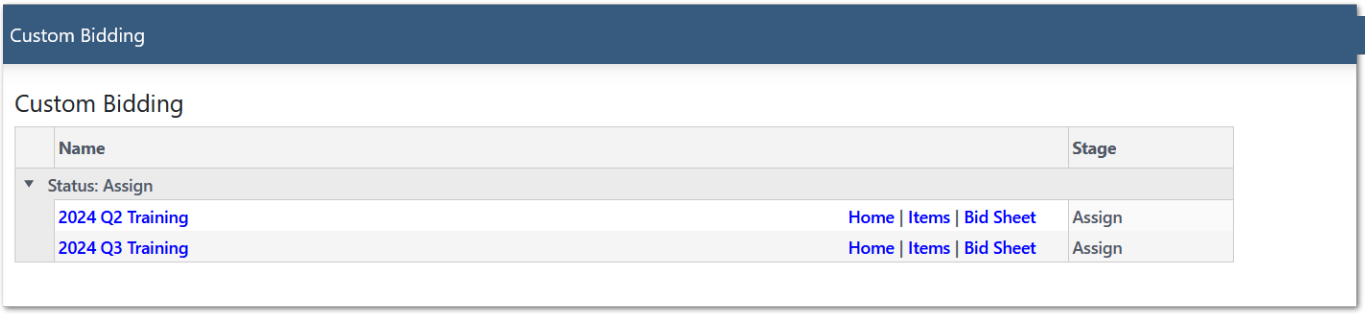
Employees can view items based upon a filter. The filter is set by the organization and helps to limit the scope of items to only those the employee is qualified to bid on.

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



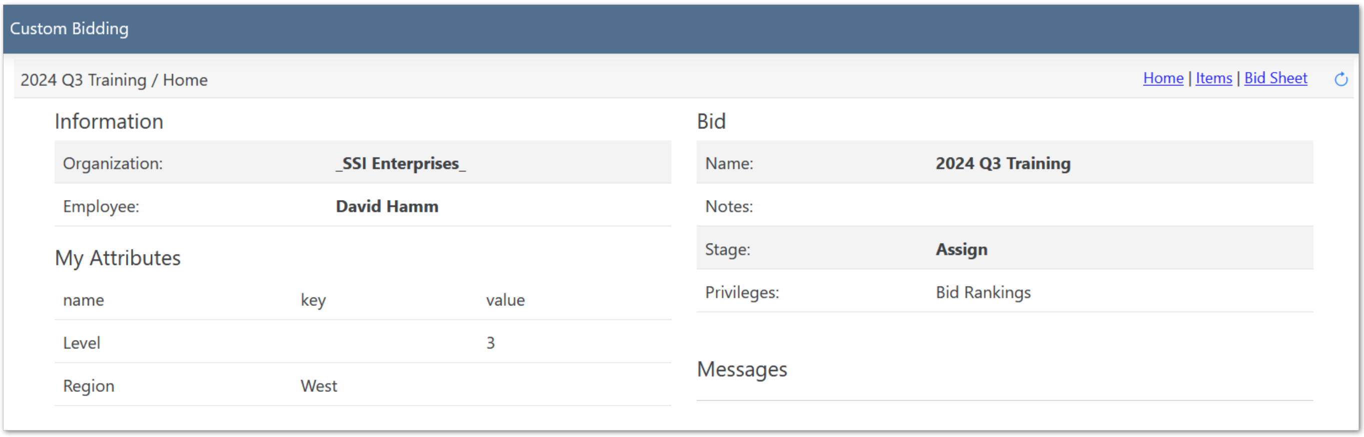
9.3.1 Selecting a Bid

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.



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.

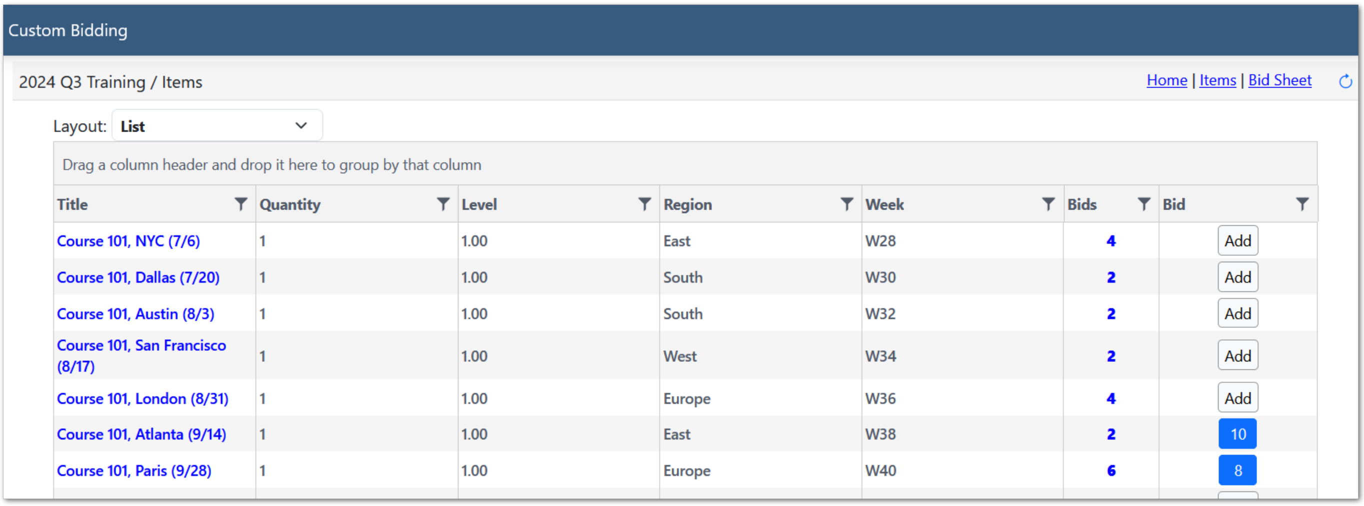


9.3.3 Viewing Items

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.

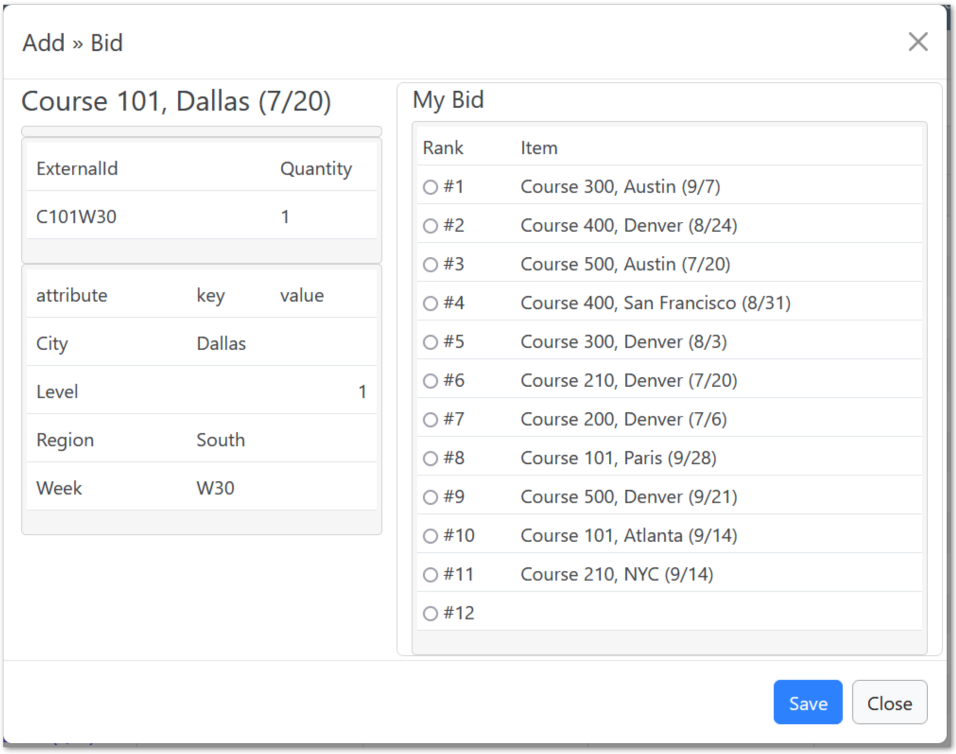
There are several links to click on for additional information. Each option is summarized below.



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**

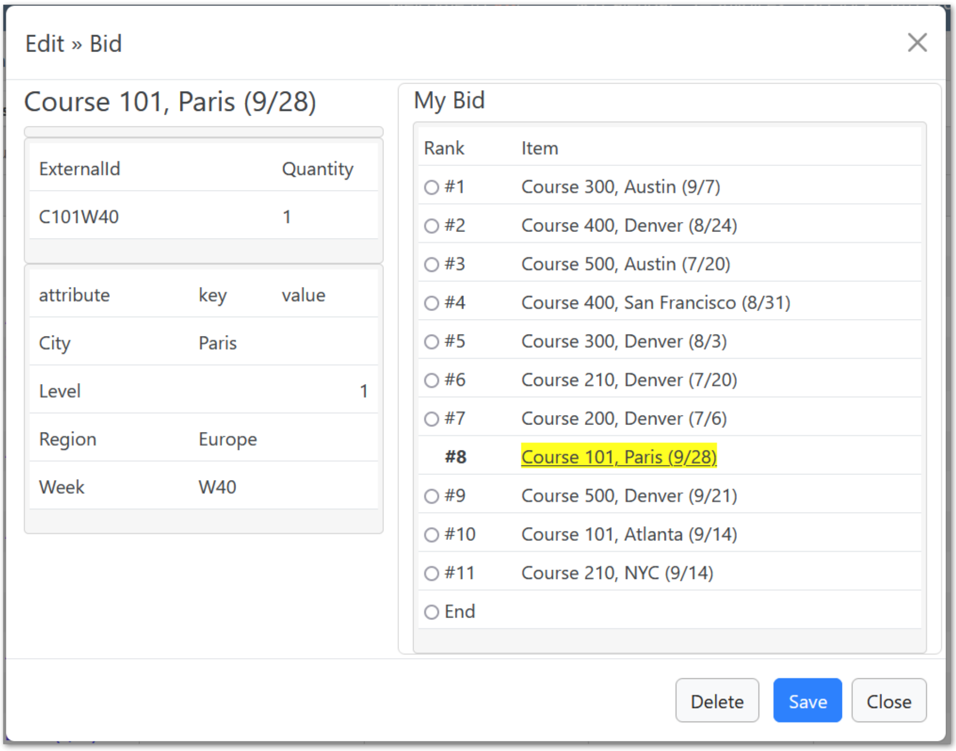


Edit Bid

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

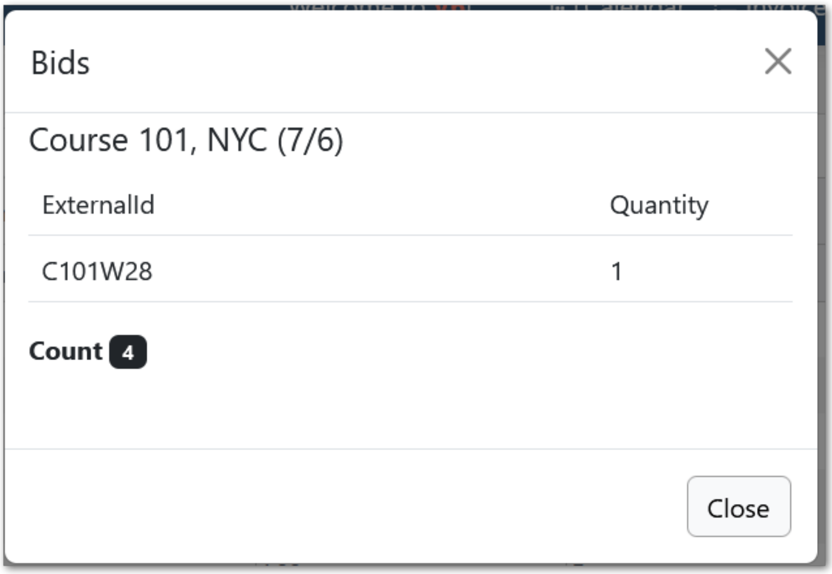
1. Click the **1st**, **2nd**, etc. button in the "My Bids"
2. (Optional) Select a new choice number (priority)
3. Click **Save**

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



Other Bids

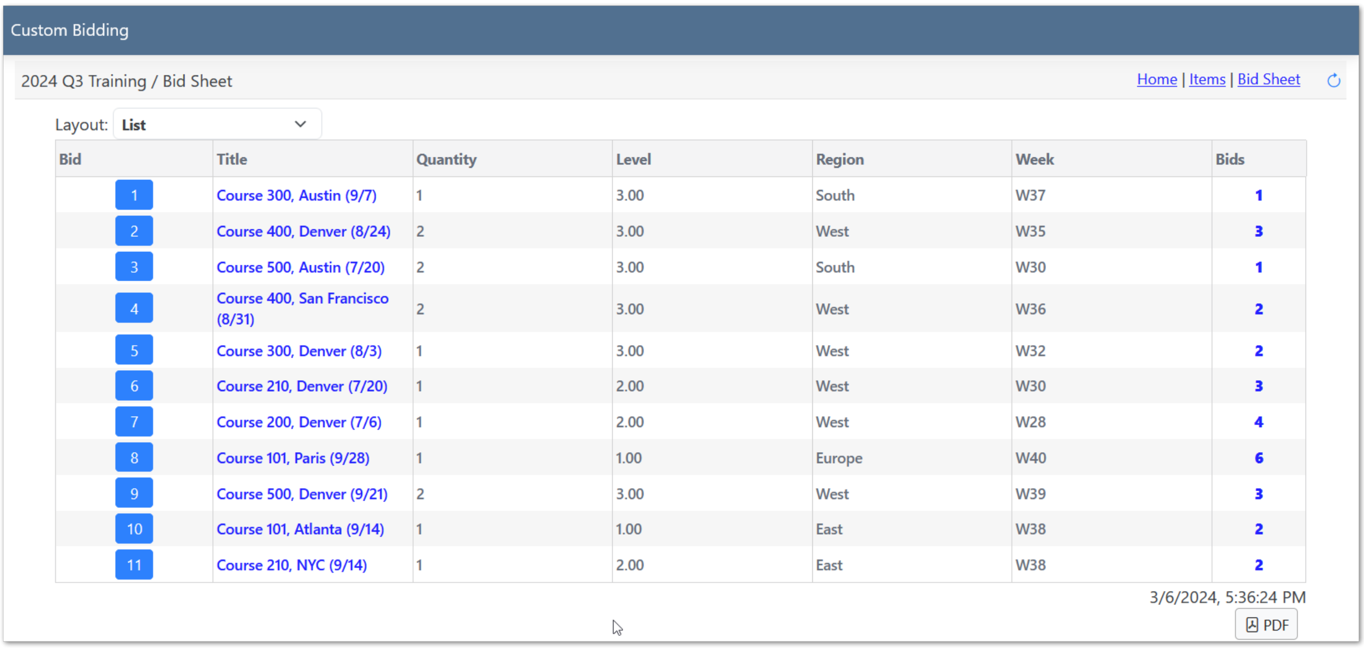
Click the button (with count) in the "Bids" column to see a list of other employee's bids. Depending on the settings, the names of other bidders may or may not be listed. If you have bid on those items, your name will appear in the list.



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.



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

10. Events

10.1 Events

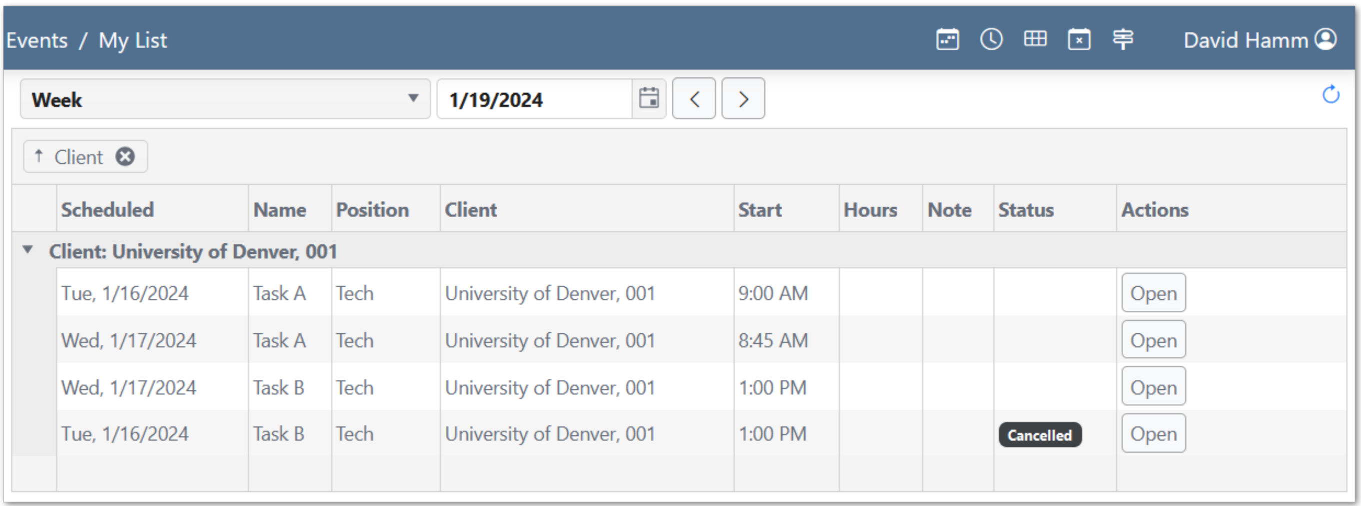
TeamWork provides an optional event (task) management system. Events are created independently of shifts. If an event is attached to a shift, it is consider the responsibility of the employee working the shift. In this way events can be requested and planned independently of scheduling, and the linking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

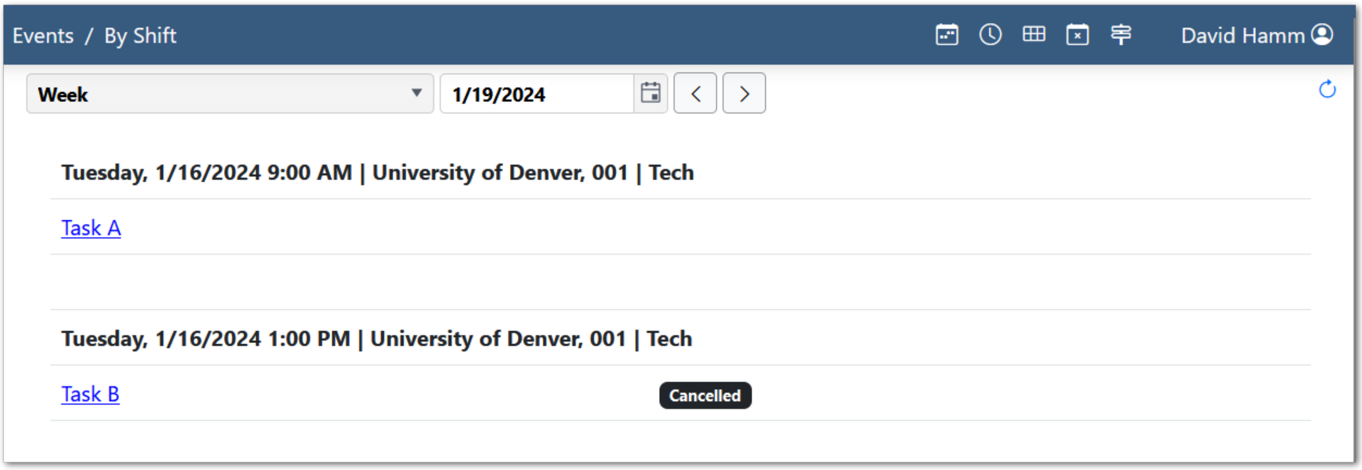
This page lists events in chronological order for a day, week, or month at a time (see Date Navigation). You can group the events by dragging a column header up to the group bar.

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



10.1.2 By Shift

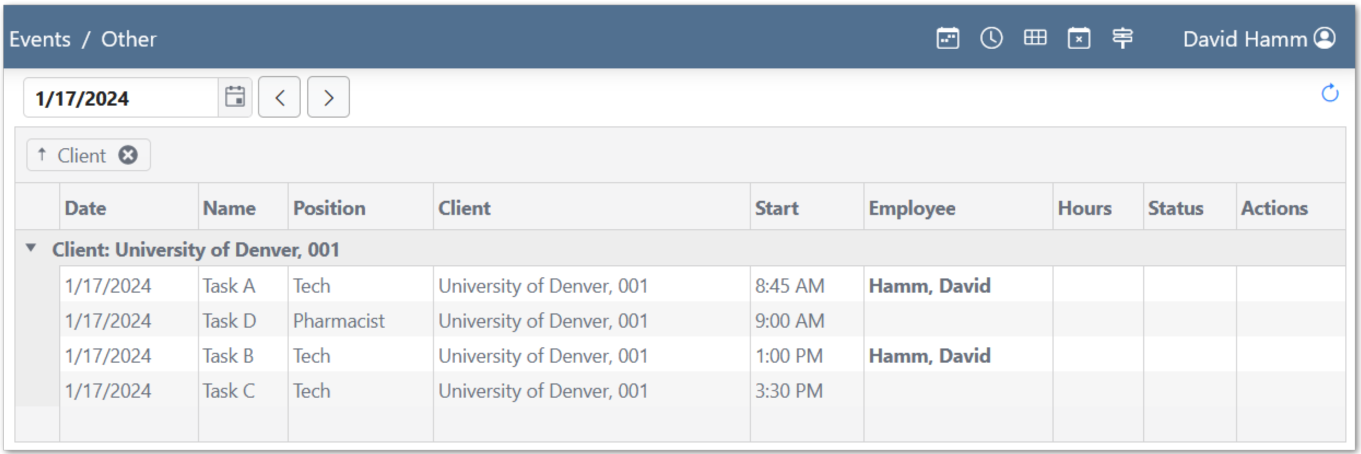
This page groups the events by assigned shifts. Click the name of the event to open the editor.


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.

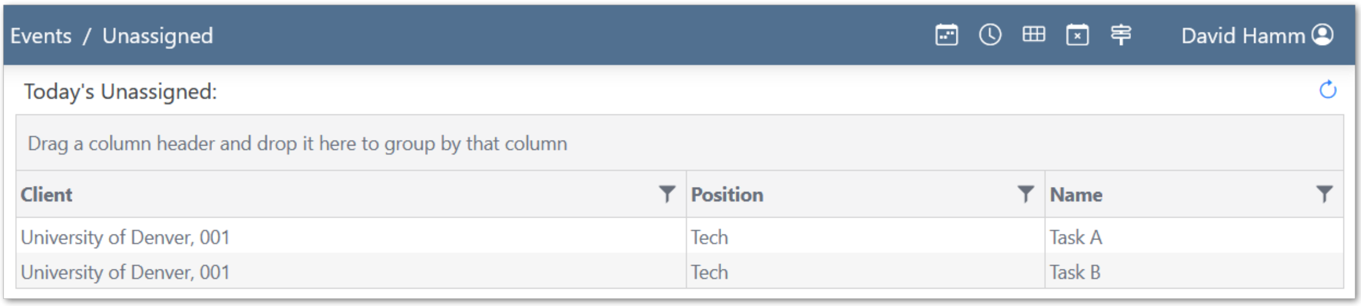
This view allows employees to understand the distribution of events/tasks. Under some configurations, a lead employee can re-assign events to better optimize the workload.



10.3 Unassigned Events

This page shows the unassigned events for today. The events may our 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.



11. Invoices

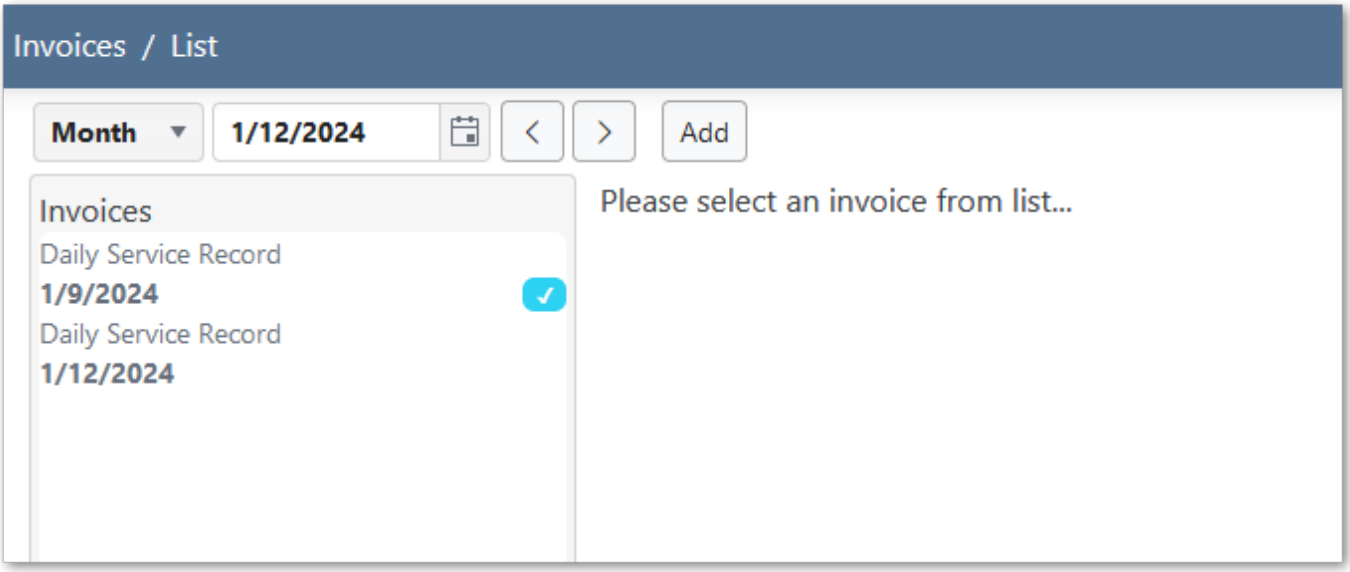
11.1 Using Invoices

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.

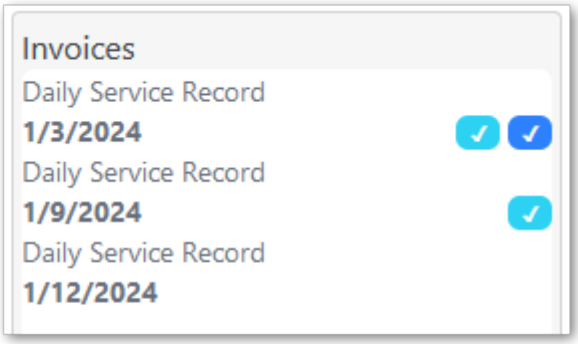
Each invoice is for a date or date range. Invoices are optionally linked to a Client record (per invoice setup). The invoice type, date(s), client, and approval status are shown in the list.



Click on an invoice in the list to open the invoice editor.

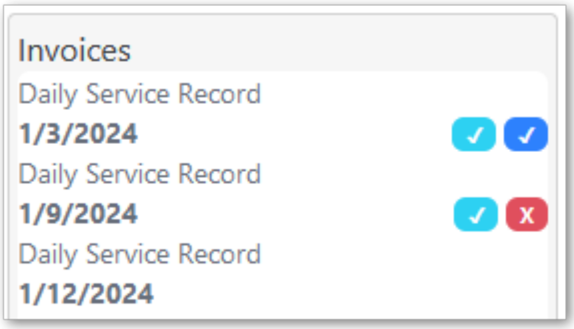
Approvals

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

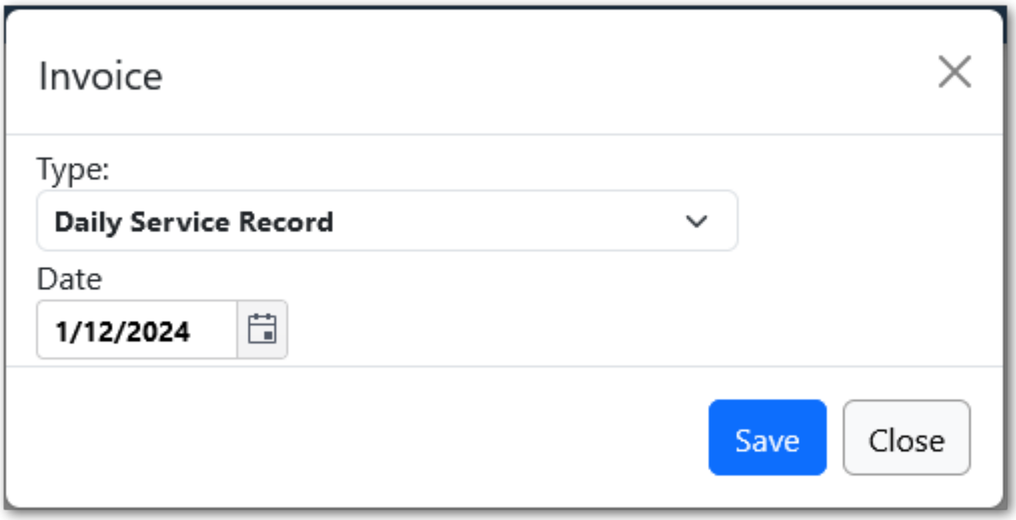
Invoices can also be "Manager Declined" if there are reasons for rejecting the invoice. The Declined status is indicated with a **red-x**. A "Declined" invoice must be corrected (changed and re-saved) prior to another Employee approval. In the example below, the second invoice has been "Manager Declined".



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:

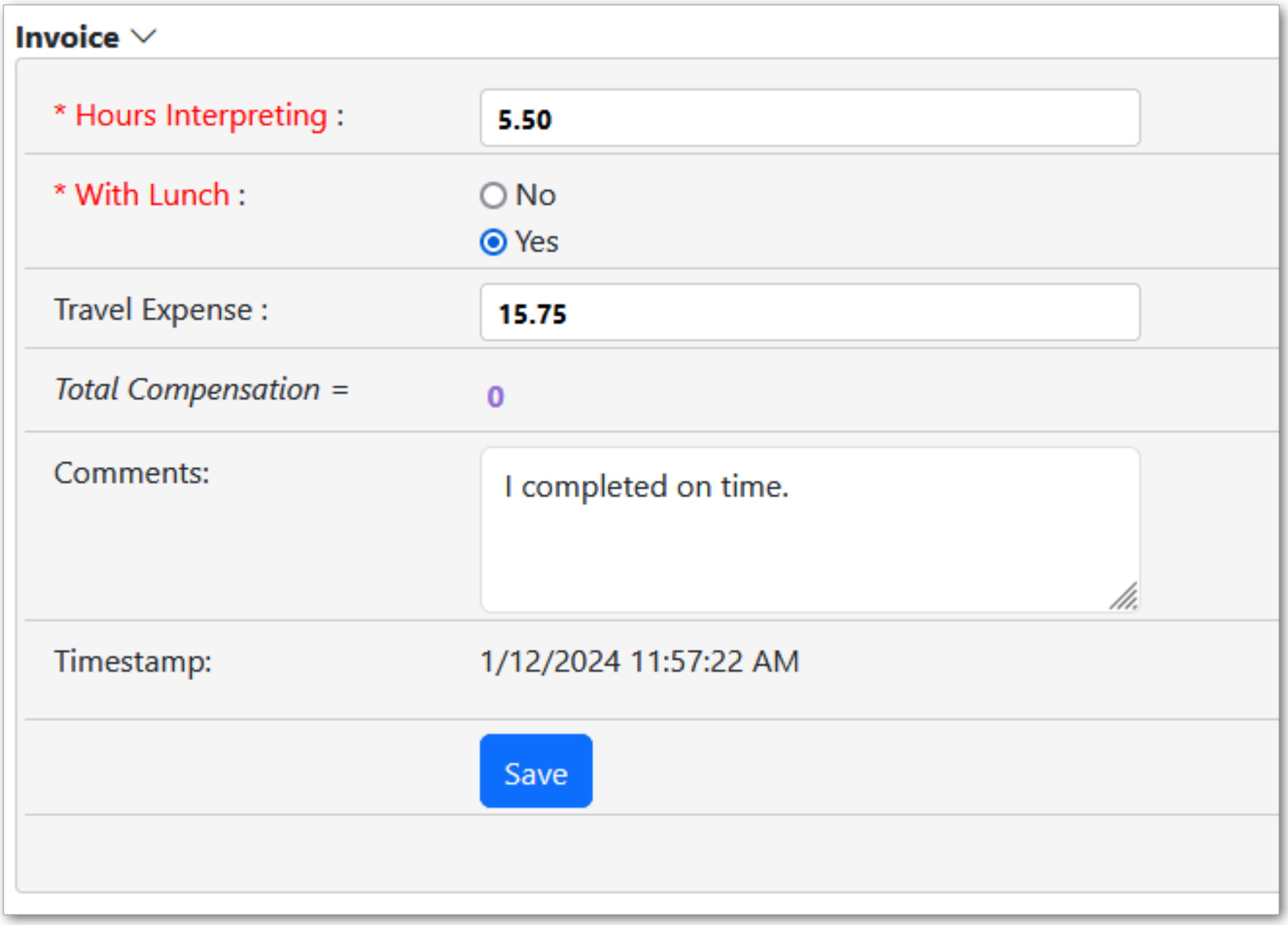
1. Select an **Invoice Type**
2. (Optional) Select a **Client** for the invoice
3. Enter a **Date** or date range
4. Click **Save**



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.



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

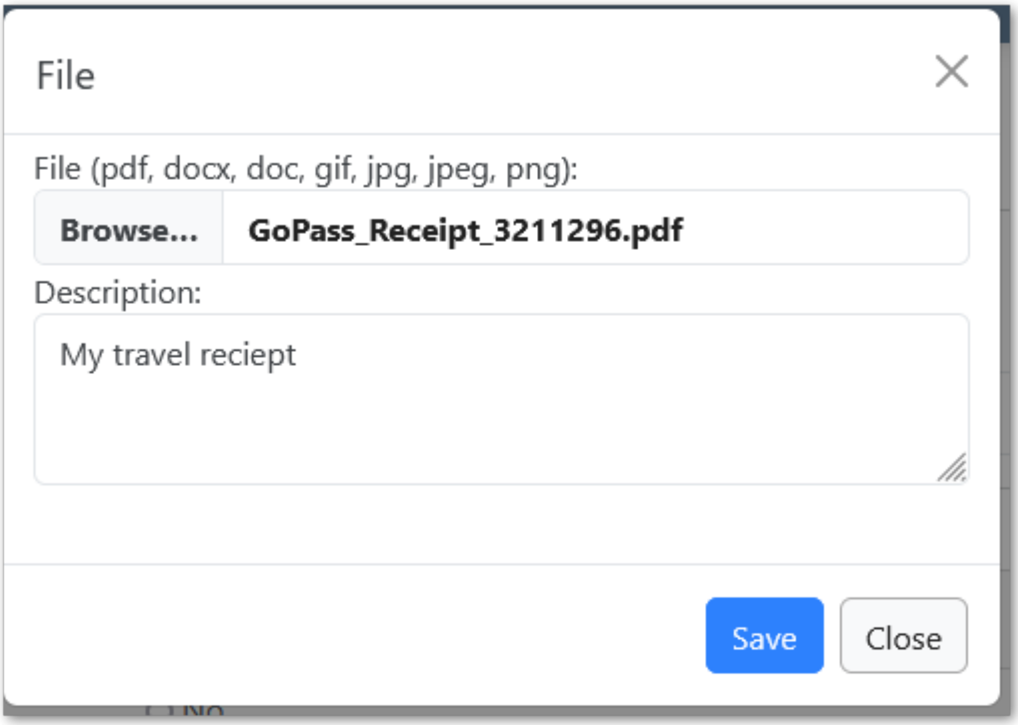
11.1.4 Files

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

Attach File

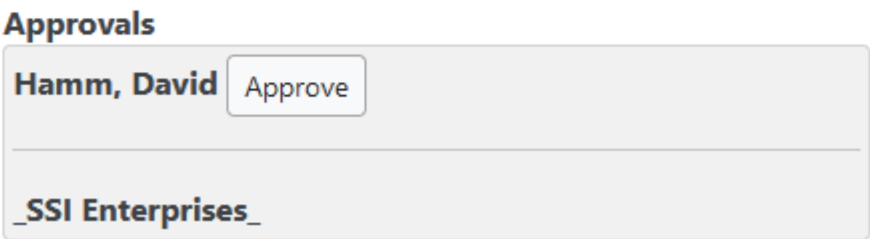
To attach a file,

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**



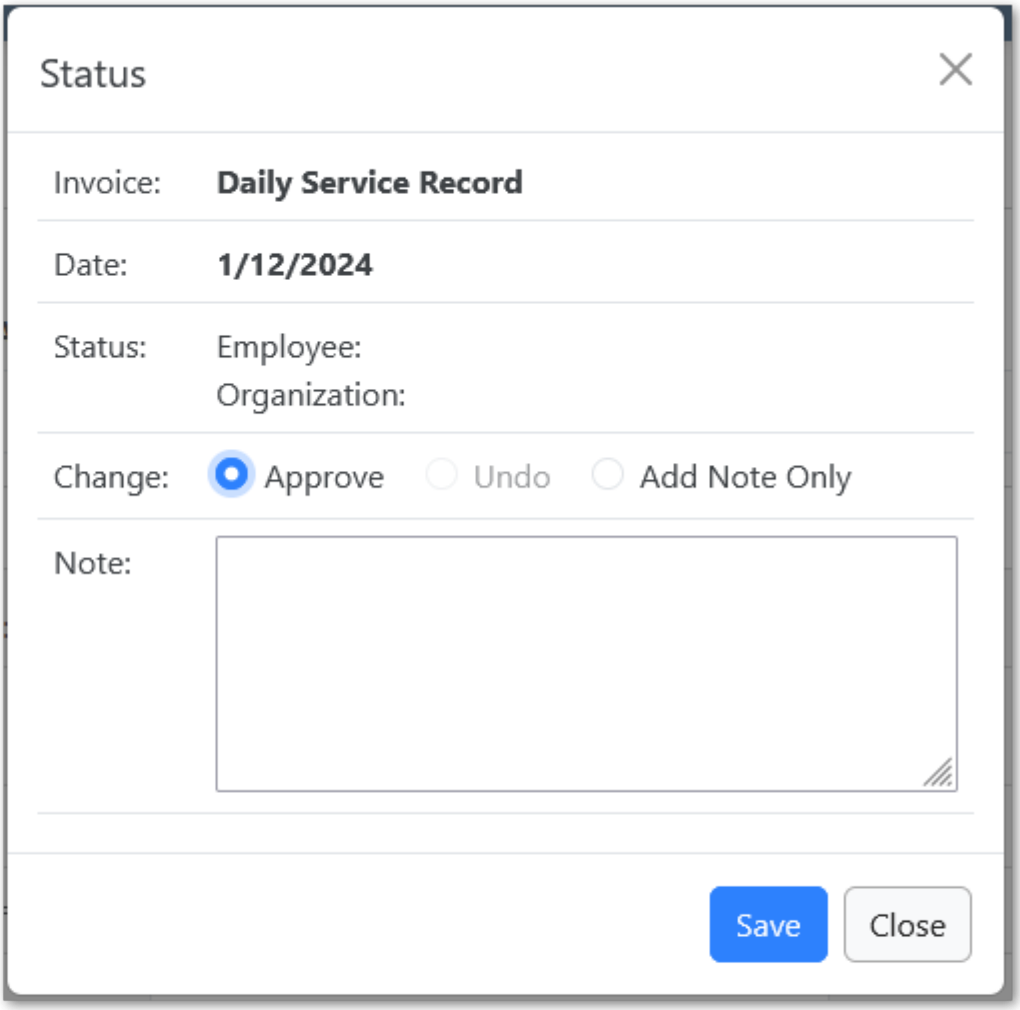
11.1.5 Approve Invoice

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.



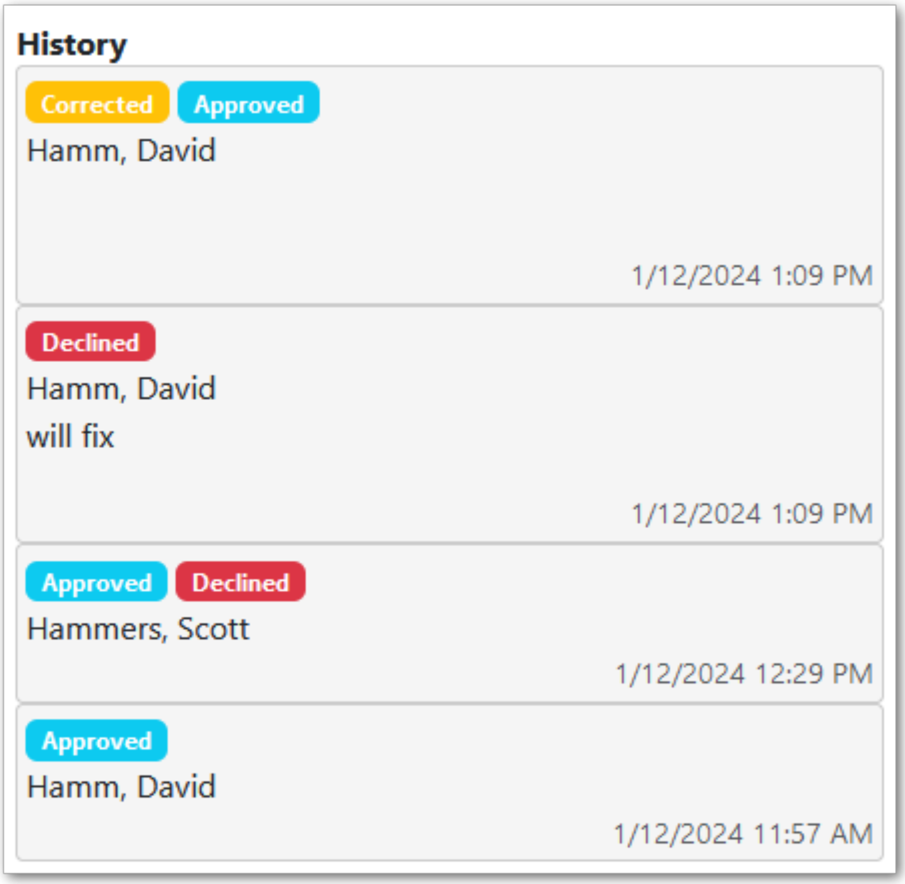
To submit an approval,

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**



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
Declined
Hamm, 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

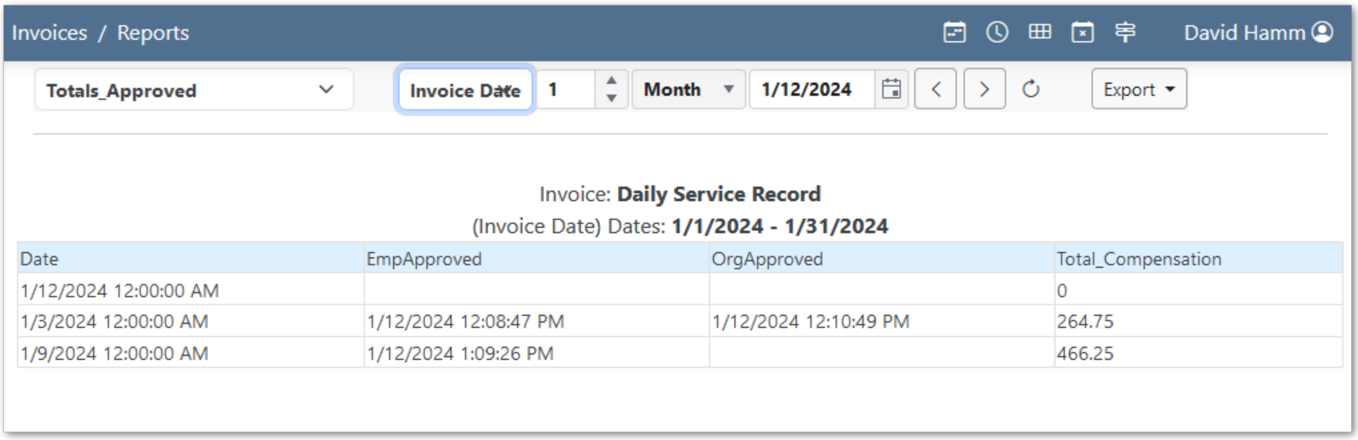
11.2 Invoice Reports

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,

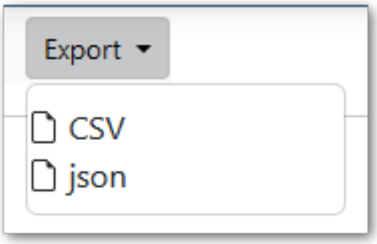
1. Select a report definition in the first dropdown
2. Select a date to query on (default: Invoice date)
3. Select date range (using the Date Navigator)
4. Move to past date ranges using the navigation arrows



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)


Export
CSV
json