

# TeamWork Employee Guide

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TeamWork Help Documentation

## Contents

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1. TeamWork Employee Guide	6
1.1 About TeamWork	6
1.2 Common Uses	6
1.3 Getting Started	6
1.3.1 Top Pages	6
1.3.2 Sections	7
2. Navigation	8
2.1 Main Menu	8
2.2 Quick Links	8
2.3 User Menu	9
2.4 Date Ranges	9
2.4.1 Example 1	10
2.4.2 Example 2	10
3. Home	11
4. Calendar	12
4.1 Calendar Settings	12
4.2 Calendar Pop-Up	12
5. Schedule	14
5.1 My Leave	14
5.1.1 Requesting Leave	14
5.1.2 Editing Requests	15
5.1.3 Leave Statuses	16
5.2 My Shifts	17
5.2.1 Swapping Shifts	18
5.2.2 Splitting Shifts	18
5.2.3 Approving Shifts	19
5.2.4 Open a Shift	19
5.3 Totals	21
5.3.1 Filter Example	21
5.4 Swapboard	22
5.4.1 Viewing Counts	22
5.4.2 My Shifts	23
5.4.3 Available Shifts	23
5.4.4 Claiming a Shift	24
5.4.5 Split/Claim a Shift	25

6. Time	27
6.1 Time Clock	27
6.1.1 Opening the Clock	27
6.1.2 Clocking <b>On</b>	28
6.1.3 Clocking <b>Off</b>	28
6.1.4 Transferring	29
6.1.5 Viewing Today's Clockings	30
6.1.6 Viewing Geo-Location	30
6.2 Time Card	32
6.2.1 Opening the Card	32
6.2.2 Navigating Weeks	33
6.2.3 Adding Time	33
6.2.4 Editing Time	35
6.3 Timesheet	36
6.3.1 Approving Time	36
6.3.2 Unapproving Time	37
6.3.3 Adding Time	38
6.3.4 Editing Time	39
6.4 Attendance	41
6.4.1 Issues	41
7. Organization	42
7.1 Organization Shifts	42
7.2 Organization Leave	43
7.3 Organization Coworkers	44
7.4 Organization Messages	45
7.4.1 Adding Messages	45
7.4.2 Sharing	46
7.4.3 Broadcasting	47
7.5 Organization Events	49
7.5.1 Adding Events	49
7.5.2 Sharing	50
7.5.3 Broadcasting	51
7.6 Organization Feedback	53
7.6.1 Viewing Responses	53
7.6.2 Adding a Response	53
8. My Setup	55
8.1 Profile	55
8.1.1 Updating Password	55

8.1.2	Updating Contact Information	56
8.1.3	Viewing and Editing Attributes	56
8.1.4	Deployments	57
8.2	Preferences	58
8.2.1	Site Settings	59
8.2.2	Calendar Settings	59
8.2.3	Scheduling Settings	60
8.2.4	Public Pages	61
8.3	Notifications	62
8.3.1	Adding a Profile	62
8.3.2	Notification Options	63
8.4	Availability	66
8.4.1	Availability Calendar	66
8.4.2	Availability Templates	67
8.4.3	Availability Overrides	69
8.4.4	Volunteer Lists	70
8.5	Credentials	72
8.5.1	Viewing Credentials	72
8.5.2	Viewing Goals	73
9.	Bidding	74
9.1	Shift Bidding	74
9.1.1	Selecting a Bid	74
9.1.2	Home Page	75
9.1.3	Viewing Lines (Search)	75
9.1.4	Bid Sheet	80
9.1.5	History	81
9.2	Leave Bidding	82
9.2.1	Selecting a Bid	82
9.2.2	Home Page	83
9.2.3	Viewing Dates (Search)	83
9.2.4	Bid Sheet	86
9.2.5	Balances	87
9.2.6	History	87
9.3	Custom Bidding	88
9.3.1	Selecting a Bid	88
9.3.2	Home Page	89
9.3.3	Viewing Items	89
9.3.4	Bid Sheet	92

10. Events	93
10.1 Events	93
10.1.1 My Events	93
10.1.2 By Shift	93
10.2 Other Events	95
10.3 Unassigned Events	96
11. Invoices	97
11.1 Using Invoices	97
11.1.1 List Invoices	97
11.1.2 Add Invoice	98
11.1.3 Edit Invoice	99
11.1.4 Files	100
11.1.5 Approve Invoice	101
11.2 Invoice Reports	104
11.2.1 Viewing Reports	104
11.2.2 Exporting Data	104

# 1. TeamWork Employee Guide

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## 1.1 About TeamWork

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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

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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

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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

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- [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

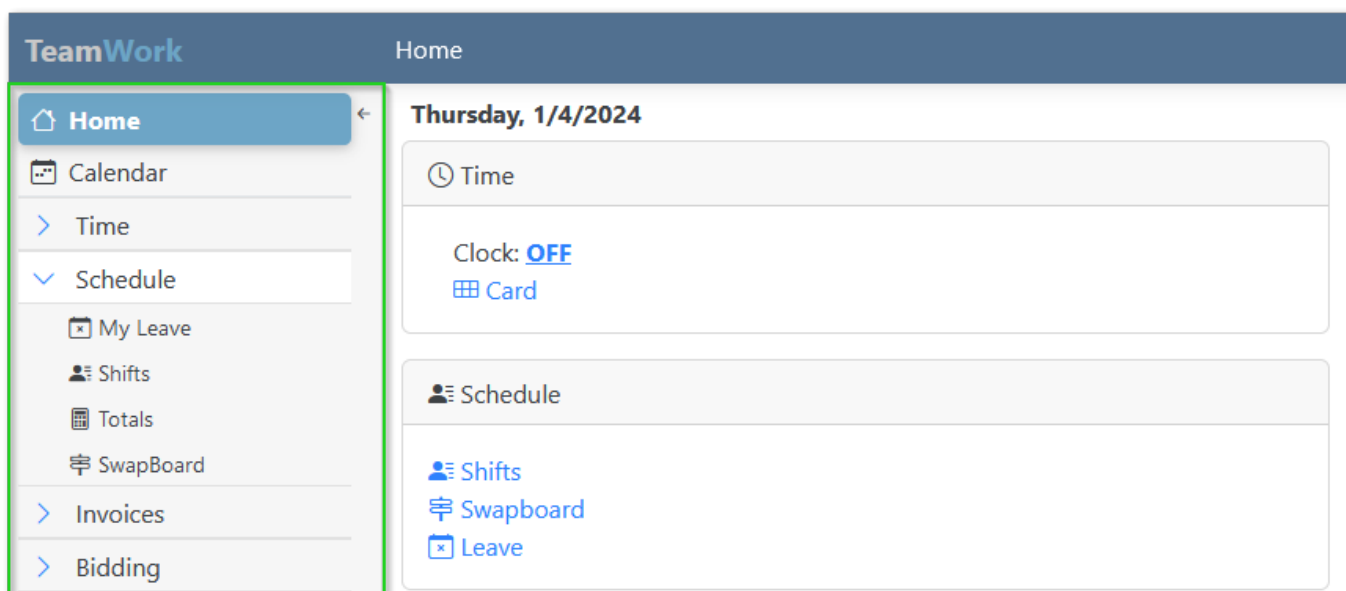
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### 2.1 Main Menu

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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.

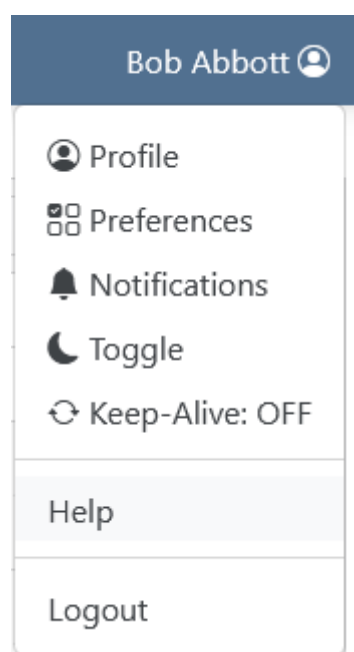




## 2.3 User Menu

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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

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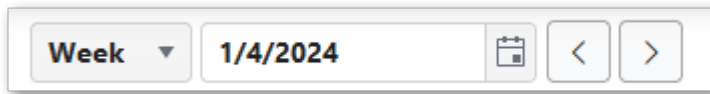
Many pages present date-based data. These pages will have "date navigation" capabilities to quickly change the view based on desired time period.

The common options for date navigation are:

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

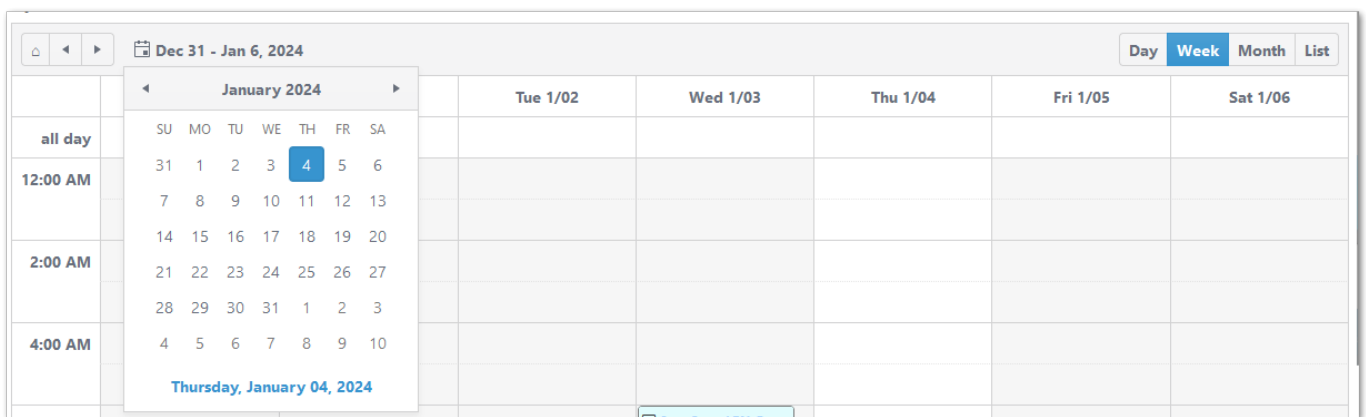
## 2.4.1 Example 1

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.

Home

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

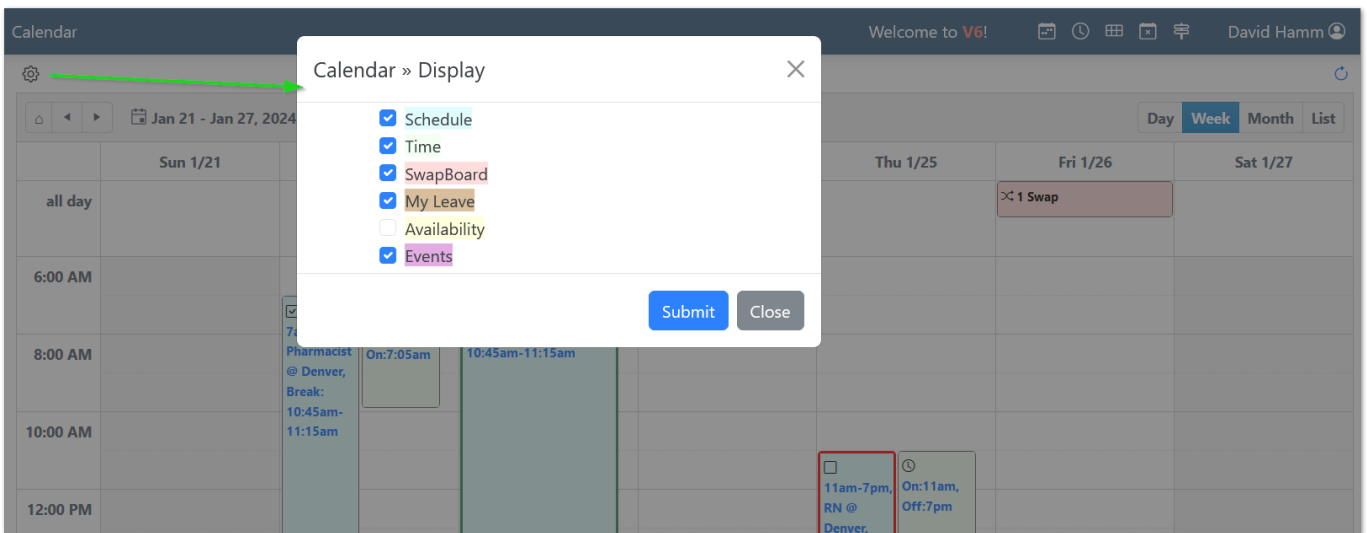
Name: Hamm, David  
Email: scott@schedulesource.com

# 4. Calendar

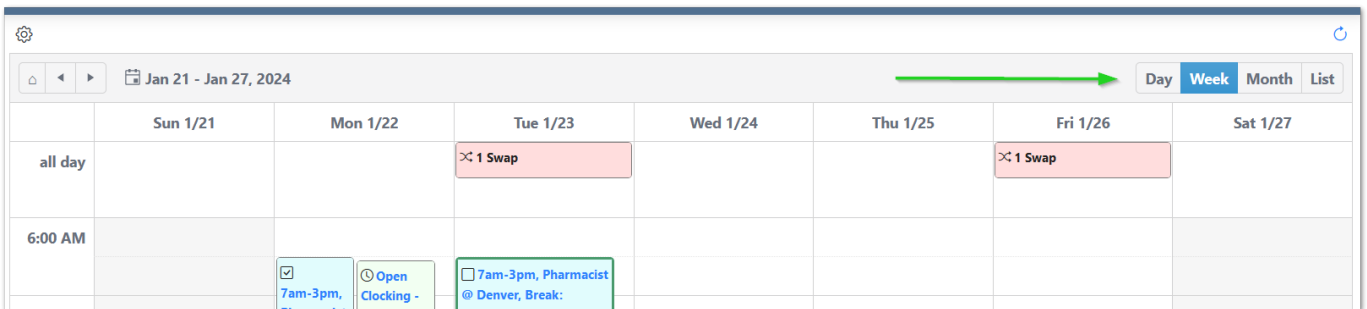
The Calendar displays your schedule for each of the stations and locations you are assigned to. Set display options (what will be visible), view your schedule and your availability.

## 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.

**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		<input type="button" value="Open"/>
REQUESTED	Apr 07 (Sun)	Apr 13 (Sat)	April	7	56.00	1:00 AM - 1:00 AM	PTO		<input type="button" value="Open"/>

**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.

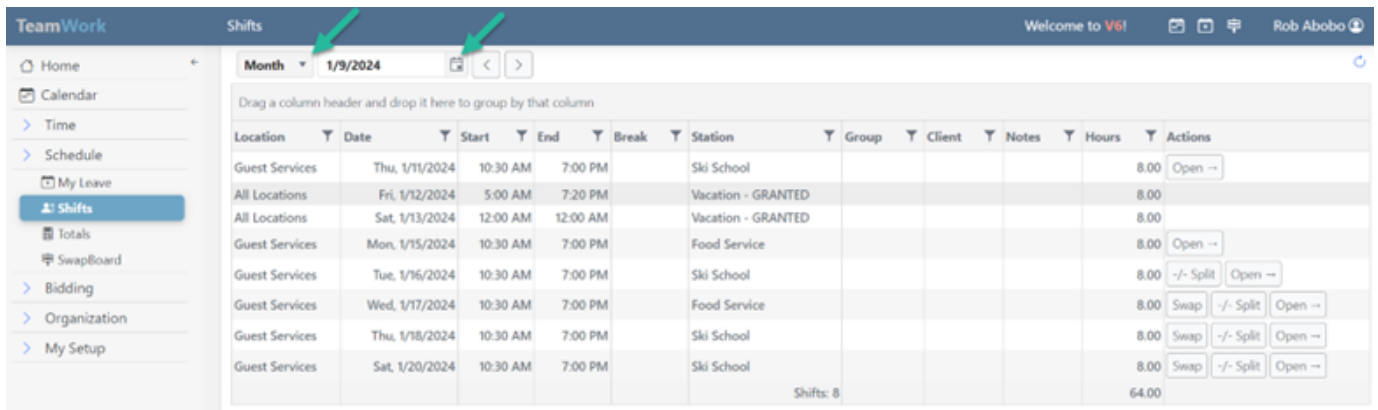
In some configurations, it's possible to have certain leave types auto-approve upon request. In addition, there may be additional constraints placed on leave availability that could impact auto-approve. Otherwise, most requests are reviewed and approved or denied by managers.



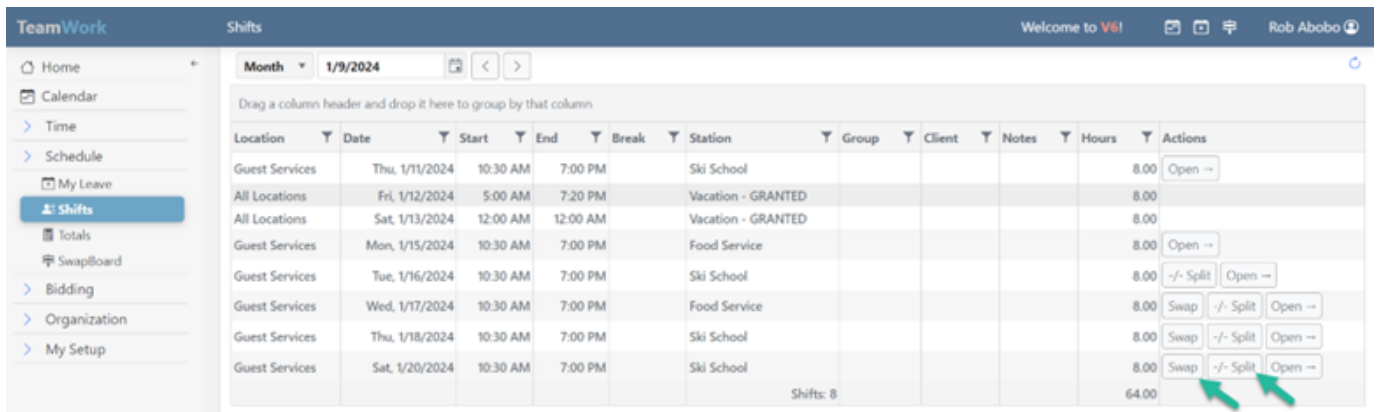
## 5.2 My Shifts

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.



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.

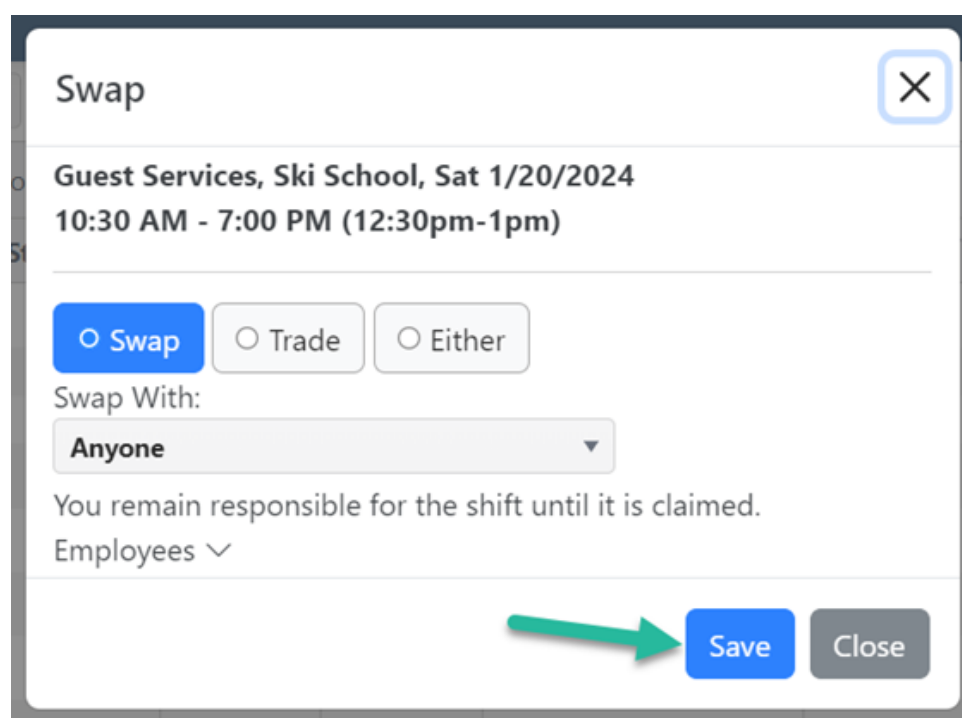


## 5.2.1 Swapping Shifts

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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**



Swap

Guest Services, Ski School, Sat 1/20/2024  
10:30 AM - 7:00 PM (12:30pm-1pm)

Swap  Trade  Either

Swap With:  
Anyone

You remain responsible for the shift until it is claimed.

Employees

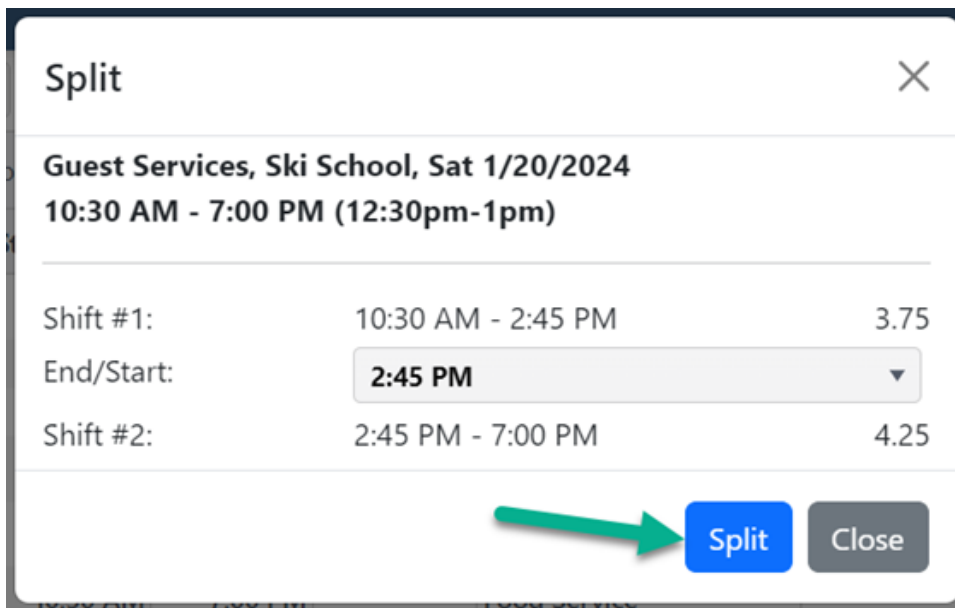
Save Close

## 5.2.2 Splitting Shifts

---

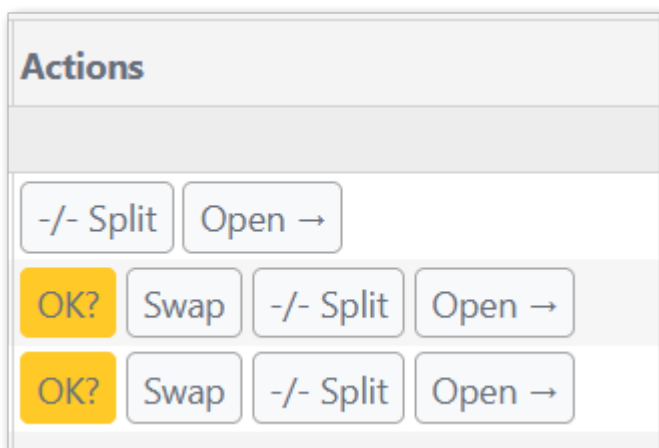
If you wish to give up a portion of a shift and retain the rest, the shift must be split. Splitting a shift creates one or two new shifts (depending on the split times). Any of the shifts can then be posted to swap independently of the others.

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**



### 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

[Back](#)

### Shift

### Actions

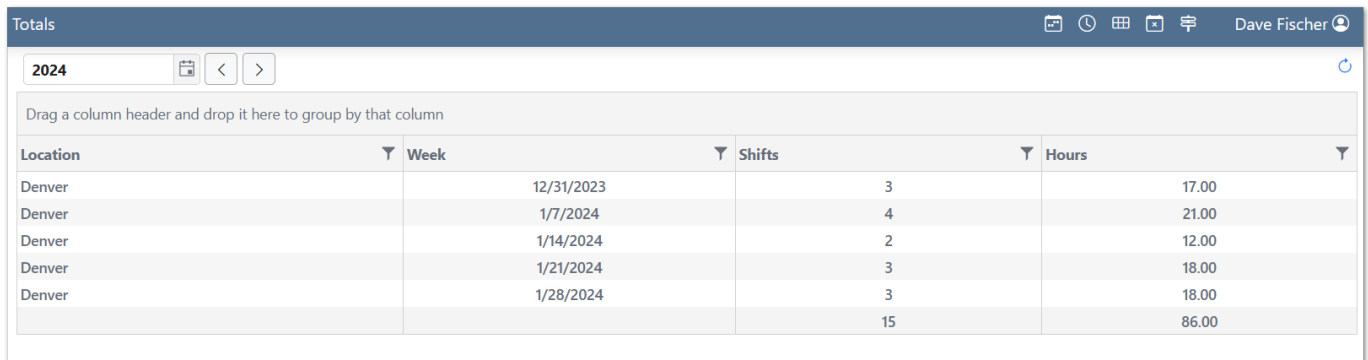
Date:	Thursday, 1/25/2024	
Times:	7:00 AM - 3:00 PM	8 Hours
Break:	-	
Location:	Denver	
Position:	LPN	
Client:		

[OK?](#) [Remove](#)

[Swap](#) [-/- Split](#)

## 5.3 Totals

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

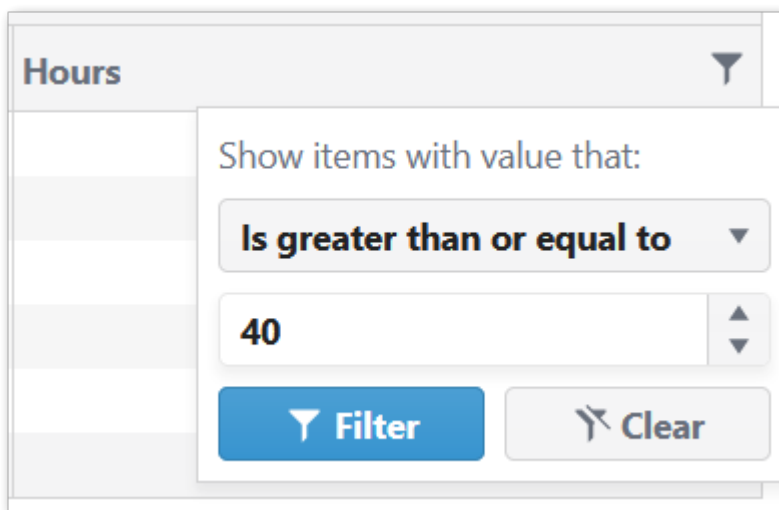


The screenshot shows the 'Totals' page interface. At the top, there is a header with the year '2024' and navigation arrows. Below the header is a table with the following data:

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.



The screenshot shows a filter dialog for the 'Hours' column. The dialog has a title 'Hours' with a dropdown arrow. Below the title, it says 'Show items with value that:'. There is a dropdown menu with the selected option 'Is greater than or equal to'. Below that is a text input field containing the number '40'. At the bottom of the dialog, there are two buttons: a blue 'Filter' button and a grey 'Clear' button.

## 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

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

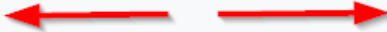
Split: 8:15 AM ▾ 10:30 AM ▾

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** Claim

**6:00 AM - 8:15 AM** 

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*.

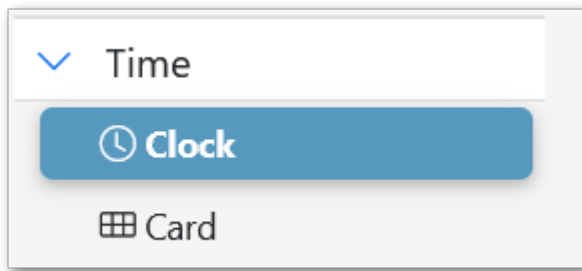
The time clock will ask for your geo-location, so that it can be logged. In some cases, the system may prevent clocking on or off if not within a pre-defined region for the location (or client).

The screenshot displays the 'Clock' interface with the following components:

- Header:** 'Clock' and 'Thursday, March 07, 2024 4:40:24 PM'.
- Status:** Shows 'On' with a clock icon. Below it are three small status indicators: '@ 4:40:17 PM', '0:00:07', and '0.00'. A yellow 'Clock Off' button is present.
- Today:** A timeline showing '4 AM', '12 PM', and '8 PM'. An 'Entries:' section shows a blue bar for '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:** Shows '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.

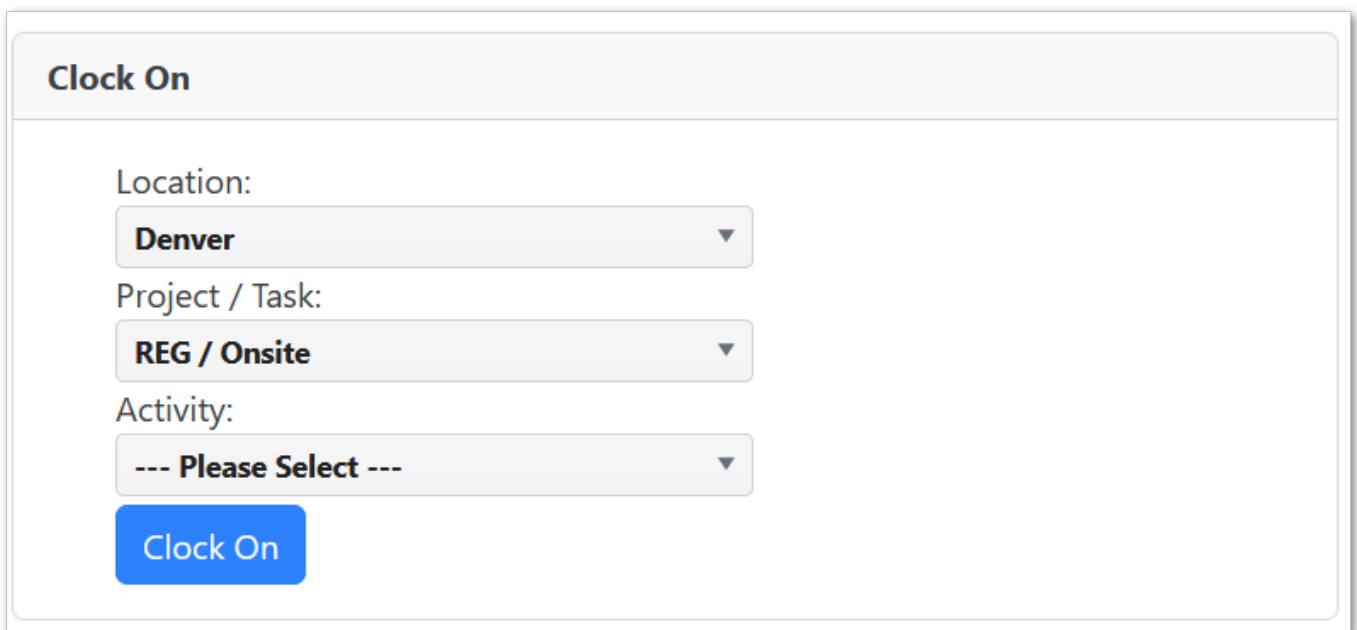


## 6.1.2 Clocking On

---

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 "Clock On" at the top. Below the title, there are three dropdown menus: "Location:" with "Denver" selected, "Project / Task:" with "REG / Onsite" selected, and "Activity:" with "--- Please Select ---" selected. At the bottom of the form is a blue "Clock On" button.

## 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

**Clock Off**

## 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:

Project / Task:

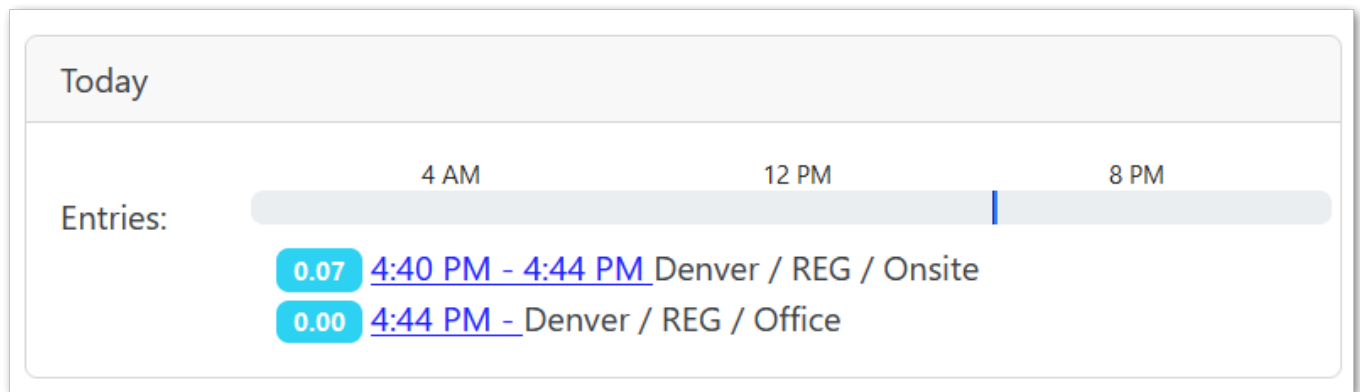
Activity:

**Transfer**

## 6.1.5 Viewing Today's Clockings

---

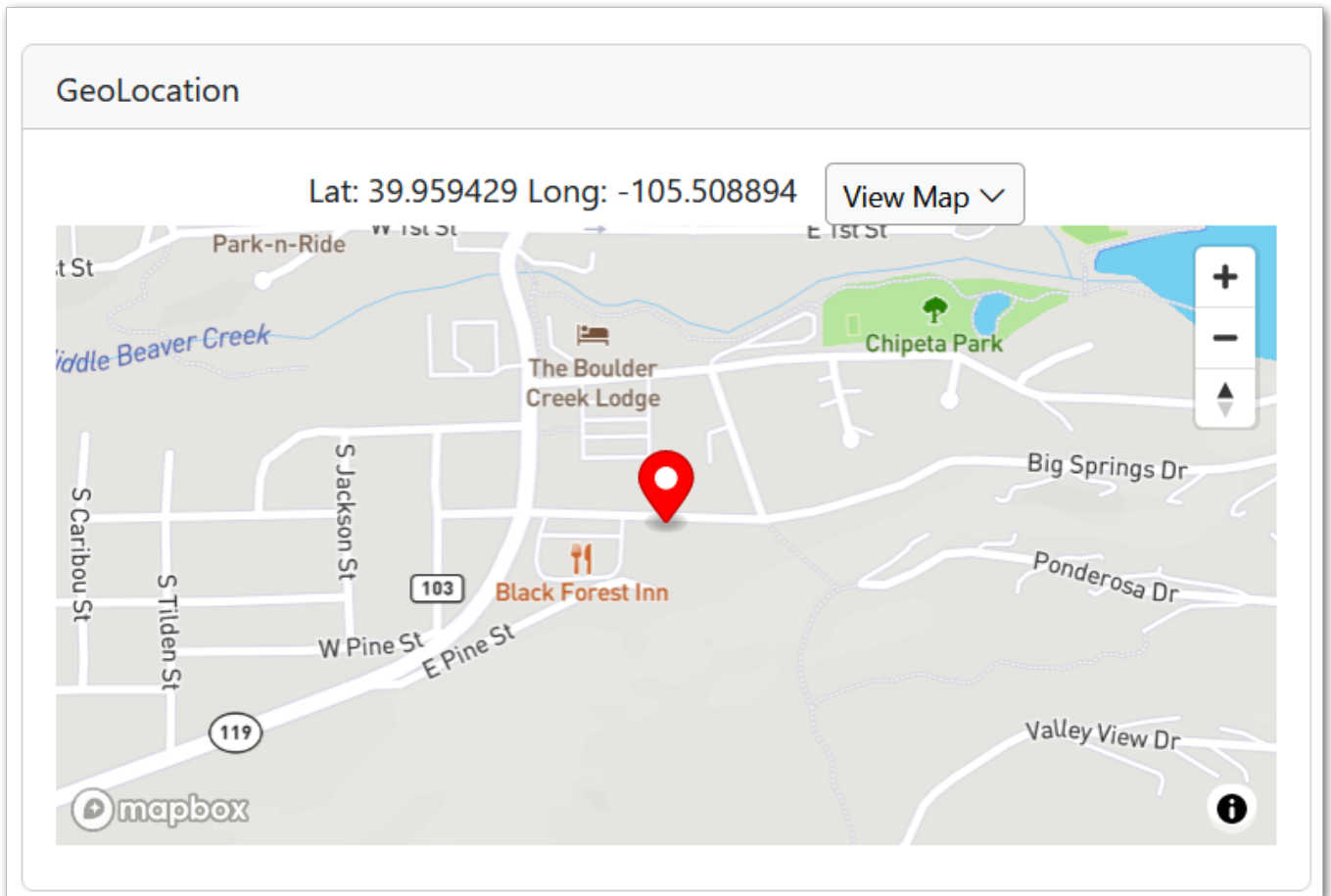
The "Today" section on the clock page lists any scheduled shifts along with time entries. You can click the times of a time entry to open an editor with more details. (Editing clockings is optional and depends on setup.)



## 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.)



## 6.2 Time Card

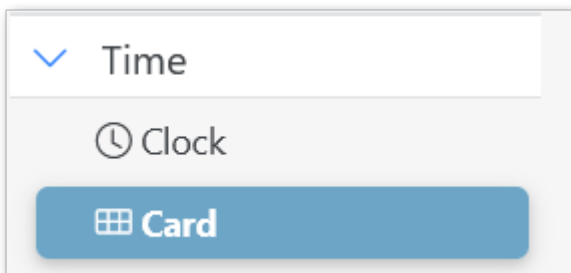
The time card enables management of time entries. Employees can enter time after-the-fact, or for the future (e.g. PTO). Many organizational rules and configuration settings impact time entries, but generally they can be added and edited for several weeks on the time card.

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	
<b>Time</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>8.00</b>	<b>0.07</b>	<b>0.00</b>	<b>0.00</b>	<b>8.07</b>

### 6.2.1 Opening the Card

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



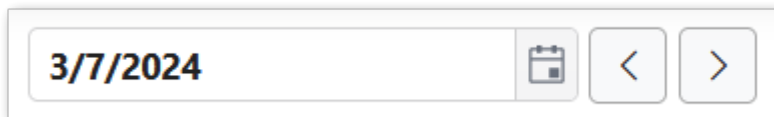


## 6.2.2 Navigating Weeks

---

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).



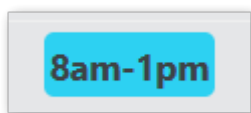
## 6.2.3 Adding Time

---

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:**  

**Schedule:**

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

**Times:**   -  

**Break Hours:**  

**Calculated Hours:**

**\*Project / Task:**

**Activity:**

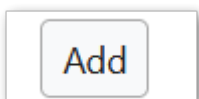
**Notes:**

**Alert Manager:**

## Add By Day

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

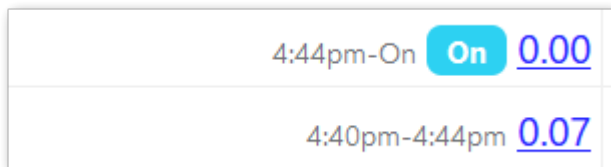
1. Click **Add** in the bottom row of the card
2. Enter **Start** and **End** Times
3. (Optional) Enter break hours (decimal) to subtract from time span
4. Select **Location**, **Project/Task**, etc.
5. (Optional) Enter notes and select **Alert Manager** if there's a need to communicate something about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

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:   < > ↻

**Summary** ▾

Approve

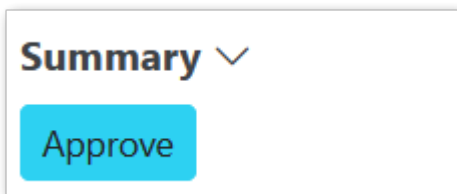
Location	Local	Manager	Enterprise	Organization	Open	Error	Void	Valid	Regular	Total
Denver	Not Locked	Not Approved	Not Locked	Not Approved	0	0	0	3	8.83	8.83

**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

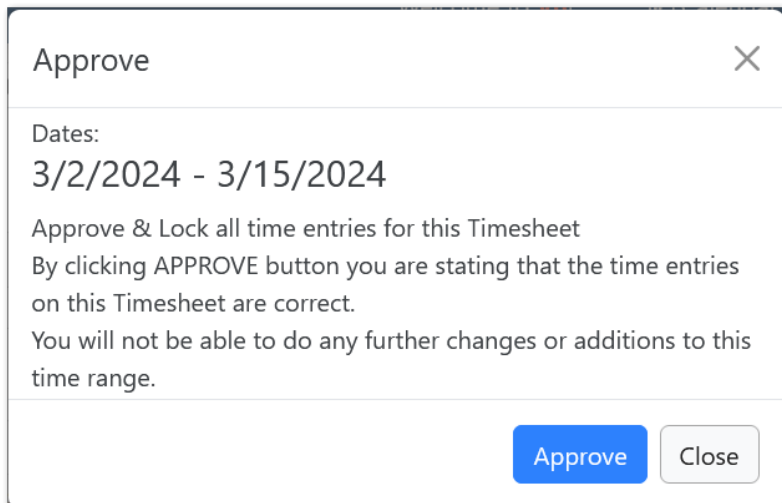
If timesheet approvals are allowed, there will be a button for submitting approval. If you approve the timesheet, it becomes locked from editing. Do not submit an approval if any additions or edits might be needed.



To approve the timesheet:

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

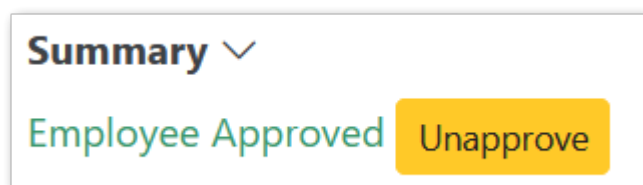
This action approves **all** time entries for the timesheet (pay period).



## 6.3.2 Unapproving Time

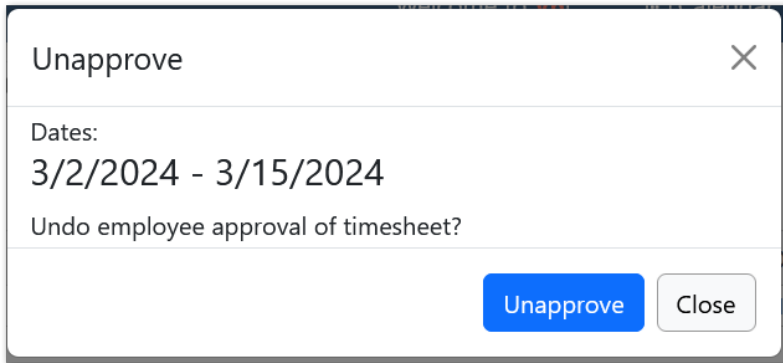
---

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:

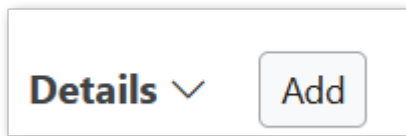
1. Click the **Unapprove** button
2. Review the dates to ensure the correct pay period
3. Click **Unapprove**



### 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**


Entry » Add ✕

**Date:**  

**Schedule:**

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

**Times:**   -  

**Break Hours:**  

**Calculated Hours:**

**\*Project / Task:**

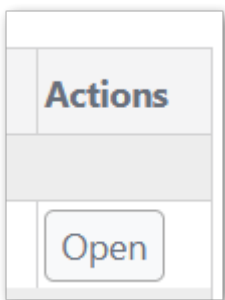
**Activity:**

**Notes:**

**Alert Manager:**

## 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:  

\*Times:   -  


\*Break Hours:  

Calculated Hours:

\*Location:  

\*Project / Task:  

Employee Notes:

Alert Manager:  

Manager Notes:



## 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.

The screenshot shows the Attendance page interface. At the top, there is a header bar with the title "Attendance" and a user profile "David Hamm". Below the header, there is a "Date Navigator" section with a dropdown for "Year(s) From Date" set to "1/12/2024" and navigation buttons for previous and next dates. A message "Drag a column header and drop it here to group by that column" is displayed above the table. The table has columns for Location, Date, Message, Status, Points, Minutes, and Notes. The data rows show various attendance issues for Denver, including "Not Scheduled" and "Clock Out Early" with associated points and minutes.

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	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	1 - DENIED	31	01	02	03
04	05	06	07	08	09	10
11	12	13	14	15	16	17
18	1 - GRANTED	1 - GRANTED	1 - GRANTED	1 - GRANTED	1 - GRANTED	1 - GRANTED
1 - GRANTED	1 - GRANTED	1 - GRANTED	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				303 434 8811		FT	kip@redheadbrewery.com		
Fischer, Dave						PT			
Galloway, Alberto						PT			
Green, Paul	2000000000					FT			

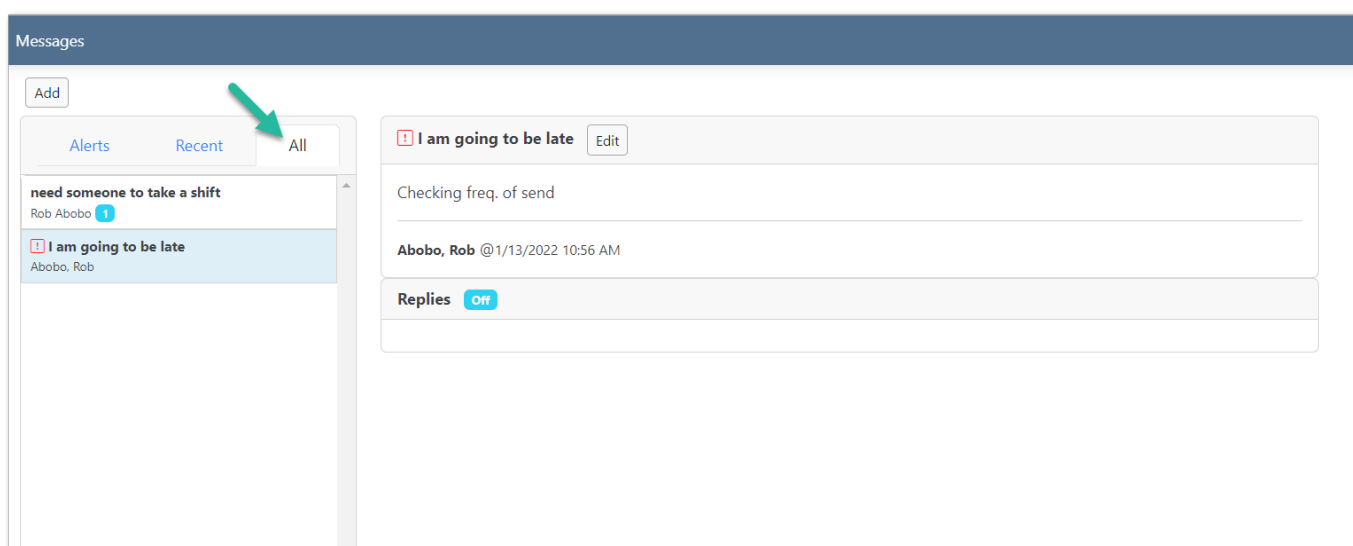
The Organization pages show information for other employees, as allowed by the organization setup.

## 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**

Message

Settings Shares Broadcast

Effective Dates: 2/8/2024 - 2/14/2024

\*Title: Valentine Cookies for everyone

Notes: Let's have a cookie buffet on Valentine's. Bake and bring your favorite to share. Thanks everyone!

Is Alert  Allow Replies  
 Enabled

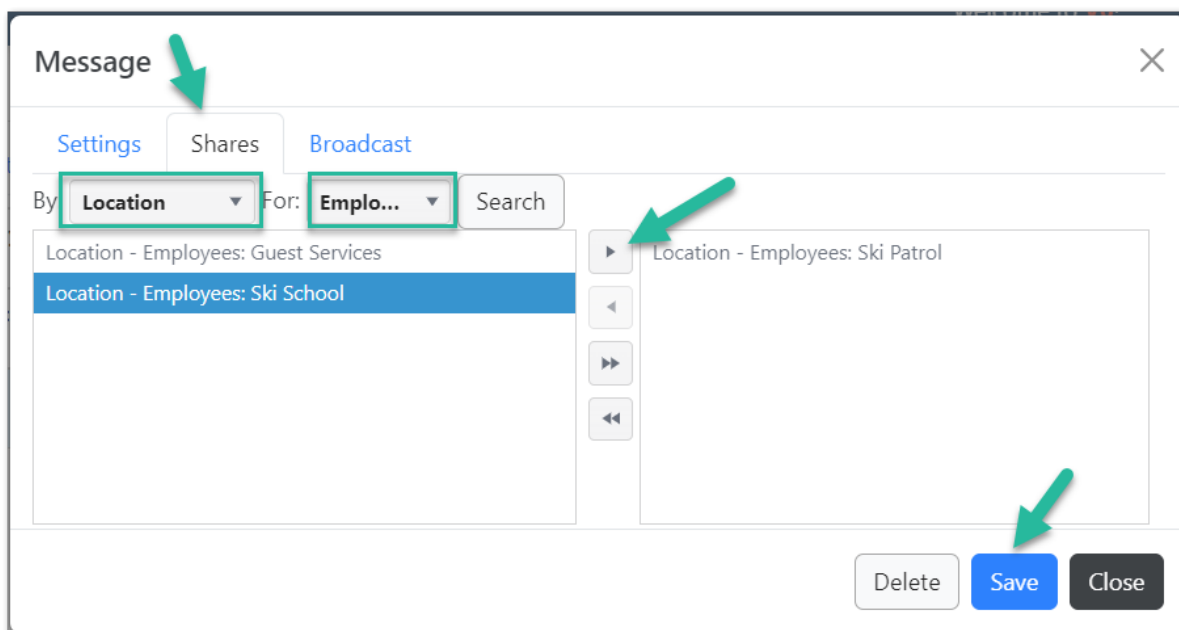
Delete Save Close

## 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

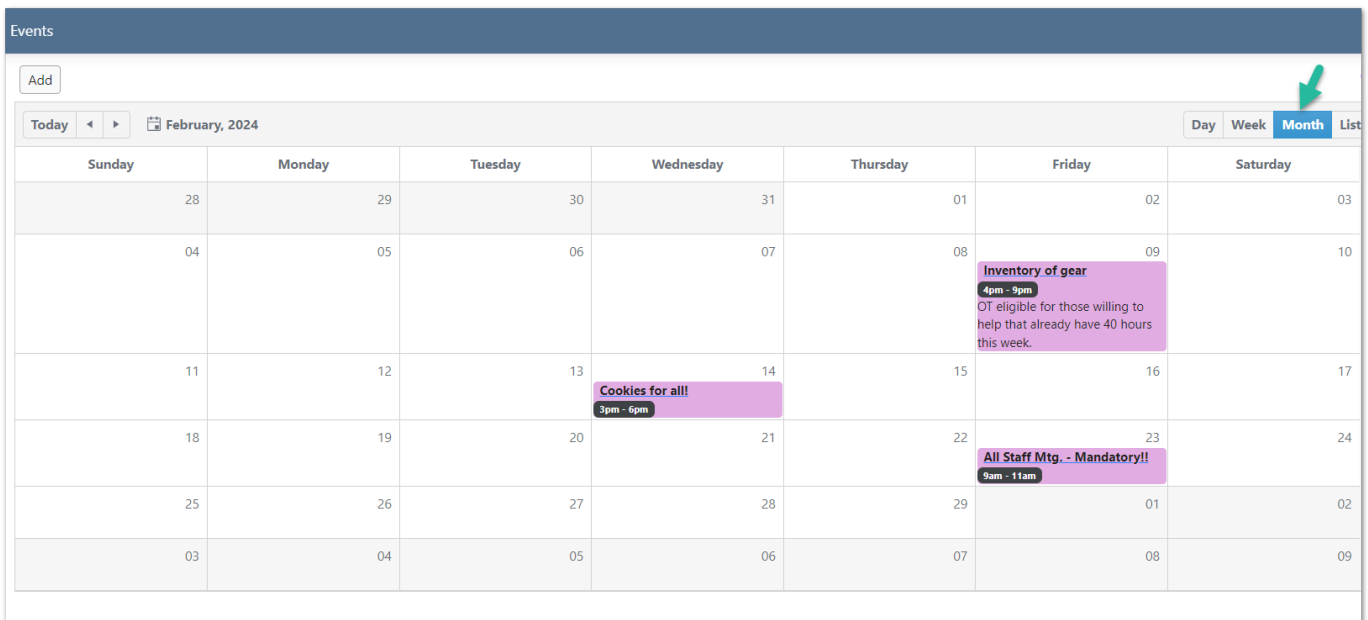


## 7.5 Organization Events

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.

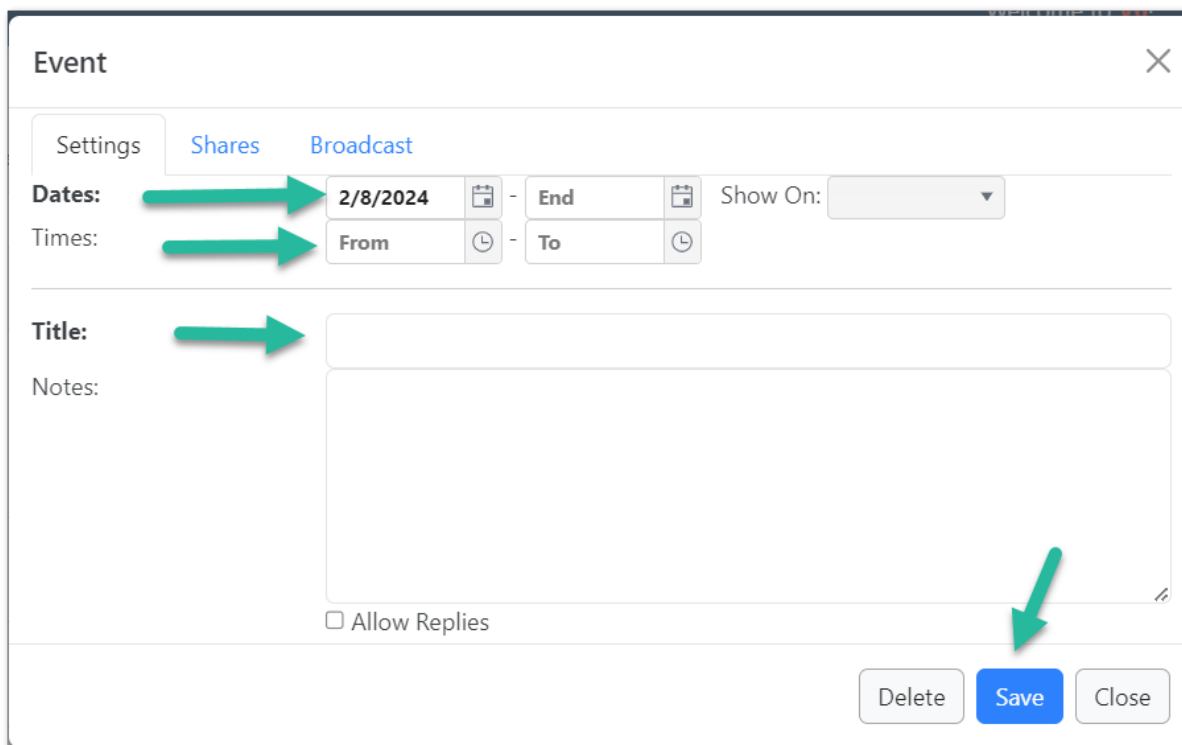


### 7.5.1 Adding Events

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**



The screenshot shows the 'Event' creation form. It has three tabs: 'Settings', 'Shares', and 'Broadcast'. The 'Dates' field is set to '2/8/2024' with a calendar icon, and the 'End' field is empty with a calendar icon. The 'Times' field has 'From' and 'To' fields, both with clock icons. The 'Title' field is empty. The 'Notes' field is a large text area. There is a checkbox for 'Allow Replies' which is unchecked. At the bottom right, there are three buttons: 'Delete', 'Save', and 'Close'. Green arrows point to the 'Dates' field, the 'Times' field, the 'Title' field, and the 'Save' button.

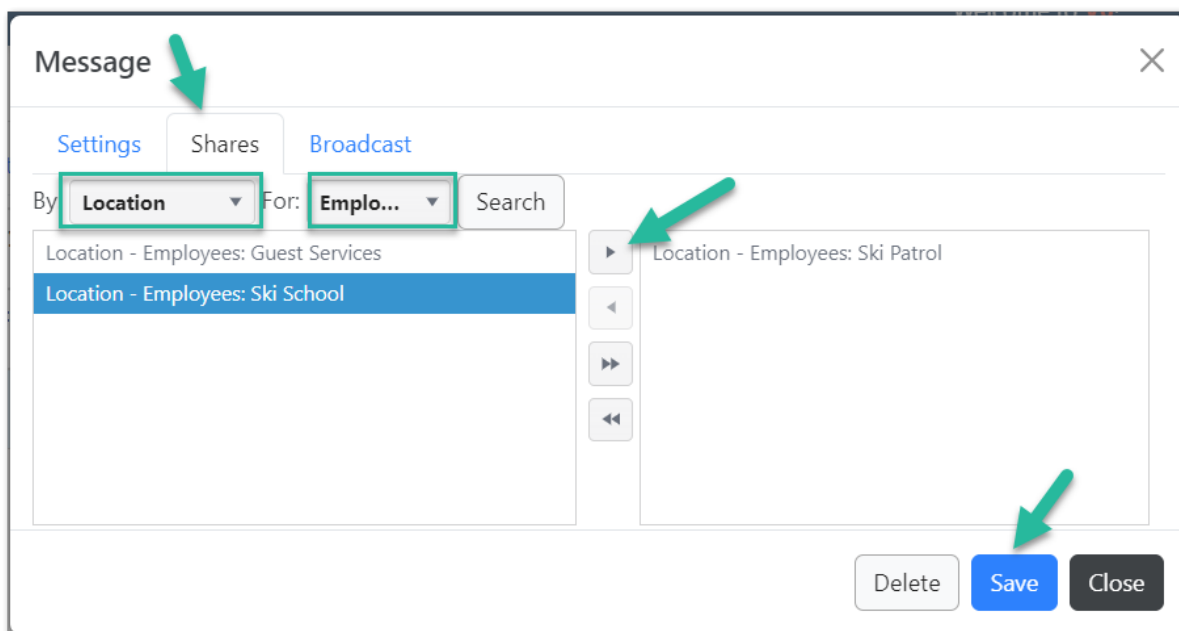
## 7.5.2 Sharing

Events are only visible to yourself unless you share them with others. The Shares tab lets 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)



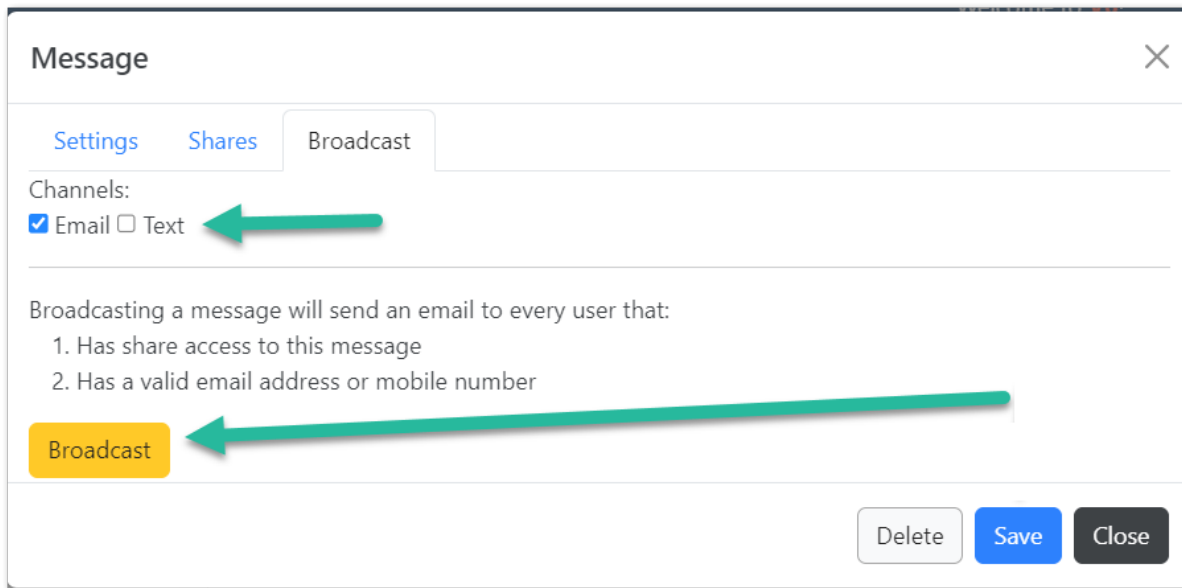
## 7.5.3 Broadcasting

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)



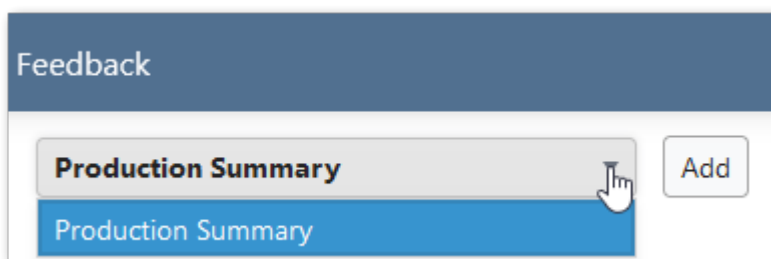
## 7.6 Organization Feedback

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.

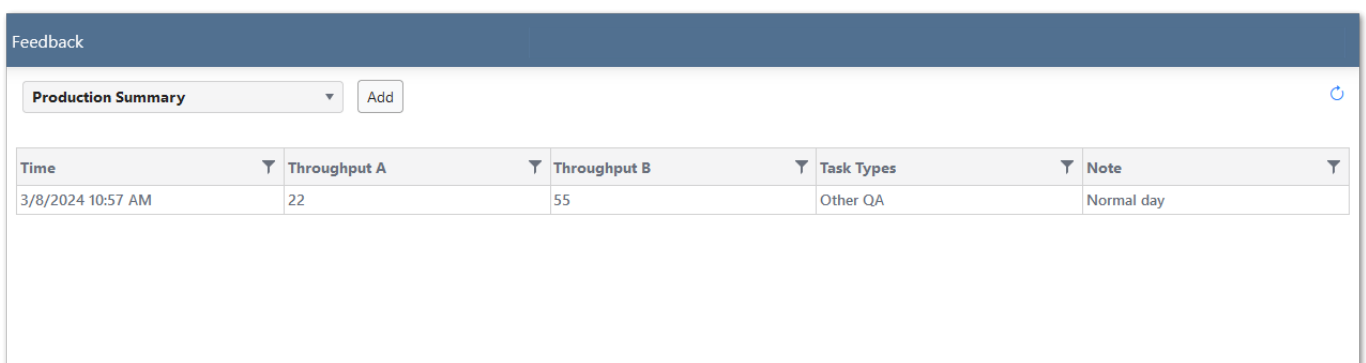
Open the Feedback page from the menu **Organization > Feedback**

### 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.

A screenshot of the Feedback page showing a table of responses. The table has a dark blue header with the word 'Feedback' in white. Below the header, there is a light gray dropdown menu with 'Production Summary' selected and a white button with the text 'Add'. To the right of the dropdown is a blue refresh icon. The table has five columns: Time, Throughput A, Throughput B, Task Types, and Note. The first row of data shows the time '3/8/2024 10:57 AM', Throughput A '22', Throughput B '55', Task Types 'Other QA', and Note 'Normal day'.


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 :	<input type="text" value="22.00"/>
* Throughput B :	<input type="text" value="55.00"/>
* Task Types :	<input type="text" value="QA"/> <input type="text" value="Other"/>   <input type="text"/>
Comments:	<input type="text"/>

# 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.

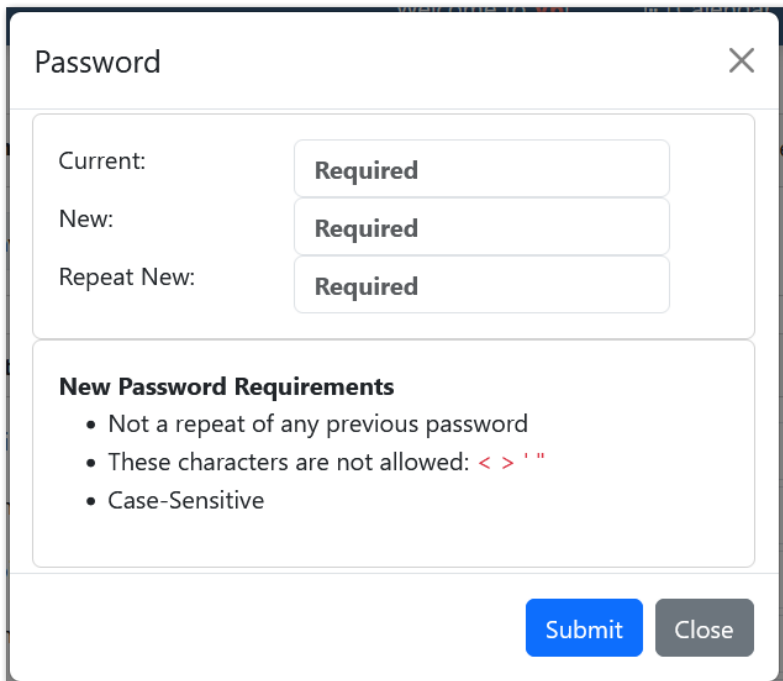
The screenshot shows the 'Profile' page with the following details:

- Name Section:** Username: bob, Password: Change. Name fields contain 'Bob' and 'Abbott'. A 'Nick Name' field is also present.
- Contact Information Section:** Fields for Email, Phone, Mobile, Phone 2, Phone 3, Fax, Address, Address 2, City, State, Postal Code, and Country. A 'Save' button is at the bottom right.

### 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**



A dialog box titled "Password" with a close button (X) in the top right corner. It contains three input fields for "Current:", "New:", and "Repeat New:", each with a "Required" label. Below these fields is a section titled "New Password Requirements" with a bulleted list: "Not a repeat of any previous password", "These characters are not allowed: < > ' \"", and "Case-Sensitive". At the bottom right are "Submit" and "Close" buttons.

## 8.1.2 Updating Contact Information

---

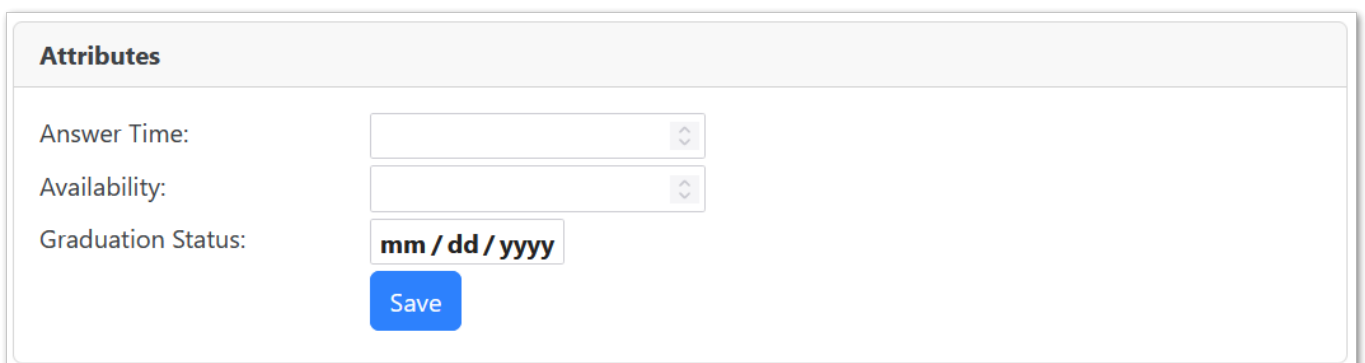
If your organization allows editing, you can enter, add, or change your contact information. Simply enter new values in the **Contact Information** section and click **Save**.

## 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**.



A form titled "Attributes" with a light gray header. It contains three input fields: "Answer Time" and "Availability" are dropdown menus, and "Graduation Status" is a text field with the placeholder "mm / dd / yyyy". A blue "Save" button is located below the "Graduation Status" field.



## 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
<b>Denver</b> <b>Default</b>	(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: (Organization/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

**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: [Unique ID] Clear

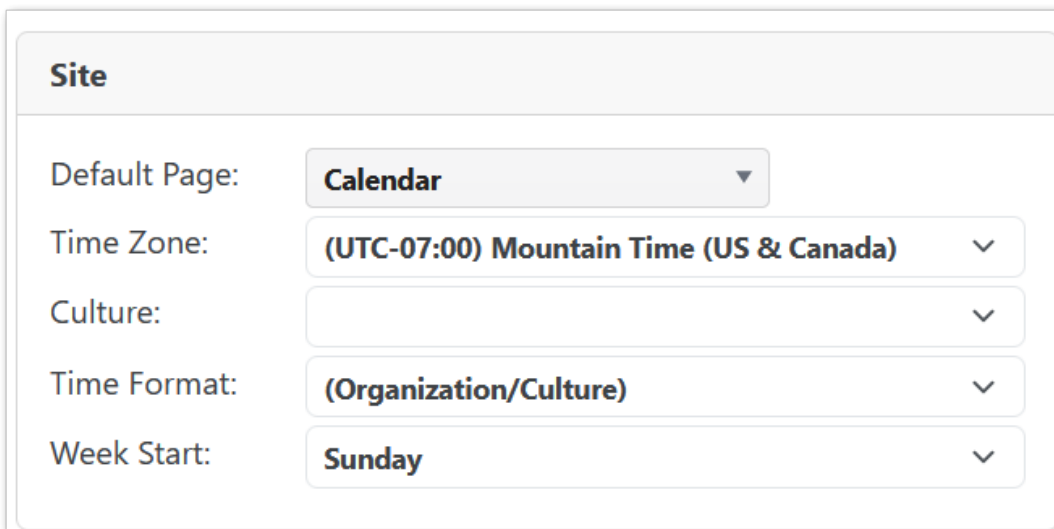
Test your public page: [http://tmwork.net/public/empsch?id=\[Unique ID\]&format=ical](http://tmwork.net/public/empsch?id=[Unique ID]&format=ical)  
Link to iCal formatted data (copy and paste to other applications):  
[http://tmwork.net/public/empsch?id=\[Unique ID\]&format=ical](http://tmwork.net/public/empsch?id=[Unique 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 settings panel titled "Site" with the following configurations:

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"/>	▲ ▼

## 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:

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

---

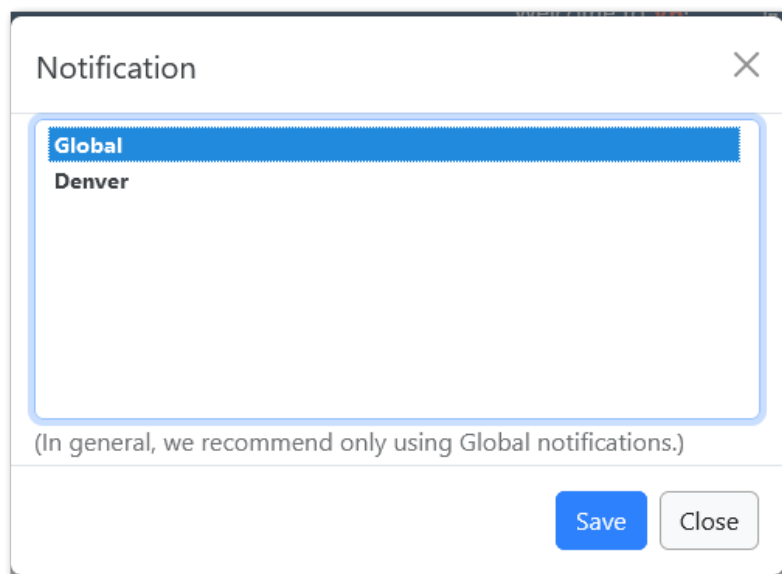
The notifications page lets employees configure emails and text alerts from TeamWork. These settings are done in a profile that has a scope of either **Global** or a specific **Location**. In general, only a global profile is needed. You might consider a location profile only, if you are deployed to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

### 8.3.1 Adding a Profile

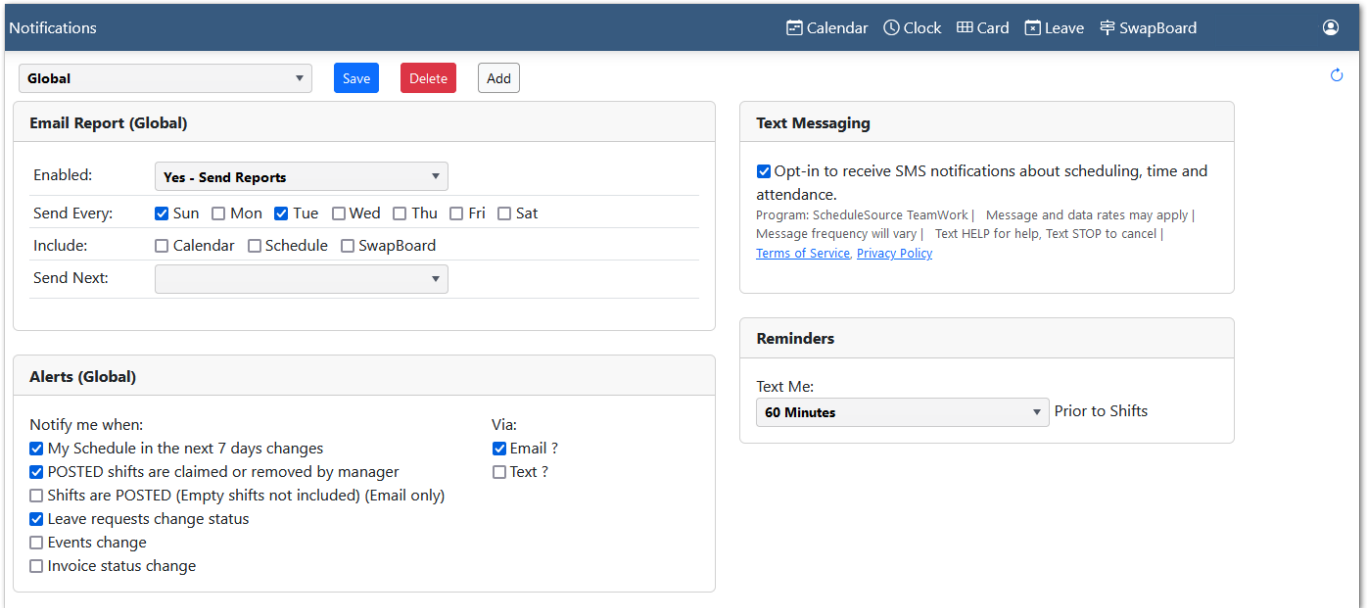
---

To add a notifications profile:

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



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

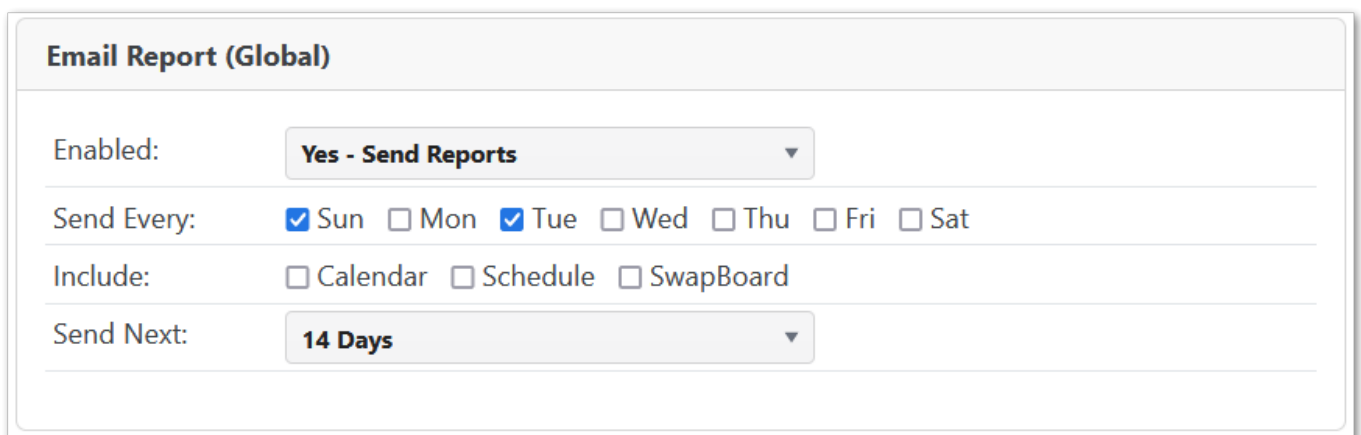


### 8.3.2 Notification Options

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.

### 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						
Today ◀ ▶ 📅 February, 2024						
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**

## 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.

A screenshot of a time selection interface. It consists of two adjacent input fields. The first field is labeled 'From' and contains a clock icon. The second field contains the text '3:00 PM' and also contains a clock icon. The fields are separated by a vertical line.

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

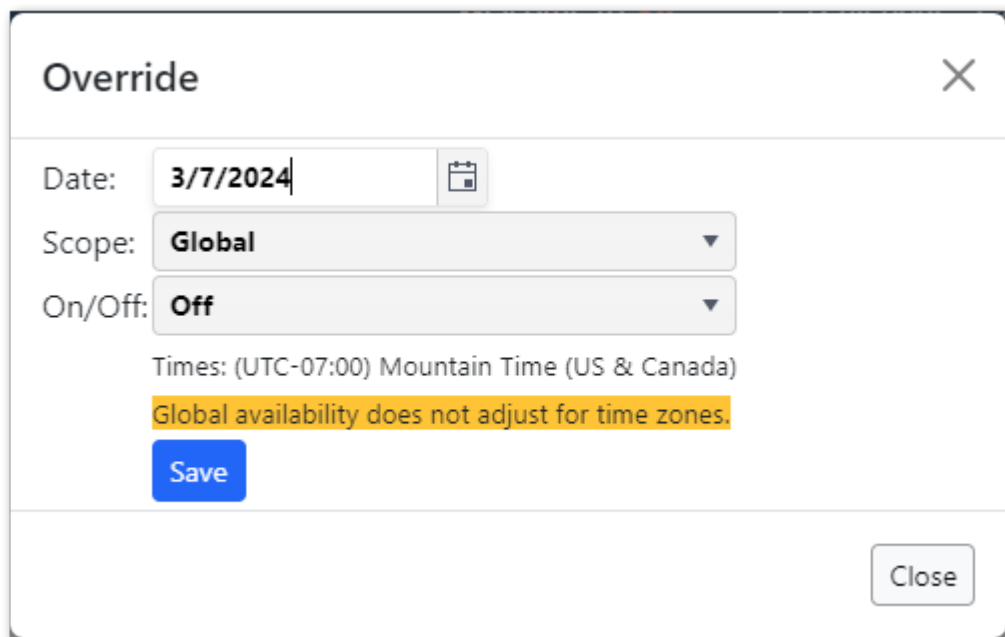
## 8.4.3 Availability Overrides

---


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:

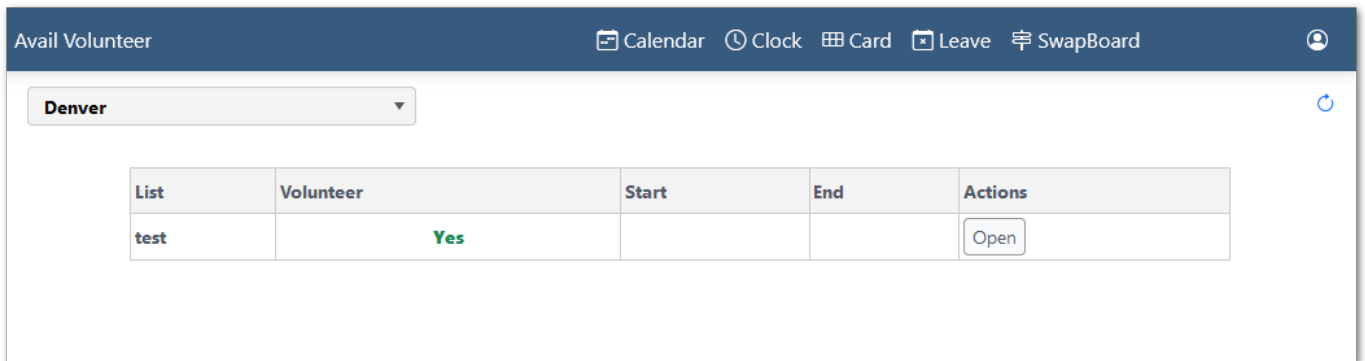
1. Click **Open** in the actions column of the overrides list
2. Click **Delete**

## 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.

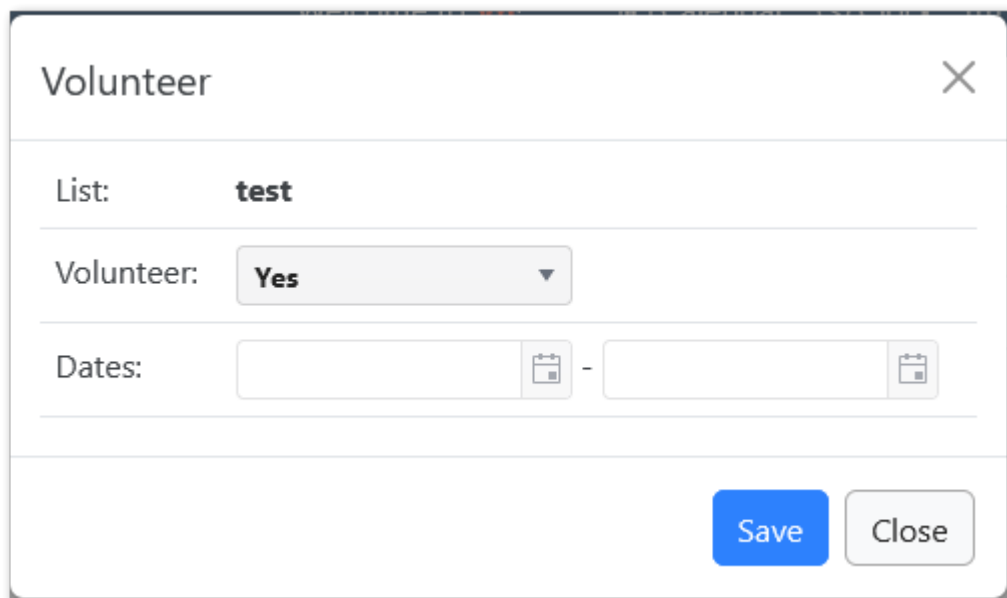
To see volunteer lists, select a **Location** from the drop-down at the top of the page.



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.).



The screenshot shows the 'My Credentials' interface. At the top, there is a header bar with the title 'My Credentials' and a user profile 'Paul Green'. Below the header, there is an 'Add' button and a refresh icon. A message says 'Drag a column header and drop it here to group by that column'. Below this is a table with the following columns: Name, Due, Start, End, Completed, Notes, Status, and Files. The table contains one row with the following data: Name: Lift 50 Lbs, Due: (empty), Start: 1/1/2011, End: 12/31/2021, Completed: 1/1/2011, Notes: (empty), Status:  OK, Files: (empty). The 'Expired' label is visible next to the status.

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 <b>Expired</b>	

### 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			<span style="border: 1px solid #ccc; padding: 2px 5px;">Add</span>
Security Best Practices	1			<span style="border: 1px solid #ccc; padding: 2px 5px;">Add</span>
Translation Certification	3			<span style="border: 1px solid #ccc; padding: 2px 5px;">Add</span>

## 9. Bidding

---

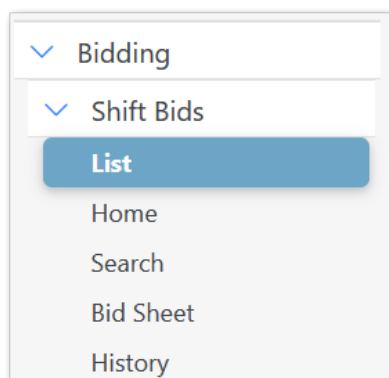
### 9.1 Shift Bidding

---

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.

The screenshot shows a table titled "Shift Bids" with columns for Name, Start, End, and Stage. There are two rows of data, one for a "Select" status bid and one for a "Complete" status bid. Each row includes a "Home | Search | Bid Sheet" link.

Name	Start ↓	End ↓	Stage
Status: Select <a href="#">2024 Full Bid</a> <a href="#">Home</a>   <a href="#">Search</a>   <a href="#">Bid Sheet</a>	12/31/2023	12/28/2024	Select
Status: Complete <a href="#">2021 Q1</a> <a href="#">Home</a>   <a href="#">Search</a>   <a href="#">Bid Sheet</a>	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".

The screenshot shows the home page for a bid. It is divided into several sections: "Bid" with details like Name, Dates, Stage, and Privileges; "My Status" showing Rank (6) and Status (No Assignment); and "Messages" with a "Bidding Timeline" message about starting bidding on lines and processing choices.

### 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

2024 Full Bid / Search

Home | Search | Bid Sheet

Paul Green

--- Filters --- Filter View All

Name	Pattern	Position	Start Time	End Time	Hours	Capacity	Available	Bids	My Bids
A	S [1-5] S	Tech	8:00 AM	5:00 PM	40.00	1	1	0	Add
B	1 [1-4] 5 [6-10] 11 [12]	Pool	6:00 AM	5:00 PM	70.00	1	1	0	Add
C	[1-4] 5 [6-10] 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

**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

Name: **A**

Pattern: **S M T W T F S**

Positions: Tech

Times: 08:00 - 17:00

Hours: 40.00

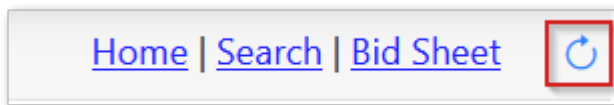
Choice: **1**

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:



### 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: **S M T W T F S**

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	
<b>A</b>																																<b>OFF</b>
<b>B</b>																																<b>OFF</b>
<b>c</b>																																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
<b>A</b>	Tech	Tech	Tech	Tech	Tech	<b>OFF</b>	<b>OFF</b>	Tech	Tech	Tech	Tech	Tech	<b>OFF</b>	<b>OFF</b>	Tech	Tech	Tech	Tech	Tech	<b>OFF</b>	<b>OFF</b>	Tech	Tech	Tech	Tech	Tech	<b>OFF</b>	<b>OFF</b>	Tech	Tech	Tech
<b>B</b>	Pool	Pool	Pool	<b>OFF</b>	<b>OFF</b>	Pool	Pool	Pool	Pool	<b>OFF</b>	<b>OFF</b>	<b>OFF</b>	Pool	Pool	Pool	<b>OFF</b>	<b>OFF</b>	Pool	Pool	Pool	Pool	<b>OFF</b>	<b>OFF</b>	<b>OFF</b>	Pool	Pool	Pool	<b>OFF</b>	<b>OFF</b>	Pool	
<b>c</b>	<b>OFF</b>	<b>OFF</b>	<b>OFF</b>	Pool	Pool	Pool	Pool	<b>OFF</b>	<b>OFF</b>	Pool	Pool	Pool	<b>OFF</b>	<b>OFF</b>	<b>OFF</b>	Pool	Pool	Pool	Pool	<b>OFF</b>	<b>OFF</b>	Pool	Pool	Pool	<b>OFF</b>	<b>OFF</b>	<b>OFF</b>	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
<b>A</b>	Tech	Tech	<b>OFF</b>	<b>OFF</b>	Tech	Tech	Tech	Tech	Tech	<b>OFF</b>	<b>OFF</b>	Tech	Tech	Tech	Tech	Tech	<b>OFF</b>	<b>OFF</b>	Tech	Tech	Tech	Tech	Tech	<b>OFF</b>	<b>OFF</b>	Tech	Tech	Tech	Tech
<b>B</b>	Pool	Pool	<b>OFF</b>	<b>OFF</b>	<b>OFF</b>	Pool	Pool	Pool	<b>OFF</b>	<b>OFF</b>	Pool	Pool	Pool	Pool	<b>OFF</b>	<b>OFF</b>	<b>OFF</b>	Pool	Pool	Pool	<b>OFF</b>	<b>OFF</b>	Pool	Pool	Pool	Pool	<b>OFF</b>	<b>OFF</b>	<b>OFF</b>
<b>c</b>	<b>OFF</b>	<b>OFF</b>	Pool	Pool	Pool	<b>OFF</b>	<b>OFF</b>	<b>OFF</b>	Pool	Pool	Pool	Pool	<b>OFF</b>	<b>OFF</b>	Pool	Pool	Pool	<b>OFF</b>	<b>OFF</b>	<b>OFF</b>	Pool	Pool	Pool	Pool	<b>OFF</b>	<b>OFF</b>	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	S M T W T F S	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.

2024 Full Bid / History
Paul Green

Timestamp

1/24/2024 12:00 AM
-
Maximum

Action By

Name

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

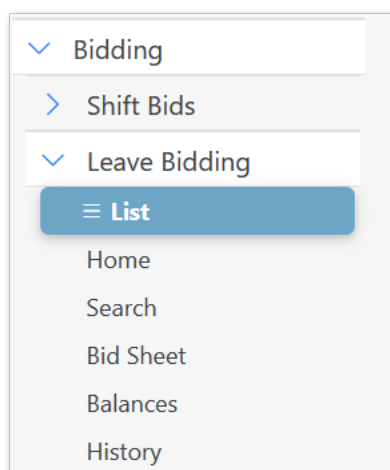
## 9.2 Leave Bidding

---

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					
Location	Name		Start	End	Stage
▼ Status: Select					
Denver	<a href="#">2024 Date List</a>	<a href="#">Home</a>   <a href="#">Search</a>   <a href="#">Bid Sheet</a>	12/31/2023	12/28/2024	Select
▼ Status: Assign					
Denver	<a href="#">2023 Date List</a>	<a href="#">Home</a>   <a href="#">Search</a>   <a href="#">Bid Sheet</a>	1/1/2023	12/30/2023	Assign
▼ Status: Complete					
Denver	<a href="#">Dept 1 - 2021 Vacation Bid</a>	<a href="#">Home</a>   <a href="#">Search</a>   <a href="#">Bid Sheet</a>	1/1/2021	12/31/2021	Complete
Denver	<a href="#">TEST FEB</a>	<a href="#">Home</a>   <a href="#">Search</a>   <a href="#">Bid Sheet</a>	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:

### 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

### 1) R1

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

## 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.

Leave Bidding Paul Green

2024 Date List / Search [Home](#) | [Search](#) | [Bid Sheet](#)

**PTO 120.00 / 160.00 hours remaining**

Start	End	Name	Capacity	Granted	Available	Bids	My Bids
12/31/2023 (Sun)	1/7/2024 (Sun)		3	0	3		<input type="button" value="Add"/>
1/7/2024 (Sun)	1/14/2024 (Sun)		3	2	1	<input type="button" value="1"/>	<input type="button" value="Add"/>
1/14/2024 (Sun)	1/21/2024 (Sun)		3	3	0		<input type="button" value="Add"/>
1/21/2024 (Sun)	1/28/2024 (Sun)		3	0	3	<input type="button" value="1"/>	<input type="button" value="1st"/>
1/28/2024 (Sun)	2/4/2024 (Sun)		3	3	0		<input type="button" value="Add"/>
2/4/2024 (Sun)	2/11/2024 (Sun)		3	0	3	<input type="button" value="1"/>	<input type="button" value="Add"/>
2/11/2024 (Sun)	2/18/2024 (Sun)		3	0	3	<input type="button" value="2"/>	<input type="button" value="2nd"/>
2/18/2024 (Sun)	2/25/2024 (Sun)		3	0	3		<input type="button" value="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 ✕

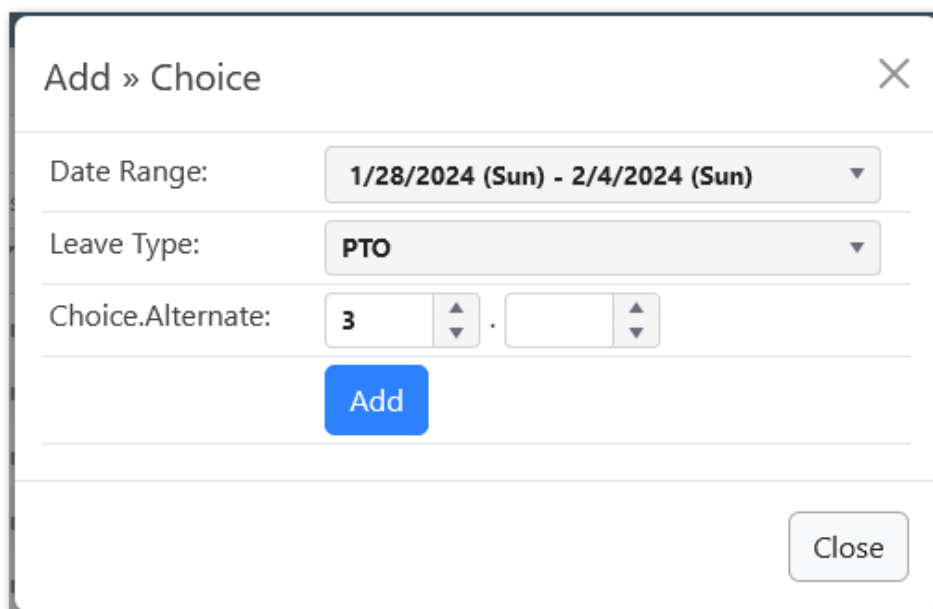
Capacity: 3 Granted: 0 Available: 3

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

## 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**



The screenshot shows a modal dialog box titled "Add » Choice". It features a close button (X) in the top right corner. The dialog contains three rows of input fields: "Date Range:" with a dropdown menu showing "1/28/2024 (Sun) - 2/4/2024 (Sun)"; "Leave Type:" with a dropdown menu showing "PTO"; and "Choice.Alternate:" with two numeric input fields, the first containing the number "3". Below the input fields is a blue "Add" button. At the bottom right of the dialog is a "Close" button.

## 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#

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 🏠 ⌚ 🗪 📄 🗑️ Paul Green

**2024 Date List** / Bid Sheet [Home](#) | [Search](#) | [Bid Sheet](#) ↻

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 <span>2023</span>												
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						
Timestamp		Action By		For		
1/25/2024 12:00 AM		Maximum		Name		Name
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 - 4 of 4 items

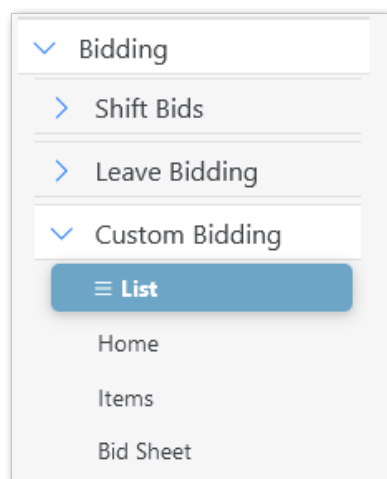
## 9.3 Custom Bidding

---

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		
Name		Stage
▼ Status: Assign		
<a href="#">2024 Q2 Training</a>	<a href="#">Home</a>   <a href="#">Items</a>   <a href="#">Bid Sheet</a>	Assign
<a href="#">2024 Q3 Training</a>	<a href="#">Home</a>   <a href="#">Items</a>   <a href="#">Bid Sheet</a>	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		<a href="#">Home</a>   <a href="#">Items</a>   <a href="#">Bid Sheet</a> <a href="#">↻</a>	
Information		Bid	
Organization:	<b>_SSI Enterprises_</b>	Name:	<b>2024 Q3 Training</b>
Employee:	<b>David Hamm</b>	Notes:	
My Attributes		Stage:	<b>Assign</b>
name	key	value	Privileges:
Level		3	Bid Rankings
Region	West		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: <b>List</b>									
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	

## 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
<a href="#">1</a>	<a href="#">Course 300, Austin (9/7)</a>	1	3.00	South	W37	<b>1</b>
<a href="#">2</a>	<a href="#">Course 400, Denver (8/24)</a>	2	3.00	West	W35	<b>3</b>
<a href="#">3</a>	<a href="#">Course 500, Austin (7/20)</a>	2	3.00	South	W30	<b>1</b>
<a href="#">4</a>	<a href="#">Course 400, San Francisco (8/31)</a>	2	3.00	West	W36	<b>2</b>
<a href="#">5</a>	<a href="#">Course 300, Denver (8/3)</a>	1	3.00	West	W32	<b>2</b>
<a href="#">6</a>	<a href="#">Course 210, Denver (7/20)</a>	1	2.00	West	W30	<b>3</b>
<a href="#">7</a>	<a href="#">Course 200, Denver (7/6)</a>	1	2.00	West	W28	<b>4</b>
<a href="#">8</a>	<a href="#">Course 101, Paris (9/28)</a>	1	1.00	Europe	W40	<b>6</b>
<a href="#">9</a>	<a href="#">Course 500, Denver (9/21)</a>	2	3.00	West	W39	<b>3</b>
<a href="#">10</a>	<a href="#">Course 101, Atlanta (9/14)</a>	1	1.00	East	W38	<b>2</b>
<a href="#">11</a>	<a href="#">Course 210, NYC (9/14)</a>	1	2.00	East	W38	<b>2</b>

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 considered 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.

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.

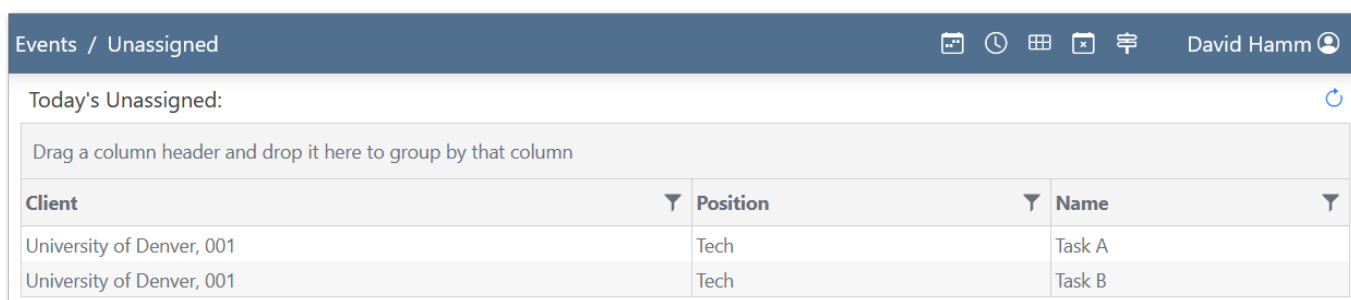
This view allows employees to understand the distribution of events/tasks. Under some configurations, a lead employee can re-assign events to better optimize the workload.

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.



The screenshot shows a web interface for 'Events / Unassigned'. At the top, there is a dark blue header with the text 'Events / Unassigned' on the left and user information 'David Hamm' on the right. Below the header, the main content area is titled 'Today's Unassigned:' and contains a table. The table has three columns: 'Client', 'Position', and 'Name'. The first row shows 'University of Denver, 001' for Client, 'Tech' for Position, and 'Task A' for Name. The second row shows 'University of Denver, 001' for Client, 'Tech' for Position, and 'Task B' for Name. Above the table, there is a prompt: '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

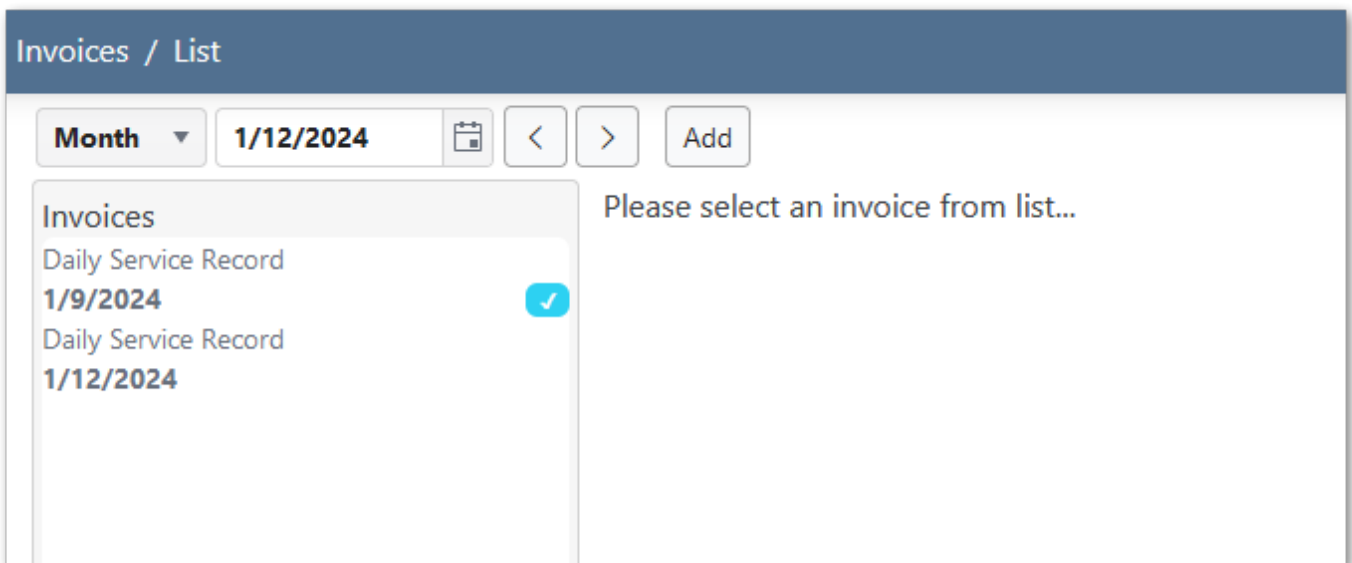
## 11.1 Using Invoices

The invoices page allows entering organization-defined invoice forms. Each form has 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.

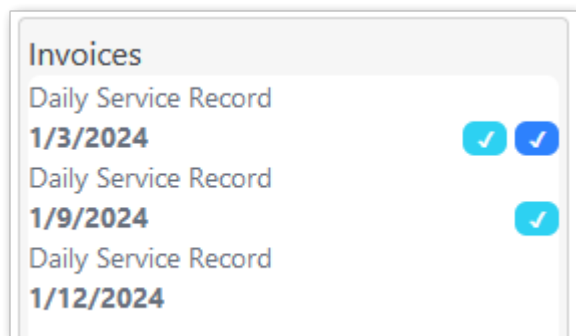


Click on an invoice in the list to open the [invoice editor](#).

### Approvals

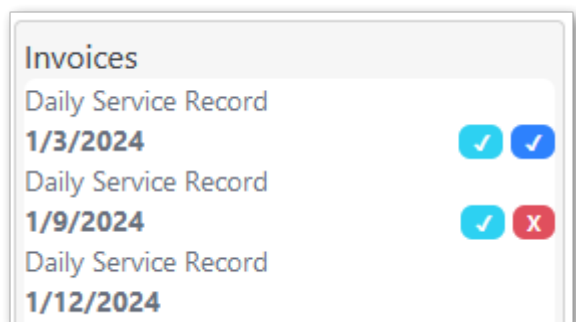
The status of each invoice is shown in the list. A **light-blue check** indicates "Employee Approved". A **dark-blue check** indicates "Manager Approved". In the example below, the first

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".

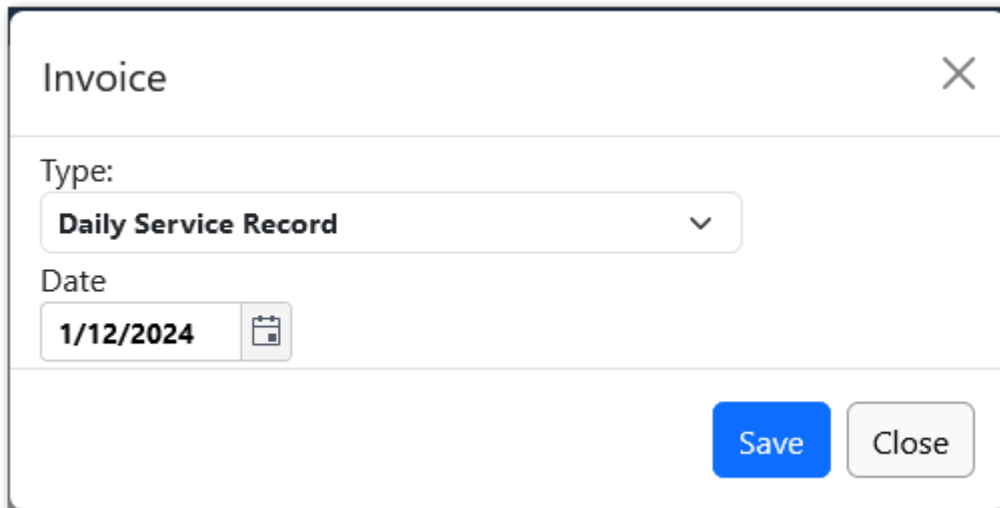


## 11.1.2 Add Invoice

---

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:	<input type="text" value="I completed on time."/>
Timestamp:	1/12/2024 11:57:22 AM
<input type="button" value="Save"/>	

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** ▾

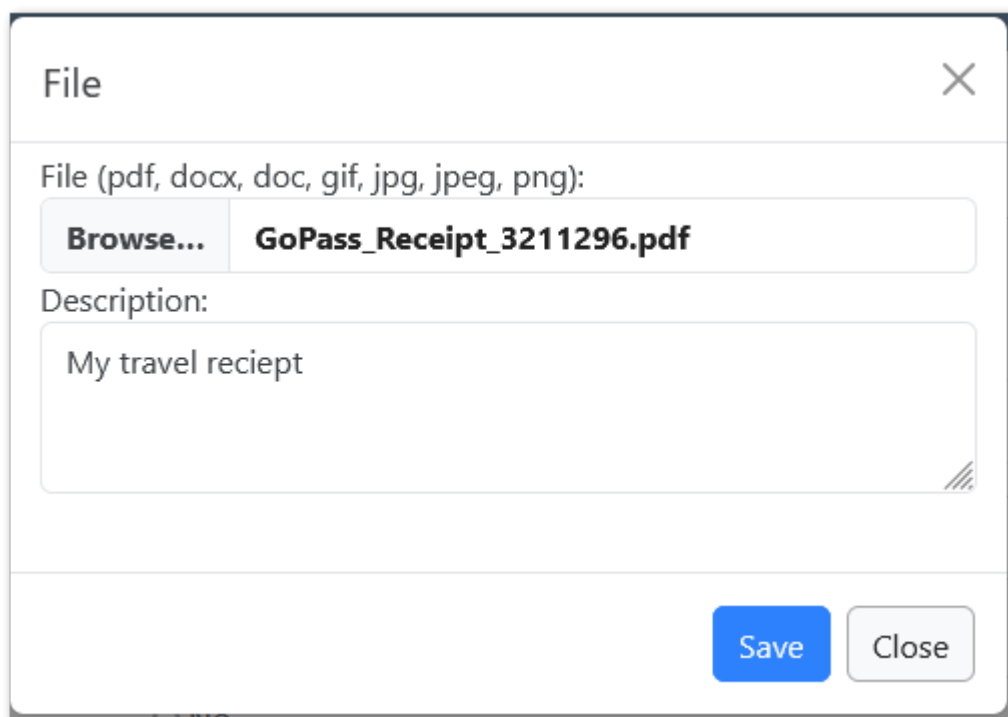
---

[\\_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**



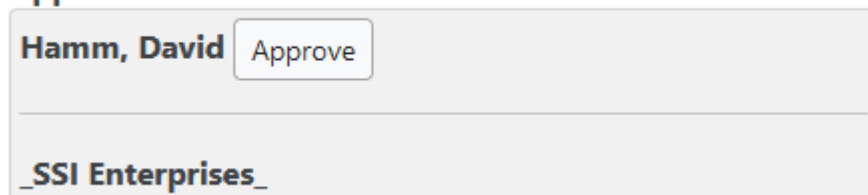
The screenshot shows a 'File' dialog box with a close button (X) in the top right corner. Below the title bar, it says 'File (pdf, docx, doc, gif, jpg, jpeg, png):'. There is a 'Browse...' button and a text input field containing 'GoPass\_Receipt\_3211296.pdf'. Below that, there is a 'Description:' label and a text input field containing 'My travel receipt'. At the bottom right, there are two buttons: 'Save' (blue) and 'Close' (grey).

## 11.1.5 Approve Invoice

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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.

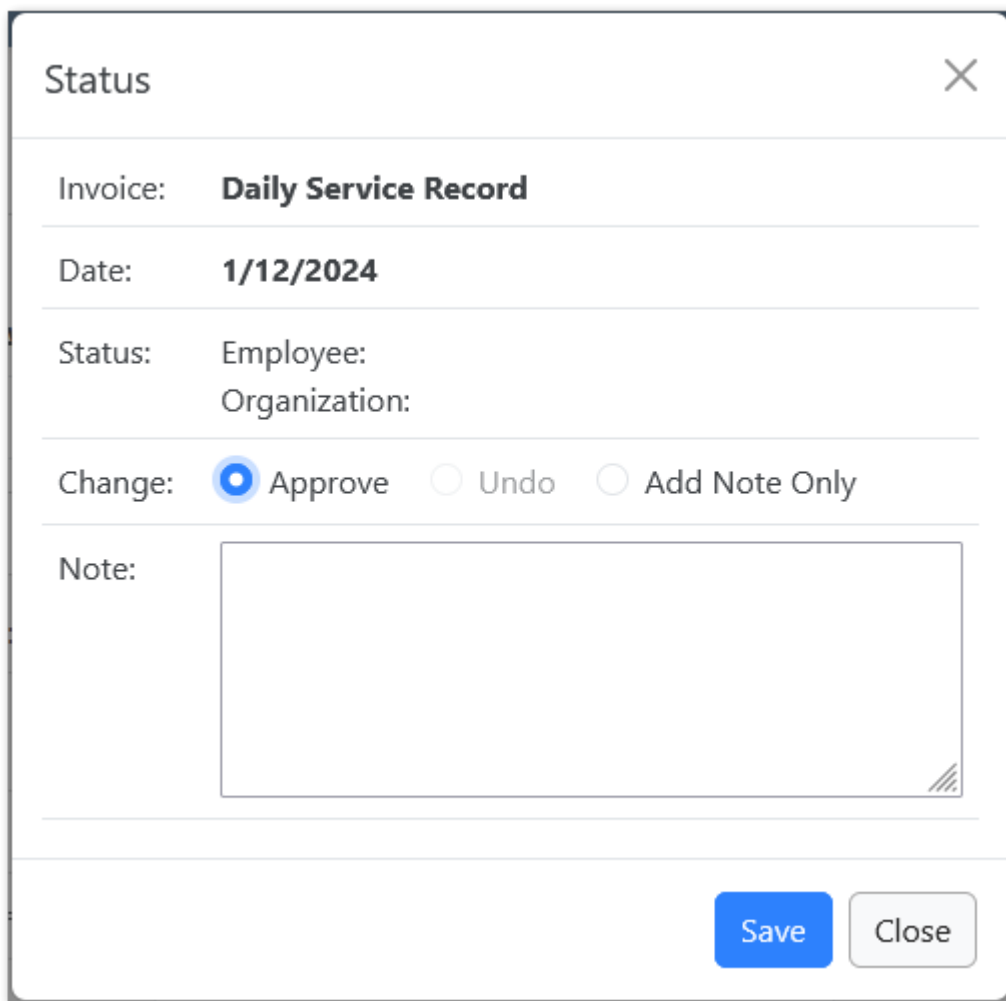
### Approvals



The screenshot shows the 'Approvals' section. It features a grey background with a white border. On the left, the name 'Hamm, David' is displayed. To its right is a button labeled 'Approve'. Below this, there is a horizontal line, and at the bottom, the text '\_SSI Enterprises\_' is visible.

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**



The screenshot shows a 'Status' pop-up window with a close button (X) in the top right corner. The window contains the following information:

- Invoice: **Daily Service Record**
- Date: **1/12/2024**
- Status: Employee:  
Organization:
- Change:  Approve  Undo  Add Note Only
- Note: A large empty text area with a small icon in the bottom right corner.
- Buttons: **Save** (blue) and **Close** (grey).

## Approval History

Below the approvals section, there is an approval history list. This list shows 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

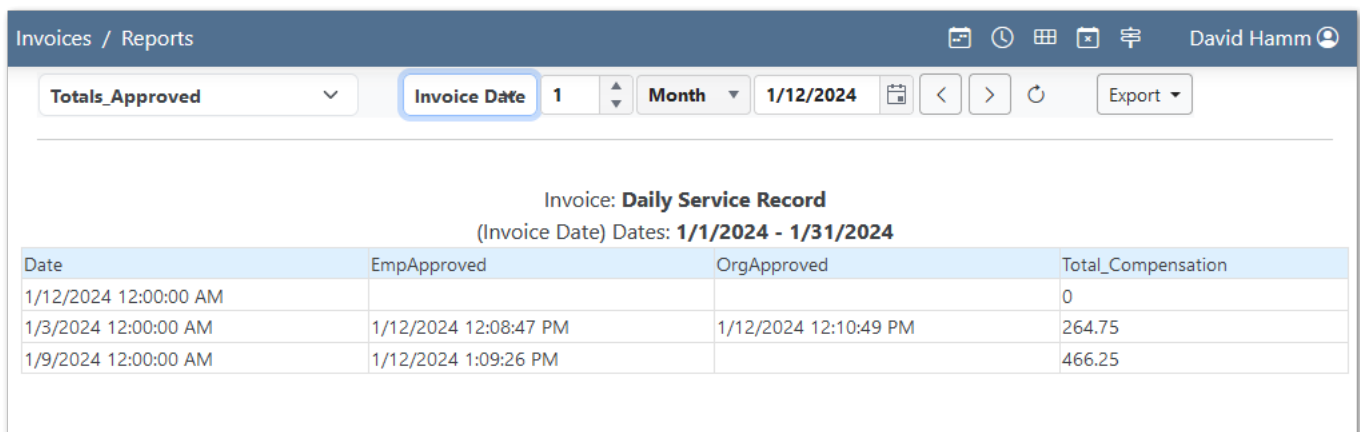
## 11.2 Invoice Reports

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



The screenshot shows the 'Invoices / Reports' interface. At the top, there is a navigation bar with the user's name 'David Hamm'. Below the navigation bar, there are several controls: a dropdown menu for 'Totals\_Approved', a dropdown for 'Invoice Date' set to '1', a dropdown for 'Month', a date field set to '1/12/2024', and navigation arrows. An 'Export' button is also visible. The main content area displays the report title 'Invoice: Daily Service Record' and the date range '(Invoice Date) Dates: 1/1/2024 - 1/31/2024'. Below this is a table with the following data:

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)



