TeamWork Manager Guide

TeamWork Help Documentation

ScheduleSource Support

Contents

1. TeamWork Manager Guide

This document explains key concepts, the structure of the application, and has many How-To's for setting up your organization.

1.1 Setup Information

- Introduction
- Organization
- Locations
- Stations
- Employees
- Policies

1.2 Operational Areas

- Leave
- Templates
- Schedules
- Time
- Credentials

1.3 Collaboration and Reporting

- Collaboration
- Reports

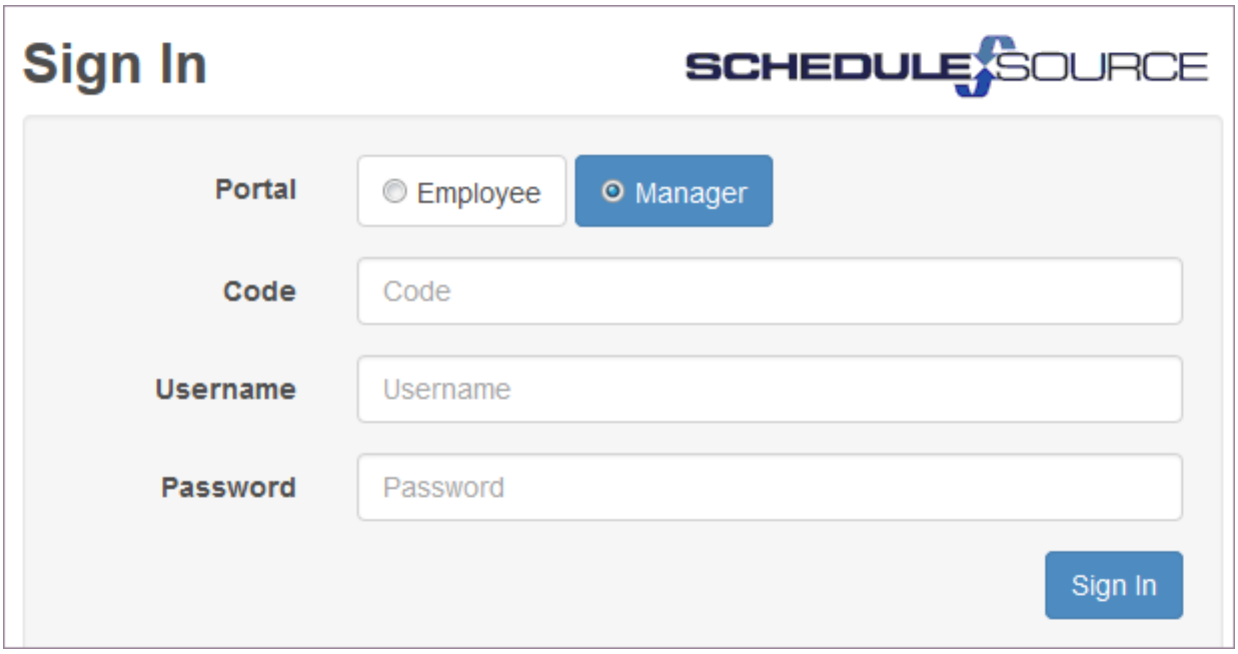
2. Getting Started

Topics to help you get started include:

2.1 Signing In

Once you have the URL and a login, use these instructions to sign in to the Manager portal.

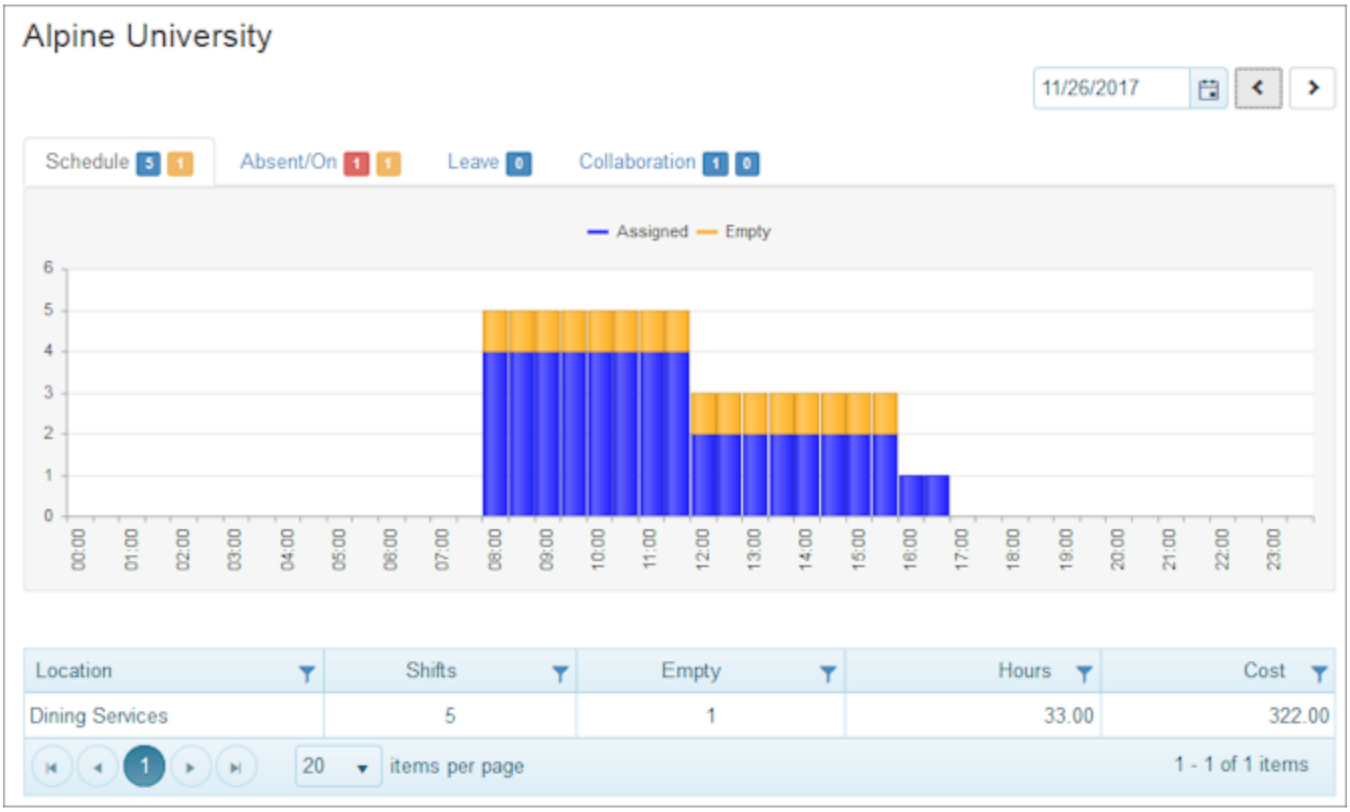
1. Enter the URL for TeamWork that your organization provides you.
   Sign In page displays.



2. Select Manager.
3. Enter your Code, User, and Password and select Sign In.
   Home page displays.
   Important: We recommend changing your password. See My Settings.

2.2 Using Home

Use the Home page to view Schedule, Absent/On, Leave, and Collaboration data for today or the day you select. Example:

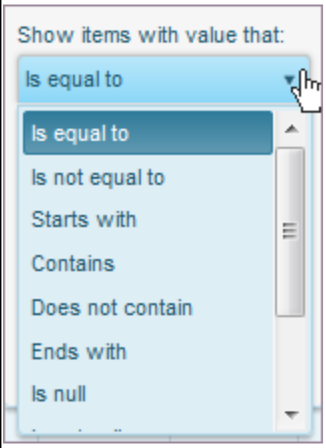
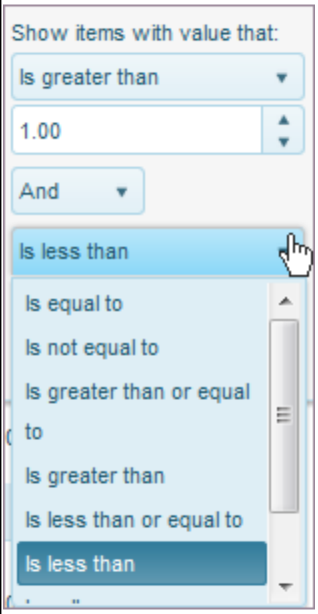


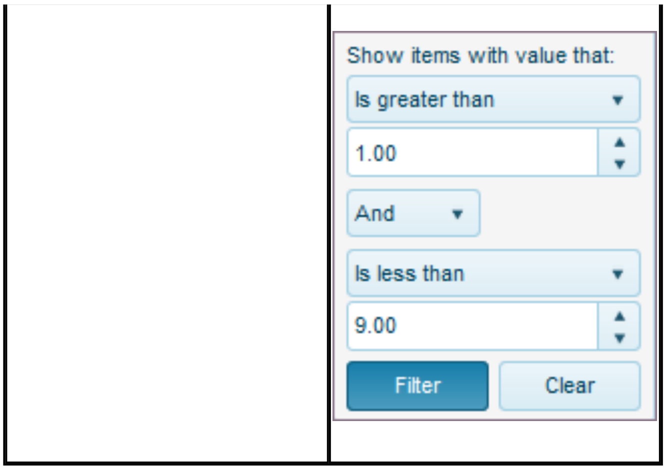
2.3 Using Filters

Use filters to search for details.

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

Refer to the following for specific information.

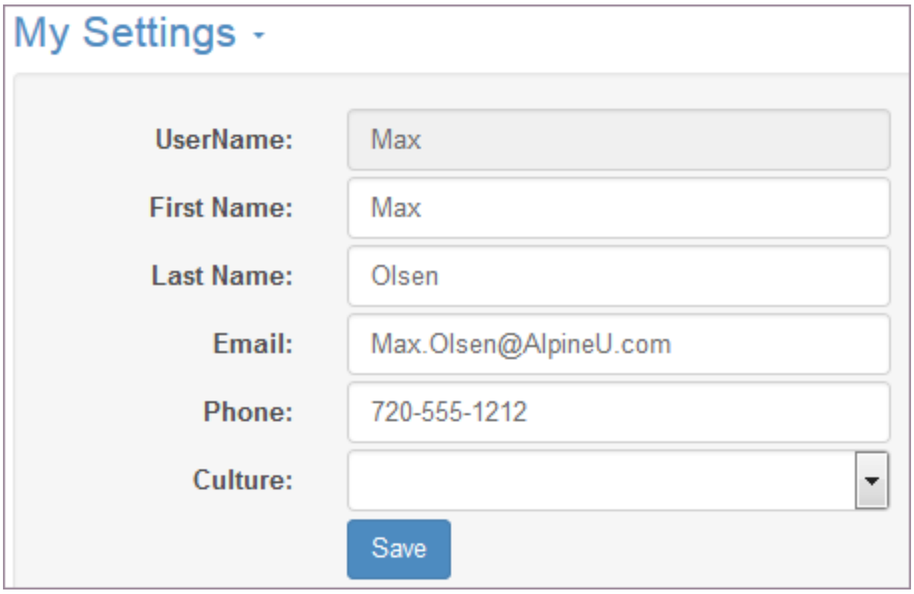
<table>
<tr><th>Filter Type</th><th>Displays</th></tr>
<tr><td>First factor:
Show items with value that</td><td>
</td></tr>
<tr><td>Include or Exclude
Chose And...Or</td><td>
</td></tr>
<tr><td>Second Factor</td><td>
</td></tr>
<tr><td>Example</td><td></td></tr>
</table>



2.4 Using My Settings

Use My Settings to add and edit personal information and reset your password. Session data also displays.

2.4.1 My Settings

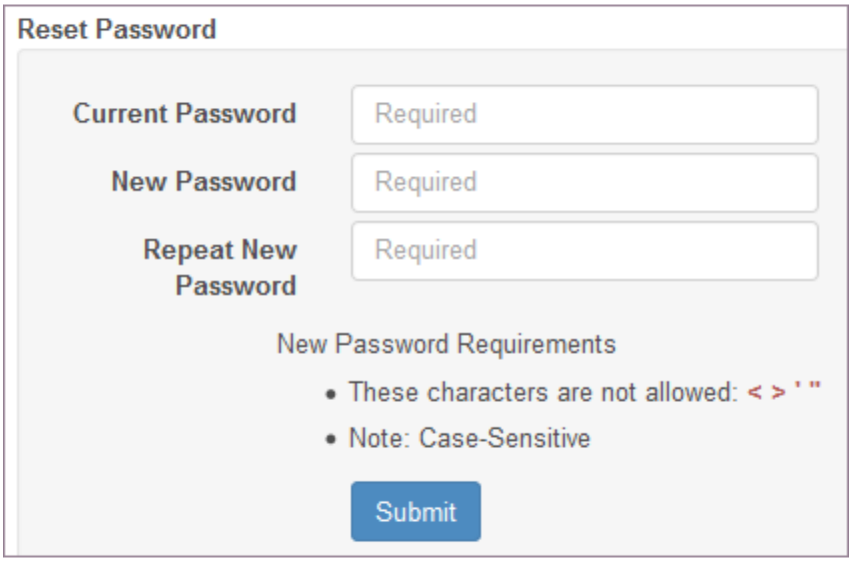


Note: You cannot edit your UserName. Your system administrator must do this.

To edit your settings:

1. Edit your First Name and Last Name.
2. Add or edit an Email address.
   Important: An accurate email address ensures you receive system messages and notifications.
3. Add a Phone number.
   Important: An accurate phone number ensures you receive TeamWork calls and notifications.

2.4.2 Resetting Your Password



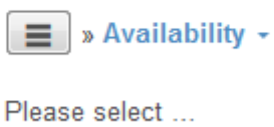
To reset your password:

1. Enter your Current Password.
2. Enter your New Password and Repeat your New Password.
   Important: Follow the requirements provided.
3. Select Submit.

2.5 Using the Menu Button

Many TeamWork pages include a Menu button. Use it to quickly filter a list and locate the information you are looking for.

Example:



Expands

2.6 Using Help

TeamWork provides a number of ways to receive help and support.

• Visit the Helpdesk to review the knowledge base and guides.

• Enter a Support Ticket. Log in to add a new ticket, update a current ticket, or check ticket status.

3. Overview

3.1 Overview

Inportant concepts of TeamWork includes:

- Introduction
- Manager Portal Workflow
- Main Menu and Scope
- Role Access
- Getting Started

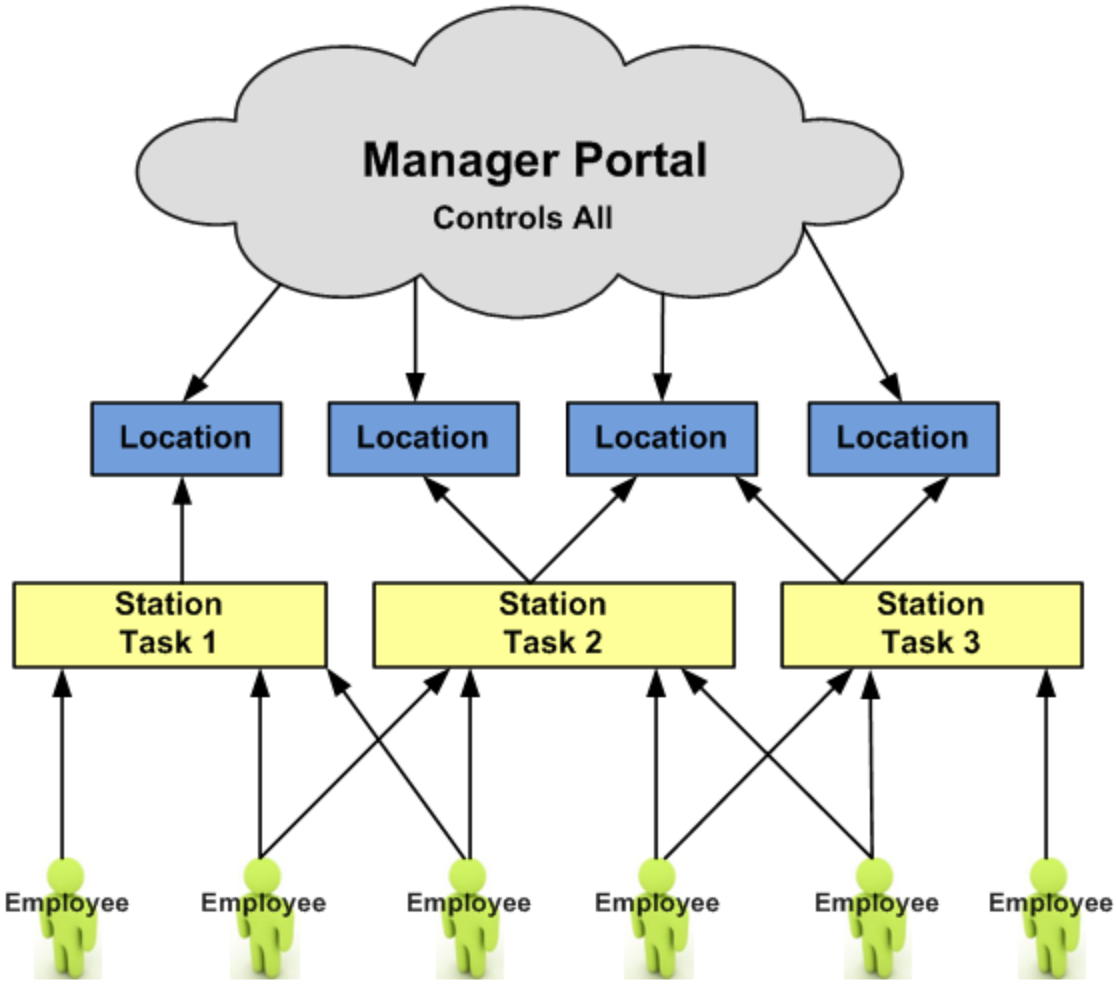
3.2 Introduction

TeamWork uses a Manager portal and an Employee portal to help you manage your company workforce. Together, they help you manage tasks in schedules, employee time, and work in all locations in your organization. A brief description follows.

- Manager Portal — use it to structure your organization and define user access and privileges. Within the Manager portal are sections for the enterprise and for locations, stations, employees, and time. Also included are sections for managing leave, encouraging collaboration, and running reports.
- Employee Portal — use it so employees can access their schedule, time worked, message board, and email notifications. Choose optional features for employee access: allow employees to self-assign themselves to available shifts, swap and/or bid on shifts, view coworker information, enter availability, and view a full location schedule.

3.2.1 TeamWork Diagram

The following diagram shows how TeamWork generally operates. The Enterprise portal provides the umbrella or cloud configuration that houses all locations, the stations where tasks are performed, and the employees who are assigned to perform them.



3.2.2 How It Works

Enter organization data into the Manager portal pages and use it to develop schedules and assign employees to shifts. As employees work shifts, they enter time in the Employee portal. Managers use the time-related information for payroll and to improve performance and efficiency. Refer to the Manager Portal Workflow.

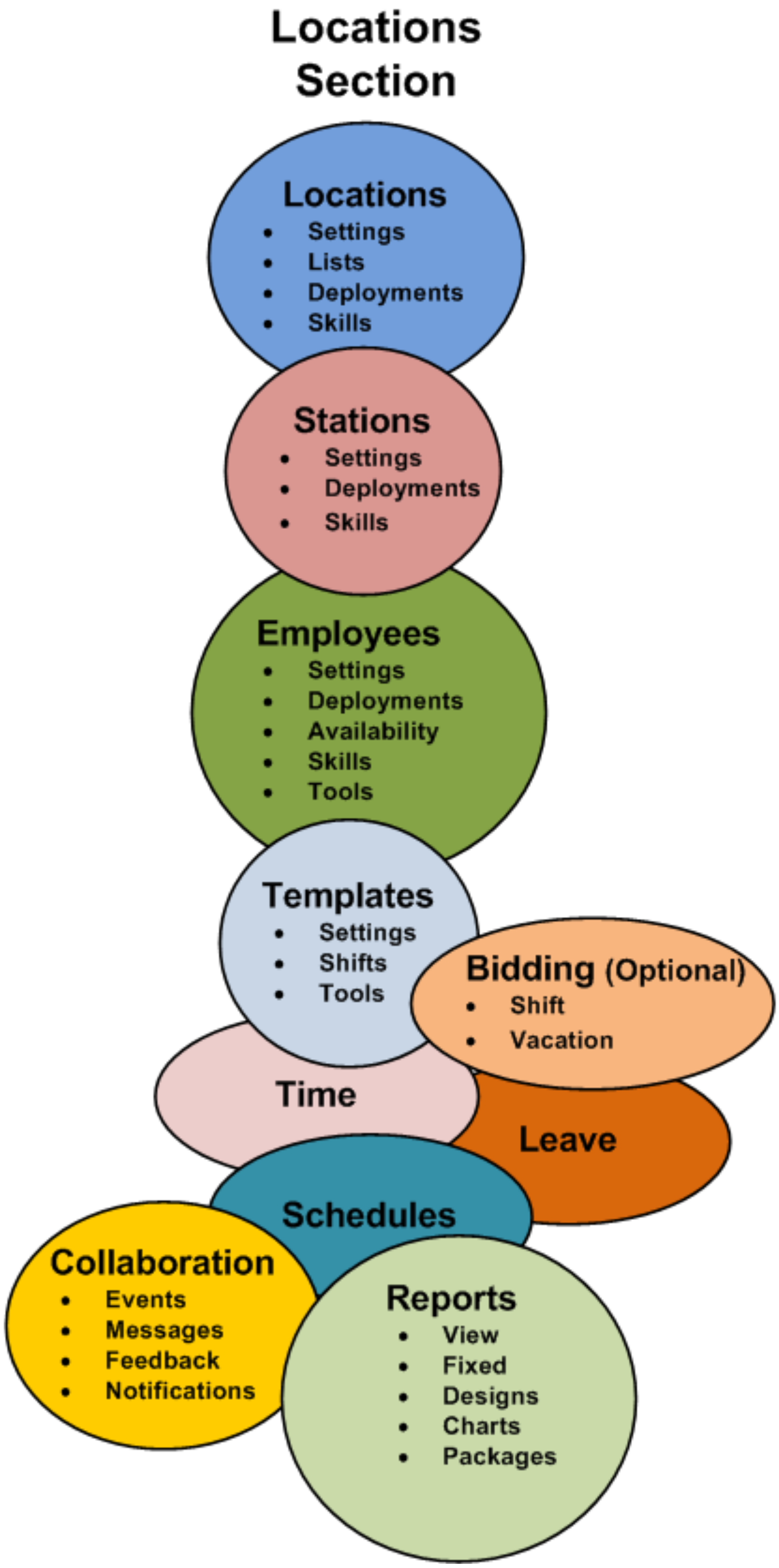
3.3 Manager Portal Workflow

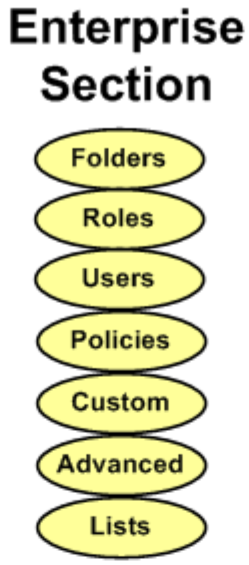
The Manager portal provides centralized management for the enterprise as well as all locations, employees, stations, and users. The workflow includes:

- Setting up the enterprise section including information, configuration, roles, users, policies, and lists.
- Setting up your organization's locations.
- Setting up the stations where employees work and assigning these stations to locations.
- Entering employees and deploying them for work at locations and stations.
- Setting up templates to define shifts.
- Managing schedules, time, and leave.
- Maintaining communications including events, messages, notifications, and feedback.
- Running reports and monitoring organizational performance.

3.3.1 Manager Portal Diagram

Refer to the following diagram of the Manager portal.


Locations Section
Locations
Settings
Lists
Deployments
Skills
Stations
Settings
Deployments
Skills
Employees
Settings
Deployments
Availability
Skills
Tools
Templates
Settings
Shifts
Tools
Bidding (Optional)
Shift
Vacation
Time
Leave
Schedules
Collaboration
Events
Messages
Feedback
Notifications
Reports
View
Fixed
Designs
Charts
Packages


Enterprise Section
Folders
Roles
Users
Policies
Custom
Advanced
Lists

3.3.2 Manager Portal Sections

Refer to the Main Menu and Scope for more detailed information about how to use the Enterprise Scope and Locations Scope.

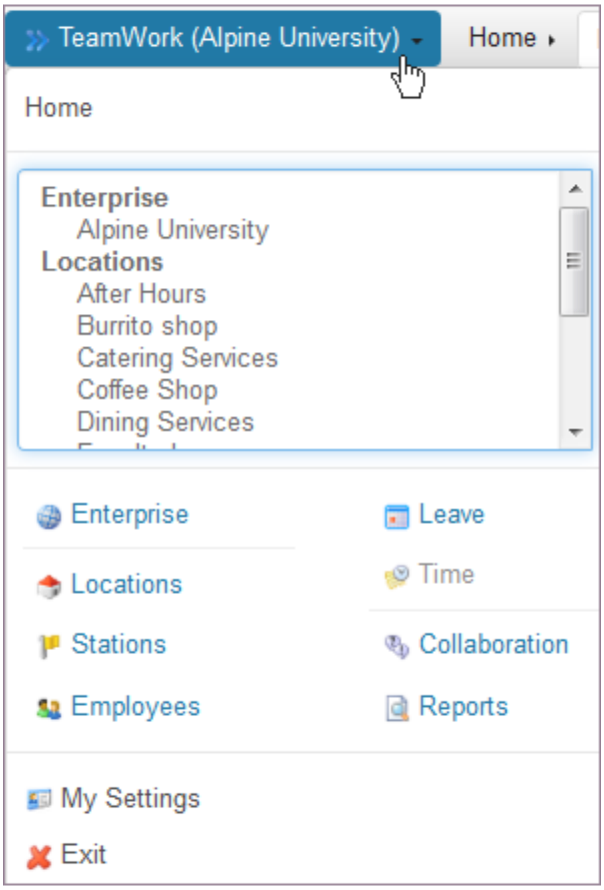
3.4 Main Menu and Scope

The Manager portal allows you to work on pages that hold information for the entire organization or data related to one location. Role privileges define what you can see and do. When you are given a login, you are also assigned role access. For more information, see Role Access.

- If you have full access, you see the Enterprise link as well as links to all Locations.
- If you have access to one or more Locations, you see links for those Locations.

3.4.1 Main Menu

Use the TeamWork drop-down list to switch between the Enterprise or Location-specific information.



3.4.2 Scope

The two levels of access scope:

- Enterprise section
- Locations section

Each is described as follows.

Enterprise Scope

Use the Enterprise Scope section to review your license agreement, configure settings, configure the enterprise system, and review system usage.

- Enterprise Information — enterprise-wide information such as name, time zone, and license agreement
- Enterprise Configuration — links to settings and features your organization chooses to use

- Enterprise — options available and settings used
- Policies — options available for policy management
- Passwords — options available for password management
- System — features enabled by ScheduleSource in your TeamWork account

ENTERPRISE SECTION ITEMS

- Folders — optional
- Roles — system settings to establish access and privileges for performing tasks
- Users — add users or change user location and role assignment
- Custom — add and edit custom fields and attributes
- Lists — add and edit items in lists that display on section pages
- Advanced — resolve IP Blocking, customize application terminology, and use data I/O with ScheduleSource support

Location Scope

Use the Locations scope to set up localized data in TeamWork. Locations section items include the following.

- Locations — add and edit distinct areas where employees work
- Stations — add and edit positions, jobs, or distinct work areas within a location. Assign stations to locations.
- Employees — add and edit the people who perform work in your organization. Deploy employees to stations in locations.
- Templates — create and edit weekly shifts to use in schedules for stations at a location
- Bidding (Optional) — create and edit shift and vacation bids for employees to bid on
- Leave — view, add, grant, deny, and delete employee leave requests
- Schedules — add and edit schedules, fill them with shifts, and assign shifts to employees
- Time — approve time in your organization and assign project tasks and activities to employees. Display time-related issues, time worked, exceptions, and alerts.
- Collaboration — post events to an organizational calendar, send messages and alerts, set up email notifications, and build surveys for feedback
- Reports — organize your organization data using a variety of summary, detail, and fixed reports. Schedule reports and automatically email reports.

3.5 Role Access

TeamWork provides different access to the system based on your role permission. Roles are the definition of system-related privileges. They control what a user can see and do. For detailed information on roles, see Enterprise Role Definitions and Location Role Definitions.

3.5.1 Enterprise and Multiple Locations

If you are a user who is assigned to the enterprise, you have access to the Organization. The pages that help you manage the enterprise include the following tabs:

- Configuration
- Folders
- Roles
- Users
- Policies
- Custom

If you are a user who is also assigned to multiple locations, the following additional pages display when you log into TeamWork.

- Locations
- Stations
- Employees
- Credentials
- Leave
- Time
- Collaboration
- Reports

3.5.2 Single Location

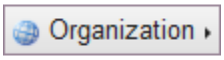
If you are a user who is assigned to one location, the following pages display when you log into TeamWork.

- Stations
- Employees
- Templates
- Schedules
- Time
- Collaboration
- Reports

4. Organization

4.1 Organization Section

Use the Organization section tabs for folders, roles, users, policies, custom, lists, and advanced. Once information is set up in the Organization section, other system pages use it.



Select Enterprise from the main menu to display the Enterprise section tabs. Select a tab to add, edit, or delete related information.

- Folders (optional)
- Roles
- Users
- Custom (optional)
- Lists
- Select Lists
- Special Days
- Agreement Types
- Position Types
- Shift Names
- Data I/O
- Enterprise Roles and Location Roles (describes each section and the features)
- Policies (optional)

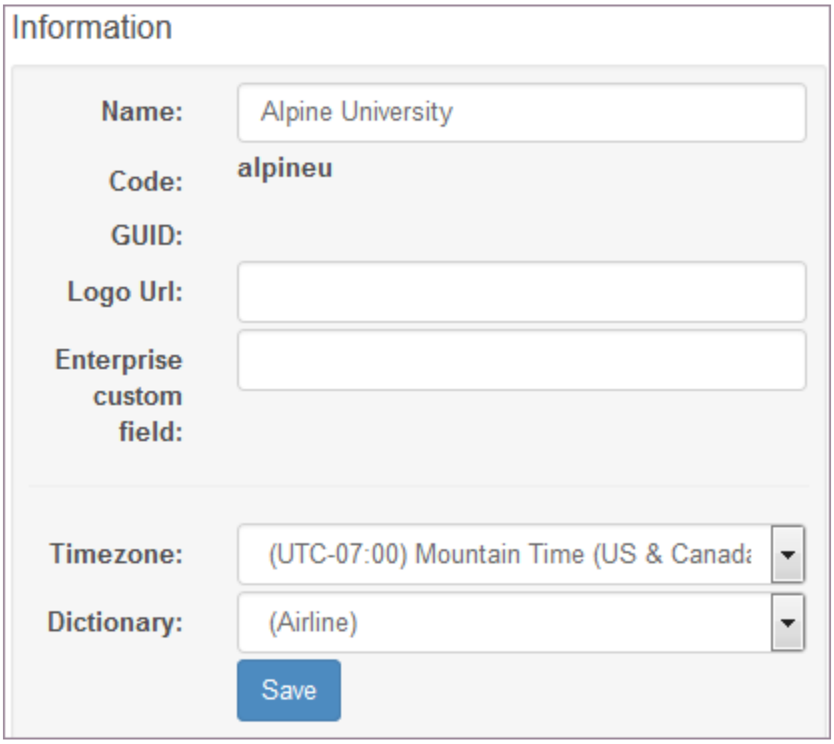
4.2 Organization Information

Use the Information page to configure and review the Manager portal name and time zone settings.

To configure organization Information:

1. Select your organization name under Enterprise.
2. Verify Name is correct or make changes. This is the name that appears in the top left corner of the Manager portal.
3. Verify the Code. This is the account code used to logon to the Manager portal.
   Note: To change the code, open a new support ticket.
4. Logo Url. If you would like to display the organization Logo on your log on page, open a new support ticket.
5. If your organization creates Enterprise custom fields, they display in this window.
6. Select the Time Zone from the drop-down list. This is the time zone that displays when you are logged in.
7. Select the Dictionary from the drop-down list. Standard is the default.
8. Select Save.

Example:



4.3 Organization

The Organization page allows you to set organization-wide features in TeamWork.

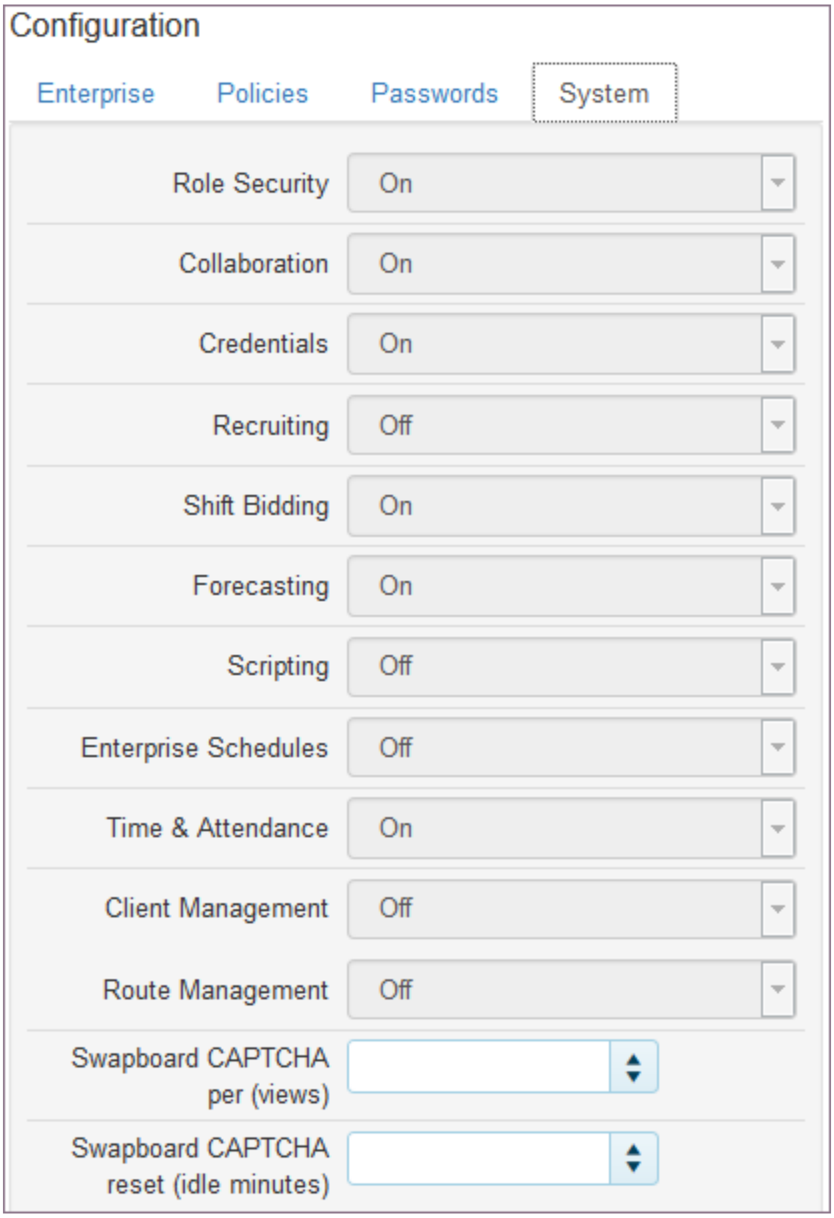
To configure the Organization page:

1. Select Organization from the main menu.
2. Select the Enterprise tab if it is not selected.
3. Make the desired selections and select Save.
4. Review the description and configuration settings in the following table.

4.3.1 System Section

The System Section allows you to review the system features that are enabled in your TeamWork account. These settings are read-only and available for reference. To add additional features to your account, open a new support ticket.

Example:


Configuration
Enterprise
Policies
Passwords
System
Role Security
On
Collaboration
On
Credentials
On
Recruiting
Off
Shift Bidding
On
Forecasting
On
Scripting
Off
Enterprise Schedules
Off
Time & Attendance
On
Client Management
Off
Route Management
Off
Swapboard CAPTCHA per (views)
Swapboard CAPTCHA reset (idle minutes)

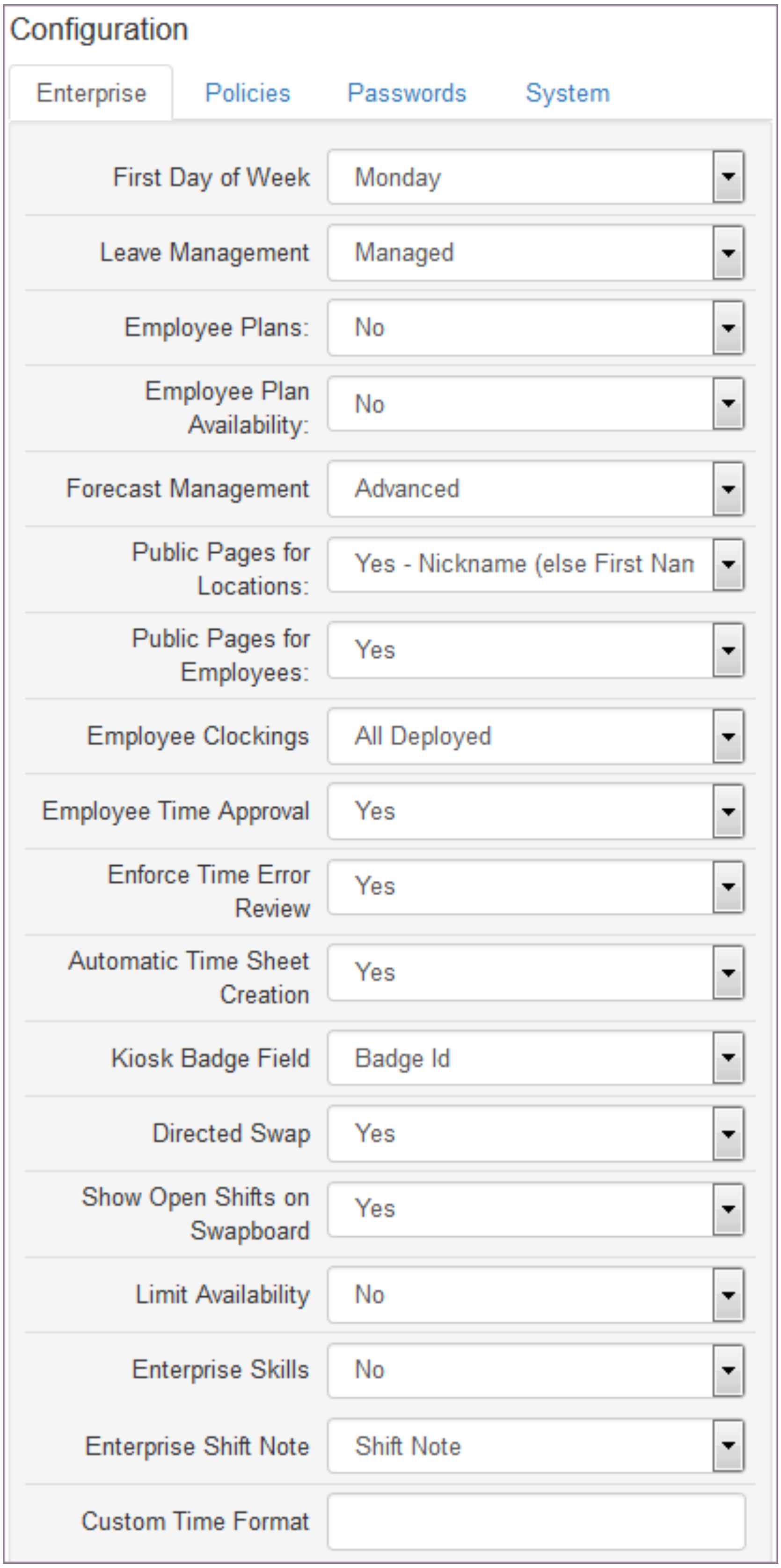
4.3.2 Enterprise Section

Field	Description	Settings
First Day of Week	Designates the start day of schedules	The first day of the schedule for locations. This is enforced if locations cannot change the First Day in the Location Days/Hours Settings.
Leave Management	Pertains to how time off is handled	**Ad-Hoc** -Uses Leave section for Leave requests and the ability to grant, deny, or cancel leave. **Managed** – Uses Bidding section to set up and manage vacation bids.
Employee Plans	Currently not used	**No** - **Yes** -
Employee Plan Availability	Currently not used	**No** - **Yes** -
Forecast Management	Pertains to types of forecast available. Used only if the Forecasts module is activate.	**Advanced** - Data Feeds, Time Series, and Headcount Plans are available. **Simple** - Only the Data Feeds feature is available
Public Pages for Locations	Generates a URL link to view published schedules and a link to iCal formatted data	**No** - Locations do not get the ability to the URL link. Yes allows the URL link and you choose employee name type to be shown. **Yes** - Nickname (If none then First Name) **Yes** - Full Name **Yes** - First Name and First Letter of Last Name **Yes** - First Name
Public Pages for Employees	Generates a URL link to view their own published schedules	**Yes** - Employees see a new tab in the Profile section to create a URL and a Link to iCal formatted data.

Employees Clockings	Pertains to where Employees are allowed to Clock on. Used only if the Time module is used.	**All Deployed** - Allows Employees to Clock on to all individual locations to which they are assigned. **Only default** - Allows Employees to Clock on to only their primary default location.
Employees Time Approval	Pertains to whether or not Employees are required to approve their timesheet, both time clock and time card entries.	**No** - Employee does not approve their timesheet. **Yes** - Employee does approve the timesheet, both time clock and time card entries.
Enforce Time Error Review	Pertains to whether or not Time Errors must be reviewed and whether or not errors must be fixed. Used only if the Time module is used.	**Yes** - Requires location to review and fix all time entries with ERROR status (correct time entry or void) before the pay period can be approved. **No** - No required review by location manager.
Automatic Time Sheet Creation	Pertains to the Pay Period. Used only if the Time module is used.	**Yes** - Enables hourly auto run where timesheets are automatically updated per rules; including creating timesheet for new employees. We recommend that you leave this setting as Yes, otherwise you must manually create timesheets for each new employee you enter in the system. **No** - Timesheets for new employees are not created automatically. To create a timesheet manually, go to Time > Configuration > Pay Periods and click on the buttons: **Update Names** and **Add Timesheets**.
Kiosk Badge Field	Pertains to the Time Kiosk. Used only if the Time module is used.	Choose the field that the Kiosk window reads to clock employees on and off. Available fields are External Id, Username/Id, Badge ID, Bio ID, and IVR Pin.
Directed Swap	Pertains to Swapboard functionality	**Enabled** - Turns on directed swaps at **all** locations. Allows employees to direct a swap to one employee of their choice. **Off** - Posted swap shifts are available to all employees and can't be 'directed' to one employee.

Show Open Shifts on Swapboard	Pertains to posted shifts on the Swapboard.	**Yes** - All empty shifts in a published schedule are automatically posted on the swapboard **No** - Only shifts posted by employees for swapping are posted on the swapboard.
Limit Availability	Pertains only to Enterprise Scheduling Only applicable if Enterprise Scheduling is active.	**Off** - Employees are eligible to pick up Enterprise Swap Board shifts for any hours. **Business Hours** - Employee ability to pick up shifts from the enterprise Swapboard is limited to business hours entered in the Location Days/Hours Settings.
Enterprise Skills	Employee assignment to stations by location	**Off** - The location can assign employees to any station they have. The Stations section includes the Tools menu so that skills can be updated in the Location portal using Mass Update Skills. **Enabled** - A location skill can only be assigned if the employee has been given a master skill at that station by the enterprise.
Enterprise Shift Note	Allows the organization to display or not display shift notes on the shifts in the Employee portal.	Off - shift notes do not display in Employee portal Shift Note - (default) shift notes display in schedule and swapboard shifts in the Employee portal Task - notes display on tasks in the Employee portal Activity - notes display on activities in the Employee portal
Custom Time Format	Pertains to using a time format. Used only if the Time module is used.	Text box - enter time format If left blank, data displays in U.S. format: am or pm

Example:


Configuration
Enterprise
Policies
Passwords
System
First Day of Week
Monday
Leave Management
Managed
Employee Plans:
No
Employee Plan Availability:
No
Forecast Management
Advanced
Public Pages for Locations:
Yes - Nickname (else First Nan
Public Pages for Employees:
Yes
Employee Clockings
All Deployed
Employee Time Approval
Yes
Enforce Time Error Review
Yes
Automatic Time Sheet Creation
Yes
Kiosk Badge Field
Badge Id
Directed Swap
Yes
Show Open Shifts on Swapboard
Yes
Limit Availability
No
Enterprise Skills
No
Enterprise Shift Note
Shift Note
Custom Time Format

4.3.3 Policies Section

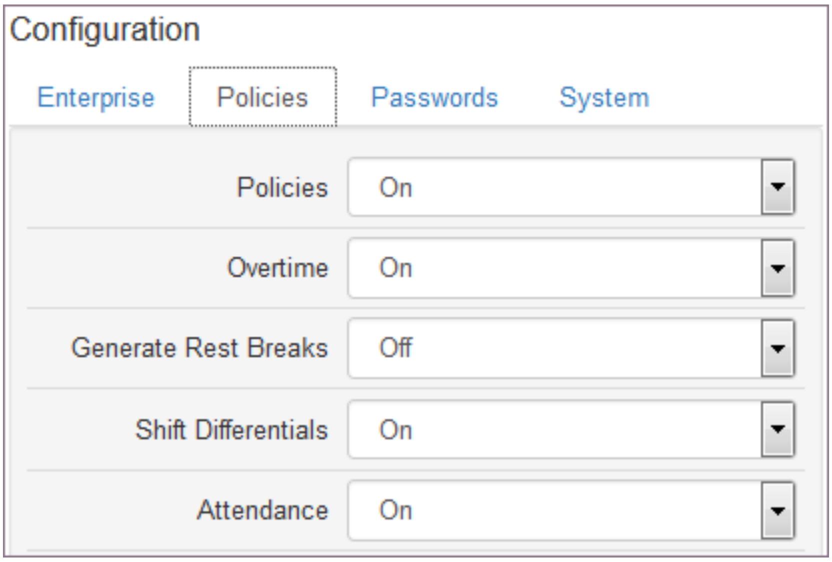
The Policies page allows you to set features related to the management of time, overtime, breaks, shift differentials, holiday pay, attendance, and the deployment of projects, tasks, and activities.

To configure the Policies page:

1. Select Organization from the main menu.
2. Select the Policies tab.
3. Make the desired selections and select Save.
4. Review the description and configuration settings in the following table.

Field	Description	Settings
Policies	Allows you to set up policies with management components.	**On** - Policy management is enabled. **Off** - Policy management is not enabled.
Overtime	Allows you to set up and enforce overtime rules for groups of employees.	**On** - Setting overtime rules is enabled. **Off** - Setting overtime rules is not enabled.
Generate Rest Breaks	Allows you to set up and enforce rest breaks according to government regulations of labor agreements.	**On** - Setting rest breaks is enabled. **Off** - Setting rest breaks is not enabled.
Shift Differentials	Allows you to set up and enforce shift differential payment.	**On** - Setting shift differential payment is enabled. **Off** - Setting shift differential payment is not enabled.
Attendance	Allows you to set up a system for tracking attendance and accessing violations for tardiness.	**On** - Attendance tracking is enabled. **Off** - Attendance tracking is not enabled.

Example:



4.3.4 Passwords

The Passwords page allows you to set password management criteria.

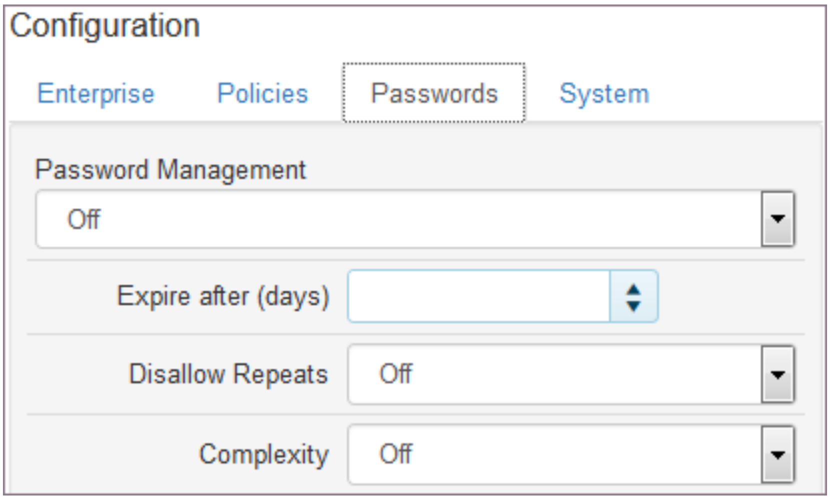
To configure the Passwords page:

1. Select Organization from the main menu.
2. Select the Passwords tab.
3. To set password management criteria, select Enabled from the drop-down list.
4. Enter the number of days a password should Expire after.
5. Select whether to Disallow Repeats: Off or Enabled
6. Select whether or not Complexity is Off or Enabled. If enabled, refer to the following guidelines:

- At least eight (8) characters long
- Contains both letters and numbers
- Not a variation of the user name

7. Select Save.

Example:


Configuration
Enterprise
Policies
Passwords
System
Password Management
Off
Expire after (days)
Disallow Repeats
Off
Complexity
Off

4.4 License Agreement

Use the License Agreement link to review the agreement between ScheduleSource and your organization.

To review the License Agreement::

1. Select your organization name under Enterprise.
   Settings page displays.
2. Scroll down and select License Agreement.
   License Agreement page displays.

4.5 Usage

Use the Usage link to review usage of your ScheduleSource account.

To review Usage:

1. Select your organization name under Enterprise.
   Settings page displays.
2. Scroll down and select Usage.
   System Usage page displays.

4.6 Folders

Use Folders to set up your organization's hierarchical structure. This is an optional feature that restricts the amount of data Manager portal users see and are allowed to work with. You can limit access to data to only some locations.

4.6.1 Adding a Folder

1. Select Organization from the main menu.
2. Select the Folders tab.
3. Select Add.
4. On the Add >> Folder window, type the Name.
5. Type the External Id.
6. Select Save.

4.6.2 Assigning a Location to a Folder

1. Select a folder.
2. Under the folder page, select Locations Add.
3. Select the locations for this folder and select Save.
   Note: You can select multiple locations at once.

4.6.3 Adding a Sub-Folder to a Folder

1. Select a folder.
2. Select Add Sub Folder.
3. On the Add >> Folder window, type the Name.
   Note: You can change the parent folder using the drop-down list.
4. Type the External Id.
5. Select Save.

Example:

4.6.4 Deleting a Folder

1. Select Organization from the main menu.
2. Select the Folders tab.
3. Select a Folder.
4. Select Delete.
   Pop-up window prompts: Delete Item?
5. Select OK

4.7 Roles

Use Roles to define the sections and features a user may have access to for the enterprise or locations. Each section contains a list of features with associated actions that can be performed. When you select a check box, you enable or permit a user to perform a section feature. To set up roles:

1. Add a role and identify the type, i.e., enterprise or location.
   Note: After you Save an enterprise role, a symbol designates it as an enterprise role.
2. Select a role and select a section.
   Actions available display for each feature.
3. Select the check box by a feature you want to enable in this section for the role.
   Note: You can select All to quickly enable all features in a section. Use Clear to quickly disable selected features.
4. Add a role to users. To add a user, see Users.

Adding a Role:

1. Select Organization from the main menu.
2. Select the Roles tab.
3. Select + Add in upper right corner.
4. On the Add >> Role window, type the Name.
5. Select the Type of role: Enterprise or Location.
6. Select Save.

Example:

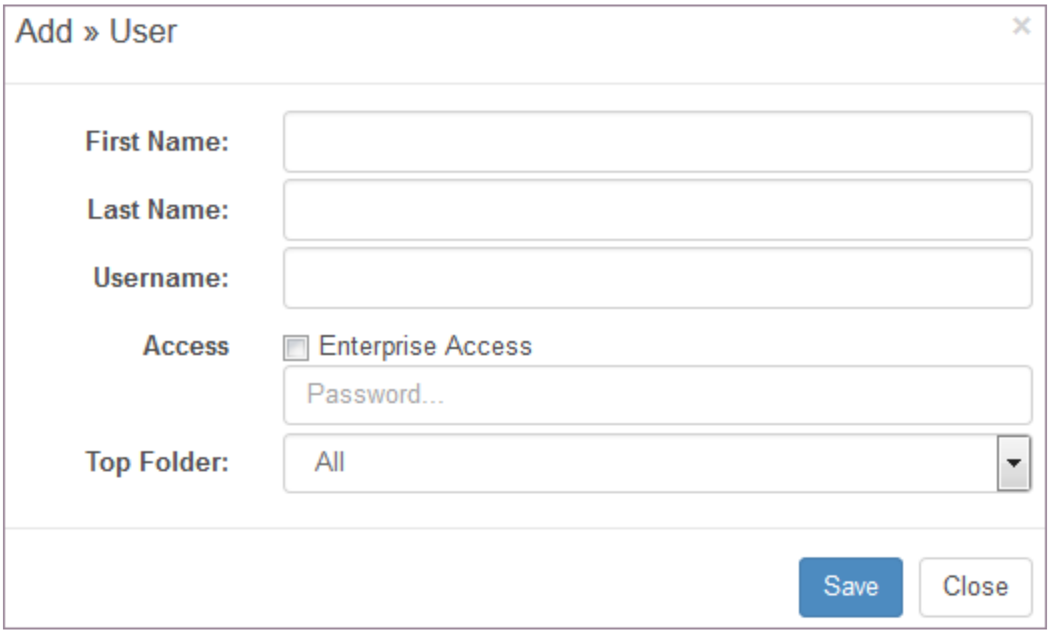
Defining Role Features:

1. Select Organization from the main menu.
2. Select the Roles tab.
3. Select a Role.
   Sections and Features display.
4. Select the check boxes of the features that you want to enable for this role.
   See Enterprise Role Definitions and Location Role Definitions.

4.7.1 Adding a Role to a User

1. Select Organization from the main menu.
2. Select the Roles tab.
3. Select a Role.
4. Select Add adjacent to Users.
5. On the Add >> User window, select the User names you want to add.
6. Select Save.
   User name is listed under Users.

Example:



Deleting a Role from a User:

1. Select Organization from the main menu.
2. Select the Roles tab.
3. Select the role you want to delete from a user.
   Users assigned this role display.
4. Select X Remove.
   Pop-up window prompts: Remove?
5. Select OK.

4.7.2 Deleting a Role

1. Select Organization from the main menu.
2. Select the Roles tab.
3. Select the role you want to delete.
   Role information displays.
4. Select Delete on the right corner.

4.8 Users

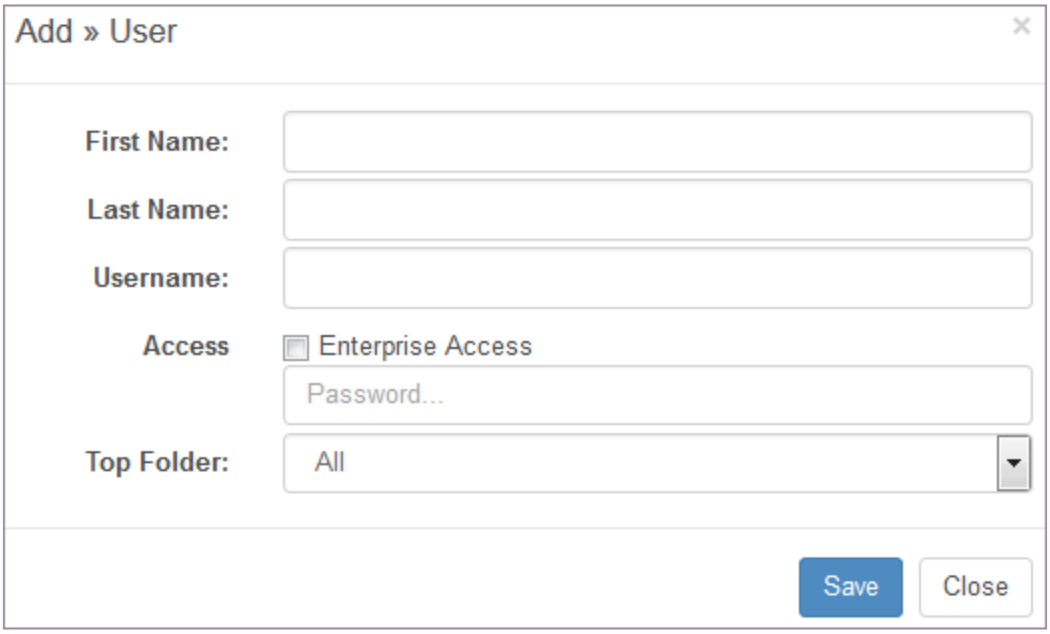
Use the Users pages to add a user and assign a location and role to that user.

1. Add a user and identify whether the user has Enterprise Access. You may select a Folder also.
2. Select a user and select a location and role.
   Note: After you Save a user with enterprise access, a symbol designates the user has enterprise access.

4.8.1 Adding a User

1. Select Organization from the main menu.
2. Select the Users tab.
3. Select + Add in upper right corner.
4. On the Add >> User window, type the First Name, Last Name, and Username.
5. Select the Access check box if this User has Enterprise Access.
6. Type the Password.
7. (Optional) Select the Top Folder.
8. Select Save.

Example:



4.8.2 Adding a Location to a User

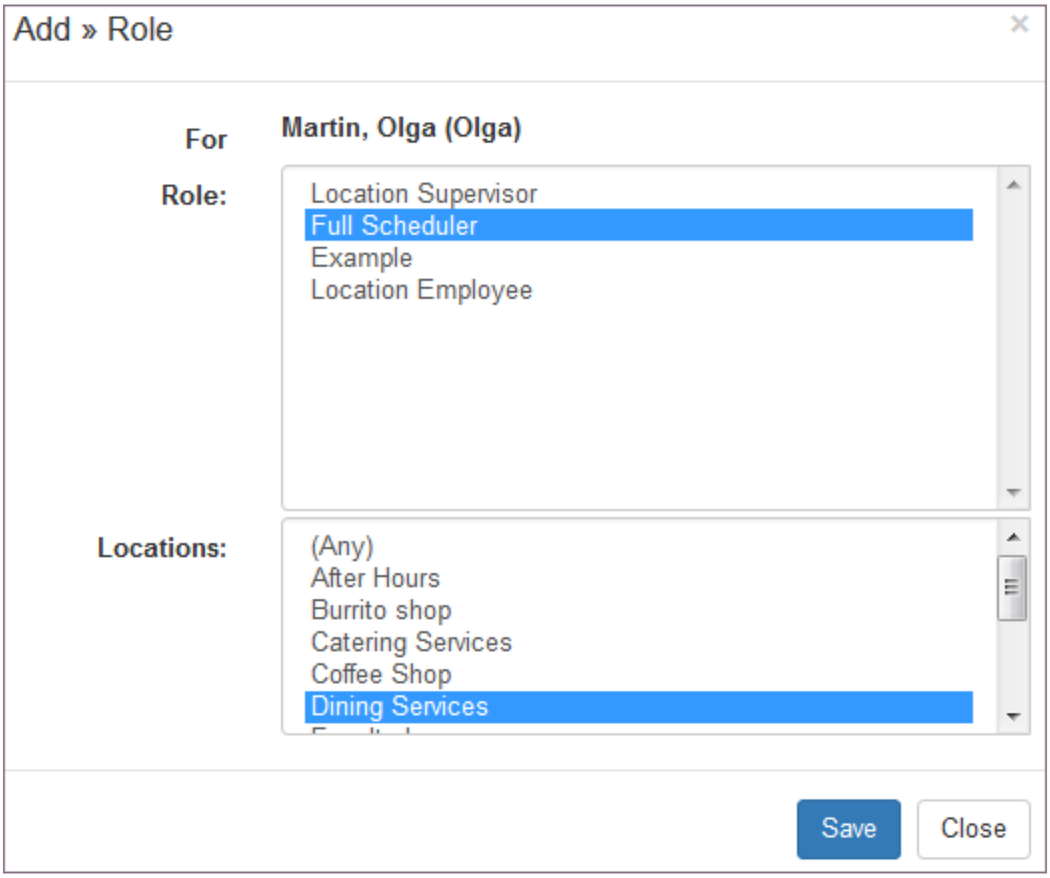
1. Select Organization from the main menu.
2. Select the Users tab.
3. Select a User.
4. Select Add adjacent to Locations.
5. On the Add >> Location window, select the location to add.
6. Select Save.
   Assigned locations display in Location list.

   Example:

4.8.3 Adding a Role to a User

1. Select Organization from the main menu.
2. Select the Users tab.
3. Select a User.
4. Select Location or Enterprise adjacent to Roles.
5. On the Add >> Role window, select the role to add.
6. Select Any to have this role apply to all locations or select one or more locations.
7. Select Save.
   Assigned roles display in Roles list. Specific location is in parenthesis.

   Example:



4.8.4 Editing User information

1. Select Organization from the main menu.
2. Select the Users tab.
3. Select a User.
4. Make desired changes to User information, including Password and Enterprise Access.
5. Select x Remove to remove an assigned location or role.
   Pop-up window prompts: Remove?
6. Select OK.

4.8.5 Deleting a User

1. Select Organization from the main menu.
2. Select the Users tab.
3. Select a User.
4. Select Delete.
   Pop-up window prompts: Delete Item?
5. Select OK.

4.9 Enterprise Roles

The following tables provide a brief description of the features related to the enterprise and multiple location access.

4.9.1 Admin Section

Feature	Description
View	allows viewing of the Admin section data – no editing.
Information	allows editing the data on the Information link.
Configuration	allows editing the information on the Configuration link.
Usage	allows viewing the Usage link information.
Enterprise Custom Fields	can add, edit and delete all the Custom Fields and the Lists for Employee Agreements and Employee Positions.
Location Custom Fields	can add, edit and delete the Location Custom Fields data.
User Custom Fields	can add, edit and delete the User Custom Fields data.
Employee Custom Fields	can add, edit and delete the Employee Custom Fields data.
Station Custom Fields	can add, edit and delete the Station Custom Fields data.
Shift Swap Reasons	can add, edit and delete the Shift Swap Reasons.
Shift Reassign Reasons	can add, edit and delete the Shift Reassign Reasons.
Shift Cancel Reasons	can add, edit and delete the Shift Cancel Reasons.
IP Address Blocking	can unblock the IP Address Blocking caused by logon failures.
Leave Types	can add, edit and delete Leave Types used in the Days Off requests.
Special Day Types	can add, edit and delete the Special Day Types.

Special Days	can add, delete and assign as a blackout day the Special Day.
Accounting Ids	can add, edit and delete Accounting ids used with web services.

4.9.2 Collaboration Section

Feature	Description
View	allows viewing of the Collaboration section data – no editing.
Event Administrator	allows the addition, editing, sharing and deletion of events on the calendar.
Message Administrator	allows the addition, editing, sharing and deletion of messages.
Notification Administrator	allows the addition, editing, sharing and deletion of notification settings.
Feedback Administrator	allows the addition, editing, sharing and deletion of feedback surveys.

4.9.3 Credentials Section

Feature	Description
View	allows information in the Credentials section to be viewed; no editing.
Edit	allows information in the Credentials section to be edited. Includes adding prerequisites and identifying stations where qualification, training class, or certification is required.
Assign	allows assignment of qualification, training class, and certification to employee.
Schedule Enforcement Settings	allows editing of schedule and time enforcement information for a location.
Clear Non-Compliant Shifts	allows clearing non-compliant shifts.

4.9.4 Employees Section

Feature	Description
View	allows viewing the information in the Employee section – no editing.
Add	allows adding employees to the organization.
Edit	allows editing the employee information.
Delete	allows deleting employees from the organization.
Inactive	allows inactivating or reactivating employees in the organization.
Change Password	allows changing the employee’s password.
Assign to Folders	allows employees to be assigned to folders in the Organization section.
Deploy to Locations	allows employees to be deployed or assigned to Locations.
Assign to Stations	allows the employee to be assigned to a Station and give a master skill level.
Assign Employee Agreement	If Policy Management is enabled, allows the employee to be assigned agreements.
Mass-Assign Employee Agreement	allows new employees to be assigned Employee Agreements and Employee Positions (if Lists have been created in the Organization section). If Policy Management is enabled, allows new employees to be assigned a policy.
View Leave	allows viewing of leave requests and status.
Edit Leave	allows managing leave including approving and cancel if user is authorized at the location.
View Credentials	allows information in the Credentials section to be viewed; no editing

4.9.5 Forecasting Section

Feature	Description
View	allows full access and editing to the Forecasting section to create templates based on headcounts and share the templates with locations.

4.9.6 Leave Section

Feature	Description
Leave	allows viewing of leave requests and status. Allows managing leave including approving and canceling leave if user is authorized at the location. Allows adding leave types.

4.9.7 Locations Section

Feature	Description
View	allows viewing the information in the Locations section – no editing.
Add	allows adding locations to the enterprise.
Edit	allows editing information for locations.
Copy Settings	allows copying the settings from one location to other locations.
Deploy Users	allows the assignment of Users so they can login to the location.
Deploy Employees	allows employees to be deployed (assigned) to a location.
Deploy Stations	allows stations to be deployed to a location for scheduling.
Deploy Projects	allows projects to be deployed to a location for scheduling.
Deploy Activities	allows activities to be deployed to a location for scheduling.

4.9.8 Organization Section

Feature	Description
View Folders	allows viewing the organization folder structure – no editing.
Edit Folders	allows additions, edits, or deletions to the organization folder structure.
View Policies	allows viewing the organization policies structure - no editing.
Edit Policies	allows additions, edits, or deletions to the organization policies structure.
Edit Policy Component	allows additions, edits, or deletions to the organization policy component structure.
Manage Default Policy	allows additions, edits, or deletions to the organization default policy.

4.9.9 Reports Section

Feature	Description
View	allows all reports to be viewed; can use filters but cannot edit or add new reports.
Edit	allows full access to reports to be added, edited or deleted.
Selected	allows access to only selected reports. Unless selected for this user, shared reports do not display.

4.9.10 Roles Section

Feature	Description
View	allows viewing the role settings in the Roles section – no editing.
Add	allows roles to be added in the Roles section.
Edit	allows existing roles to be edited in the Roles section.
Delete	allows existing roles to be deleted in the Roles section.
Assign to User	allows roles to be assigned to users.

4.9.11 Schedule Section

Feature	Description
View Local Schedule	adds Local Section to Menu bar; Adds List Schedules and Insert Template links to Tools folder; allows viewing the summary of the local schedules total shifts and hours that have been created by each location.
View Local SwapBoard	adds Swap Board link to Tools Folder; allows viewing the swapboard of shifts currently posted in each location for the next 7 days (Options tab filters are not applied)
Local Schedules Auto-Fill	adds Auto-Fill link to Tools folder; allows auto-fill to fill shifts for schedules created in the location (User does not have to be assigned to the location)
Edit Shift	under Shift Browser allows editing a location shift if User is assigned to the location
Assign Employee to Shift	under Shift Browser allows assigning employee to a location shift if User is assigned to the location
Post to Swapboard	allows posting shift for an employee to the swapboard (history shows user posted)

4.9.12 Scripting Section

Feature	Description
Admin	allows administering scripts

4.9.13 Stations Section

Feature	Description
View	allows the information in the Stations section to be viewed; no editing.
Add	allows stations to be added to the organization.
Edit	allows existing station information to be edited.
Delete	allows existing stations to be deleted.
Deploy to Location	allows existing stations to be deployed to a location.
Assign Employee	allows the employees to be assigned skills at existing stations.

4.9.14 Templates Section

Feature	Description
View	allows full access and editing to the Template section.

4.9.15 Time Section

Feature	Description
View	allows viewing of the Time section data; no editing
Manage Project/Task/ Activities	allows full access to the Project, Task, and Activity links
Manage Pay Rate	allows full access to the Pay Rates Folder including the set up link
Manage Clocks	allows full access to the Clocks folder including the set up link
Manage IVR	allows full access to the IVR link for managing clocking on by telephone
Time Approver	allows for the approval of the time entries at the enterprise
Time Reviewer	allows for viewing the local time entries at the enterprise
Time View Coverage Report	allows access to the Coverage Report in the Time section
View Pay Periods	allows viewing the pay periods; no editing
Add Pay Periods	allows the addition of pay periods
Complete Pay Periods	allows for the completion of pay periods by locking and approving them
Edit Pay Periods	allows pay periods to be edited
Clock in Employees	adds ability to clock in an employee; link added on the employee Timesheet
Edit Payroll	allows access to the Time/Configuration/ “Payroll Exports page”; enables ability to set-up and design a custom payroll export
Export Payroll	allows access to the Time/Pay Period/ “Payroll page”; enables ability to download the pay period data from the fixed or the custom exports

View Pay Rates	adds pay rate data to the Review/Actuals & Pay Period/Time Sheet pages; displays the Total Dollars for Pay Rate for the time entry
View Bill Rates	adds bill rate data to the Review/Actuals & Pay Period/Time Sheet pages; displays the Total Dollars for Bill Rate for the time entry
View Time Issues	adds the ‘Issues Tab’ to the Review Section for view only
Edit Time Issues	adds ability to Edit Time Issues
Mark Time Issues Void	adds ability to Change Status of Time Entry to Void
Mark Times Issues Open	adds ability to Change Status of Time Entry to Open
Mark Attendance Issues Confirmed	allows changing attendance issues to Confirmed
Edit Attendance Points	allows editing the Point value of an attendance issue
View Attendance Roll Ups Report	allows access to summary report of attendance points
Add Manual Attendance	allows user-entered attendance points, in addition to system generated
Payroll Corrections	enables entering corrections to past pay periods, with adjustments inserted into a current or future period

4.9.16 Users Section

Feature	Description
View	allows information in the Users section to be viewed; no editing.
Add	allows the addition of Location and Enterprise Users to the application.
Edit	allows the User information to be edited.
Delete	allows the ability to delete any User from the application.
Change Password	allows the User password to be changed.
Deploy to Locations	allows the User to be deployed to locations so they can logon at the location.
Assign to Roles	allows the assignment of roles to Users.

4.10 Location Roles

The following tables provide a brief description of the features related to single location access.

4.10.1 Admin Section

Feature	Description
Admin	Provides the ability to edit the Unique ID, set employee privileges, and set swap board rules for the location.

4.10.2 Collaboration Section

Feature	Description
Feedback Administrator	allows the addition, editing, sharing and deletion of feedback surveys.
Full	provides full access to the Collaboration section for events, messages, and notifications. Provides access to the Feedback menu to edit/manage results of an existing survey, but cannot add a new survey. See Feedback Administrator role setting above.

4.10.3 Employees Section

Feature	Description
Manage Rotations	allows the addition, editing, assigning employees and deletion of rotations
View	allows viewing of the Employees section data; no editing
Edit Personal Info	allows editing the personal information of employees on the Info screen
Edit Contact Info	allows editing of the contact information on the Info screen
Change Password	allows changing the password of an employee
Edit Crew	allows assigning an employee to a crew
Edit Schedule Settings	allows editing the scheduling settings for employees
Edit Swap Settings	allows editing the ability of an employee to access the swap board
Edit Note	allows editing the note field on the employee Info page
View and Edit PayRates	allows full access to the employee pay rate field
Inactivate	allows for the inactivation or reactivation of an employee
Delete	allows for the deletion of the employee from the location, but not the enterprise
View Leave	allows view-only of employee leave requests and status, no management ability
Edit Leave	allows adding, editing, and managing employee leave requests
Mass-Update Information	allows access to the Mass Update link in the left menu
View Availability	allows employee availability settings to be viewed; no editing

Edit Availability	allows employee availability settings to be added, edited or deleted
View Only Default Employees	**RESTRICTS** view access. Limits employee list at the location so that only employees with that location as the default are listed.
View Credentials	allows information in the Credentials section to be viewed; no editing.

4.10.4 Forecasting Section

Feature	Description
Full	allows full access and editing to the Forecasting section to create templates based on headcounts and share the templates with locations.

4.10.5 Leave Section

Feature	Description
View Leave	allows information in the Leave section to be viewed; no editing
Add Leave Bid	allows adding a bid for leave
Edit Leave Settings	allows editing of the leave bid settings
Delete Leave Bid	allows for the deletion of a leave bid
Manage Bid Schedule	allows adding, editing, and deleting leave bid rounds
Manage Bid Status	allows adding and editing leave bid status
Commit Bid	allows performance of admin functions related to a leave bid
Manage Groups	allows assigning employees into groups for leave bidding
Manage Employees	allows adding, editing, and deleting employees from a leave bid
Manage Quotas	allows adding, editing, and deleting employee quotas in a leave bid
Manage Thresholds	allows adding, editing, and deleting global limits and date range limits in a leave bid
Manual Assign	allows manual assignment of an employee to a leave bid
Clear Assign	allows manual clearing of an employee from a leave bid
Reset Assign	allows resetting of a bid on the Status, Overview, and Selections windows
Invoke Assign	allows selection of manager invoked assignment on settings window
Manage Messages	allows adding, deleting, and editing messages related to a leave bid

Edit Leave Requests	allows managing leave including approving and canceling leave requests

4.10.6 Locations Section

Feature	Description
View	allows viewing of the Locations section data; no editing
View Weekdays	allows viewing Weekdays data; no editing
Manage Crews	allows full access to crew data
Manage Labor Pools	allows full access to labor pools data
Manage Special Days	allows full access to special days (including holiday entry)
Manage ShiftGroups	allows full access to shift group data
Edit Weekdays	allows full access to the week day data

4.10.7 Reports Section

Feature	Description
View	allows all reports to be viewed; can use filters but cannot edit or add new reports.
Edit	allows full access to reports to be added, edited or deleted.
Selected	allows access to only selected reports. Unless selected for this user, shared reports do not display.

4.10.8 Schedule Section

Feature	Description
View	allows viewing of the Schedule section data – no editing
Add Schedule	allows adding a schedule
Approve Schedule	allows ability to approve the schedule as completed status
Edit Schedule	allows editing a schedule
Publish Schedule	allows ability to publish a schedule so visible in employee portal
Delete Schedule	allows the deletion of a schedule
Archive Schedule	allows the archiving of a schedule
Edit Schedule Settings	allows editing the schedule settings from the Schedule Settings link
Add Shift	allows a shift to be added
Edit Shift	allows a shift to be edited
Assign Employees to Shift	allows an employee to be assigned to a shift
Override Conflict/ Availability	allows for ignoring the availability conflict when assigning shifts
Delete Shift	allows a shift to be deleted
Run Auto Fill	allows access to the Auto Fill engine for automatic assignment of shifts
Merge Shifts	allows back to back shifts at the same station to be merged

Split Shifts	allows shifts to be split
Mass-Update	allows access to the mass update functionality for editing shifts
Mass-Assign	allows access to the mass assigning of shifts to an employee
Add from Tour	allows schedules to be built from tours that are defined
Add from Templates	allows schedules to be built from templates that are defined
Add from Schedules	allows schedules to be built from schedules that are already built
Auto Create Breaks	allows the auto creation of breaks within a set of shifts
View Swapboard	allows view-only of the swapboard shifts
Approve Swap	allows the approval of swaps if the Require Manager Approval check box is selected in the Swap Board section of the location's settings for employees.
Post to Swapboard	allows ability to post a shift for an employee to the swapboard
Coverage Report	allows access to the coverage report in the Schedules section
Totals Report	allows access to the totals report in the Schedules section
Over/Under Report	allows access to the over/under report in the Schedules section
Tours	allows access to the Tours section on the main menu
View BidBoards	allows view-only of Bid Boards that have been created. Must also have role permission enabled to View Swapboard.
Post Shifts to BidBoard	allows selecting shifts to post to Bid Board and viewing only employee bids entered. Must also have role permission to Assign Employee to Shift.

Award Shifts on BidBoard	allows awarding shifts on the Bid Board to available employees
Manage BidBoards	allows adding, deleting, and editing settings on Bid Board

4.10.9 Stations Section

Feature	Description
View	allows viewing of the stations section data; no editing.
Edit	allows full editing of the stations section data.

4.10.10 Templates Section

Feature	Description
View	allows viewing information in the template section.
Edit	allows editing information in the template section.

4.10.11 Time Section

Feature	Description
View	allows viewing of the Time section data – no editing
Edit	allows full editing of the time data, but not the ability to clock an employee in
Clock in Employees	adds ability to clock in an employee; link added on the employee Timesheet
Lock	allows a timesheet to be locked to prevent changes
UnLock	allows a timesheet to be unlocked for changes
Mass-Lock	allows all timesheets to be locked at once
Approve	allows a timesheet to be locked and approved
UnApprove	allows for a timesheet being unapproved for changes
Mass-Approve	allows all timesheets to approved at once
View Pay Rates	adds pay rate data to the Review/Actuals & Pay Period/Time Sheet pages; displays the Total Dollars for Pay Rate for the time entry
View Bill Rates	adds bill rate data to the Review/Actuals & Pay Period/Time Sheet pages; displays the Total Dollars for Bill Rate for the time entry
View Time Issues*	adds the ‘Issues Tab’ to the Review Section for view only
Edit Time Issues*	adds ability to Edit Time Issues
Mark Time Issues Void*	adds ability to Change Status of Time Entry to Void
Mark Times Issues Open*	adds ability to Change Status of Time Entry to Open
	allows changing attendance issues to Confirmed

Mark Attendance Issues Confirmed*	
Edit Attendance Points*	allows editing the Point value of an attendance issue
View Attendance Roll Ups Report*	allows access to summary report of attendance points
Add Manual Attendance*	allows user-entered attendance points, in addition to system generated
* indicates	these are also known as Attendance issues

4.11 Styles

You can define colors and fonts to enhance viewing data, from the Organization / Styles page. Styles can then be assigned to Stations & Employees.

4.11.1 Creating a Style

1. Open the Style page (Organization / Style)
2. Click the **Add** button
3. Enter a name, click **Save**
4. Select the new style in the list
5. Select color(s), change font styles
6. Click **Save**

4.11.2 Assigning a Style

1. Open the settings page for a Station or Employee
2. Select one of your style definitions for the **Style** setting
3. Click **Save**

4.12 Custom

Use the Custom pages to create custom fields and attributes. They allow you to track additional data that displays within a section or on reports.

- First - Select Custom and select the section where the field or attribute displays.
- Second - Specify the input type.
  Important: There are four options, but you can only use one input type at a time. Options include: Entry field box for number or text by leaving Values box empty, Values to create a drop-down list, Input Type that is a date or number, or Pattern.
- Third - provide any help information. It displays next to the custom field.

The following are the sections where you can build custom fields and attributes.

- Employee — Employee custom fields display in the Employees > Settings > Personal page.
- Station — Station custom fields display in the Stations > Settings > Information page.
- Location — Location custom fields display in the Locations > Settings > Information page.
- Enterprise — Enterprise custom fields display in the Enterprise Settings page.

4.12.1 Adding Custom Fields or Attributes

1. Select Organization from the main menu.
2. Select the Custom > Fields or Custom > Attributes.
3. Select the section.
4. Type the Name.
5. If this is a custom field, determine how you want it to display on the page. Please open a support ticket for assistance.
6. If you want an entry field box for a number or text, leave Input type blank.
7. If you want a drop-down list, enter each item on one line.
8. If you want a date-picker pop-up calendar, choose Input Type: date
9. If you want a number, choose Input Type: number
10. If you want a Pattern, type the Pattern validator.

    Note: To sort by date, you must use the Full Date Validation (year first format). Other formats will not sort the dates correctly in reports. The pattern validator must be chosen from html5 pattern link: http://html5pattern.com/
11. Type Help instructions to clarify entry requirements.
12. Select Save.

4.12.2 Editing Custom Fields or Attributes

1. Select Organization from the main menu.
2. Select the Custom > Fields or Custom > Attributes. Make desired changes to the Name or Values.
3. Select [Clear Values] to clear all values or edit the values you would like to change.
   Pop-up window prompts: Clear saved data?
4. Select OK.
5. Select Save.

4.12.3 Deleting Custom Fields or Attributes

1. Select Organization from the main menu.
2. Select the Custom > Fields or Custom > Attributes.
3. Select Delete.
   Pop-up window prompts: Delete Item?
4. Select OK.

4.13 Lists

4.13.1 Select Lists

Use the Select Lists link under the Lists tab to create lists of reasons that document why actions occur. Once you set up lists here, you can select reasons on other pages. In addition, add shift notes to document why shift changes occur.

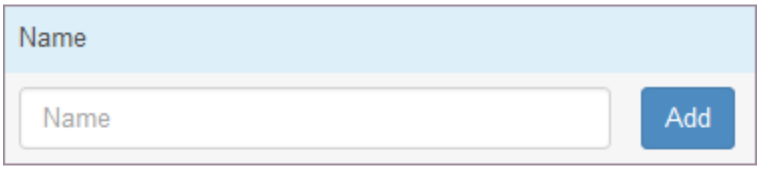
Create the following list types:

- Swap Reasons
- Reassign Reasons
- Cancel Reasons
- Time Reasons
- Shift Notes

Note: You cannot edit a reason or note, but you can delete it and enter a new one.

Adding a Reason or Shift Note:

1. Select Organization from the main menu.
2. Select Lists > Select Lists.
3. Select the type of reason you would like to add.



1. Type the Name.
2. Select Add.
   A list of reason displays.

Deleting a Reason or Shift Note:

1. Select Organization from the main menu.
2. Select Lists > Select Lists.
3. Select the type of reason or shift note you would like to delete.
4. Select x Delete.
   Pop-up window prompts: Delete Item?
5. Select OK.

4.13.2 List Reasons Uses

Reason Type	Where Used	Required to be Used if Created	Results
Swap Reasons	Employee use swap reasons when placing a shift on the Swap Board	Yes	Reason is required when employee is posting a shift to Swap Board. Reason is visible in individual Shift History on the Edit pop-up in the Schedule section. While it is not visible on the summary tab for Shift audit trail history, it is visible on the Swap Board. Does not show in Employee portal on the Swap Board. In Reports, the reason is retained only if the shift is actually swapped.
Reassign Reasons	Schedulers use reassign reasons when they reassign a shift to a different employee	No	Is used by Scheduler when manually reassigning a shift to a different employee to show why it was reassigned. If used, is part of the History audit trail on the individual shift. Is also able to be viewed and filtered on in Reports > Designs.
Cancel Reasons	Schedulers use cancel reasons when they inactivate a shift	Yes	Shift displays as grayed out (Inactive) on Schedule in Location and Employee portals Audit history (Edit shift/Status tab) shows timestamp & user of all inactive and reactivated actions. Shift can be enable/reactivate at any time (Edit Shift/ Status tab). Reports: Column “inactive code” shows 1=inactive/ cancelled or 0=active shift.
Time Reasons	Employees use time reasons when they clock in late	Yes	Reason is required when the employee clocks in late.

4.14 Special Days

Use the Special Days link under the Lists folder to define Special Day Types and Calendars. Special Days are days that your organization determines are different than a normal work day. Examples include:

- Official holidays such as Christmas, New Year's Day, Thanksgiving, July Fourth, Memorial Day, and Labor Day.
- A bank holiday when some of your organization is closed.
- A religious holiday when scheduled leave is allowed.
- A blackout day when leave requests are not allowed.

When you add Special Days, they are used in schedules. You can add Special Days on this page for the entire organization or you can go to a location and add Special Days under Locations > Lists for one location.

- First - Add a Special Days type.
- Second - Add Calendars to use in policies.
- Third - Define special days using a Special Day type and Calendar.

4.14.1 Adding a Special Days Type

1. Select Organization from the main menu.
2. Select Lists > Special Days.
3. Select Add under Types.

Example:

1. Type the Name of the Special Days type and a Description.
2. Select a color to represent it on a calendar using the color picker.
3. Select Add.
   Note: You cannot edit a Special Days Type, but you can delete it.

4.14.2 Adding a Calendar

1. Select Organization from the main menu.

2. Select Lists > Special Days.
3. Select Add under Calendars

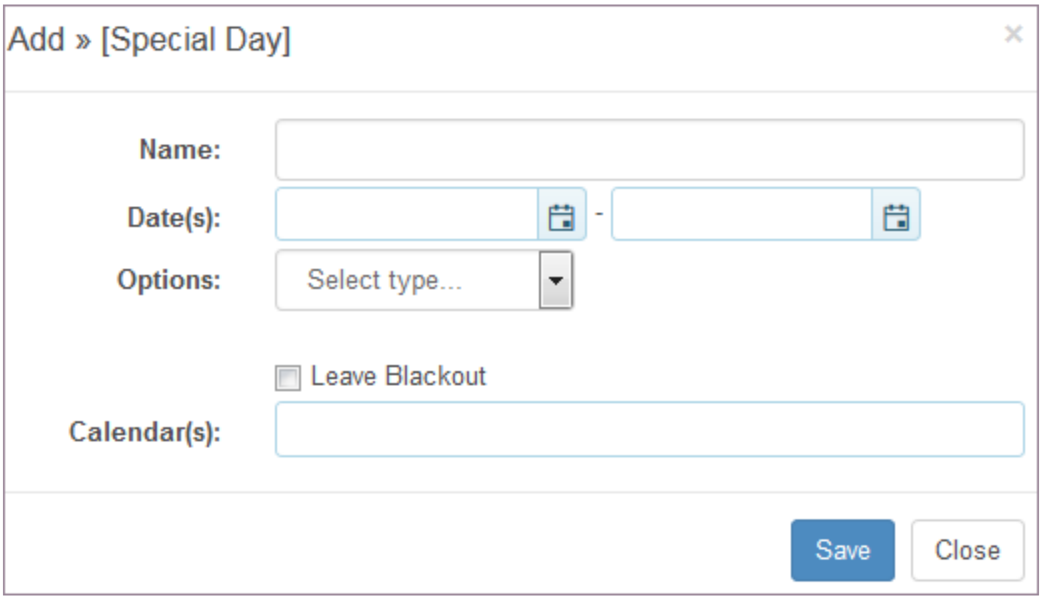
Example:

1. Type the Name of the calendar.
2. Select Add.
   Note: You cannot edit a Calendar, but you can delete it.

4.14.3 Adding a Special Day

1. Select Organization from the main menu.
2. Select Lists > Special Days.
3. Select Add adjacent to Days.

Example:



1. Select the starting and ending Date(s).
2. Select the Options, i.e., Special Days Types.
3. Select whether the check box if this is a Leave Blackout day.
   Example: You may define Leave Blackout days because you need everyone to report to work.
4. Select Save.
   Note: You cannot edit or delete a Special Day.

4.14.4 Deleting a Special Days Type or Calendar

1. Select Organization from the main menu.
2. Select Lists > Special Days.
3. Select the x Delete by the Special Days Types or Calendars you would like to delete.
   Pop-up window prompts: Delete item?
4. Select OK.

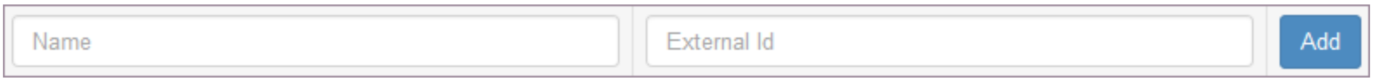
4.15 Agreement Types

Use the Agreement Types link under Lists to enter Agreement information. Assign agreements to specific employees using Employees > Tools > Manage Agreements.

4.15.1 Adding an Agreement Type

1. Select Organization from the main menu.
2. Select Lists > Agreement Types.
3. Type the Name of the Agreement Type.
4. Type the External Id of the Agreement Type.
5. Select Add.
   Note: You cannot edit an Agreement Type, but you can delete it.

Example:



4.15.2 Deleting an Agreement Type

1. Select Organization from the main menu.
2. Select Lists > Agreement Types.
3. Select the x Delete by the Agreement Type you would like to delete.
   Pop-up window prompts: Delete item?
4. Select OK.

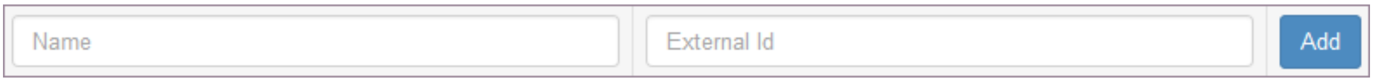
4.16 Position Types

Use the Position Types link under Lists to enter employee positions. Assign positions to specific employees using Employees > Tools > Manage Agreements.

4.16.1 Adding a Position Type

1. Select Organization from the main menu.
2. Select Lists > Position Types.
3. Type the Name of the Position Type.
4. Type the External Id of the Position Type.
5. Select Add.
   Note: You cannot edit a Position Type, but you can delete it.

Example:



4.16.2 Deleting a Position Type

1. Select Organization from the main menu.
2. Select Lists > Position Types.
3. Select the x Delete by the Position Type you would like to delete.
   Pop-up window prompts: Delete item?
4. Select OK.

4.17 Shift Names

Use the Shift Names link under Lists to enter Shift Names.

4.17.1 Adding a Shift Name

1. Select Organization from the main menu.
2. Select Lists > Shift Names.
3. Type the Name of the Shift Name.
4. Select the Shift Start and Shift End.
5. Select the Break Start and Break End.
6. Select Add.
   Note: You cannot edit a Shift Name, but you can delete it.

Example:

Name	Shift	Break	Hours	
Day Shift	8:00 AM-4:00 PM		8.00	✖ Delete
Day Shift 4/10s	6:00 AM-4:00 PM		10.00	✖ Delete
Name	Shift Start Shift End	Break Start Break End		Add

4.17.2 Deleting a Shift Name

1. Select Organization from the main menu.
2. Select Lists > Shift Name.
3. Select the x Delete by the Shift Name you would like to delete.
   Pop-up window prompts: Delete item?
4. Select OK.

4.18 Data I/O

Use the Data I/O link under Advanced to export data from or import data into TeamWork.

Important: Ensure you have an ExternalId entered for each record you are going to export or import.

4.18.1 Exporting data

1. Select Organization from the main menu.
2. Select the Advanced > Data I/O.
3. Select Export.
4. Select the data source. For information on data sources, see Data Sources.
5. Enter the Dates.
6. Select the check boxes of the fields and add additional information.
7. Select output format.
   TXT = a tab delimited file, tab separated.
   CSV = a comma separated file
   Page = tab delimited, puts in a results page screen with data to be copied and pasted into Excel.
8. Select Export.
   Results display in the window on the right.
9. To copy and paste the data into Excel, copy it, select cell A1 and paste.
   Note: When you leave this page in TeamWork, the data is not saved. You must run the export again to capture it.

Example:

EmployeeId	LastName	FirstName	Hiredate
79485	Apple	Allison	8/1/2009 12:00:00 AM
79486	Berry	Barbara	8/1/2010 12:00:00 AM
79491	Ferry	Fern	8/1/2010 12:00:00 AM
79495	Gate	Gary	8/7/2011 12:00:00 AM
79488	Cloud	Casey	9/4/2009 12:00:00 AM
79489	Door	Dave	8/7/2011 12:00:00 AM
79490	Evergreen	Erik	5/31/2010 12:00:00 AM
79492	Hunt	Harold	8/1/2009 12:00:00 AM

Warning: If your ExternalId values have leading zeros, i.e., 001123, Excel removes the 00s when pasting. You must use Excel's Data Import Wizard and set the ExternalId column to Text.

4.18.2 Importing data

1. Select Organization from the main menu.

2. Select the Advanced > Data I/O.
3. Select Import.
4. Select the data source.
   Hint: Create an export with the columns you want to use. Use the format from these column headers in your spreadsheet data. Start with one or two records to see if the import works as expected.
5. Copy and paste or enter the information into the import window.
6. Select Import.
   Displays on top of the import window and results display below.

Example:

Found = 3
Added = 0
Updated = 2
Inactivated = 0
Skipped = 1
Invalid = 0

4.19 IP Blocking

Use the IP Blocking link under Advanced to unblock a computer that is blocked. When a user or employee fails login 20 times in 15 minutes, the IP address is blocked by ScheduleSource. No one is able to log on from that computer until the IP address is unblocked by an organization Enterprise administrator.

4.19.1 Unblocking the IP Address

Select Organization from the main menu.

Select the Advanced > IP Blocking. Note: Y (indicating yes) displays under the Enforce column.

To unblock an IP address, select the Y under the Enforce column. The Y turns to a N indicating you are not enforcing the IP Address blocking.

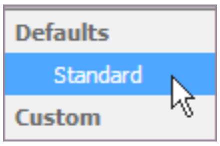
4.20 Terminology

Use the Terminology link under Advanced to review the terminology used in TeamWork. Select an item to display the translations into other languages. Create a custom dictionary.

4.20.1 Reviewing Terms

1. Select Organization section from the main menu.
2. Select the Advanced > Terminology.
3. Select the language you want to display from the drop-down list.
4. Select the dictionary. Standard displays the default TeamWork system terms.

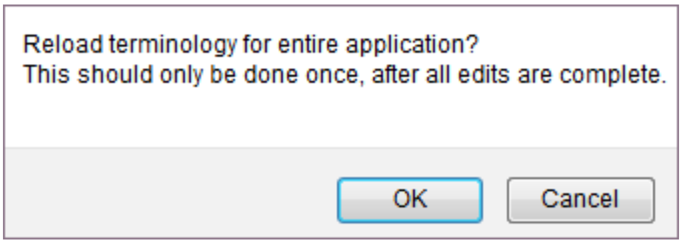
Example:



4.20.2 Creating a Custom Dictionary

1. Select Organization from the main menu.
2. Select the Advanced > Terminology.
3. Select Terminology > Add to create a custom dictionary.
4. On the Add Dictionary window, select the Parent dictionary, the one you will customize.
5. Type a Name for your custom dictionary.
6. Select Save.
   Custom table displays on right.
7. Select the term(s) you want to customize and enter the new word(s) in the text boxes provided for the language(s) you are using.
8. Select Save.
9. Repeat for as many terms as you would like to customize.
10. When finished with all customizations, select Reload.
    Prompt displays: Reload Terminology for entire application?
11. Select OK.

Example:



4.20.3 Deleting a Custom Dictionary

1. Select Organization from the main menu.
2. Select the Advanced > Terminology.
3. Select the dictionary you want to delete.
4. Select Edit.
5. Select Delete on the Edit >> Dictionary window.
   Prompt displays: Delete Item?
6. Select OK.

5. Locations

5.1 Locations

Use the Location pages to establish information for each location in your organization. Create and manage settings, work groups and special days, and the deployment of stations, employees, users, projects, and activities. In addition, you can configure the skills of employees at stations in each location.

Important: Locations are established and managed at the organization level. To do so, you must have Location role permissions enabled and be assigned to Locations.

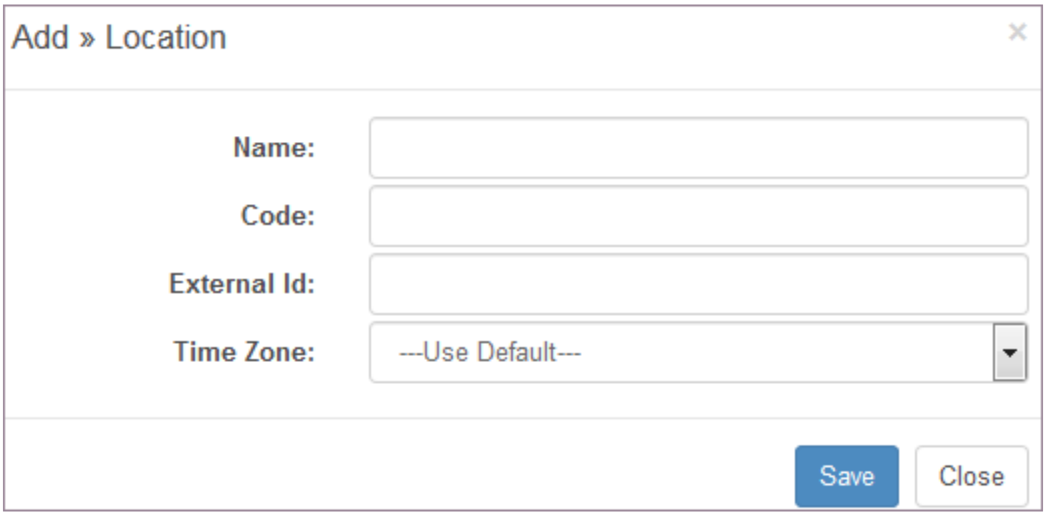
Refer to the following How To's.

- Settings
- Lists
- Deployments
- Skills

5.2 Settings

Use the Settings page to establish location information, days and hours of the location work day, employee privileges and the swap board guidelines, schedule settings for Auto Fill and auto breaks, and time settings and default project/task and activity assignments.

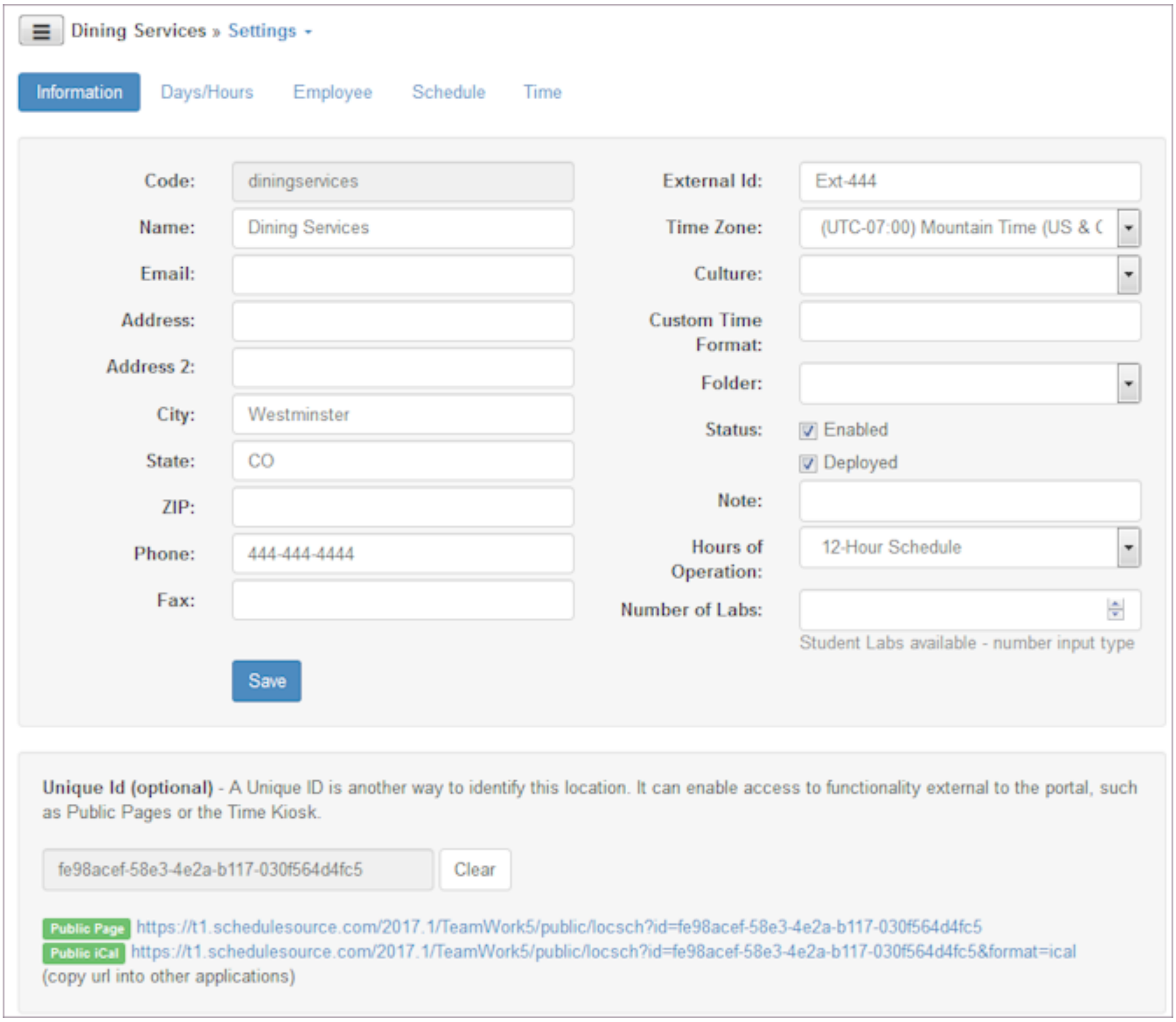
5.2.1 Adding Information

1. Select Locations from the main menu.
2. Select Locations > Add or Add to add a new location.
   Example:
   

3. Select the location. Information window displays.
   Note: Active location displays on top left.
4. Type the Code. This is the code used to log on to the Manager and Employee portals.
5. Type the Name. The name displays in the top left menu bar.
6. Enter additional address information as desired.
7. Under Time Zone, select the Time Zone using the drop-down list.
8. Maintain the Culture selection of Use Default for U.S. locations or change it to another location to meet language requirements.
   Note: The Culture selection controls the language that displays when users log in to this location.
9. Do not change the Custom Date Format and Custom Time Format fields U.S. For other format options, contact ScheduleSource.
10. If you are using folders, select Folder (optional).
11. If this location is ready for use, select the check boxes for Enabled and Deployed.
12. Type a Note if desired.

13. Select Hours of Operation.
14. Select Number of Labs.
15. To add a Unique Id, select Add.
    Note: Use the Unique Id to create a public page URL to view published schedules and provide an iCal formatted data link for downloading calendars.
16. Select Save.

Example:

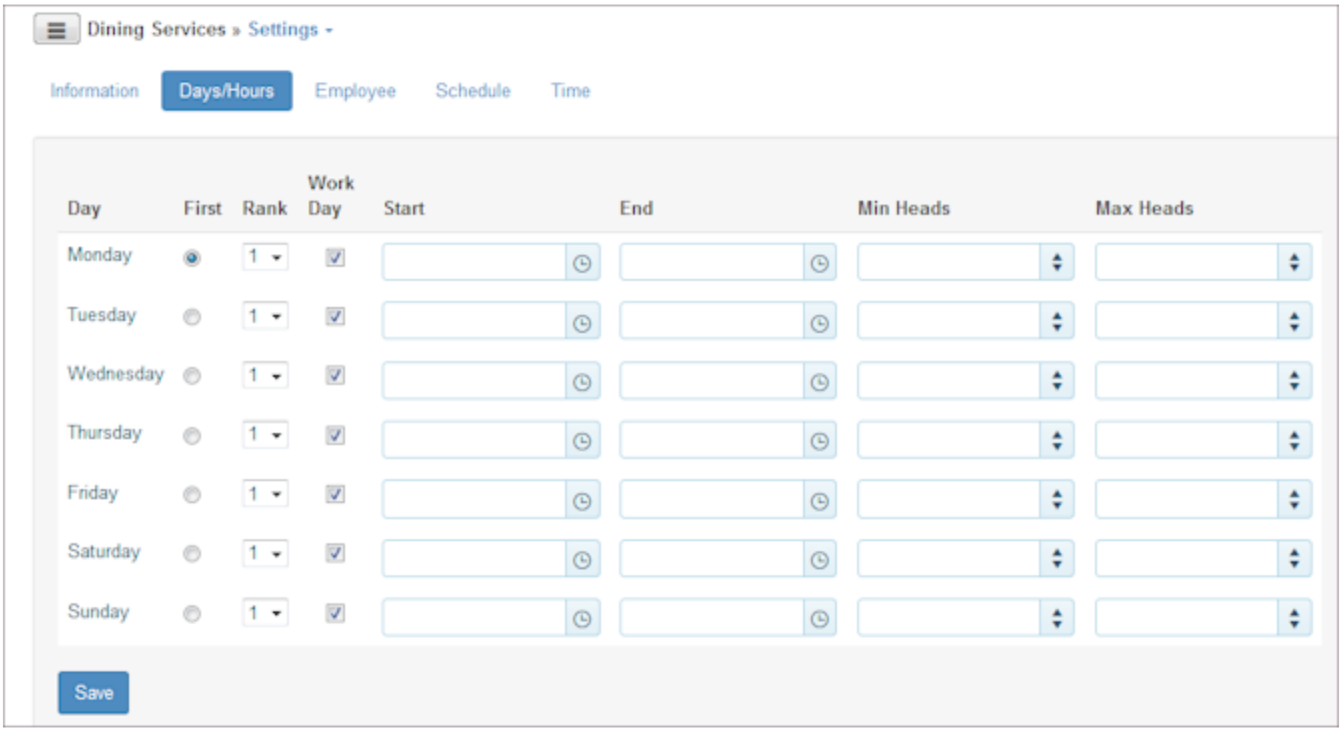


5.2.2 Configuring Days and Hours

1. Select Locations from the main menu.
   Note: Use the same location or use the Menu button to select another one.
2. Select the Settings > Days/Hours tab.

3. Select the radio button that identifies the day that is the First Day of the week for when your schedule will start. For example, many work weeks in the U.S. begin on Sunday or Monday.
4. If it is important to your organization, select a Rank or leave a default of 1. (9 highest/1 lowest)
   Explanation: A food service that does greater business on a weekend might rank Friday, Saturday, and Sunday as 9, the highest ranking. This ensures that those day's shifts are filled first and empty shifts are pushed to lower priority days.
5. Select Save.

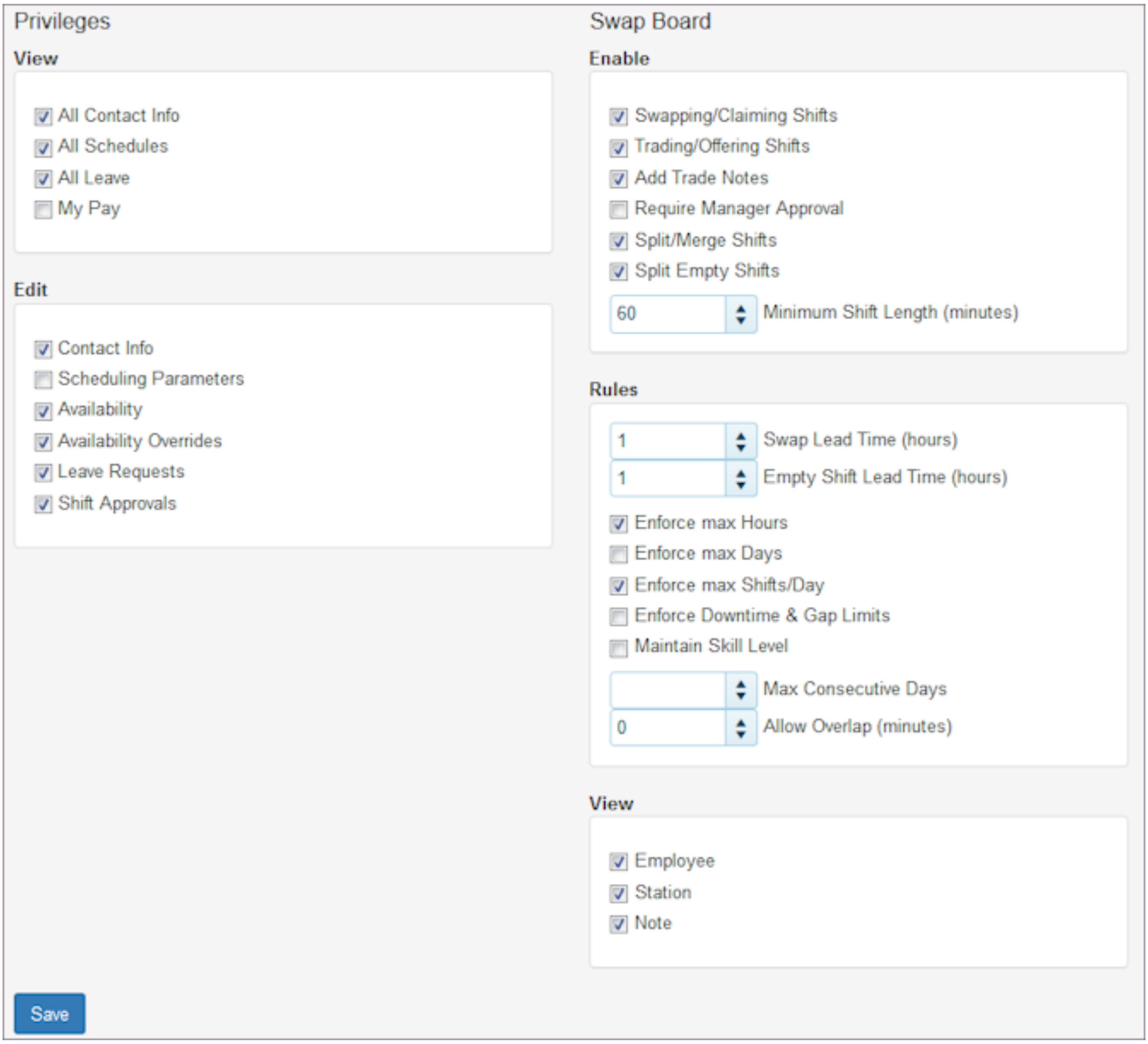
Example:



5.2.3 Configuring Employee Privileges and Swap Board

1. Select Locations from the main menu.
   Note: Use the same location or use the Menu button to select another one.
2. Select the Settings > Employee tab.
3. Under Privileges, select the check boxes of the privileges you want to grant to employees assigned to this location. They involve schedule and related shift information the employee can view, edit, and approve.
4. Under Swap Board, select the check boxes and numeric values for the settings to want to enable for this location. They involve swapping, scheduling constraints, and additional settings.
5. Select Save.

Example:



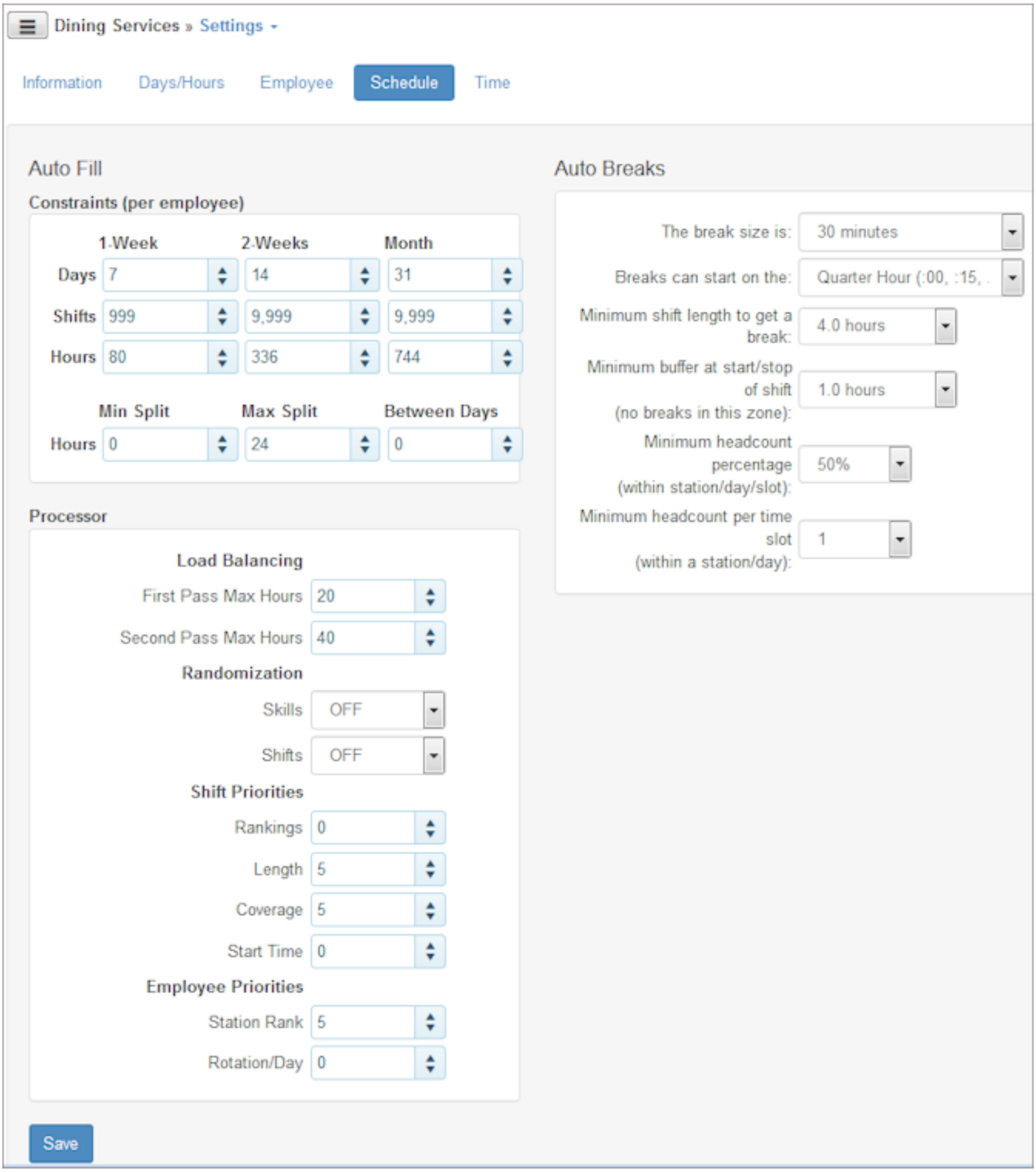
5.2.4 Setting Schedule Auto Fill and Auto Breaks

1. Select Locations from the main menu.
   Note: Use the same location or use the Menu button to select another one.
2. Select the Settings > Schedule tab.
3. Under Auto Fill, enter Constraints for Days, Shifts, and Hours.
   Note: These settings are used by the Auto Fill engine to determine the priority for filling shifts in every schedule. You can override Auto Fill limits when you schedule an employee manually.
4. Enter Min Split, Max Split, and downtime requirements Between Days.
   Min Split - minimum number of hours you require between split shifts within one day
   Max Split - maximum number of hours you require between shifts within one day
   Between Days - minimum number of hours you require before an employee can work another shift between

consecutive days. It primarily applies to 24-hour shift situations, and you may use it to prohibit employees from working back-to-back days or long double shifts.

5. Under Processor, enter Load Balancing. Auto Fill uses the number of hours you enter to assign shifts to employees.
   First Pass Max Hours - Decide what your goal is. If your goal is to give every employee some hours, enter a low number of hours. For example, if you enter 20, the engine assigns every employee 20 hours of work. If your goal is to have the most qualified person assigned to work, enter 40 and the engine assigns the most qualified employee to work 40 hours while a less qualified employee may not receive any hours.
   Second Pass Max Hours - To further distribute hours equally, enter 30 in the second box or enter 40 hours. Then, the engine assigns each employee up to 30 or 40 hours, depending on how many hours the employees have available to work.
   Note: Auto Fill does not assign more hours than you enter in Constraints (per employee) for 1-Week.
6. Under Processor, enter Randomization.
   Skill - use skill randomization to vary shift assignments from extremely variable assignments (High) to less randomization (Low), or turn Randomization off.
   Shift - use shift randomization to greatly vary shift assignments (High) to less shift randomization (Low), or turn Randomization off.
7. Under Processor, enter Shift Priorities.
   Rankings - if you want your most skilled employee to be assigned at your most priority station first, select a 9 using the drop-down list. If they are less important, select a number between 1 and 8.
   Length - to make sure that shifts with the greatest number of hours are covered before shorter shifts, select a higher number under length using the drop-down list.
   Coverage - to make sure you can get coverage first and it is not as important to use the most skilled employee or consider shift length, leave the default at 7 or raise it to a higher number.
8. Under Processor, enter Employee Priorities.
9. Under Auto Breaks, enter the break information. Select information about breaks that conforms to your organization's policies.
10. Select Save.

Example:

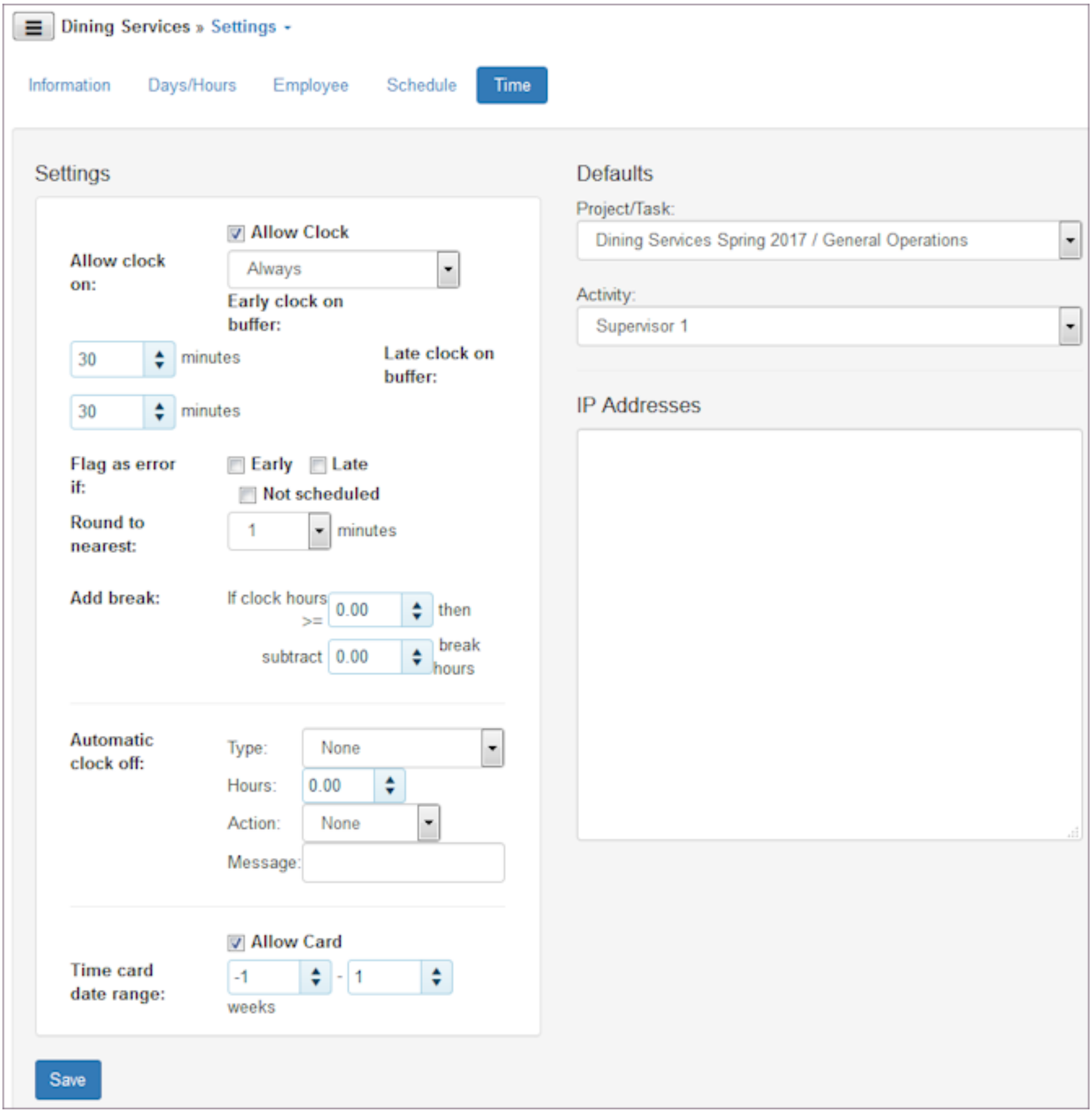


5.2.5 Adding Time Settings and Defaults

1. Select Locations from the main menu.
   Note: Use the same location or use the Menu button to select another one.
2. Select the Settings > Time tab.

3. Under Settings, select the check boxes for Allow Clock and Allow Card.
   Explanation: This specifies how employees can enter time into the system. Clock allows punching in and out in real time. The Card allows manual entries, for both past and future time.
4. Select Early clock on buffer using the arrow buttons.
5. Select Late clock on buffer using the arrow buttons.
6. Select Flag as error conditions: Early, Late, and/or Not Scheduled.
7. Select the Round to nearest minutes using the drop-down list. This rounds exact time stamps to the nearest minute specified and are used for hours calculations. Time clock entry will allow times only on the rounded minute values.
8. Select the Add break conditions to conform to your organization's policies.
9. Enter Automatic clock off options to conform to your organization's policies.
10. If allowing Time card entry, select the Time Card date range using the drop-down lists. This specifies the number of weeks before and after the current week in which employees can enter time.
11. Under Defaults, select the Project/Task for assigning time.
    Note: Add projects under Deployments > Projects.
12. Under Defaults, select the Activity for assigning time.
    Note: Add activities under Deployments > Activities.
13. Under defaults, enter IP Addresses if employees are limited to entering time in these IP addresses. Leave blank if the employee can enter time from any IP address.
14. Select Save.

    Example:


Dining Services » Settings
Information
Days/Hours
Employee
Schedule
Time
Settings
Allow Clock
Allow clock on:
Always
Early clock on buffer:
30
minutes
Late clock on buffer:
30
minutes
Flag as error if:
Early
Late
Not scheduled
Round to nearest:
1
minutes
Add break:
If clock hours >=
0.00
then
subtract
0.00
break hours
Automatic clock off:
Type:
None
Hours:
0.00
Action:
None
Message:
Allow Card
Time card date range:
-1
1
weeks
Save
Defaults
Project/Task:
Dining Services Spring 2017 / General Operations
Activity:
Supervisor 1
IP Addresses

5.3 Lists

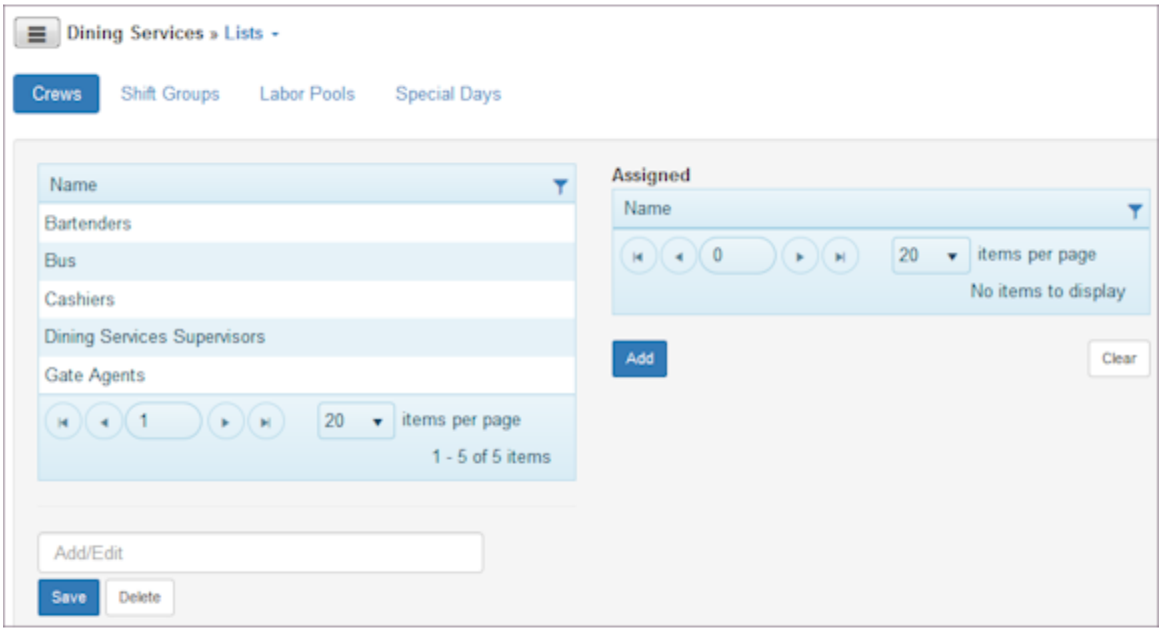
Use the Lists pages to set up lists of employees that are grouped specifically for your location. In addition, view Special Days. Each is described as follows:

- Crews — group, filter and report on a subgroup of your employees. For example, assign employees to a full time or a part-time crew or group employees into crews for Department A and Department B.
- Labor Pools — Auto Fill your schedule using groups of employees. There are two types of Labor Pools: Scheduler-assigned and volunteer. Employees can volunteer to be included in volunteer Labor Pools in the Employee portal.
- Shift Groups — group, filter, and report on a subgroup of your scheduled shifts. For example, night shift or weekend shift or first, second, and third shifts.
- Special Days — view Special Days.

5.3.1 Setting up Crews

1. Select Locations from the main menu.
   Note: Use the same location or use the Menu button to select another one.
2. Select the Lists > Crews tab.
3. Type the name of the Crew in the Add/Edit text box.
4. Select Save.
5. To add employees to the Crew, select Add.
6. Select the names of employees to add and select Save.
7. To view the employees who are in the Crew, select the Crew.
   Assigned employees display in a list on the right.
8. To delete an employee from the Crew, highlight the employee name and select Clear.
   Window prompts: Clear?
9. Select OK.

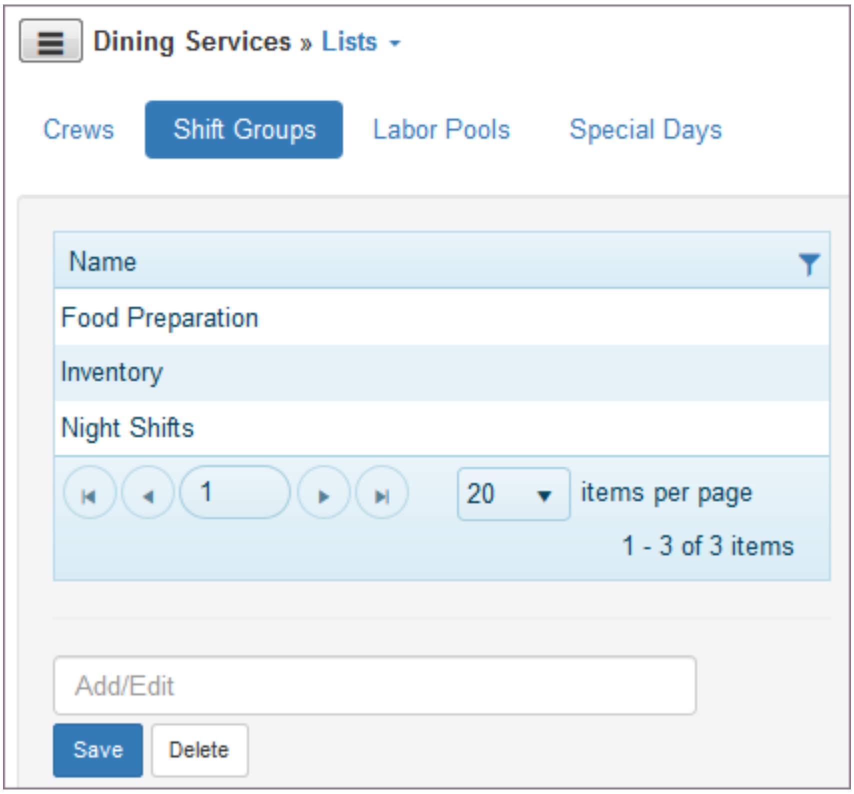
Example:



5.3.2 Setting up Shift Groups

1. Select Locations from the main menu.
   Note: Use the same location or use the Menu button to select another one.
2. Select the Lists > Shift Groups tab.
3. Type the name of the Shift Group in the Add/Edit text box.
4. Select Save.

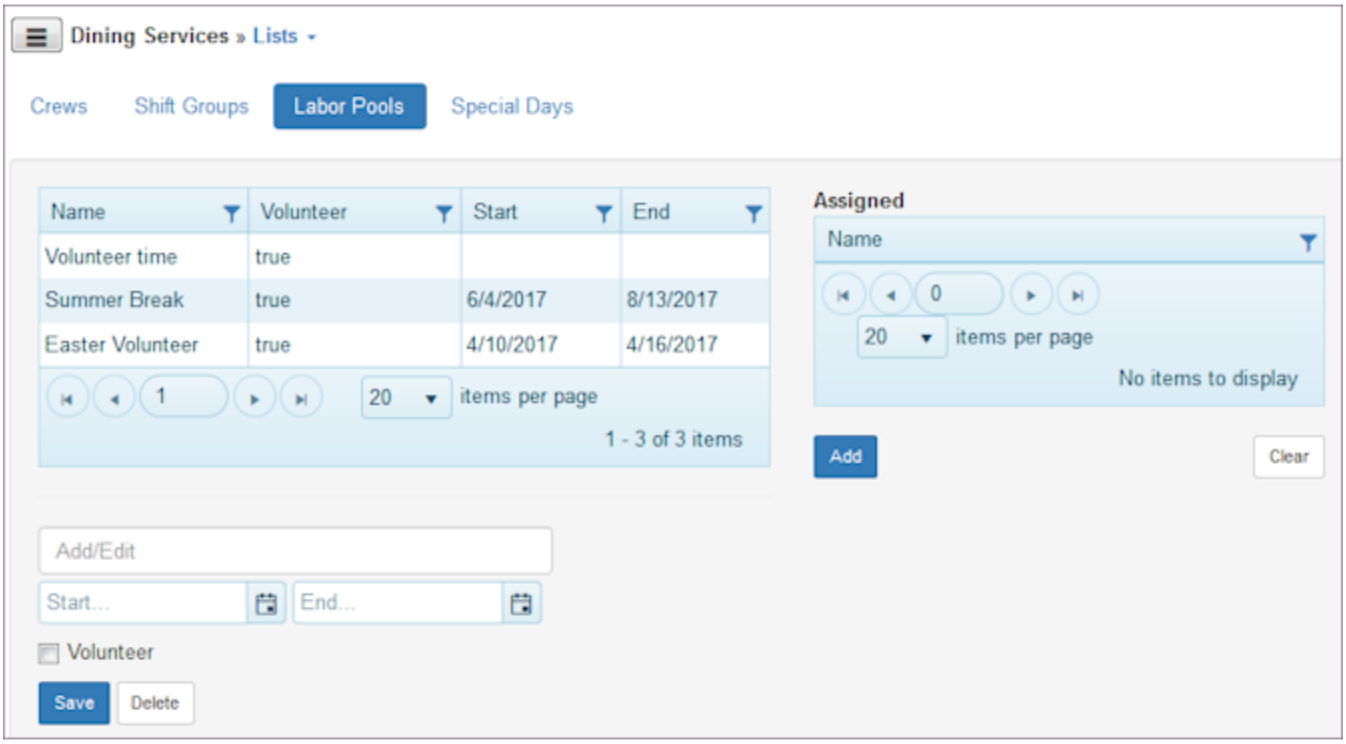
Example:



5.3.3 Setting up Labor Pools

1. Select Locations from the main menu.
   Note: Use the same location or use the Menu button to select another one.
2. Select the Lists > Labor Pools tab.
3. Type the name of the Labor Pool in the Add/Edit text box.
4. Select Save.
5. To add employees to the Labor Pool, select Add.
6. Select the names of employees to add and select Save.
7. To view the employees who are in the Labor Pool, select the Labor Pool.
   Assigned employees display in a list on the right.
8. To delete an employee from the Labor Pool, highlight the employee name and select Clear.
   Window prompts: Clear?
9. Select OK.

Example:



5.3.4 Viewing Special Days

1. Select Locations from the main menu.
   Note: Use the same location or use the Menu button to select another one.
2. Select the Lists > Special Days tab.
   Special Days display.
3. Use filters to search for information.

   Example:

Name	Blackout	Start ↓	End	Local
Christmas Day		12/25/2016	12/25/2016	
Thanksgiving Day		11/24/2016	11/24/2016	
Alaska Day		10/18/2016	10/18/2016	
Columbus Day - Alaska		10/10/2016	10/10/2016	
Labor Day		9/5/2016	9/5/2016	
July Fourth		7/4/2016	7/4/2016	
Memorial Day		5/30/2016	5/30/2016	
Sewards Day - Alaska		3/28/2016	3/28/2016	
Good Friday		3/25/2016	3/25/2016	
New Years Day		1/1/2016	1/1/2016	
Easter/Spring Break		3/22/2015	3/28/2015	
Christmas Vacation		12/19/2014	1/1/2015	
Labor Day	Yes	8/25/2014	8/25/2014	Yes
Orientation	Yes	8/17/2014	8/19/2014	
Orientation Week	Yes	8/20/2011	8/24/2018	

5.4 Deployments

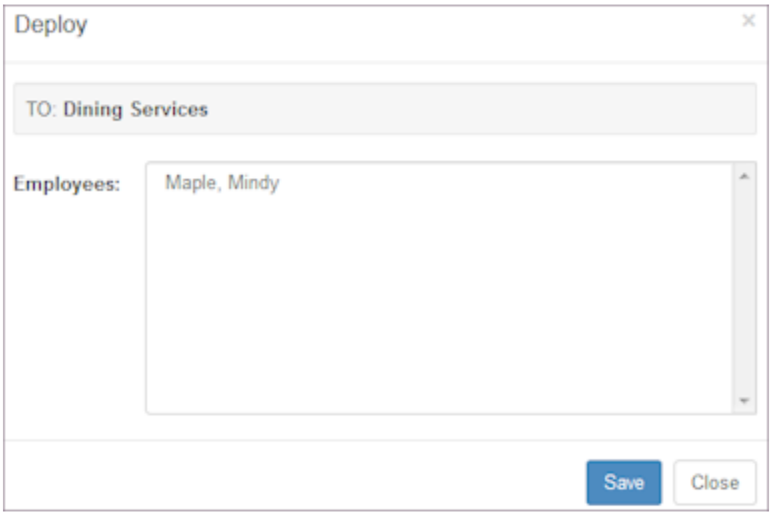
Use the Deployments pages to deploy or assign the stations, employees, users, projects, and activities that are used in a location. Establish the information on other pages, and add or delete the deployment here. The following lists where each deployment is established.

- Stations - Create stations using the Stations page.
- Employees - Create employees using the Employees page.
- Users - Create users using the enterprise level Organization > Users page.
- Projects - Create projects using the Time > Configuration > Projects/Tasks page.
- Activities - Create activities using the Time > Configuration > Activities page.

5.4.1 Adding a Deployment

1. Select Locations from the main menu.
   Note: Use the same location or use the Menu button to select another one.
2. Select the Deployments tab and select the deployment.
3. Select Add.
   Deploy window displays a list of available deployments.
4. Select the item you want to deploy.
5. Select Save.

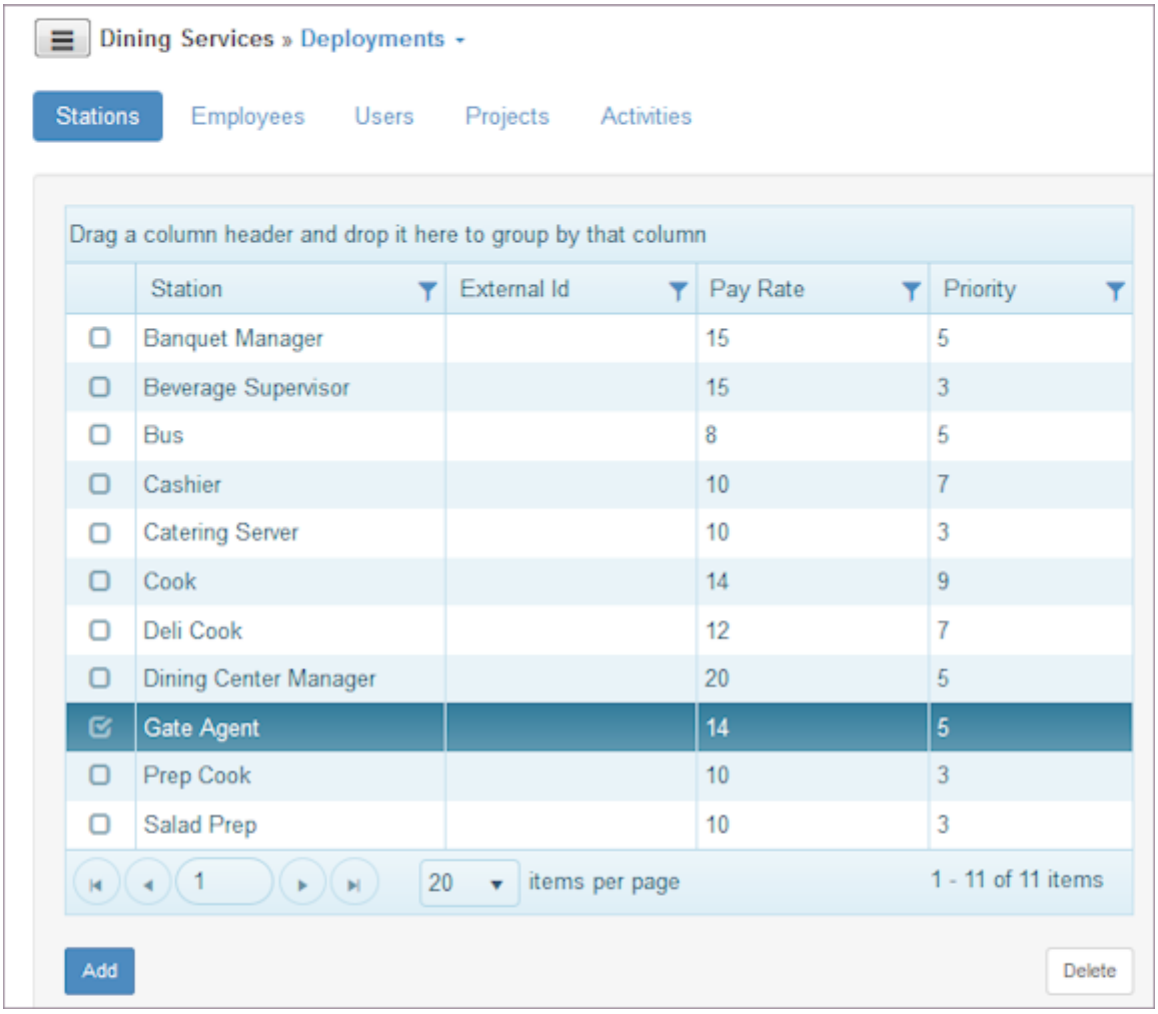
Example:



5.4.2 Deleting a Deployment

1. Select Locations from the main menu.
   Note: Use the same location or use the Menu button to select another one.
2. Select the Deployments tab and select the deployment.
3. Select the check box to the left of the item you would like to Delete.
4. Select Delete.
   Window prompts: Delete selected?
5. Select OK.

Example:



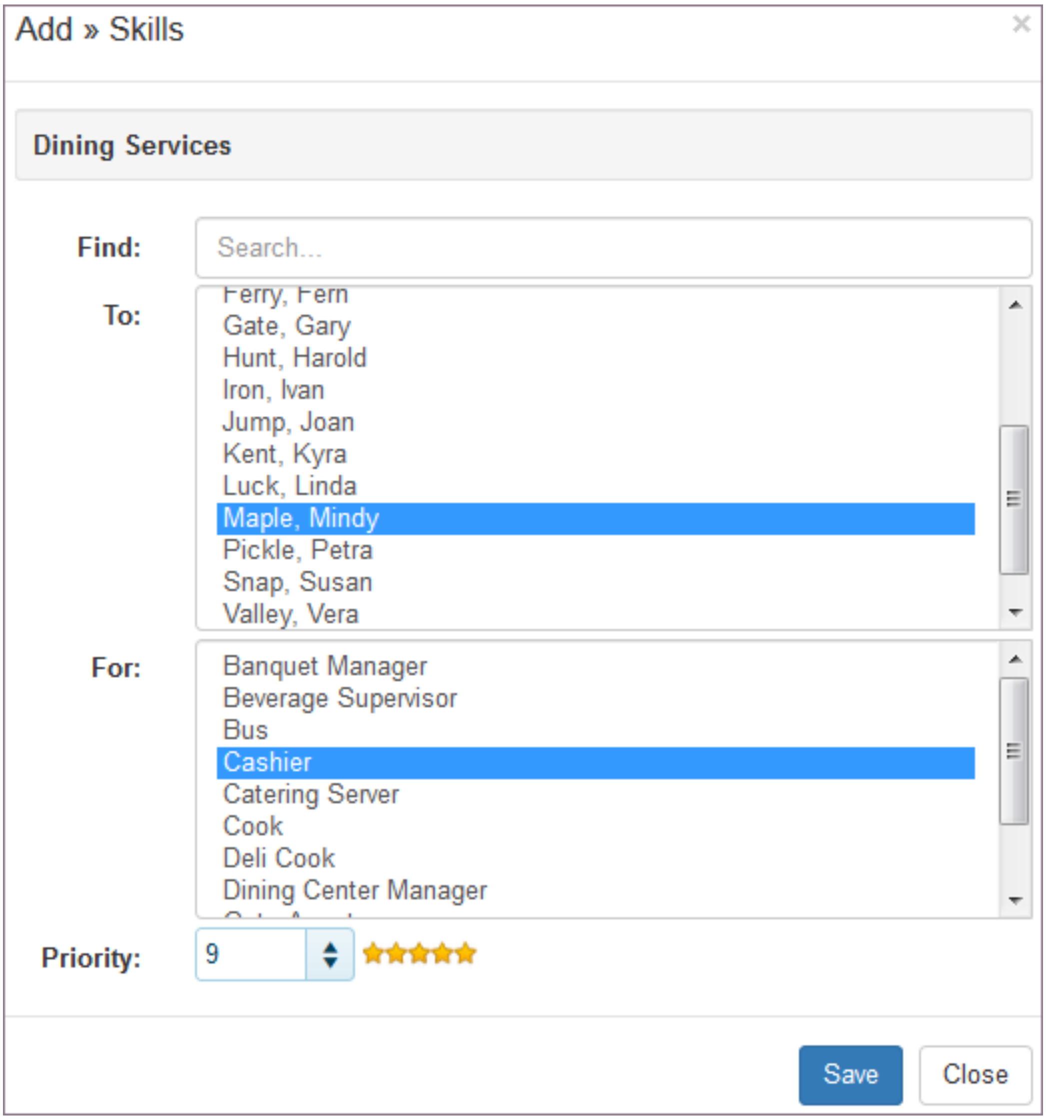
5.5 Skills

Use the Skills page to designate the employees who can work at stations in a location and specify their priority or skill level at a job.

5.5.1 Adding a Skill to an Employee at a Station

1. Select Locations from the main menu.
   Note: Use the same location or use the Menu button to select another one.
2. Select the Skills tab.
3. Select Add.
   Add >> Skills window displays a list of employees and stations.
4. Select the employee in To.
5. Select the station in For.
6. Select the Priority or skill level of the employee at this station using the number picker.
7. Select Save.

Example:



5.5.2 Editing an Employee's Skill Level

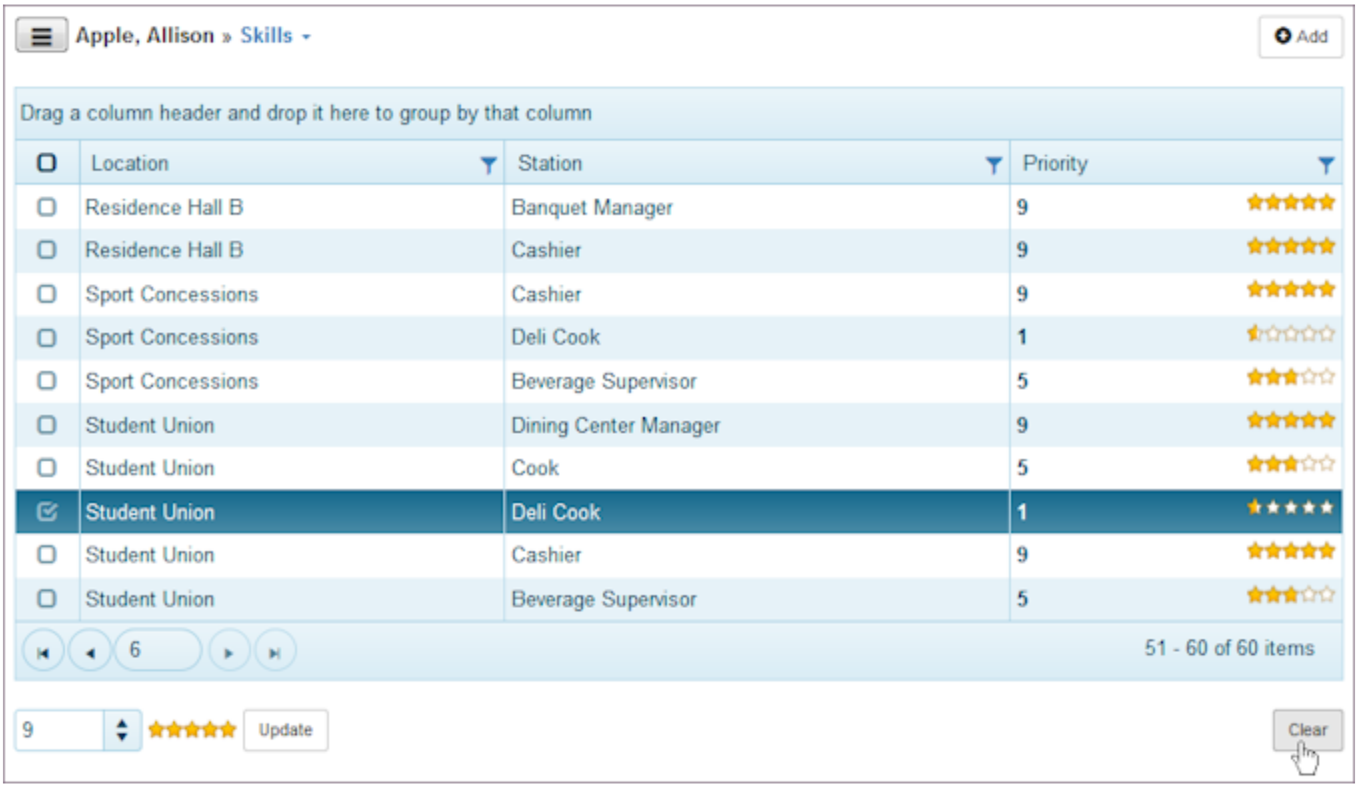
1. Select Locations from the main menu.
   Note: Use the same location or use the Menu button to select another one.
2. Select the Skills tab and select an employee.
3. Select the check box to the left of the employee whose skill level you would like to edit.
4. Use the number picker at the bottom of the table to increase or decrease the number of stars.
5. Select Update.

Example:

5.5.3 Deleting an Employee's Skill at a Station

1. Select Locations from the main menu.
   Note: Use the same location or use the Menu button to select another one.
2. Select the Skills tab and select an employee.
3. Select the check box to the left of the employee whose skill level you would like to delete.
4. Select Clear.
   Window prompts: Delete selected?
5. Select OK.

Example:


Apple, Allison » Skills
Add
Drag a column header and drop it here to group by that column
Location
Station
Priority
Residence Hall B
Banquet Manager
9
Residence Hall B
Cashier
9
Sport Concessions
Cashier
9
Sport Concessions
Deli Cook
1
Sport Concessions
Beverage Supervisor
5
Student Union
Dining Center Manager
9
Student Union
Cook
5
Student Union
Deli Cook
1
Student Union
Cashier
9
Student Union
Beverage Supervisor
5
6
51 - 60 of 60 items
9
Update
Clear

6. Stations

6.1 Stations

Use the Stations pages to add stations and related information and projects, tasks, and activities. Deploy stations to locations and deploy employees to stations. Set employee priority or skill levels at each station.

Refer to the following How To's.

- Settings
- Deployments
- Skills

6.2 Settings

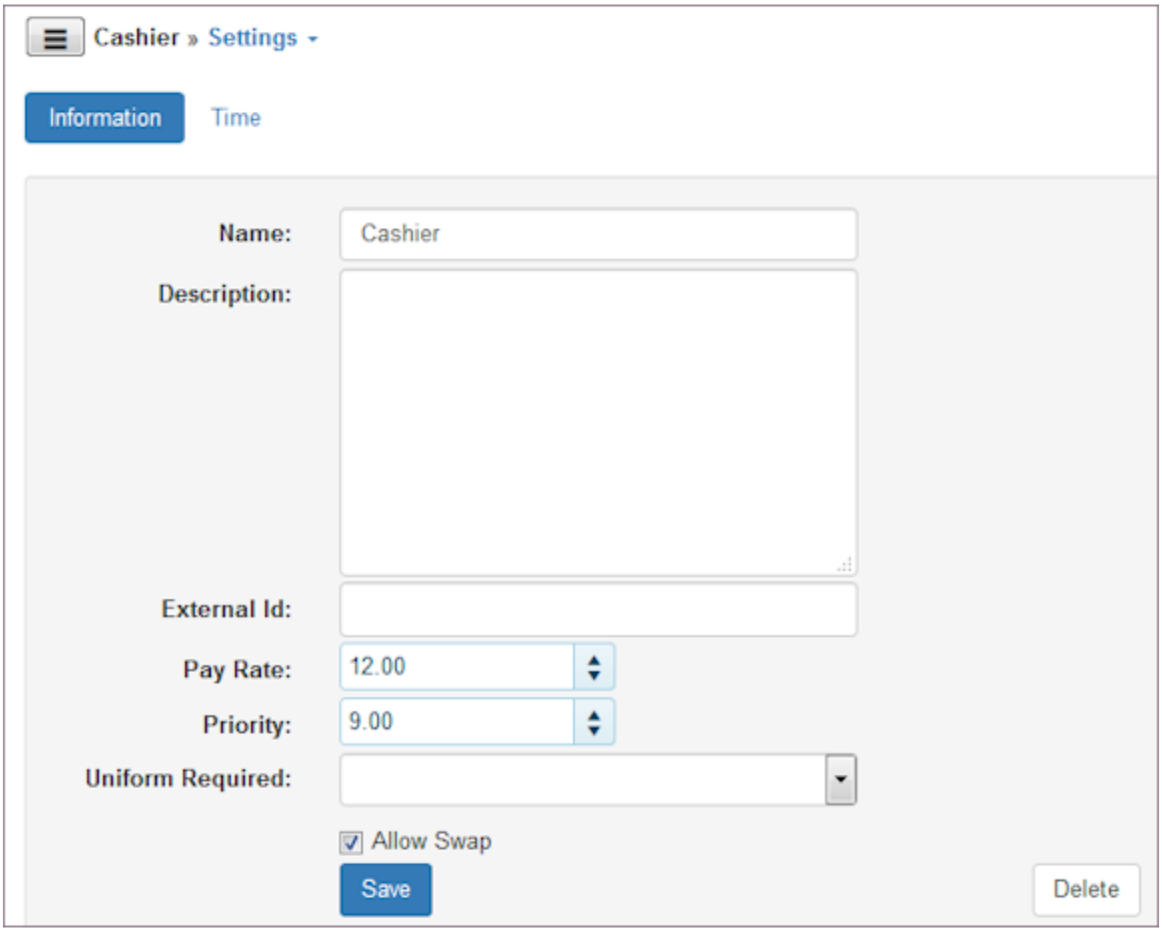
Use the Settings pages to establish station information and set station projects, tasks, and activities.

6.2.1 Adding Information

1. Select Stations from the main menu.
2. Select Station > Add or Add to add a new station.
   Example:
   

3. Select the station. Information window displays.
   Note: Active station displays on top left.
4. Name displays. Made changes if desired.
5. Type a Description if desired.
6. Type an ExternalId if you are downloading data to external systems.
7. Enter the Pay Rate for this station.
   Note: It is used to calculate the cost of an empty shift in Schedules if the employee rate of pay is blank.
8. Enter the Priority.
9. If desired, select whether a Uniform is required: Yes, No, or leave blank
10. Verify the check box to Allow Swap is selected if your organization wants to allow swapping on this station.
11. Select Save.

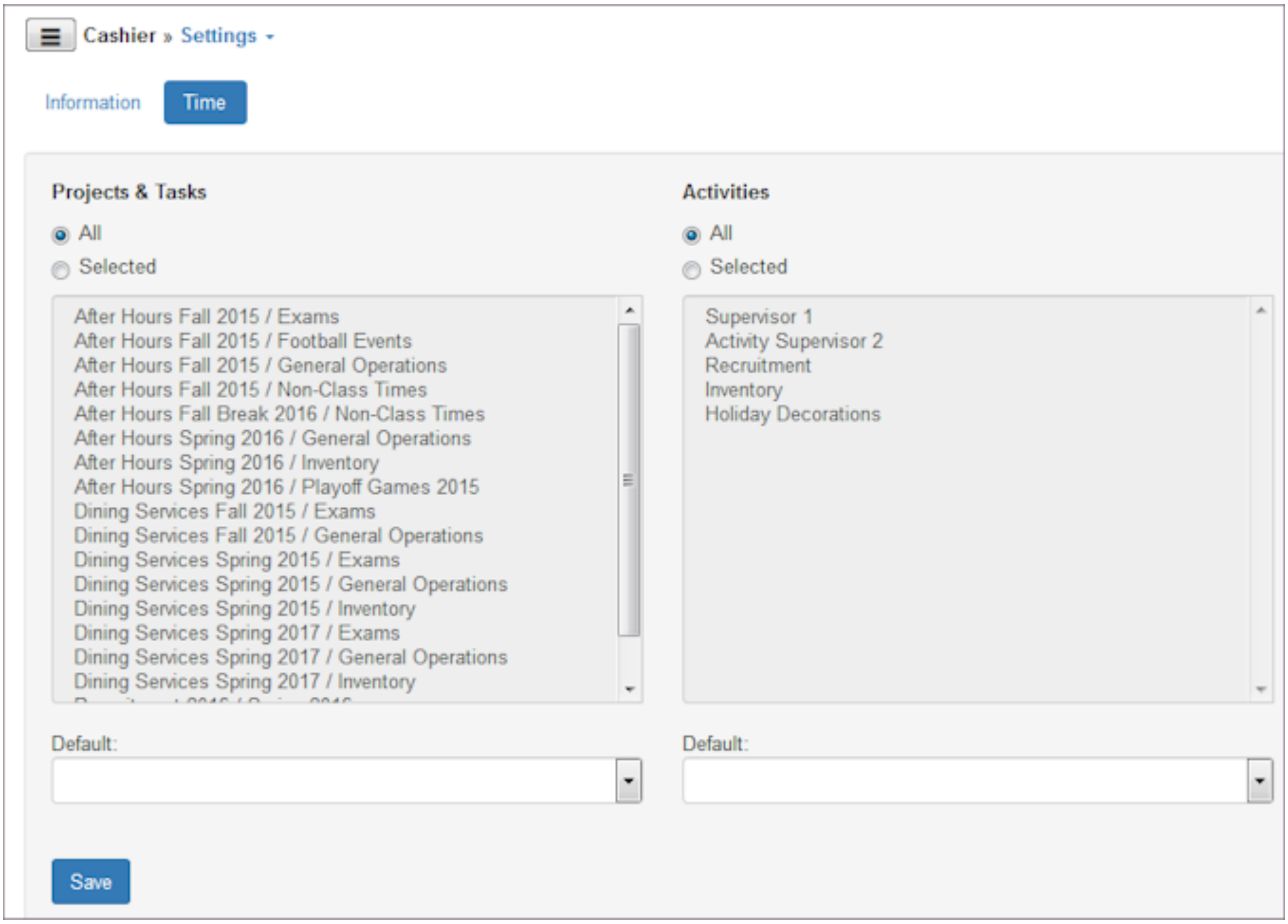
Example:



6.2.2 Adding Time Settings and Defaults

1. Select Stations from the main menu.
   Note: Use the same station or use the Menu button to select another one.
2. Select the Settings > Time tab.
3. Under Projects & Tasks, select whether this station is used at All or only Selected projects and tasks. If you choose Selected, select specific projects and tasks.
4. Under Activities, select whether this station is used at All or only Selected activities. If Selected, select specific activities.
5. To identify Default projects and tasks and activities, select it in the Default drop-down list.
6. Select Save.

Example:


Cashier » Settings
Information
Time
Projects & Tasks
All
Selected
After Hours Fall 2015 / Exams
After Hours Fall 2015 / Football Events
After Hours Fall 2015 / General Operations
After Hours Fall 2015 / Non-Class Times
After Hours Fall Break 2016 / Non-Class Times
After Hours Spring 2016 / General Operations
After Hours Spring 2016 / Inventory
After Hours Spring 2016 / Playoff Games 2015
Dining Services Fall 2015 / Exams
Dining Services Fall 2015 / General Operations
Dining Services Spring 2015 / Exams
Dining Services Spring 2015 / General Operations
Dining Services Spring 2015 / Inventory
Dining Services Spring 2017 / Exams
Dining Services Spring 2017 / General Operations
Dining Services Spring 2017 / Inventory
Activities
All
Selected
Supervisor 1
Activity Supervisor 2
Recruitment
Inventory
Holiday Decorations
Default:
Default:
Save

6.3 Deployments

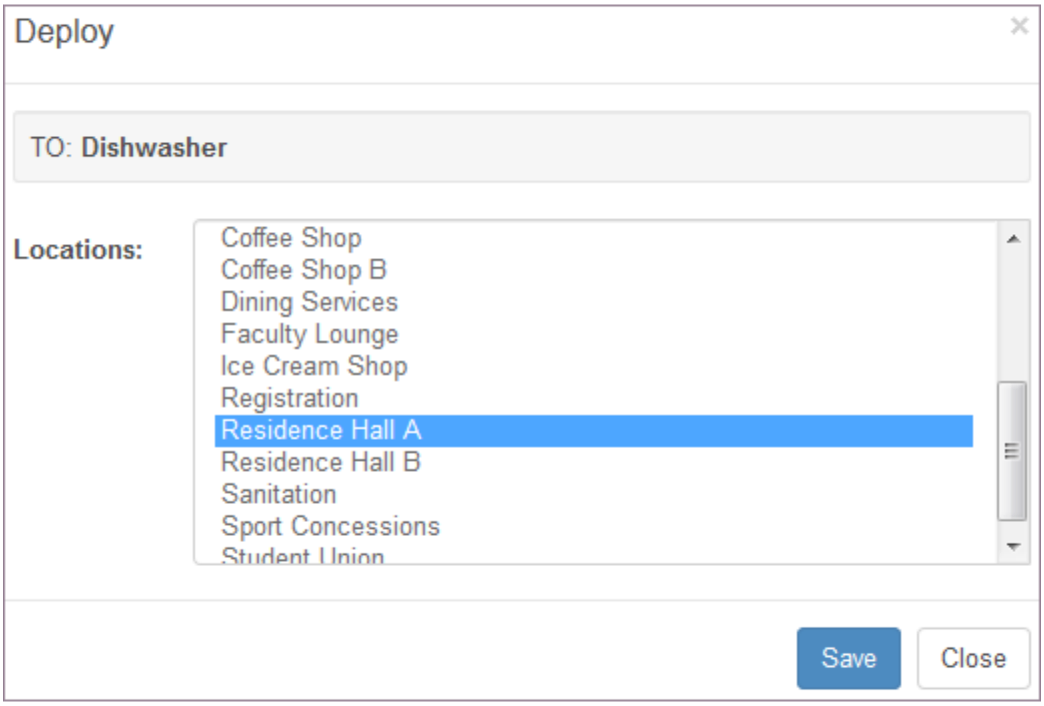
Use the Deployments pages to deploy or assign stations to locations and to employees. The following lists where each deployment is established.

- Locations - Create locations using the Locations page. Role permissions are required.
- Employees - Create Employees using the Employees page.

6.3.1 Adding a Deployment

1. Select Stations from the main menu.
   Note: Use the same station or use the Menu button to select another one.
2. Select Deployments > Locations or Employees.
3. Select Add.
   Deploy window displays a list of available deployments.
4. Select the item you want to deploy.
5. Select Save.

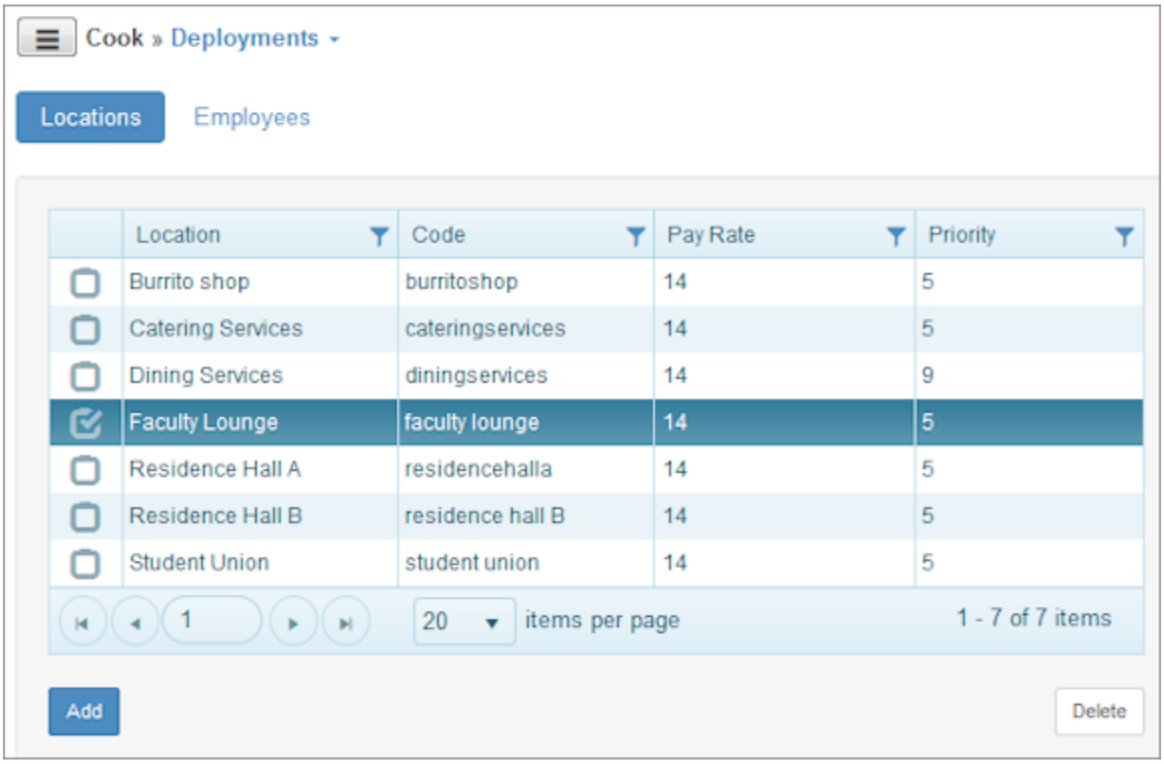
Example:



6.3.2 Deleting a Deployment

1. Select Stations from the main menu.
   Note: Use the same station or use the Menu button to select another one.
2. Select the Deployments tab and select the deployment.
3. Select the check box to the left of the item you would like to Delete.
4. Select Delete.
   Window prompts: Delete selected?
5. Select OK.

Example:



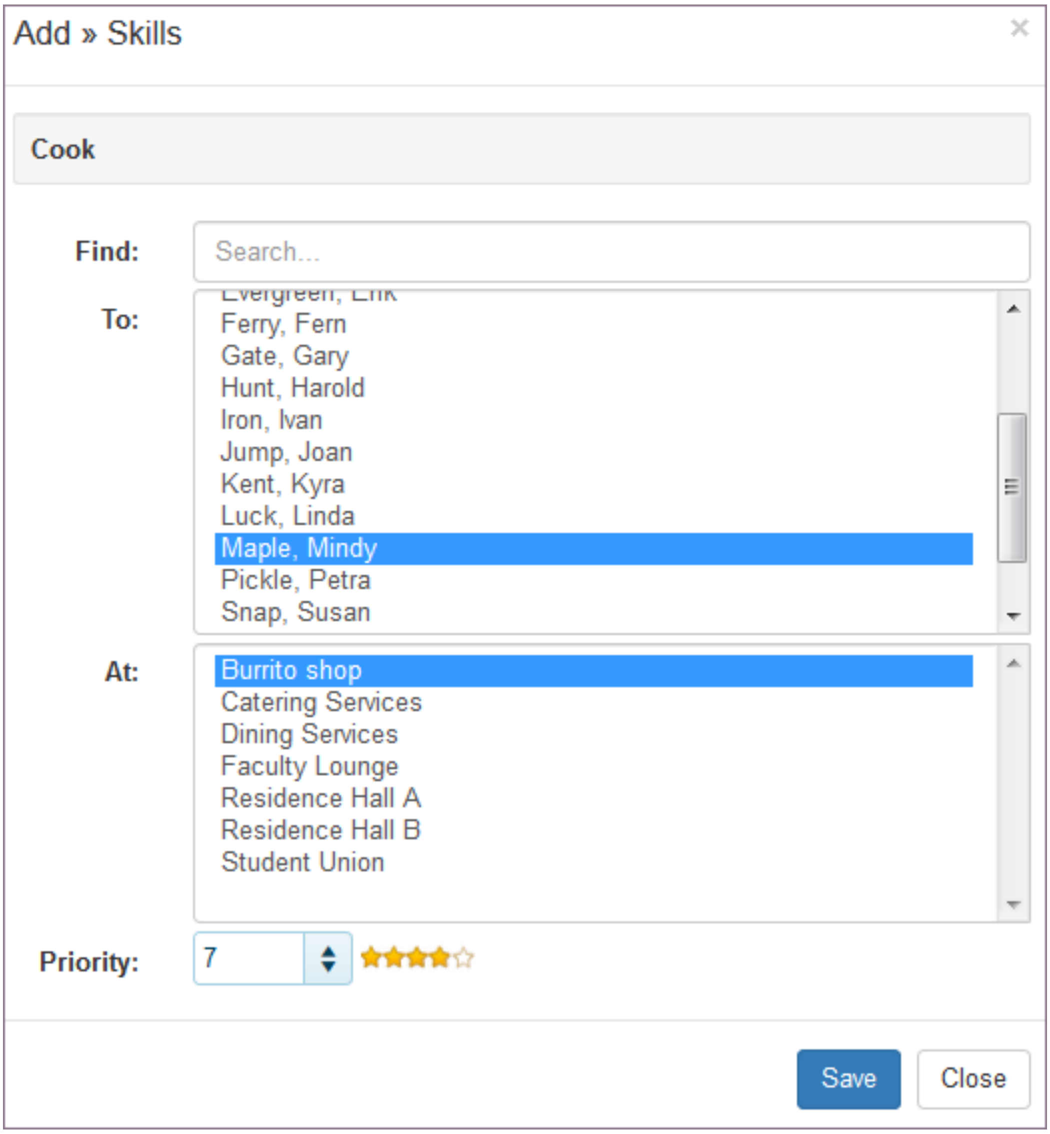
6.4 Skills

Use the Skills pages to designate the employees who can work at stations and specify their priority or skill level at that station in a location.

6.4.1 Adding a Station Skill to an Employee at a Location

1. Select Stations from the main menu.
   Note: Use the same station or use the Menu button to select another one.
2. Select the Skills tab.
3. Select Add.
   Add >> Skills window displays a list of employees and stations.
4. Select the employee in To.
5. Select the location in At.
6. Select the Priority or skill level of the employee at this station using the number picker.
7. Select Save.

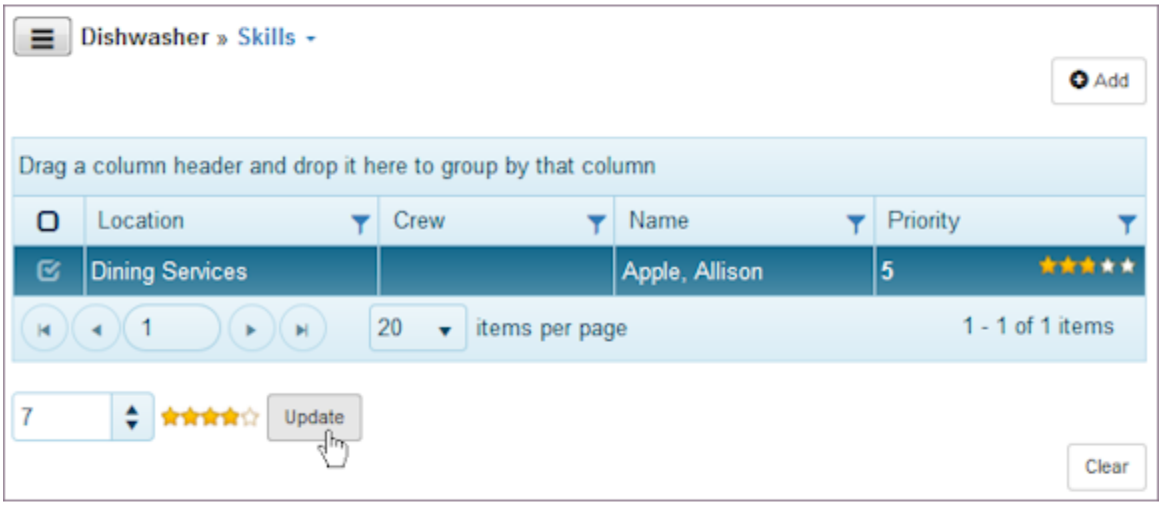
Example:



6.4.2 Editing an Employee's Station Skill Level

1. Select Stations from the main menu.
   Note: Use the same employee or use the Menu button to select another one.
2. Select the Skills tab.
3. Select a Station.
   Locations and Employees with that skill display
4. Select the check box to the left of the employee whose skill level you would like to edit.
5. Use the number picker at the bottom of the table to increase or decrease the number of stars.
6. Select Update.

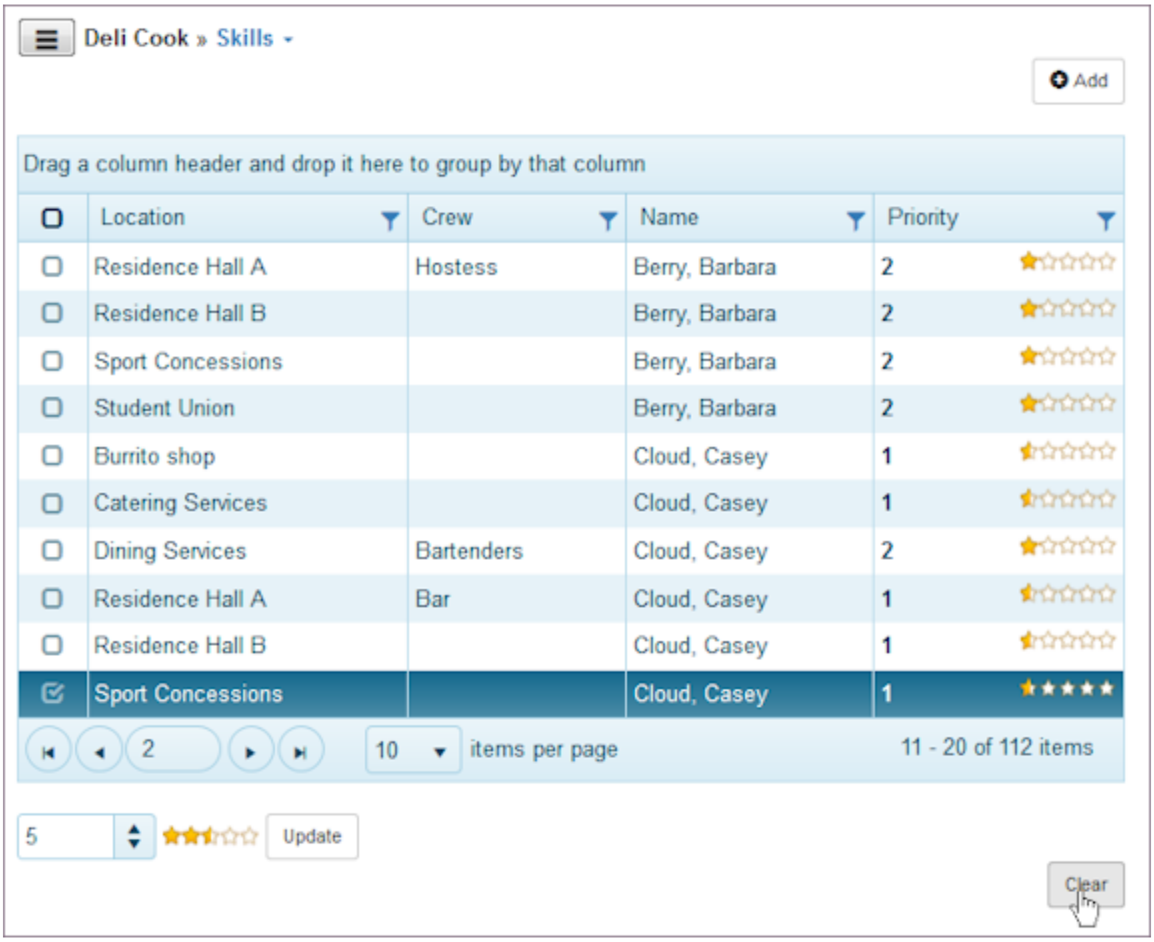
Example:



6.4.3 Deleting an Employee's Skill at a Location

1. Select Stations from the main menu.
   Note: Use the same station or use the Menu button to select another one.
2. Select the Skills tab and select an employee.
3. Select the check box to the left of the employee whose skill level you would like to delete.
4. Select Clear.
   Window prompts: Delete selected?
5. Select OK.

Example:



7. Employees

7.1 Employees

Use the Employees pages to add employees and manage related information in TeamWork 5. You can:

- Enter personal data, contact information, scheduling, and time related information.
- Assign employees to folders, locations, and stations from this section.
- Add agreements and establish and maintain credentials.
- View an Employee calendar, set up global and location-related templates, manage overrides, and also manage leave.
- Use tools to quickly update employee information, verify setup, manage leave of multiple employees, and mass update agreements.

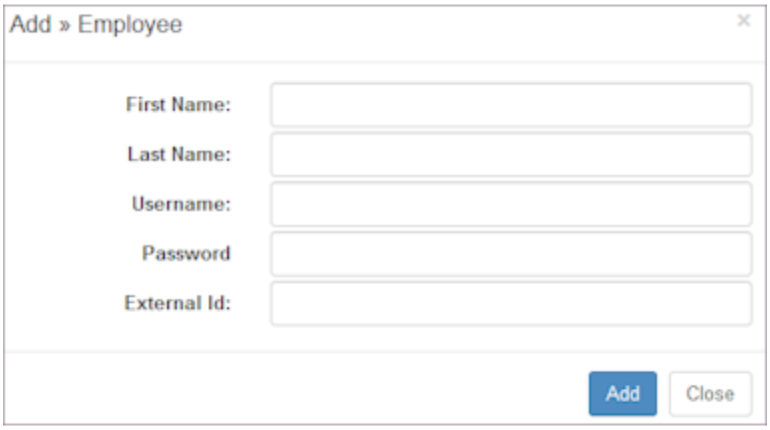
Refer to the following How To's.

- Settings
- Deployments
- Availability
- Skills
- Tools

7.2 Settings

Use Settings pages to establish an employee record. Pages are provided to help you capture personal information, contact information, scheduling parameters, and time-related information such as time zone and project/task/activity assignment. In addition, if your organization uses special attributes, you can select them on the attributes window.

7.2.1 Adding an Employee

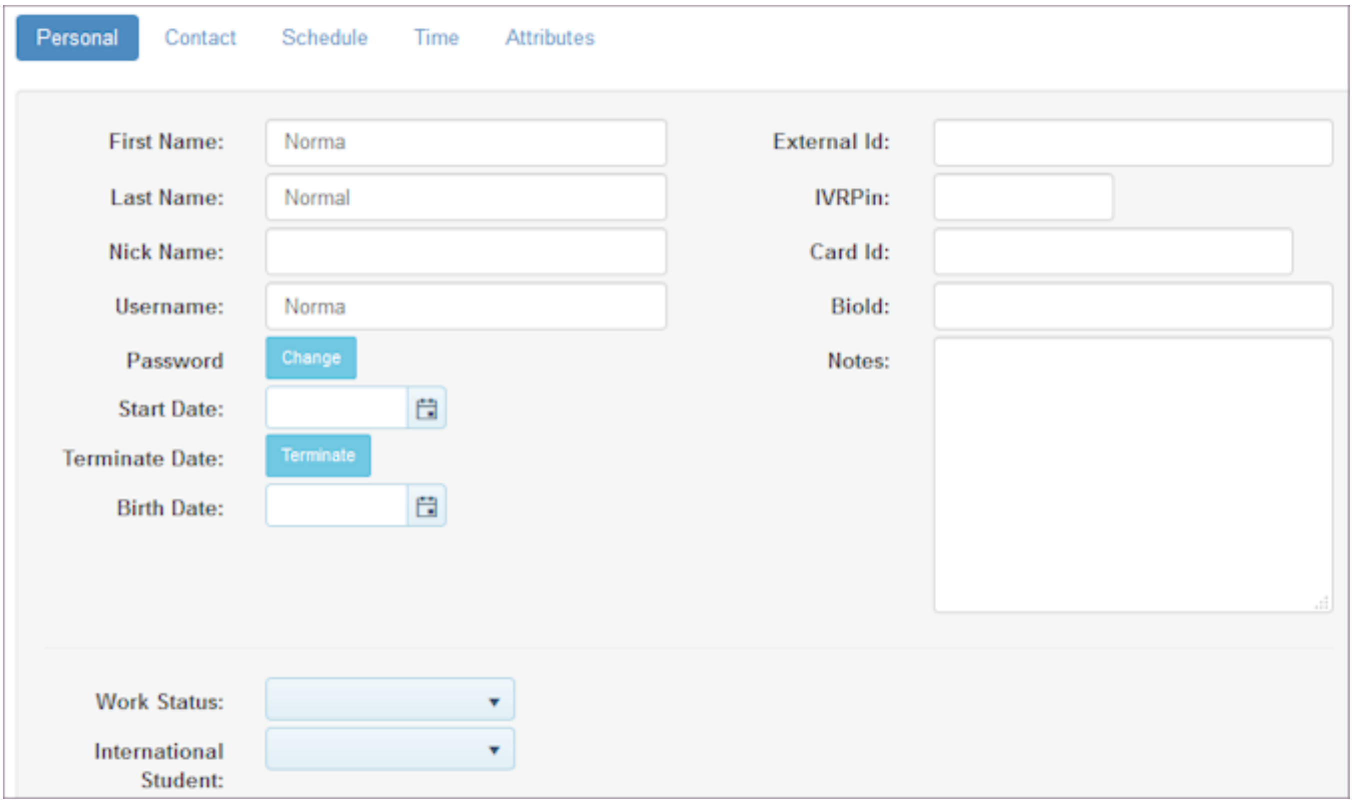
1. Select Employees from the main menu.
2. Select an employee or Employees > Add or Add to add a new employee.
   Example:
   

3. Type First Name, Last Name, Username, Password, and External Id, if you are coordinating with external systems.
4. Select Add.
   Settings > Personal page displays First Name, Last Name, and Username.

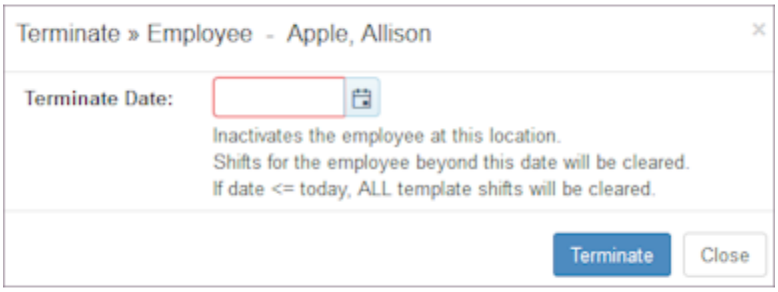
7.2.2 Adding Personal Info

1. Select the Personal tab if not already selected.
   Employees > Settings > Personal window displays.

Example:



2. Enter Start Date and Birth Date, especially if you want to use these dates as criteria in filling a bid board.
3. Enter any additional information and select Save.
4. To terminate an employee or change employee status to Inactive, select Terminate.
   Terminate >> Employee window displays.
   Example:

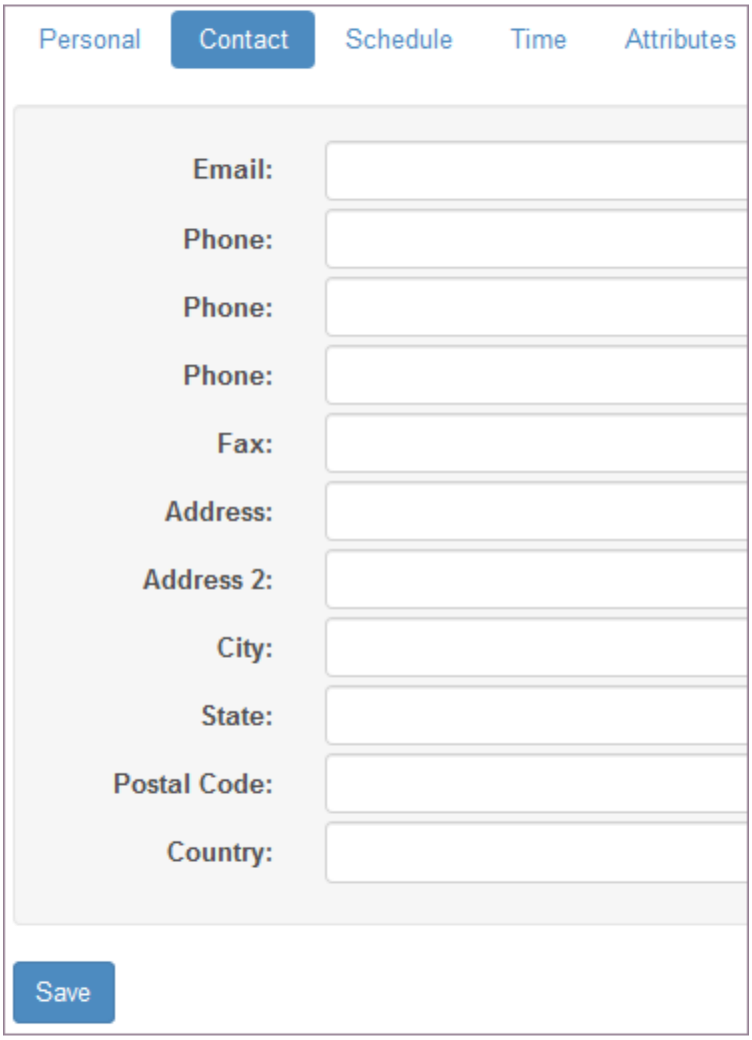


5. Enter Terminate Date and select Terminate.
6. Select Save.

7.2.3 Adding Contact Info

1. Select the Contact tab.
   Employee > Settings > Contact window displays.

Example:

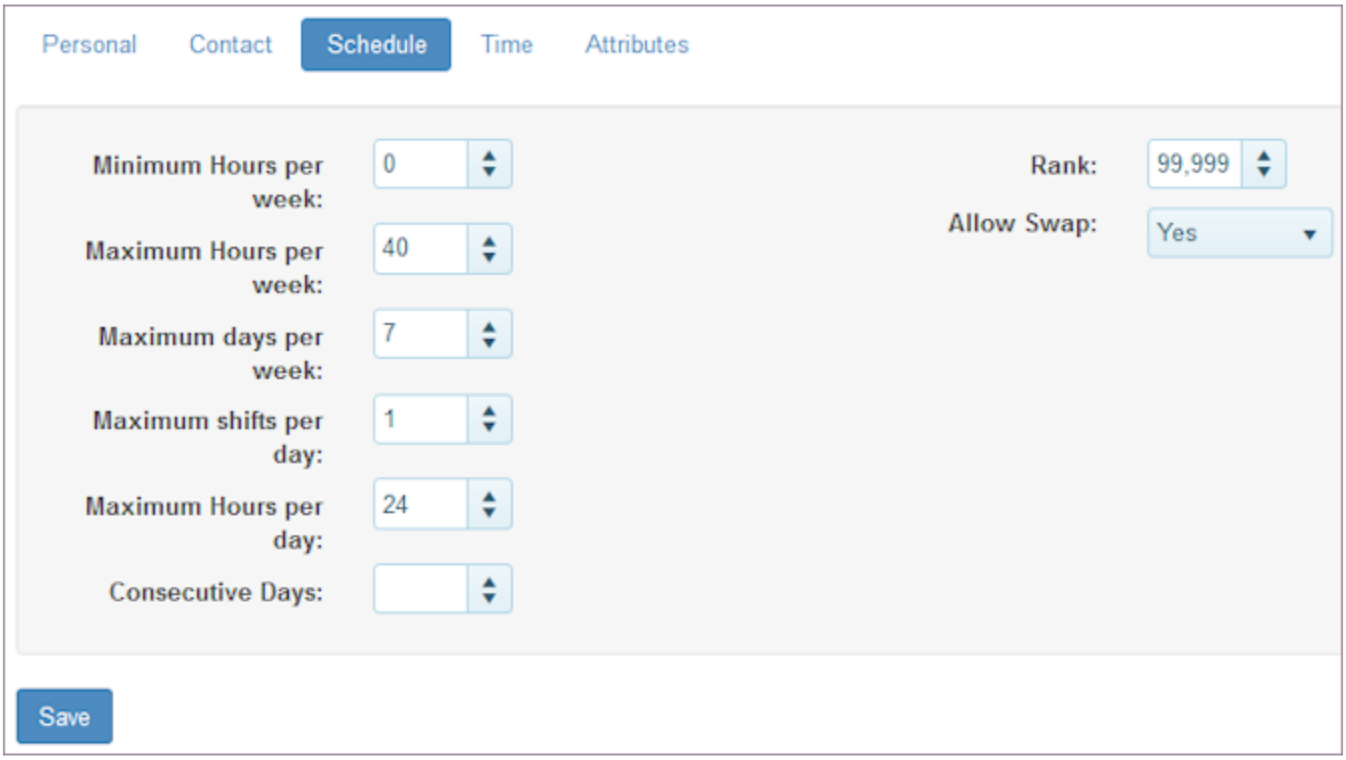


2. Enter Employee contact information and select Save.
   Note: Many organizations ask Employees to enter this information in the Employee portal.

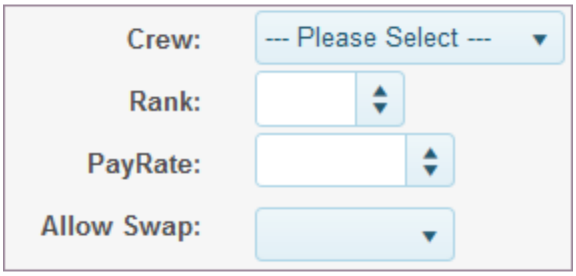
7.2.4 Adding Schedule Info

1. Select the Schedule tab.
   Employee > Settings > Schedule window displays.

Example:



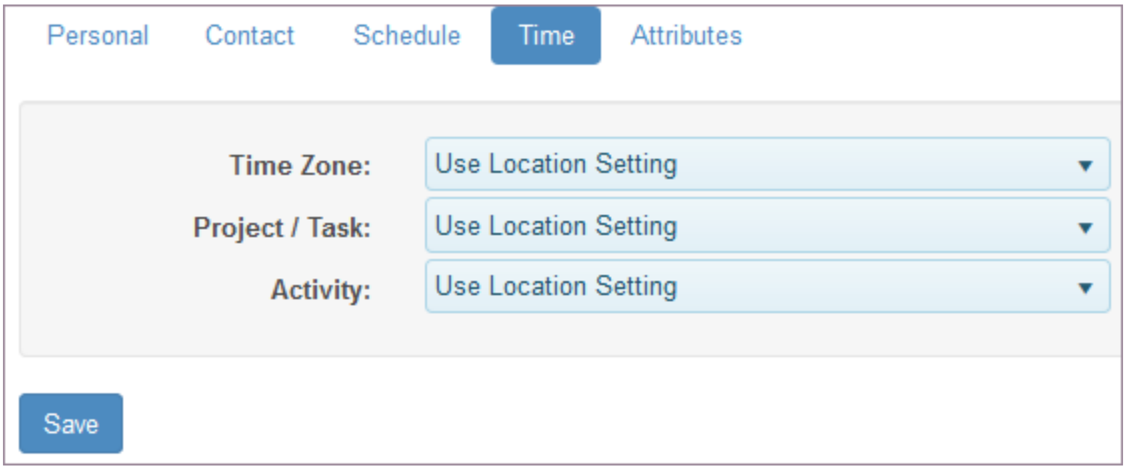
2. Make necessary changes to the default information that displays and select Save.
3. To add Crew and or Pay Rate information, log into a location. Then, select Employees > Settings > Schedule.
   Employees > Settings > Schedule window displays Crew and PayRate fields.
   Example:



7.2.5 Adding Time Info

1. Select the Time tab.
   Employees > Settings > Time window displays.

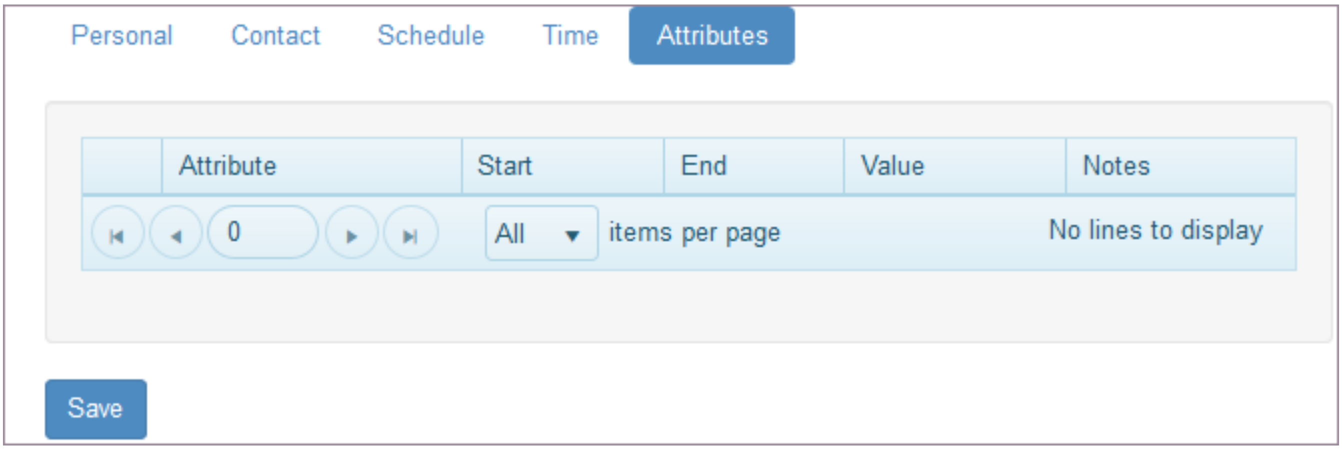
Example:



2. Make any changes to the Time Zone if the Location Setting is not applicable to this employee.
3. Select a Project/Task and Activity if you want them to display by default on the employee time settings for Clock and Card.
4. Select Save.

7.2.6 Adding Attributes Info

1. Select the Attributes tab.
   Employees > Settings > Attributes window displays.
   Example:



2. Select appropriate attributes and select Save.
   Note: To add attributes and make them available for selection, go to Organization > Custom > Attributes. Role permissions are required.
3. Once you have added Employee Settings, see Deployments.

7.3 Deployments

Use the Deployments pages to deploy or assign the folders, locations, stations, agreements, and credentials to an employee. Establish the information on other pages, and add or delete the deployment here. The following lists where each deployment is established.

- Folders - Create folders using the enterprise level Organization > Folders page. Role permissions are required.
- Locations - Create locations using the Locations page. Role permissions are required.
- Stations - Create stations using the Stations page.
- Agreements - Create information applied under Agreements for Policy, Agreement, and Position using the enterprise level Organization pages. Role permissions are required.

□ Policies - go to Organization > Policies for policies. If you do not specify a policy, the default policy is assigned to the employee

□ Agreements - go to Organization > Lists > Agreements

□ Positions - go to Organization > Lists > Positions

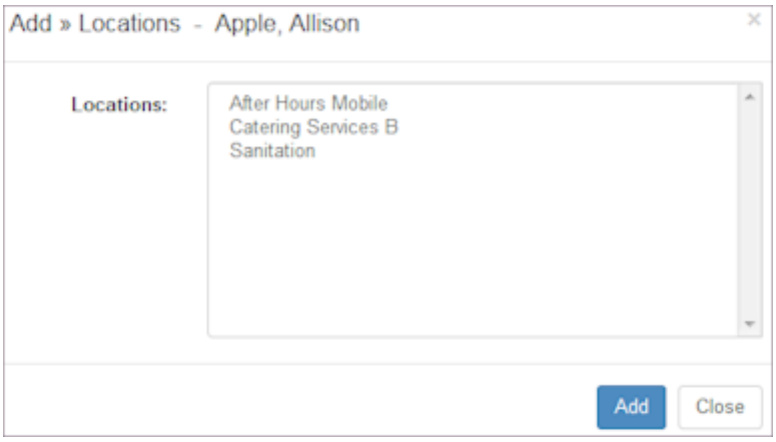
- Credentials - Create credentials using the Credentials page.

7.3.1 Adding a Deployment

1. Select Employees from the main menu.
   Note: Use the same employee or use the Menu button to select another one.
2. Select the Deployments tab and select the deployment: Folders, Locations, Stations, Agreements, or Credentials.
3. Select Add.
   Add >> deployment window for the employee displays a list of available deployments.
4. Select the item you want to deploy.

5. Select Add.

   Example:

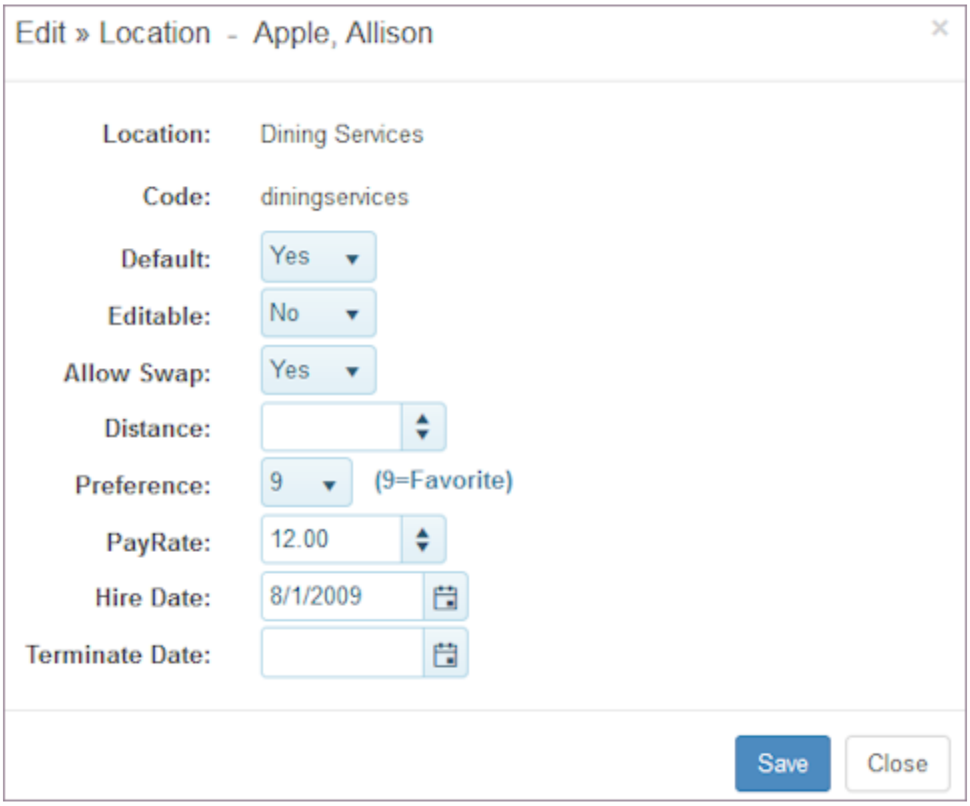


7.3.2 Editing Locations Info

Note: You can edit the information associated with the deployment of a location.

1. Select the location you would like to edit.

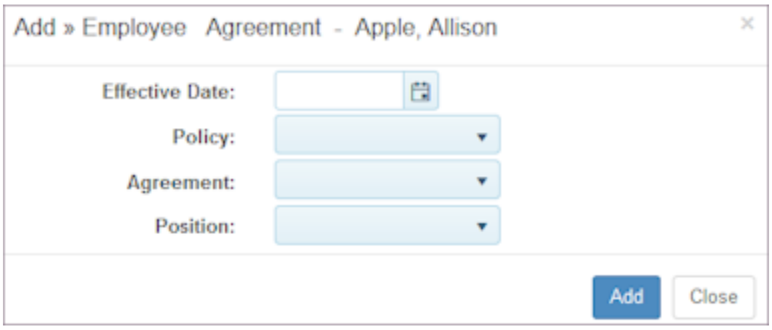
   Example:



2. Make desired changes.
3. Select Save.

7.3.3 Adding Agreements

Note: You can add policy, agreement, and position information, but not edit it. Remember, you add the info in Organization and select it here to assign it to an employee.

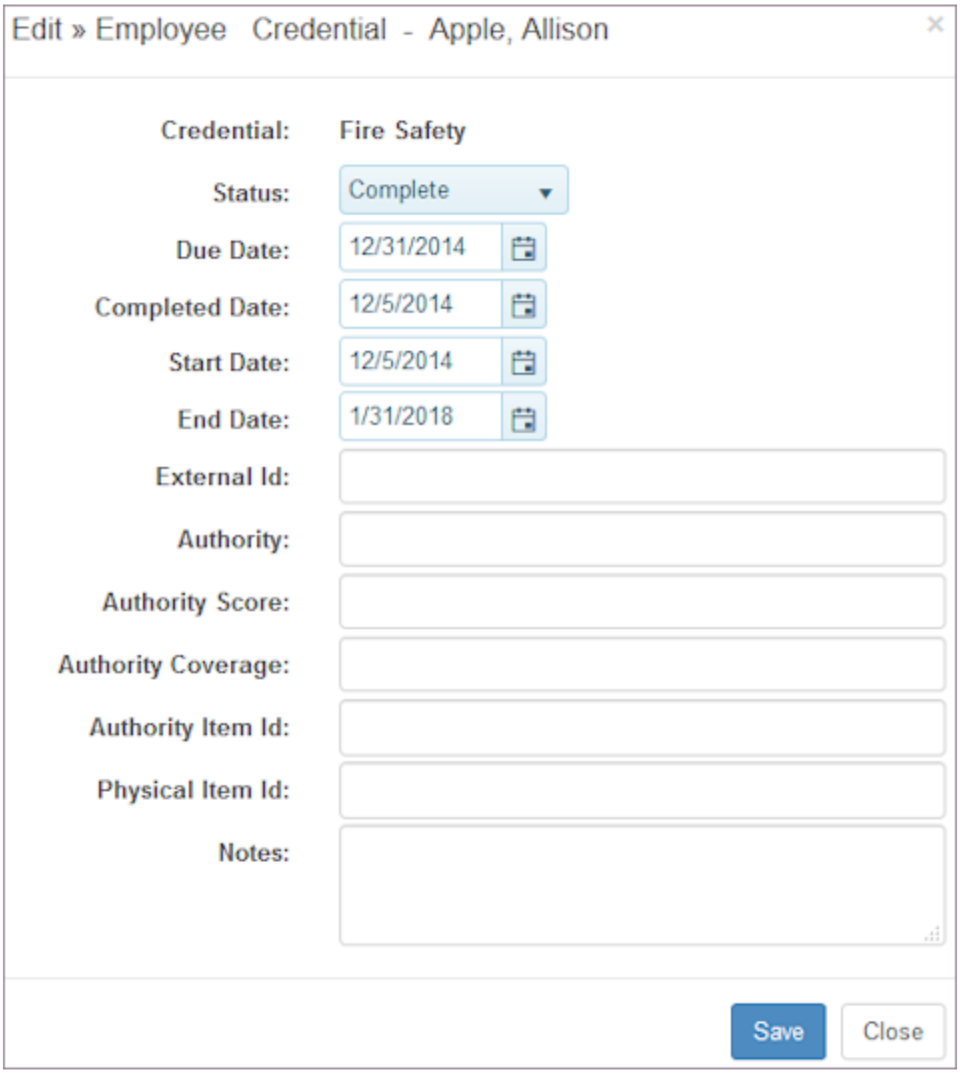
1. Select Employees from the main menu.
   Note: Use the same employee or use the Menu button to select another one.
2. Select the Deployments tab and select Agreements.
3. Select Add.
   Add >> Employee Agreement window displays for the employee.
   Example:
   

4. Select the Effective Date.
5. Select the Policy.
6. Select the Agreement.
7. Select the Position.
8. Select Add.

7.3.4 Editing Credential Info

Note: You can update credential information.

1. Select the credential you would like to edit.
   Example:



7.3.5 Deleting a Deployment

1. Select Employees from the main menu.
   Note: Use the same employee or use the Menu button to select another one.
2. Select the Deployments tab and select the deployment.
3. Select the check box to the left of the item you would like to Delete.
4. Select Delete.
   Window prompts: Delete selected?
5. Select OK.
   Example:

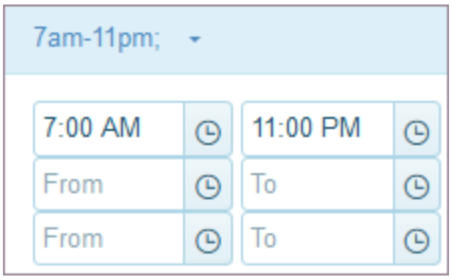
7.4 Availability

Use the Availability pages to view an employee's calendar, add or edit an employee's availability template, add availability overrides, and view, add, grant or deny an employee leave request.

7.4.1 Viewing an Employee Calendar

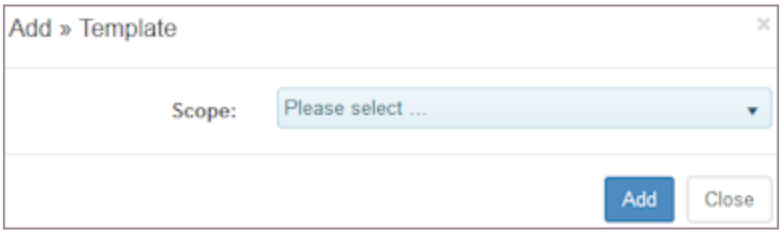
1. Select Employees from the main menu.
   Note: Use the same employee or use the Menu button to select another one.
2. Select Availability > Calendar.
3. Select the view you would like to display: Day, Week, Month, or List.
4. Select the time period using the date picker and arrows.
5. To view availability, select an Available time or Not Available time.
   Available or Not Available window displays a prompt to Open.
6. Select Open.
   Templates displays for the type of availability you selected, i.e., for a location or a global template.
7. To make changes to an employee's global or location-specific availability, see Viewing or Editing Employee Templates.

7.4.2 Viewing or Editing Employee Templates

1. Select Employees from the main menu.
   Note: Use the same employee or use the Menu button to select another one.
2. Select Availability > Templates.
3. Select the template you would like to view.
4. Select the day or time under the Available column.
   Time Entry window displays.
   Example:
   

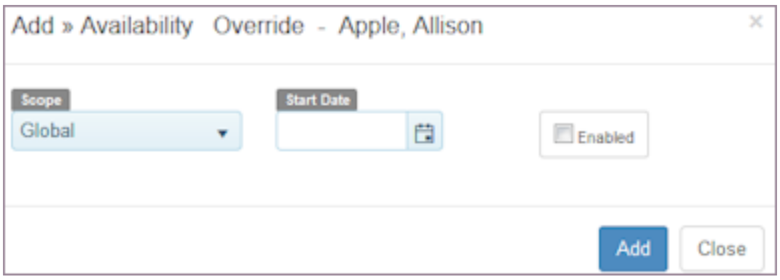
5. Make changes.
6. Select Save.

7.4.3 Adding an Employee Template

1. Select Employees from the main menu.
   Note: Use the same employee or use the Menu button to select another one.
2. Select Availability > Templates.
3. Select Add.
   Example:
   

4. Select the Scope, i.e., a location or global.
5. Select the check boxes of the days the employee is available.
6. Select a Priority using the drop-down list. 1 indicates a low interest in working and 9 indicates it is a high priority.
7. Enter Available times. If not available ALL DAY, select From and To times you are available in each day.
8. (Optional) Enter Preferred times.
9. Select Save.

7.4.4 Adding Overrides

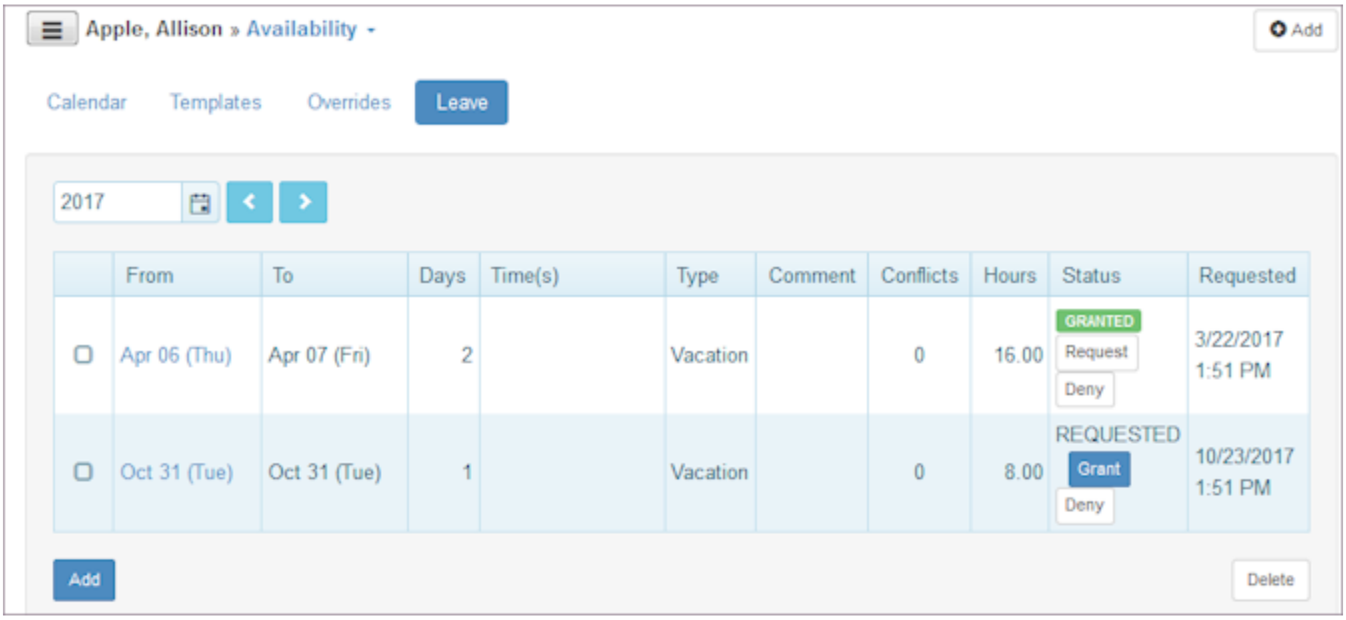
1. Select Employees from the main menu.
   Note: Use the same employee or use the Menu button to select another one.
2. Select Availability > Overrides.
3. Select Add.
   Add >> Availability Override window displays for employee.
   Example:
   

4. Select Scope: either Global or a Location.
5. Select a Date.
6. To be unavailable the entire day, select Save at this time.
7. To be available for part of the day, select the Enabled check box.

8. Enter Available Time Ranges and Preferred Time Ranges for the single day.
9. Select Save.

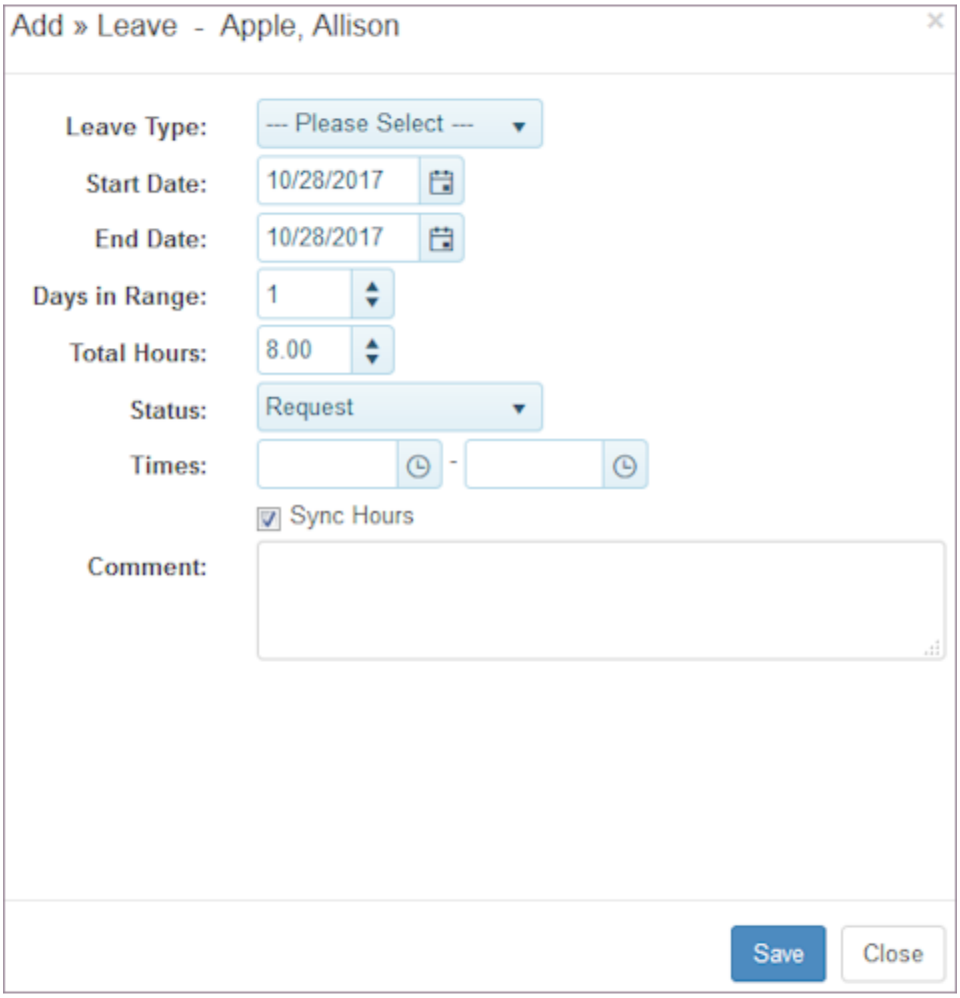
7.4.5 Managing Employee Leave

1. Select Employees from the main menu.
   Note: Use the same employee or use the Menu button to select another one.
2. Select Availability > Leave.
3. **Select the Leave tab.**
   Leave window displays with leave information.
   Example:



4. **To add Leave, select Add.**
   Add >> Leave window displays.

Example:



5. **On the Add Leave Request window, select Leave Type.**
   Note: Leave Types are entered in the Leave > Types page. Role permissions are required.
6. Select a Start Date and End Date.
7. **Type the number of Days in Range or verify the automatic calculation.**
8. **Type the number of Total Hours or verify the automatic calculation.**
9. Select the Status: Request or Grant.
10. **Select the check box to Sync Hours.**
11. **Enter Times only if the request is for less than one day, then specify the hours start and end time.**
12. **Add a Comment as desired.**
13. **Select Save.**
14. To grant a leave request, select Grant.
    Pop-up window questions: Grant Leave?
15. Select OK.
    When you refresh the window, Granted displays in green.

16. **To deny a Leave request, select Deny.**
    Pop-up window questions: Deny leave?
17. **Select OK.**
    When you refresh the window, DENIED displays in all capital letters.

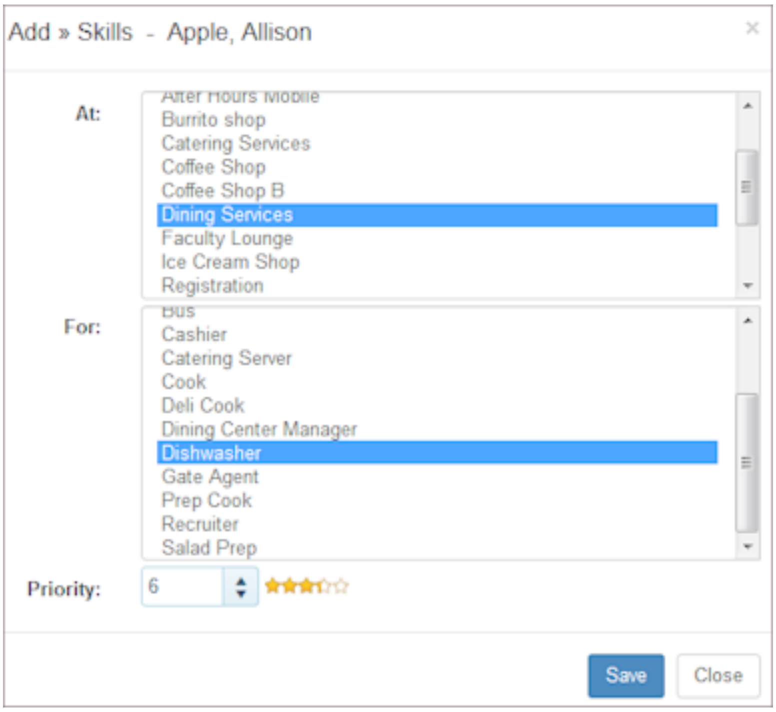
7.5 Skills

Use the Skills pages to add or edit an employee's skills at a station in a location. Specify their priority or skill level at a job. When you build schedules, employees are assigned to a shift based on that ranking as well as the importance of the station and the employee's scheduling parameters and availability information.

7.5.1 Adding a Skill to an Employee at a Location

1. Select Employees from the main menu.
   Note: Use the same employee or use the Menu button to select another one.
2. Select the Skills tab.
3. Select Add.
   Add >> Skills window displays a list of locations and stations.
4. Select the location in At.
5. Select the station in For.
6. Select the Priority or skill level of the employee at this station using the number picker.
7. Select Save.

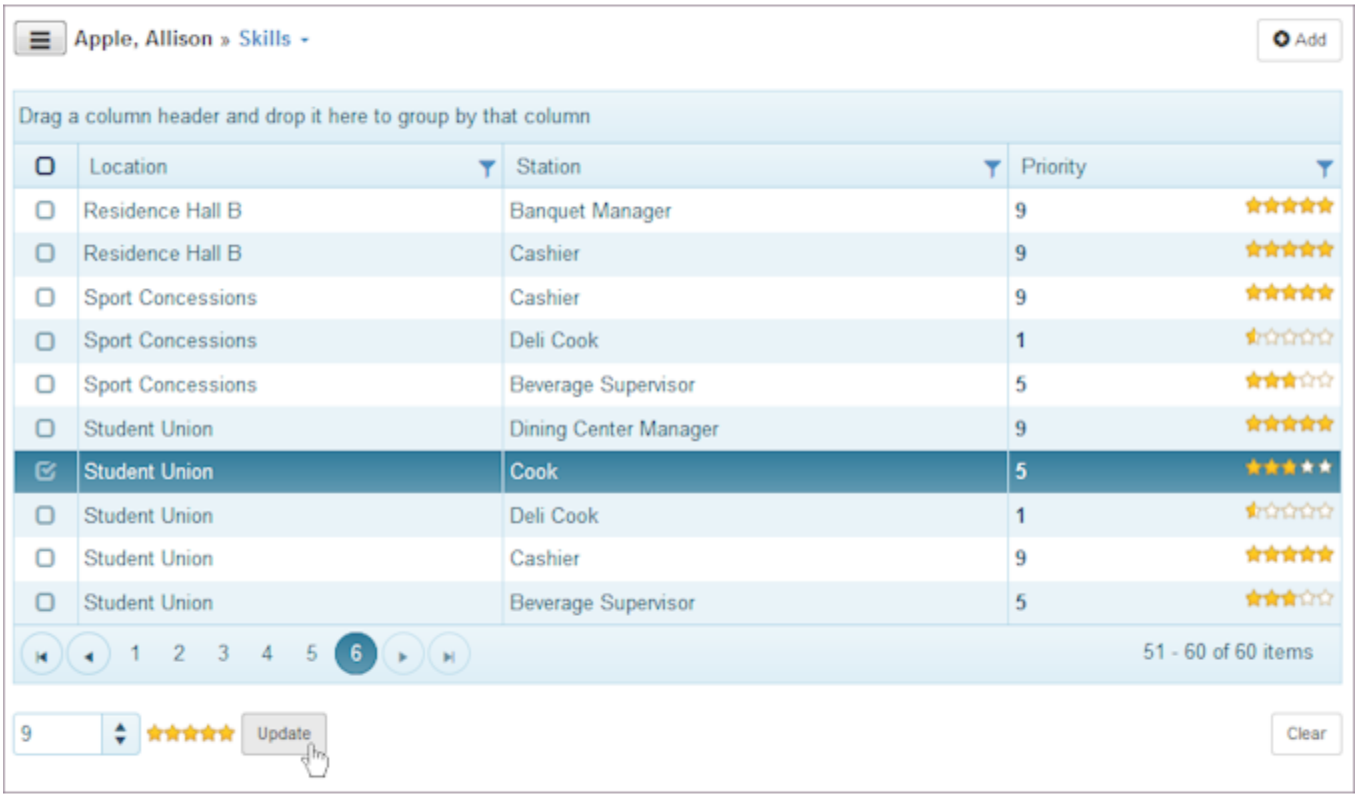
Example:



7.5.2 Editing an Employee's Skill Level

1. Select Employees from the main menu.
   Note: Use the same employee or use the Menu button to select another one.
2. Select the Skills tab.
3. Select the check box to the left of the employee whose skill level you would like to edit.
4. Use the number picker at the bottom of the table to increase or decrease the number of stars.
5. Select Update.

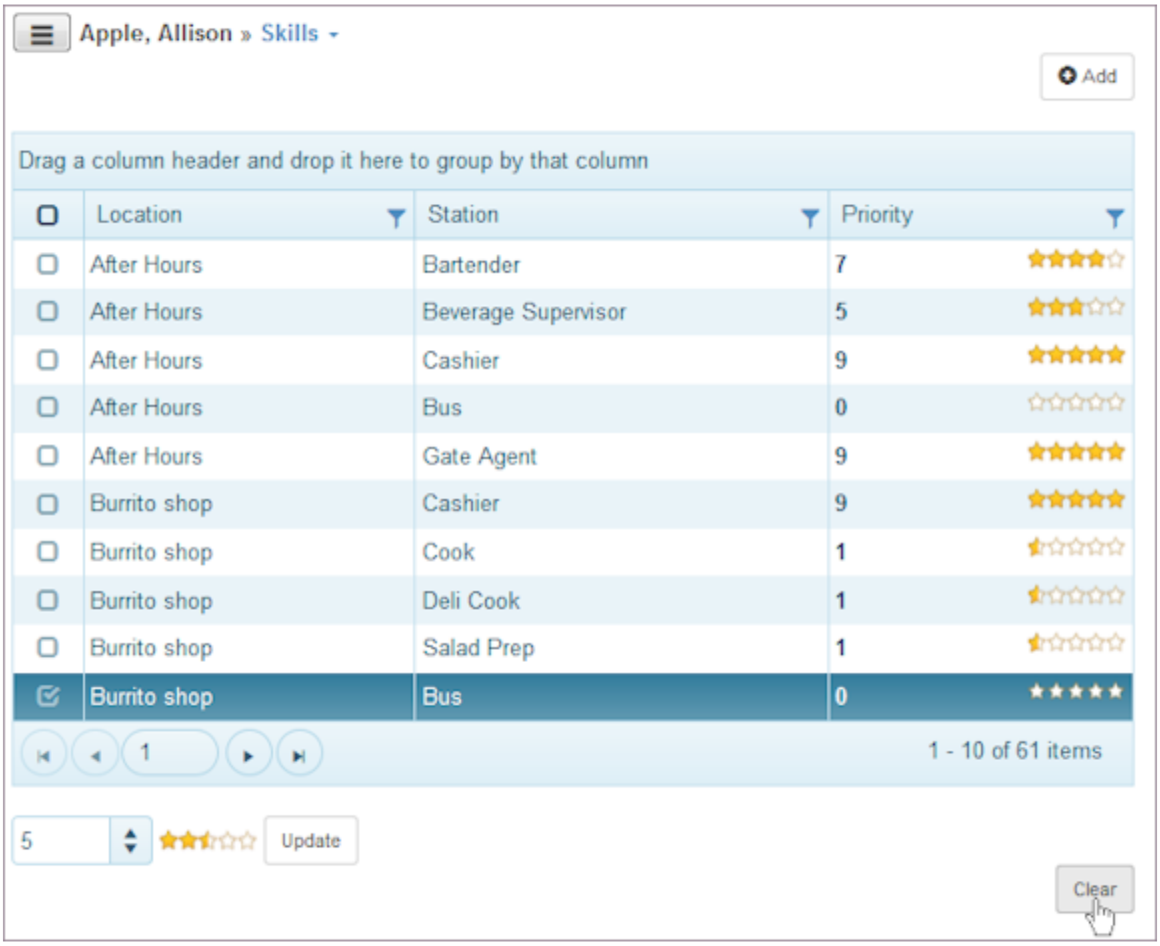
Example:



7.5.3 Deleting an Employee's Skill at a Location

1. Select Employees from the main menu.
   Note: Use the same employee or use the Menu button to select another one.
2. Select the Skills tab and select a location and the station.
3. Select the check box to the left of the employee whose skill level you would like to delete.
4. Select Clear.
   Window prompts: Delete selected?
5. Select OK.

Example:


Apple, Allison » Skills
Add
Drag a column header and drop it here to group by that column
Location
Station
Priority
After Hours
Bartender
7
After Hours
Beverage Supervisor
5
After Hours
Cashier
9
After Hours
Bus
0
After Hours
Gate Agent
9
Burrito shop
Cashier
9
Burrito shop
Cook
1
Burrito shop
Deli Cook
1
Burrito shop
Salad Prep
1
Burrito shop
Bus
0
1
1 - 10 of 61 items
5
Update
Clear

7.6 Tools

Use the Tools pages to view employee information, manage leave and agreements, use mass update, and manage rotations. See all employees on one window, and quickly update a field for multiple employees at once.

7.6.1 Using Mass Update

1. Select Employees from the main menu.
2. Select Tools > Mass Update.
3. Select the check box next to all employees whose records should be updated.
   Note: To quickly select all employees, select the check box in the table header. To quickly clear all check boxes, clear the check box in the table header.
4. Enter the settings that you want changed.
5. Select Update.

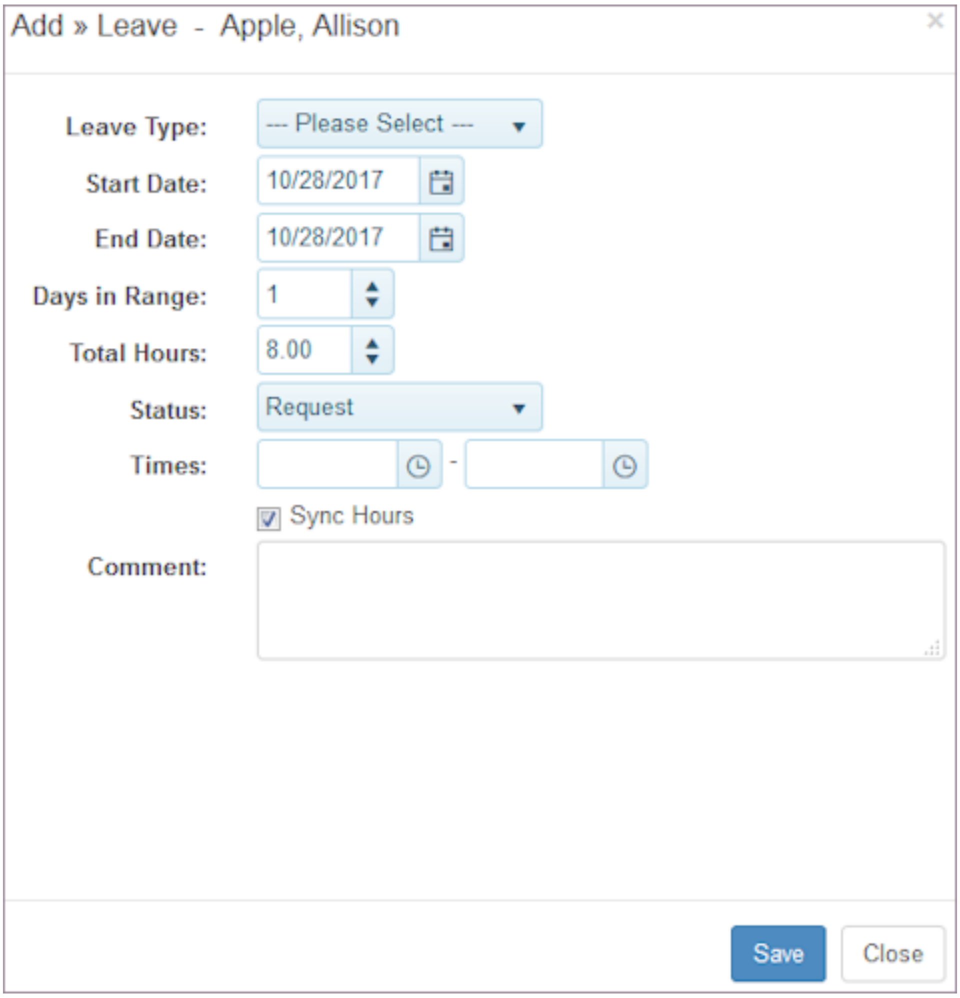
7.6.2 Verifying Setup

Note: You must have organization level permissions to use Verify Setup.

1. Select Employees from the main menu.
2. Select Tools > Verify Setup.
3. Select the section name of the setup information you would like to view.
   Setup information displays.
4. Select the radio button to specify the amount of information: Exceptions Only or All
5. Select a Name to make changes or additions to the employee setup information.
   Related window displays.
   Note: Refer to the How To's for that section.

Managing Leave:

1. Select Employees from the main menu.
2. Select Tools > Manage Leave.
3. **Select the forward and backward arrows to display future and past years or use the calendar picker.**
4. **To add Leave, select Add.**
   Add >> Leave window displays.
   Example:



5. **On the Add Leave request window, select Leave Type.**
   Note: Leave Types are entered in the Leave > Types page. Role permissions are required.
6. Select a Start Date and End Date.
7. **Type the number of Days in Range or verify the automatic calculation.**
8. **Type the number of Total Hours or verify the automatic calculation.**
9. Select the Status: Request or Grant.
10. **Select the check box to Sync Hours.**
11. **Enter Times only if the request is for less than one day, then specify the hours start and end time.**
12. **Add a Comment as desired.**
13. **Select Save.**

14. To grant a leave request, select Grant.
    Pop-up window questions: Grant Leave?
15. Select OK.
    When you refresh the window, Granted displays in green.
16. **To deny a Leave request, select Deny.**
    Pop-up window questions: Deny leave?
17. **Select OK.**
    When you refresh the window, DENIED displays in all capital letters.

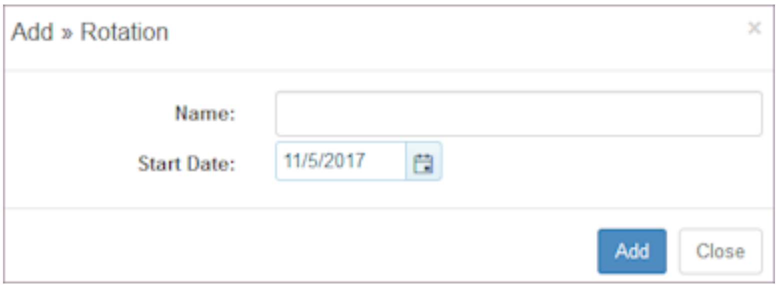
7.6.3 Managing Agreements

1. Select Employees from the main menu.
2. Select Tools > Manage Agreements.
3. Select the check box next to all employees whose records should be updated.
   Note: To quickly select all employees, select the check box in the table header. To quickly clear all check boxes, clear the check box in the table header.
4. Enter the Mass Update Effective Date.
5. Select a Policy using the drop-down list.
   Note: Policies are entered using the enterprise level Organization > Policies.
6. Select an Agreement using the drop-down list.
   Note: Agreement Types are entered using the enterprise level Organization > Lists > Agreement Types page. Role permissions are required.
7. Select the Position using the drop-down list.
   Note: Position Types are entered using the enterprise level Organization > Lists > Position Types page. Role permissions are required.
8. Select Update.

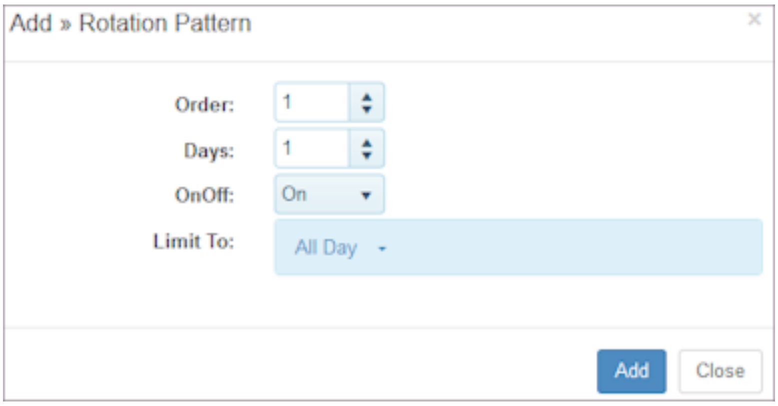
7.6.4 Managing Rotations

Note: Rotations only displays under Tools when you are logged into a location.

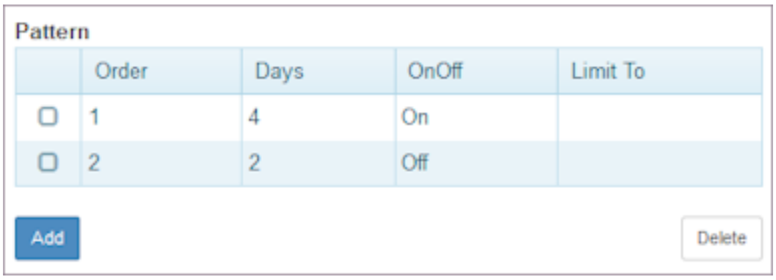
1. Select Employees from the main menu.
2. Select Tools > Rotations.
3. To add a rotation, select Add.
   Add >> Rotation window displays.
   Example:



4. Type the Name and select the Start Date.
5. To add a pattern to the rotation, select Add.
   Add >> Rotation Pattern displays.
   Example:



6. Select the Order, Days, whether employees are On or Off, and Limit To the number of hours or All Day.
7. Select Add. Repeat steps for On Pattern and Off Pattern.
   Example:

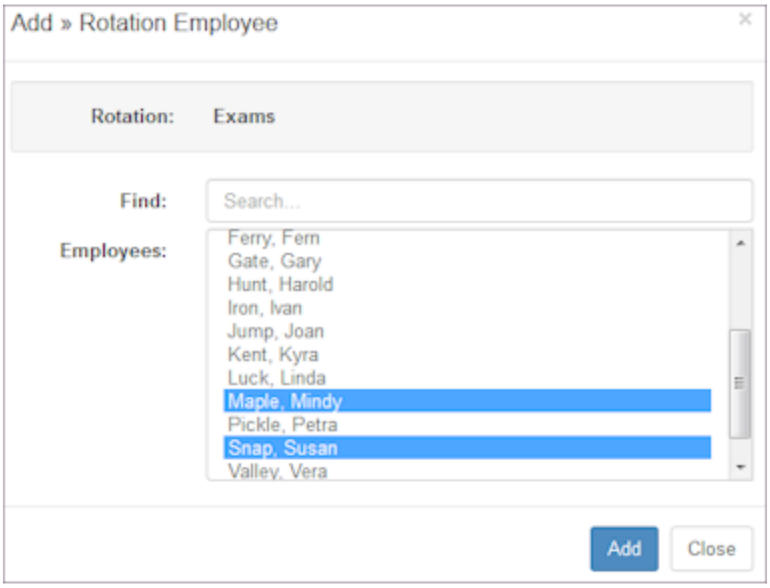


Calendar refreshes automatically and displays the Rotation Patterns.

Example:

8. To assign Employees to the Rotation, select Add.
   Add >> Rotation Employee window displays.

Example:



9. Select the employees to assign to this Rotation and select Add.
   Employees display in Assigned window.
   Example:

Note: An employee can only be assigned to one Rotation.

8. Policies

8.1 Policies

Use the Policies pages to establish components that collect and manage employee time, attendance, overtime, project tasks and activities, shift differentials, and holidays and leave. Organize each of the relevant components into a policy and assign the policy to one or more employees. Only one policy can be active for an employee during one time.

- Establish policies for a specific time-period. Policies are date-based and can cover a week, a month, a quarter, or even a year or more.
- Add new policies when you need them. Include only the components you need.
- Create another policy with a later effective date and edited components to replace a policy when it is no longer relevant.
- Edit components to reflect changes in laws or employee agreements and simply assign a new Effective Date. A new version is automatically created with the new date in the version title.

Situations when the Policies are especially useful include:

- Enforcing overtime calculations when a shift is split over midnight
- Enforcing a point system for attendance and employees who are repeatedly tardy
- Enforcing shift differentials
- Enforcing holiday pay
- Deploying different projects, tasks, and activities to different employees working in the same location

8.1.1 Required Component

You must use the Time Settings component if you are using policies. Use it to set the rules for employee time entries. It replaces time settings in the Locations page, except for the Automatic Clock Off settings. Use the radio button to indicate whether Location Time Settings or Policy Time Settings are used in your organization. If Policy Time Settings are used, specify employee time entry devices such as the kiosk, clock, or time card as well as other time-related information.

Remember: While Policy Time Settings can replace Location Time Settings, the Automatic Clock Off settings in the Location page Time Settings window are not replaced.

Important: Since you use Policy Management with the Time & Attendance module, the Time & Attendance module must be enabled before you can use Policies. However, you can use the Time & Attendance module without using Policies.

8.1.2 Optional Components

The following are optional components. You can use some or all of them in the policies you establish.

- Employee Time Edit — allows you to give an employee permission to edit their time.
- Overtime — allows you to set up and enforce overtime rules for groups of employees. For example, include policy components that address exempt employees, state and federal Fair Labor Standards Act (FLSA) guidelines using either the location's address or employee's address, shift-based rules, or even custom rules such as contractual agreements.
- Attendance — allows you to set up a point system for attendance violations and tardiness.
- Project Task Activity — allows you to restrict the employee clock options so employees only see the projects, tasks, and activities assigned to them. This prevents employees from being able to clock to all projects in their location. In addition, you can select an option to use Station/Time Settings on the Project/Task & Activity policy component.
- Shift Differentials — allows you to set shift differentials by day, shift times, and holidays. For example, you can configure the shift differential policy component to NOT pay both Shift Differential and Overtime on the same shift. You can now configure the shift differential component to mark Overtime hours with the default differential (usually as Regular Hours).
- Leave — allows you to pay an employee a differential that is earned even when the employee is taking leave.
- Holiday Calendar — allows you to set up different holiday calendars for different locations.

8.1.3 Assigning Policies to Employees

Use the Employees > Deployment > Agreements page to assign policies to employees. See Deployments.

8.1.4 Using Policies

Refer to the following How To's.

- Defining Policies
- Designating a Default Policy
- How To's for Policy Components

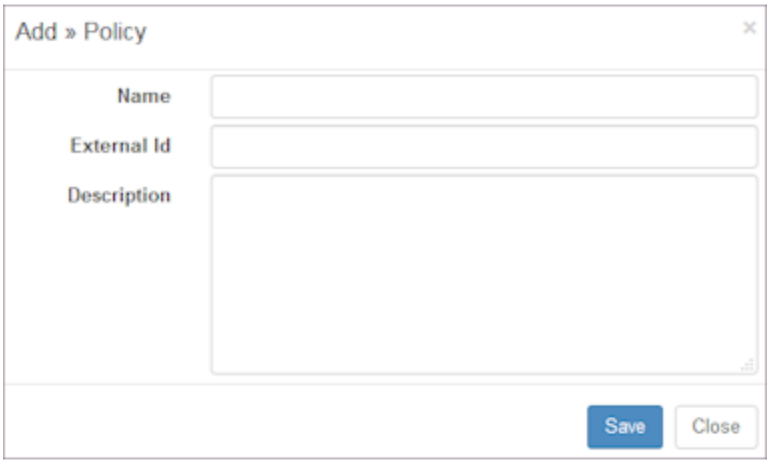
8.2 Defining Policies

Use the Policies pages to add, edit, and delete a policy.

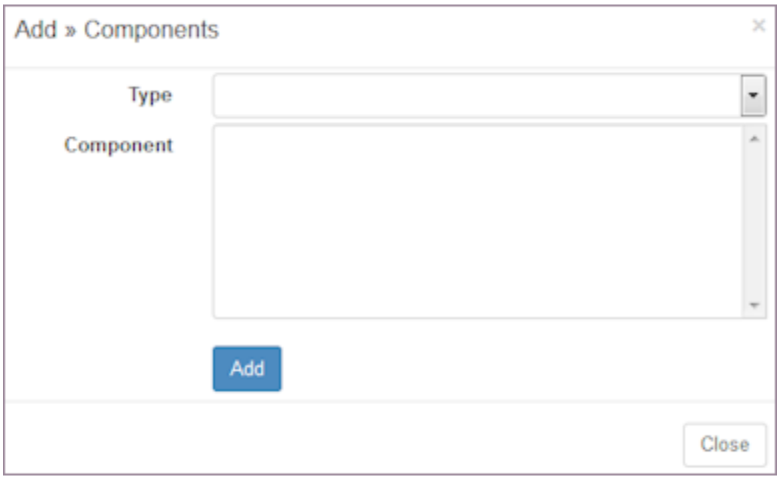
Important: Policies are established and managed at the organization level. To do so, you must have Organization role permissions enabled for Policies.

8.2.1 Adding a Policy

1. Select Organization from the main menu.
2. Select Policies.
3. To add a policy, select Policies > Add or Add.
   Example:



4. Type the Name, External Id, and Description and select Save.
   Policy >> Policy Name displays with a Components Add button.
5. Select Add.
   Add >> Components window displays.
   Example:



6. Select the Type of component.
   Components you created display.
7. Select the component to add to this policy and select Add.
   Message displays in green: Component added.
   Important: You must select a Time Settings component. All other components are optional.
8. Select Close.
   Components you added display under Components on the Policy window.

8.2.2 Editing a Policy

1. Select Organization from the main menu.
2. Select Policies.
3. Select the policy you would like to edit.
   Policy window displays.
4. Select Add to add additional components.
   Important: You can edit the name of a policy you have already created, as well as the External Code and Description. You can add new components, but you cannot edit existing components. To change components, delete the policy and add the desired components.

8.2.3 Deleting a Policy

1. Select Organization from the main menu.
2. Select Policies.
3. Select the policy you would like to delete.
   Policy window displays.
4. Select Delete.
   Window prompts: Delete policy?
5. Select OK to delete the policy.
   TeamWork lets you delete policies that have not been assigned to an employee.

   Caution: You cannot delete a policy that has been used. This is a safeguard that ensures accurate recalculation in the event you need to go back to the policy at a later time and use it to generate the same results as were received at the time the policy was used.

8.3 Designating a Default Policy

Use Default Policy under Tools to designate a Default Policy. While this is optional, it is helpful to use for new employees. A Default Policy is date-based and applies to all employees who do not have an assigned policy. Time is calculated against the default policy until a policy is assigned to the employee.

To add a default policy:

1. Select Organization from the main menu.
2. Select Policies.
3. To designate a default policy, select a policy.
   The Default Policy window displays a list of all current policies.
   Example:
   TBD
4. Select the Policy that you designate as default.
5. Select an Effective Date using the calendar picker.
6. Select Save.
   The policy you selected becomes the default policy.

8.4 How To's for Components

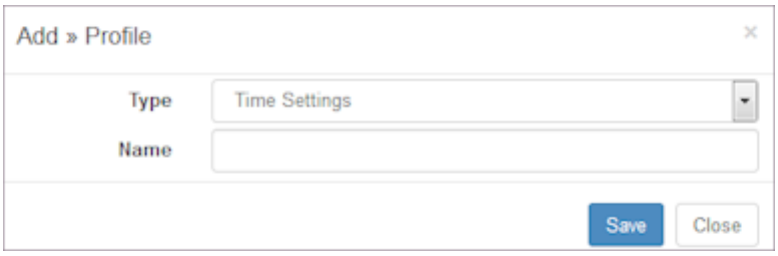
Use the Components pages to address time-related requirements. While you must enter Time Settings, other components are optional.

Important: Component windows are flexible and useful for past reconstruction as well as the establishment of policies that implement a new bargaining agreement or changes in the law.

- Select earlier versions in the component page. Earlier versions are easy to locate.
- Enter policy components and date them for the future. Select them when you need to implement them.

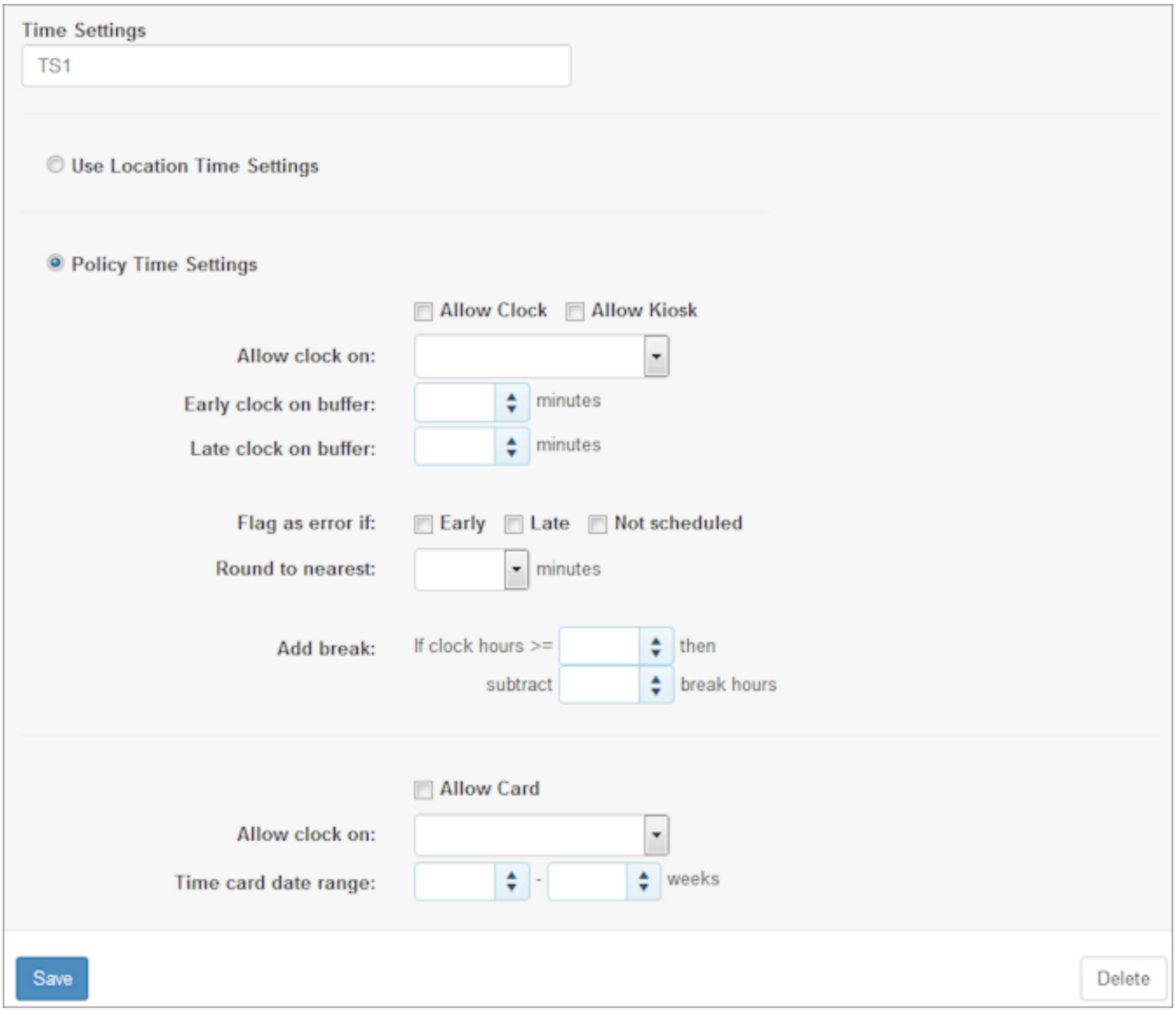
Remember: Set up components first, and then select the components to use in policies.

8.4.1 Time Settings

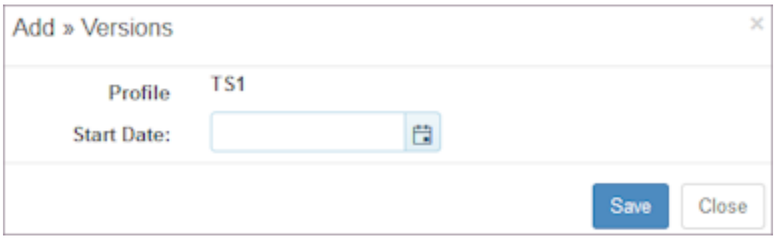
1. Select Organization from the main menu.
2. Select Policies.
3. To add a Time Settings component, select Time Settings > Add.
   Add >> Profile window displays.
   Example:
   

4. Type the Name and select Save.
   Time Settings window displays.

Example:



5. On the Time Settings window, select the radio button for Policy Time Settings.
   Note: You also have the option of continuing to use Location Time Settings. If you select this option, the Time Settings Component window displays no additional fields.
6. Select the check boxes as desired: Allow Clock and Allow Kiosk.
   Note: This specifies how employees can enter time into the system. Kiosk and Web Clock allow for entering time in and out in real time. Allow Card allows manual entries, for both past and future time.
7. Select Allow clock on: Always or Only when scheduled.
8. Select Early clock on buffer using the arrow buttons.
9. Select Late clock on buffer using the arrow buttons.
10. Select Flag as error conditions: Early, Late, and/or Not Scheduled.
11. Select the Round to nearest minutes using the drop-down list. This rounds exact time stamps to the nearest minute specified and are used for hours calculations. Time clock entry will allow times only on the rounded minute values.

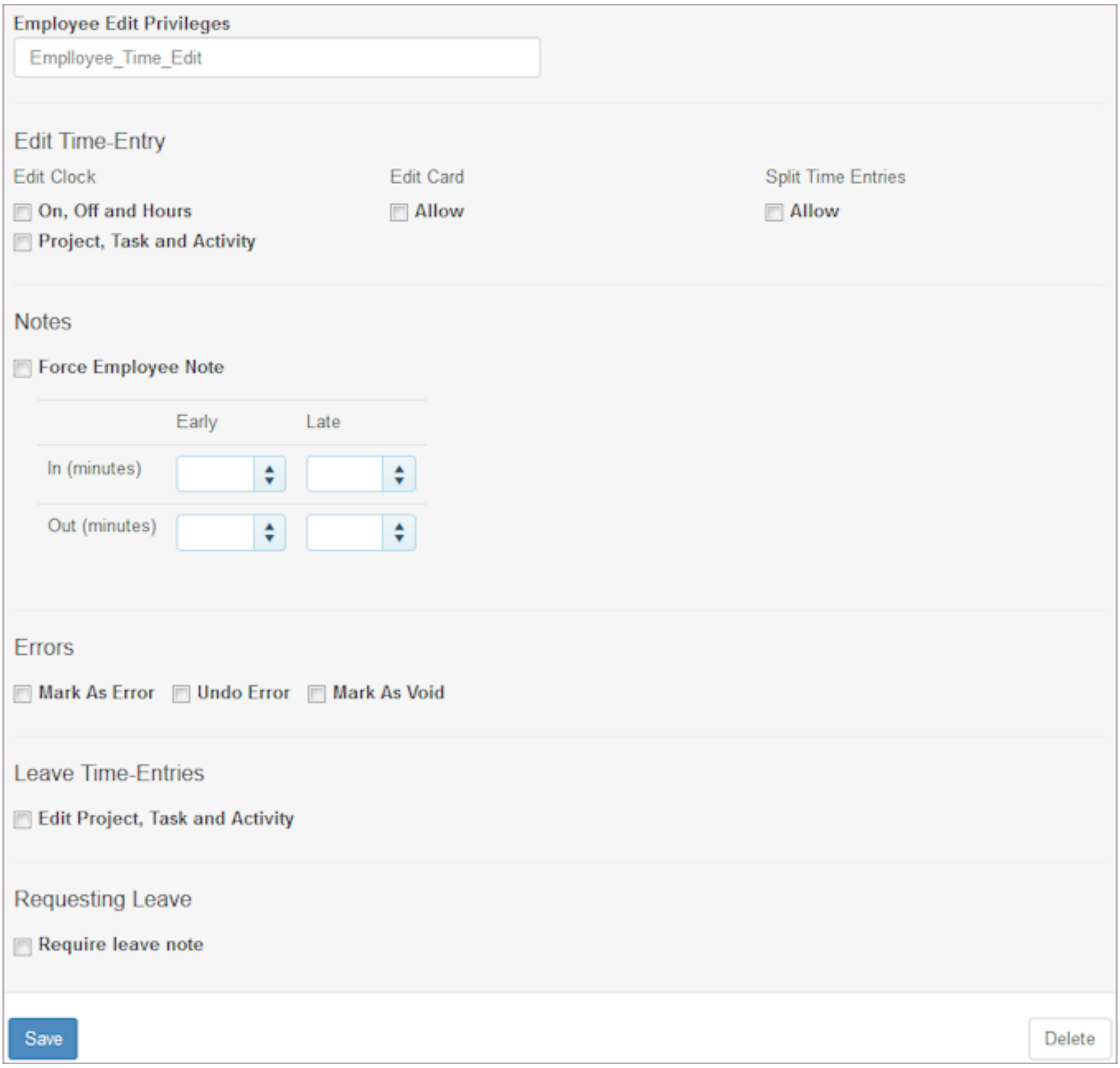
12. Select the Add break conditions to conform to your organization's policies.
13. If allowing Time card entry, select the Allow Card check box.
14. Select Allow clock on: Always or Only when scheduled.
15. Select the Time card date range. This specifies the number of weeks before and after the current week in which employees can enter time.
16. Click Save.
    Note: Version automatically displays the name of the user who created the Time Settings Component. When you refresh, it adds an Effective Date: today's date.
17. To edit a Time Settings component, select the profile and select Add by Versions.
    Add Versions window displays.
    Example:
    

18. Add a Start Date and select Save.
19. Make changes to the Time Settings window and select Save.
    New version with the new date displays along with the user who created it. [Delete Version] button displays on upper right.
20. To delete this version, select [Delete Version].
21. To delete an earlier version, select Delete.
    Note: If a policy component is used in a policy, you cannot delete it.

8.4.2 Employee Time Edit

1. Select Organization from the main menu.
2. Select Policies.
3. To add an Employee Time Edit component, select Employee Time Edit > Add.
   Add >> Profile window displays.
4. Type the Name and select Save.
   Employee Edit Privileges window displays.

Example:



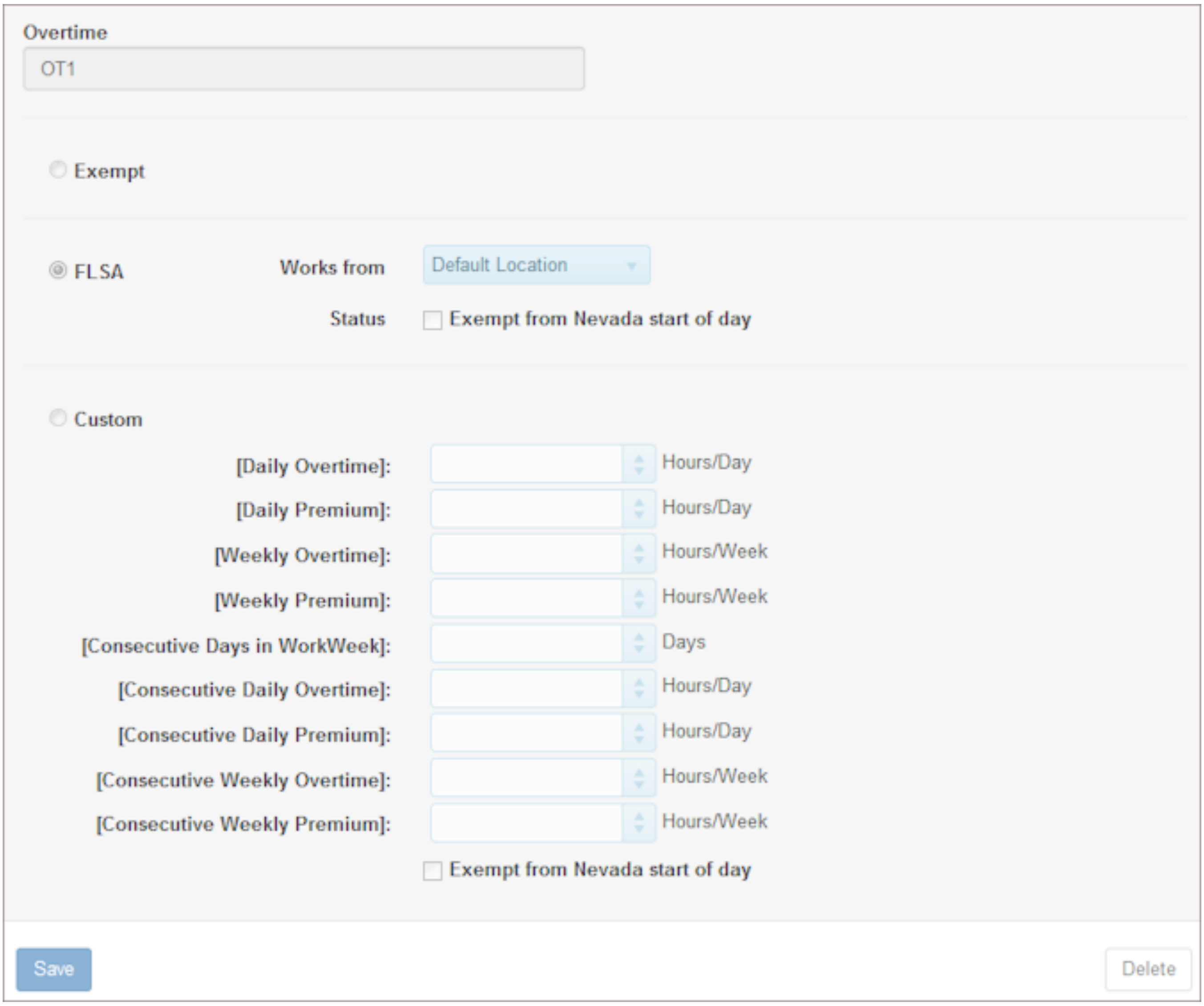
5. Select the check boxes for fields under Edit Time-Entry that you want to allow employees to edit.
6. Select the Force Employee Note check box if you want to require employees to add a note.
7. Specify the number of minutes you consider for early in, late in, early out, and late out.
8. Select employee privileges regarding errors: Mark as Error, Undo Errors, and Mark as Void.
9. Select the check box to indicate whether employees can Edit Project, Task and Activity.
10. Select the check box to indicate whether you Require leave note when employees are requesting leave.
11. Select Save.
    Note: Versions automatically displays the name of the user who created the Employee Time Edit Privileges component and adds an Effective Date: today's date.

12. To edit an Employee Time Edit component, select the profile and select Add by Versions.
    Add Versions window displays.
13. Add a Start Date and select Save.
14. Make changes to the Employee Edit Privileges window and select Save.
    New version with the new date displays along with the user who created it. [Delete Version] button displays on upper right.
15. To delete this version, select [Delete Version].
16. To delete an earlier version, select Delete.
    Note: If a policy component is used in a policy, you cannot delete it.

8.4.3 Overtime

1. Select Organization from the main menu.
2. Select Policies.
3. To add an Overtime component, select Overtime > Add.
   Add >> Profile window displays.
4. Type the Name and select Save.
   Overtime window displays.

Example:



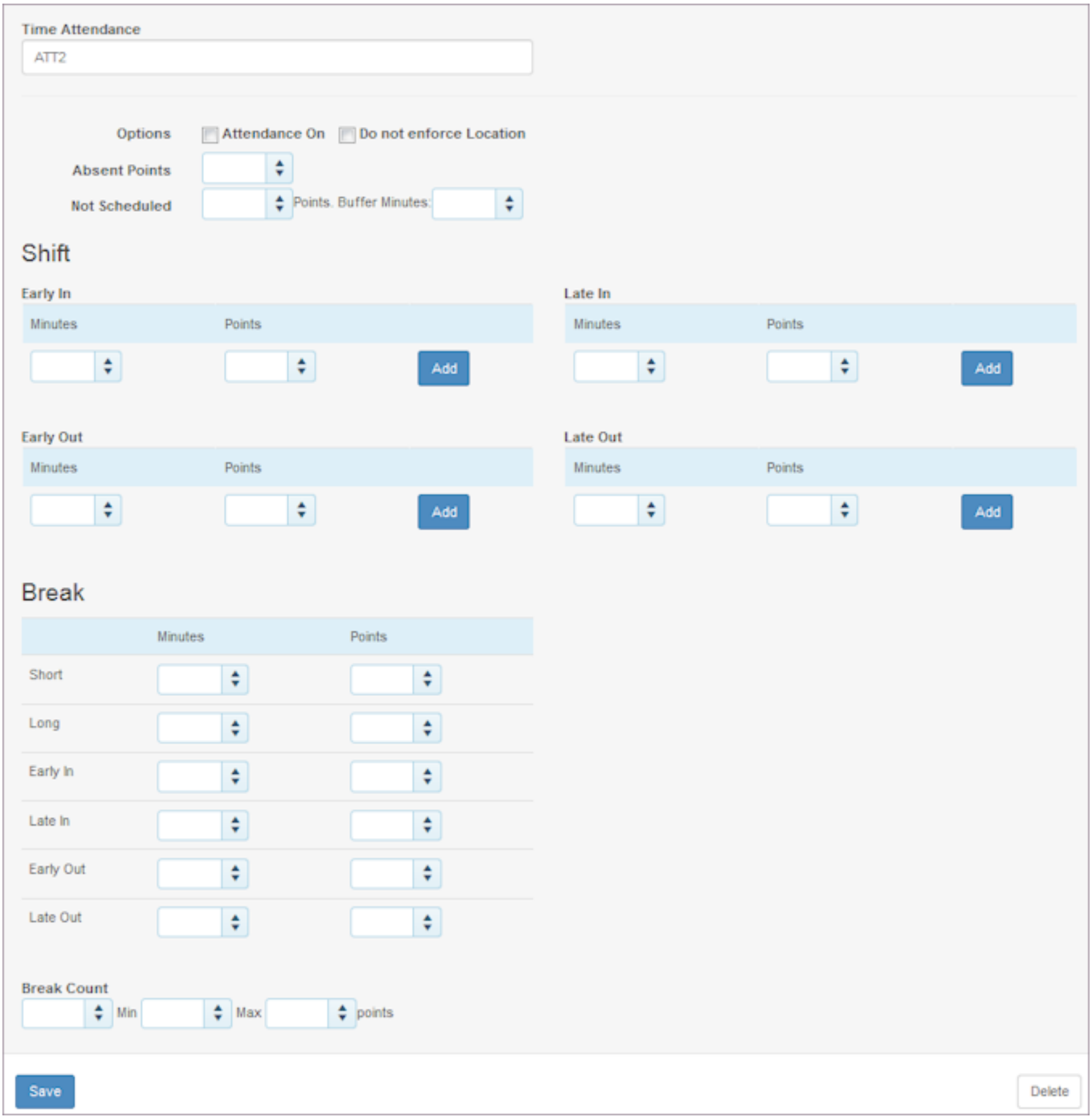
5. Select the check box for Exempt or FLSA.
6. Select Works from: Default Location or Home
7. Select the Status check box if your organization is Exempt from Nevada start of day rules, i.e., default location or employee home is not Nevada.
8. Select the radio button to indicate if this component is Custom.
9. Enter the hours/day and hour/week for overtime in each applicable category.
10. Do not select the check box to enable Nevada start of day rules unless it is applicable to your organization.
11. Select Save.
    Note: Versions automatically displays the name of the user who created the Overtime component and adds an Effective Date: today's date.
12. To edit an Overtime component, select the profile and select Add by Versions.
    Add Versions window displays.
13. Add a Start Date and select Save.

14. Make changes to the Overtime window and select Save.
    New version with the new date displays along with the user who created it. [Delete Version] button displays on upper right.
15. To delete this version, select [Delete Version].
16. To delete an earlier version, select Delete.
    Note: If a policy component is used in a policy, you cannot delete it.

8.4.4 Attendance

1. Select Organization from the main menu.
2. Select Policies.
3. To add an Attendance component, select Attendance > Add.
   Add >> Profile window displays.
4. Type the Name and select Save.
   Time Attendance window displays.

Example:



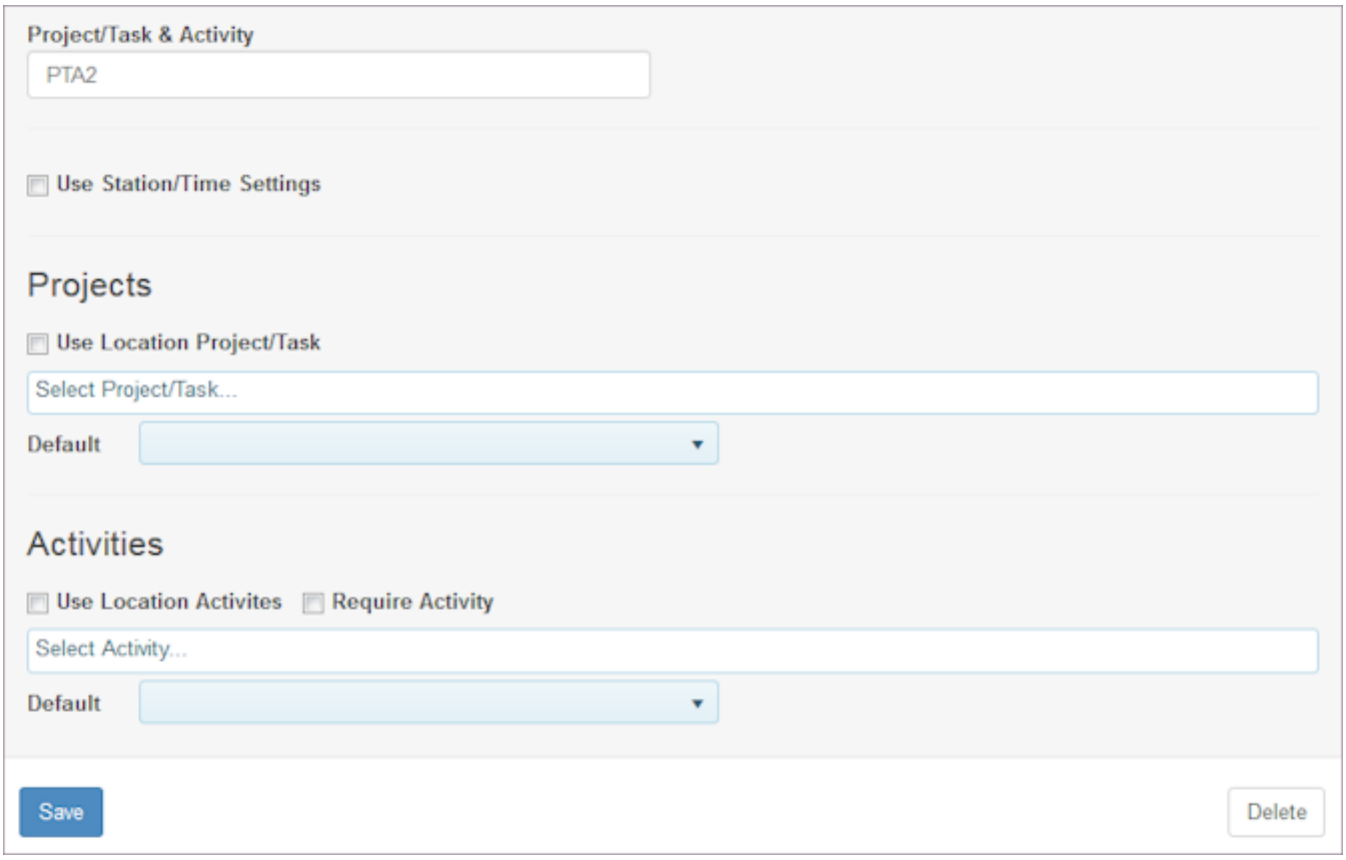
5. Select the check box for Attendance On if you want to track attendance.
6. Select the check box for Do not enforce Location if you want to allow employees to clock on at any location. Do not select the check box if you want employees to clock on at a specific location.
   Explanation: For example, a university food service may have a coffee shop and a dining services facility at three dormitories. Each facility schedules a bus staff, and since the work is location-specific, you want to allow the employee to clock on at any location.
7. Enter the number of points to be assessed for each absence in Absence Points.

8. Enter the number of point in Not Scheduled if you want to allow an employee to clock on when not scheduled. Enter the number of buffer minutes.
   Explanation: For example, a scientist who works in a laboratory may return to work to check on an experiment. While not scheduled, you may want to allow the scientist to clock on and may also want to track those hours worked.
9. Enter the number of minutes and points you would like to assess for violations involving clocking in early and clocking out early, as well as clocking in late and clocking out late. Notice that you can enter minutes and points for different levels.
   Note: You may enter 0 as points if you allow a grace period for clocking in late. Also, while you may not enter points as a violation for clocking out late, you may want to be notified that someone has worked late and track those hours worked.
10. Enter the number of minutes and points you would like to set up involving breaks, as well as a Break Count.
    Note: While your company may not penalize employees for not taking breaks, some industries are required by law to provide breaks. This gives you a way of tracking employee breaks.
11. Select Save.
    Note: Versions automatically displays the name of the user who created the Time Attendance component and adds an Effective Date: today's date.
12. To edit a Time Attendance component, select the profile and select Add by Versions.
    Add Versions window displays.
13. Add a Start Date and select Save.
14. Make changes to the Time Attendance window and select Save.
    New version with the new date displays along with the user who created it. [Delete Version] button displays on upper right.
15. To delete this version, select [Delete Version].
16. To delete an earlier version, select Delete.
    Note: If a policy component is used in a policy, you cannot delete it.

8.4.5 Project Task Activity

1. Select Organization from the main menu.
2. Select Policies.
3. To add a Project Task Activity component, select Project Task Activity > Add.
   Add >> Profile window displays.
4. Type the Name and select Save.
   Project/Task & Activity window displays.

Example:

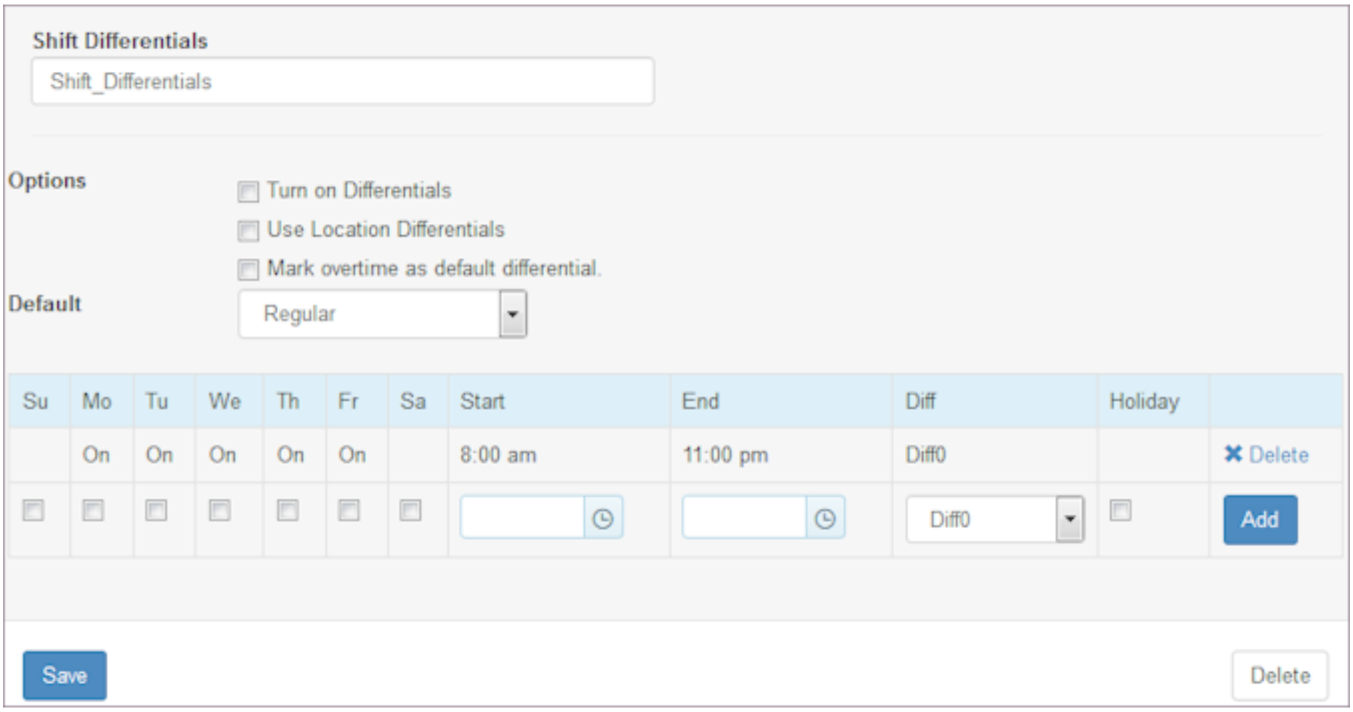


5. Select the check box for Use Station/Time Settings if you want to restrict project, tasks, and activities to only those stations on an employee's schedule.
6. Select the check box for Use Location Project/Task to display all projects and tasks. Then, select the projects and tasks you want deployed in this policy. You may also select the default project and task for this component under Default.
7. Select the check box to Use Location Activities to restrict the activities to only those deployed to a location the employee is assigned to. Then, select the activities you want deployed in this component. You may also select the default activity for this component under Default.
8. Select the check box to Require Activity if an activity is required.
9. Select Save.
   Note: Versions automatically displays the name of the user who created the Project/Task & Activity component and adds an Effective Date: today's date.
10. To edit a Project/Task & Activity component, select the profile and select Add by Versions.
    Add Versions window displays.
11. Add a Start Date and select Save.
12. Make changes to the Project/Task & Activity window and select Save.
    New version with the new date displays along with the user who created it. [Delete Version] button displays on upper right.
13. To delete this version, select [Delete Version].

14. To delete an earlier version, select Delete.
    Note: If a policy component is used in a policy, you cannot delete it.

8.4.6 Shift Differentials

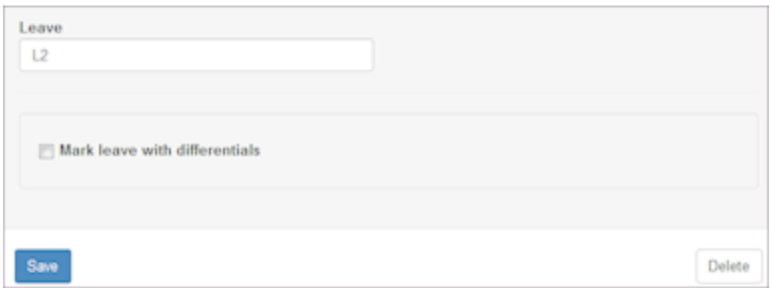
1. Select Organization from the main menu.
2. Select Policies.
3. To add a Shift Differentials component, select Shift Differentials > Add.
   Add >> Profile window displays.
4. Type the Name and select Save.
   Shift Differentials window displays.
   Example:



5. Select the check box to Turn on Differentials.
6. If desired, select the check box for Use Location Differentials if you have different shift differentials for different locations. This ensures the Shift Differential definition you are creating applies if there is no differential configured in the location.
7. Select the check box to Mark overtime as default differential if you pay overtime based on the differential you are creating.
8. Select the Default using the drop-down list: Regular or Diff0 - Diff10.
9. Select the check boxes of the Weekdays and enter the Start and End time.
10. Select the Diff using the drop-down list.
11. If this shift differentials applies to a holiday, select the Holiday check box.

12. Select Add.
    Shift Differentials you created displays on the window with a check box on the right.
13. To add more shift differentials criteria, select check boxes of the Weekdays, enter the Start and End time, and select Add.
    Additional Shift Differential criteria you created displays on the window with a check box on the right.
14. To delete one or more of the shift differentials definitions, select the check box to the right of the definition and select Delete.
15. Select Save.
    Note: Versions automatically displays the name of the user who created the Shift Differentials and adds an Effective Date: today's date.
16. To edit a Shift Differentials component, select the profile and select Add by Versions.
    Add Versions window displays.
17. Add a Start Date and select Save.
18. Make changes to the Shift Differentials window and select Save.
    New version with the new date displays along with the user who created it. [Delete Version] button displays on upper right.
19. To delete this version, select [Delete Version].
20. To delete an earlier version, select Delete.
    Note: If a policy component is used in a policy, you cannot delete it.

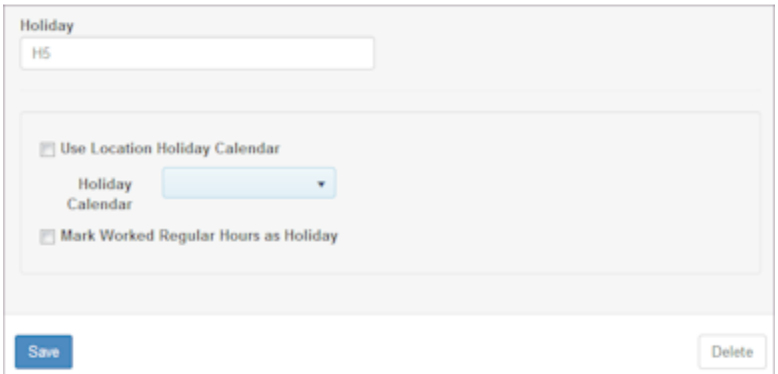
8.4.7 Leave

1. Select Organization from the main menu.
2. Select Policies.
3. To add a Leave component, select Leave > Add.
   Add >> Profile window displays.
4. Type the Name and select Save.
   Leave window displays.
   Example:
   

5. Select the check box for Mark leave with differentials if you want to pay an employee a differential that is earned even when the employee is taking leave.

6. Select Save.
   Note: Versions automatically displays the name of the user who created the Leave component and adds an Effective Date: today's date.
7. To edit a Leave component, select the profile and select Add by Versions.
   Add Versions window displays.
8. Add a Start Date and select Save.
9. Make changes to the Leave window and select Save.
   New version with the new date displays along with the user who created it. [Delete Version] button displays on upper right.
10. To delete this version, select [Delete Version].
11. To delete an earlier version, select Delete.
    Note: If a policy component is used in a policy, you cannot delete it.

8.4.8 Holiday Calendar

1. Select Organization from the main menu.
2. Select Policies.
3. To add a Holiday Calendar component, select Holiday Component > Add.
   Add >> Profile window displays.
4. Type the Name and select Save.
   Holiday window displays.
   Example:
   

5. Select the check box to Use Location Holiday Calendar if desired, and select the Holiday Calendar.
6. Select the check box to Mark Worked Regular Hours as Holiday if desired.
7. Select Save.
   Note: Versions automatically displays the name of the user who created the Holiday component and adds an Effective Date: today's date.
8. To edit a Holiday component, select the profile and select Add by Versions.
   Add Versions window displays.

9. Add a Start Date and select Save.
10. Make changes to the Holiday window and select Save.
    New version with the new date displays along with the user who created it. [Delete Version] button displays on upper right.
11. To delete this version, select [Delete Version].
12. To delete an earlier version, select Delete.
    Note: If a policy component is used in a policy, you cannot delete it.

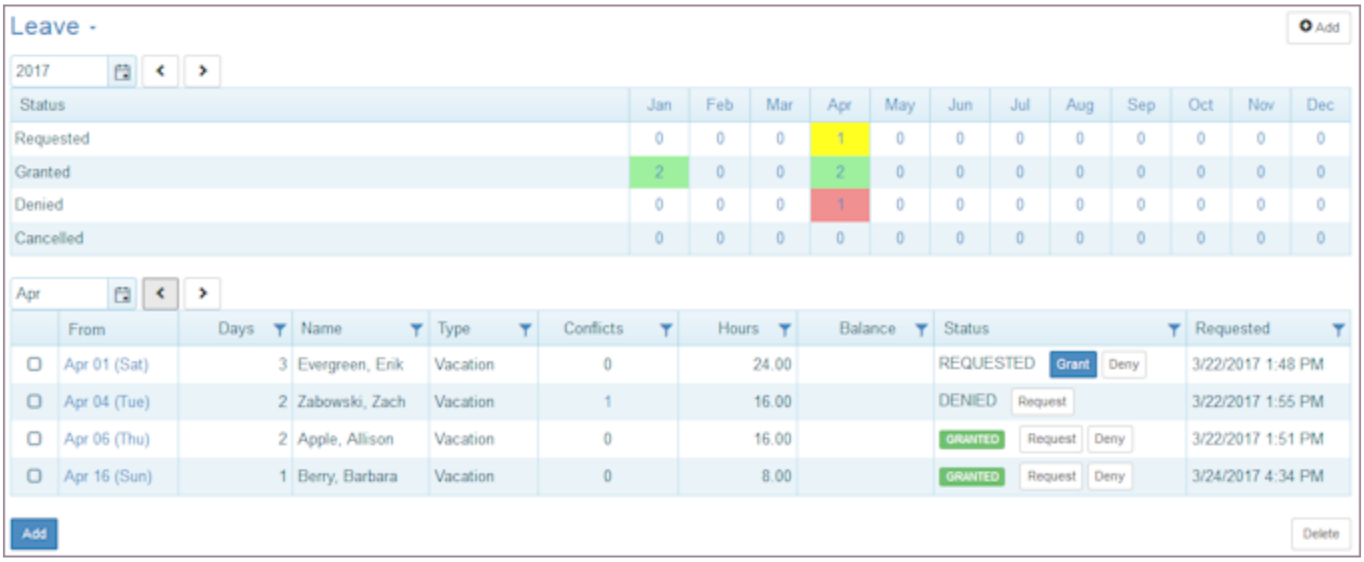
9. Leave

9.1 Leave

Use the Leave pages to display leave information, to add a leave request, and to manage leave requests. In addition, add and maintain leave types.

Important: Leave is established and managed at the organization level. To add and manage leave, you must have the Leave role permission enabled.

Example:



9.1.1 Adding Leave

1. Select Leave from the main menu.
2. Select Add or Leave > Add.
   Add >> Leave window displays.
3. Select an Employee whose Leave Request you are adding.
4. Select a Leave Type.
5. Select a Start Date and End Date.
6. Type the number of Days in Range or verify the automatic calculation.
7. Type the number of Total Hours or verify the automatic calculation.
8. Select Status: Request or Grant.
9. Enter Times only if the request is for less than one day, then specify the hours start and end time.
10. The check box to Sync Hours is selected by default.

11. Type a Comment as desired.
12. Select Save.

9.1.2 Managing Leave

1. Select Leave from the main menu.
   Leave Summary table displays listing requests for the specified time frame.
2. Use the calendar tools to adjust the time frame.
3. Select a Leave request you would like to manage.
   Leave request details display.
4. Change the status in the leave request details. Select Grant or Deny.
   OR
   Select the date of the leave request.
   Edit >> Leave - Employee name window displays.
5. Select Status: Grant or Deny.
   Window prompts: GRANT leave? or DENY leave?
6. Select OK.

9.1.3 Editing Leave

1. Select Leave from the main menu.
   Leave Summary table displays listing requests for the specified time frame.
2. Use the calendar tools to adjust the time frame.
3. Select a Leave request you would like to manage.
   Leave request details display.
4. Select the date of the leave request.
   Edit >> Leave - Employee name window displays.
5. Make desired changes.
6. Select Save.

9.1.4 Deleting Leave

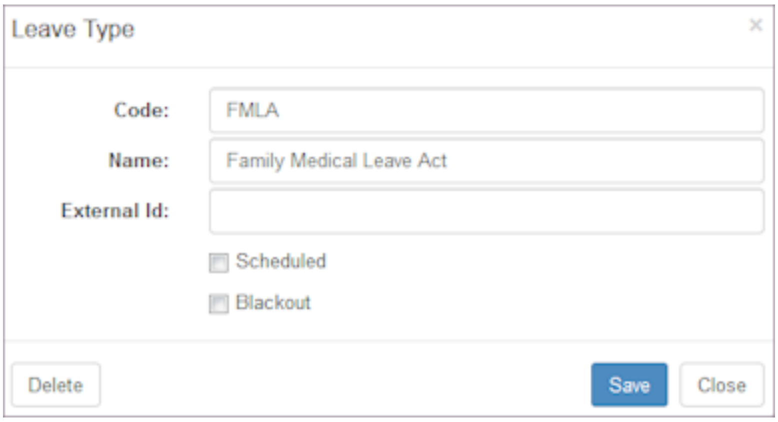
1. Select Leave from the main menu.
   Leave Summary table displays listing requests for the specified time frame.
2. Use the calendar tools to adjust the time frame.
3. Select a Leave request you would like to delete.
   Leave request details display.

4. Select the check box on the left of the leave you would like to delete.
   Leave request is highlighted.
   OR
   Select the date of the leave request.
   Edit >> Leave - Employee name window displays.
5. Select Delete.
   Window prompts: Delete selected day off entries?
6. Select OK.

9.2 Leave Types

Use the Types page to establish and maintain the leave types in your organization.

Example:



9.2.1 Adding a leave type

1. Select Leave from the main menu.
2. Select the Types tab.
   Leave Types display.
3. Select Add or Leave Types > Add.
   Leave Type window displays.
4. Type the Code.
5. Type the Name.
6. Type the External Code if you will integrate with other systems.
7. Select the check box for Scheduled if this leave type counts as Scheduled Hours for the maximum hours limit settings.
8. Select the check box for Blackout if no leave is allowed.
   Note: In order for Blackout dates to be enforced, the day must also be entered in Special Days. However, may choose different blackout options depending on the type of leave. For example, blackout might be enforced for requesting Vacation Leave, but not enforced for requesting Jury Duty Leave.
9. Select Save.

9.2.2 Editing a leave type

1. Select Leave from the main menu.

2. Select the Types tab.
   Leave Types display.
3. Select the Leave Type you would like to edit.
4. Make the changes you would like to make.
5. Select Save.

9.2.3 Deleting a leave type

1. Select Leave from the main menu.
2. Select the Types tab.
   Leave Types display.
3. Select the Leave Type you would like to delete.
   Leave Type window displays.
4. Select Delete.
   Window prompts: Delete item?
5. Select OK.

10. Templates

10.1 Templates

Use the Templates pages to quickly create, control, and reuse weekly shifts to schedule employees in a location. Use these shifts in multiple schedules. Template features include:

- Using mass update to inactivate shifts and reactivate them as needed. Only active shifts are available for use in schedules.
- Viewing totals by station or employee and viewing costs, hours, and shifts.
- Reviewing coverage by date, station and various scheduling information. Compare plans versus templates.

Refer to the following How To's.

- Settings
- Shifts
- Tools

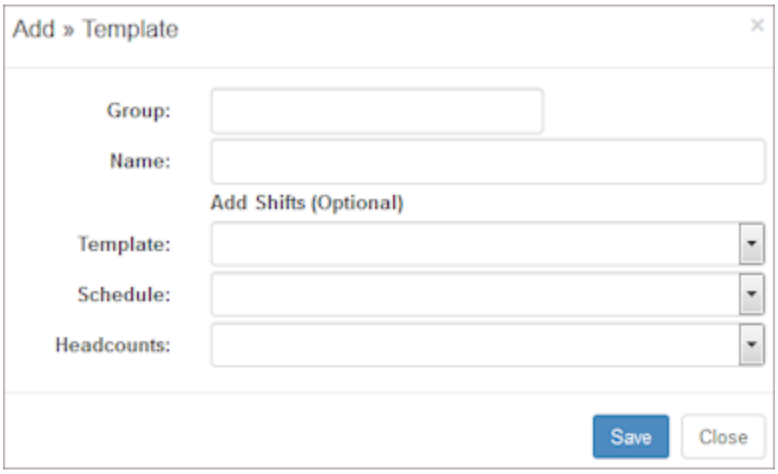
Note: You must be logged into a location for the Templates link to display.

10.2 Settings

Use the Settings page to select a template and make changes to the name or group. You may also delete a template using the Settings page.

10.2.1 Adding a Template

1. Select Templates from the main menu.
2. Select Templates > Add or Add to add a new template.
   Example:

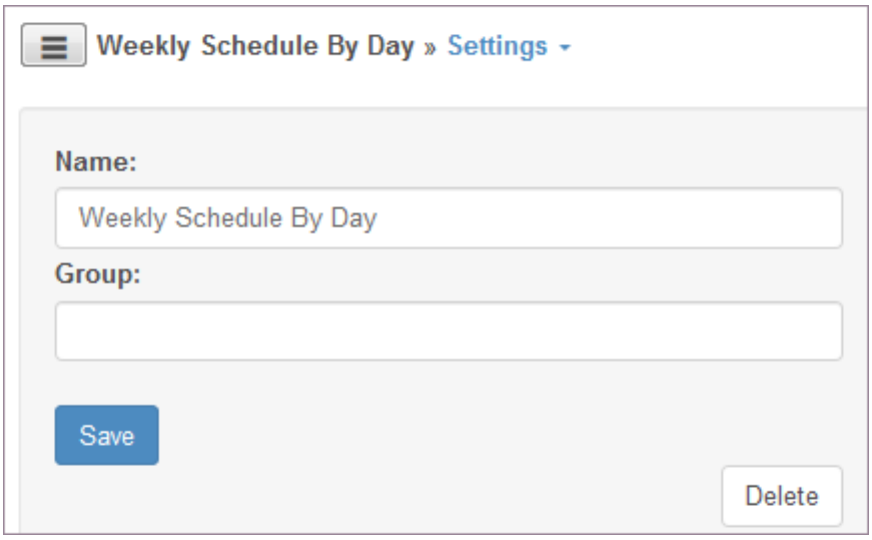


3. Type a Group name if you want the template placed in a folder with a name.
   Note: This helps you collect a series of related templates into one folder. Remember, you can group the Templates table by any column.
4. Type a Name for the template.
5. If desired, add shifts from an existing template, schedule, or headcount plan.
6. Select Save.

10.2.2 Editing Settings Information

1. Select Templates from the main menu.
2. Select Settings.

3. Use the Menu button to select the template you would like to edit.
   Example:



4. Make changes to the Name.
5. Make changes to the Group.
6. Select Save.

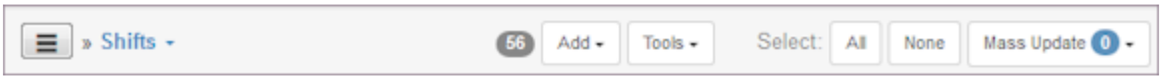
10.2.3 Deleting a Template

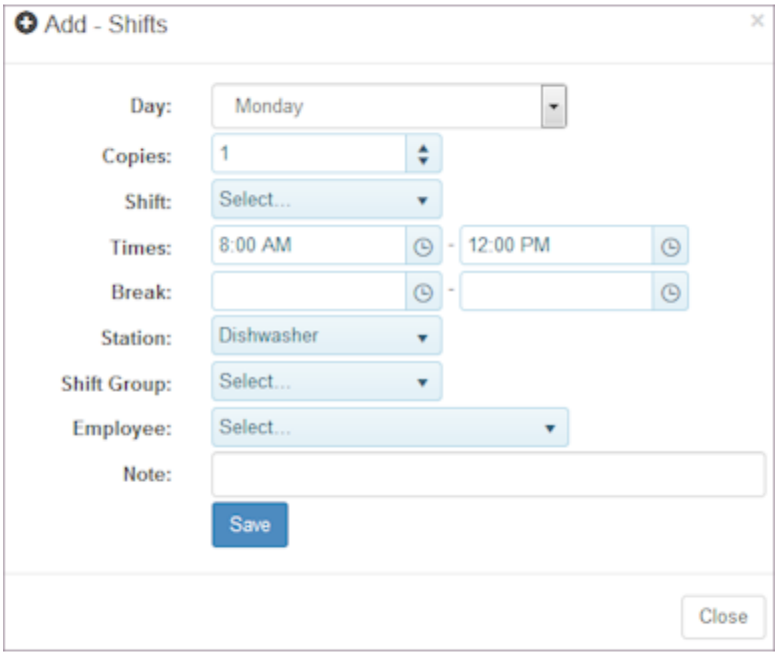
1. Select Templates from the main menu.
2. Select Settings.
3. Use the Menu button to select the template you would like to delete.
4. Select Delete.
   Window prompts: Delete Item?
5. Select OK.

10.3 Template Shifts

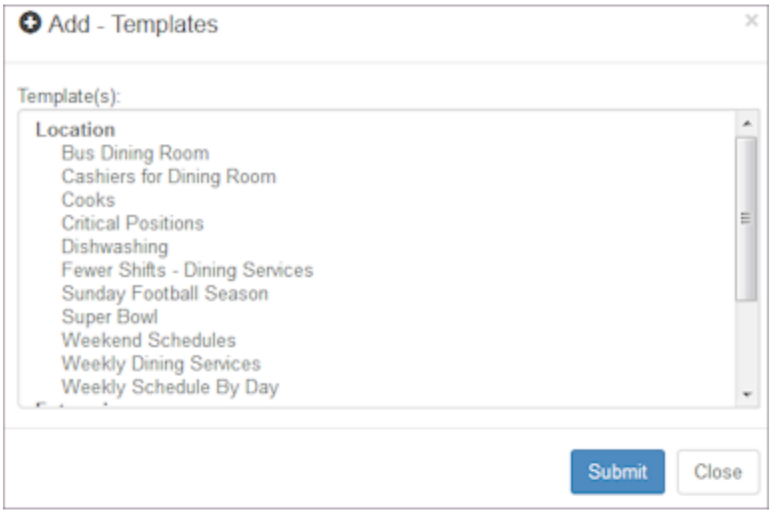
Use the Shifts pages to add shifts to a schedule, add breaks automatically to shifts, and use Mass Update to edit, copy, assign, clear assignments, clear breaks, inactivate, reactivate, and delete shifts. In addition, view shifts using a list, week, and detailed view. View totals and coverage.

10.3.1 Adding Shifts to a Template

1. Select Templates from the main menu. Select a template or select Template > Settings and use the Menu button.
   Settings window displays.
2. Select Shifts.
   Shifts display in List format.
3. Use the Shifts Toolbar to add shifts either manually or using an existing Template, Schedule, or headcount Plan.
   

4. To add shifts manually, select Add > Shifts.
   Add Shifts window displays.
   Example:
   

5. Select the Day.
6. Select the Copies or number of shifts, i.e., number of employees you need to work.
7. If desired, select the Shift, i.e., established shifts.
8. Select shift Times. If desired add Break start and end times.
   Note: If you add break times, the number of hours in the shift is reduced by the break time.

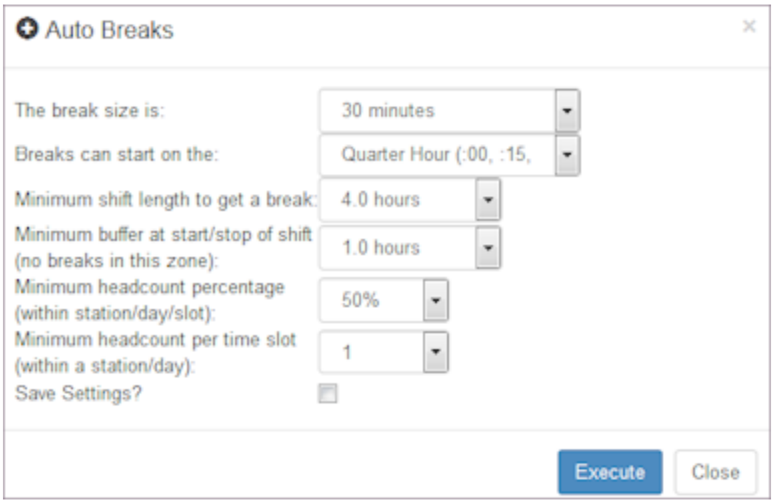
9. Select one Station.
10. Select a Shift Group if you are using shift groups.
11. If this shift should be worked by one employee, select that Employee.
    Note: By selecting an employee, any other scheduling constraints are ignored.
12. Type Notes as desired.
    Explanation: Notes display in the Note column of the shift and employees see the note when the shift is published in a schedule.
13. Select Save.
    Shifts display in the template.
14. To add shifts to a template from an existing Template, Schedule, or headcount Plan, select the source.
    Example:
    

15. Select the Template, Schedule, or headcount Plan you would like to add shifts from and select Submit.
    Shifts are added to the template and display in the list.

10.3.2 Creating Auto Breaks

1. Select Templates from the main menu. Select a template or select Template > Settings and use the Menu button.
   Settings window displays.
2. Select Shifts.
   Shifts display in List format.
3. To add breaks, select Tools > Create Breaks.
   Auto Breaks window displays.

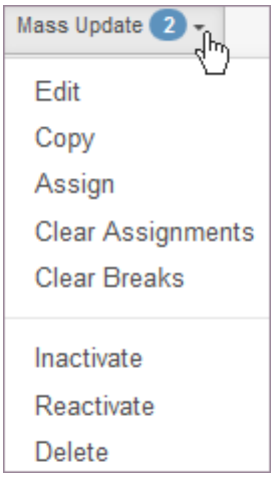
Example:



4. Select the parameters for breaks.
5. Select Execute.
   Auto breaks are added to the shift schedule. The number of breaks created displays in the lower left corner highlighted in green.
6. Select Close.

10.3.3 Using Mass Update

1. Select Templates from the main menu.
2. Select Shifts. Use the Menu button to select a template.
   Shifts display in List format.
3. Select the check boxes of the shifts you would like to update.
   Number of shifts displays in the Mass Update button.
   Note: Select All to select all check boxes and None to clear all check boxes.
4. Select the action you would like to perform.
   Example:

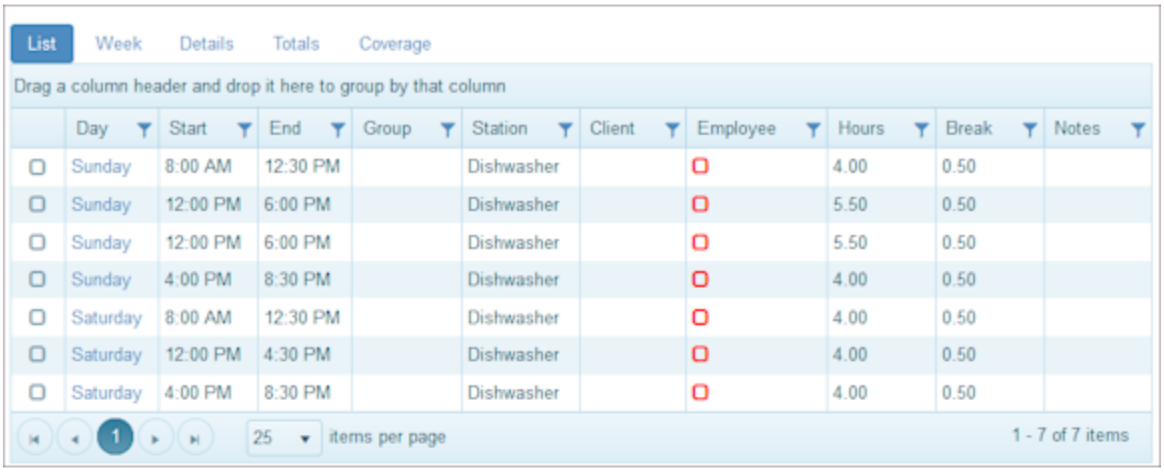


Window prompts: Update selected?

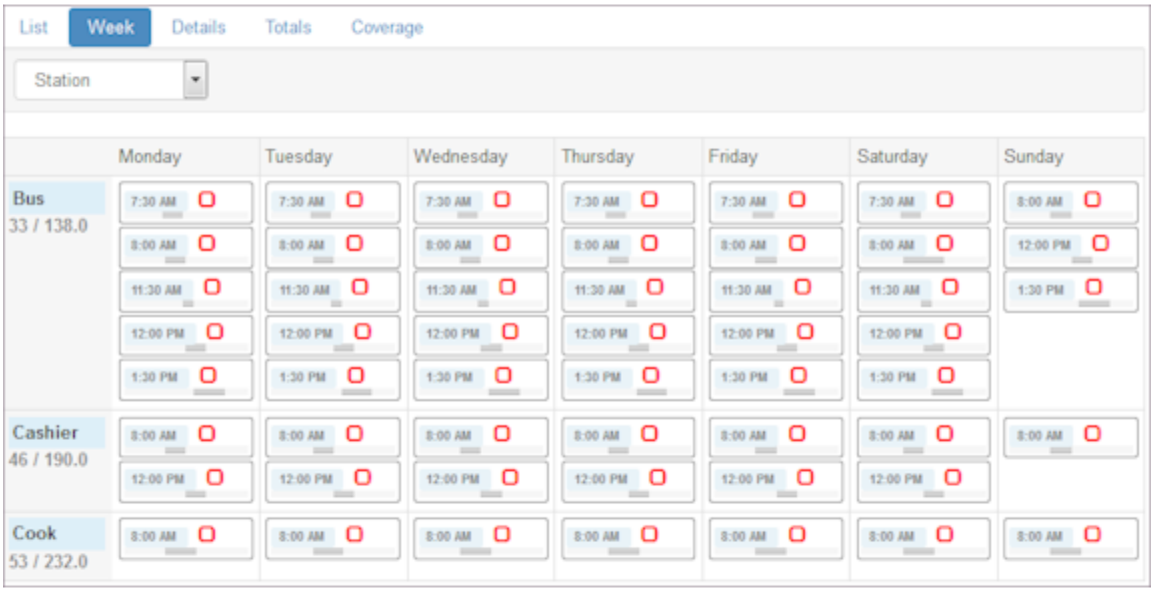
5. To update, select OK.
   Changes display in the list.
   Remember: Shifts need to be in an active state to be available for use in schedules.

10.3.4 Viewing Template Information

1. Select Templates from the main menu.
2. Select Shifts. Use the Menu button to select a template.
   Shifts display in a List view.
   Example:

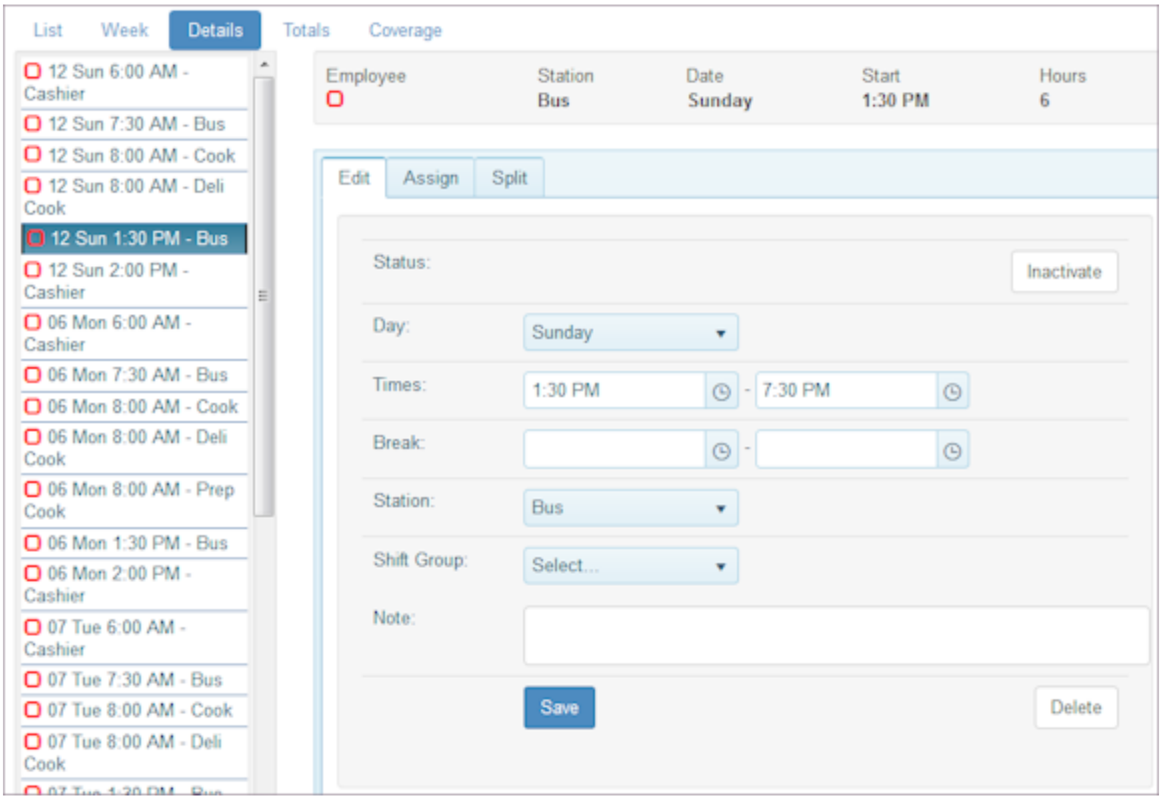


3. To view a template in a Week view, select Week.
   Example:



4. To view template details, select Details.
5. Select a shift.
   Shift details display.

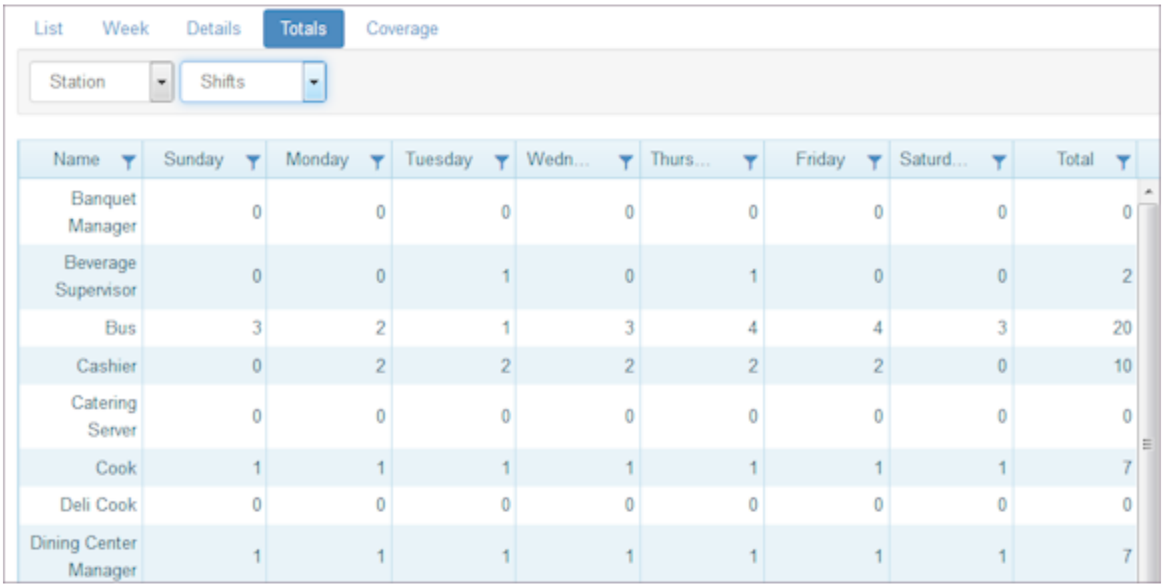
Example:



6. To edit the shift, assign an employee, or split the shift, see Editing Shift Information.
7. To view template totals, select Totals.
8. Select Employee or Station and Cost, Hours, or Shifts.

   View displays the information selected.

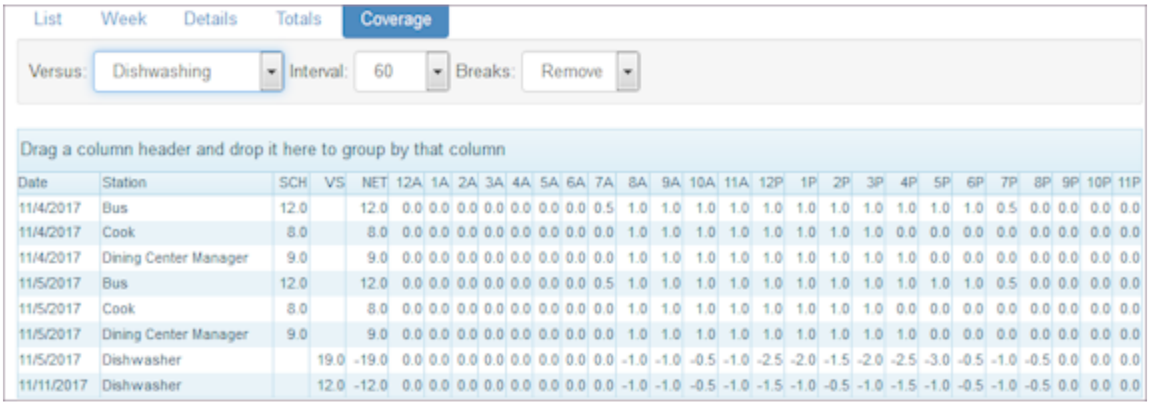
   Example:



9. To view template coverage, select Coverage.
10. Compare with other coverage and change interval as well as whether or not breaks are included.

    View displays the information selected.

Example:

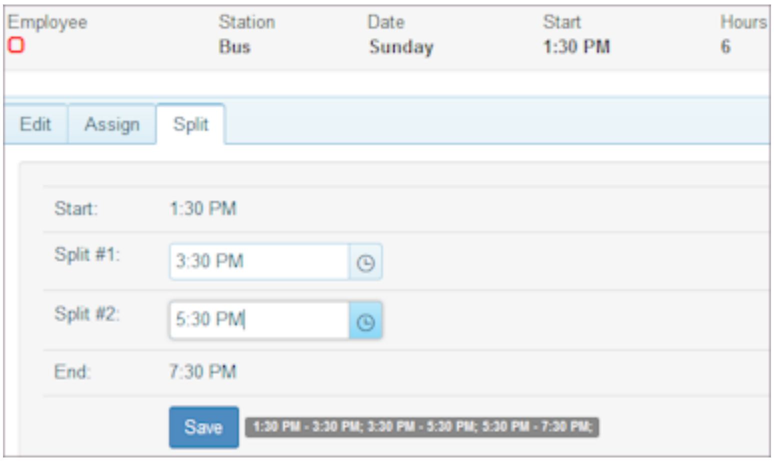


Date	Station	SCH	VS	NET	12A	1A	2A	3A	4A	5A	6A	7A	8A	9A	10A	11A	12P	1P	2P	3P	4P	5P	6P	7P	8P	9P	10P	11P
11/4/2017	Bus	12.0		12.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.5	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	0.5	0.0	0.0	0.0	0.0
11/4/2017	Cook	8.0		8.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
11/4/2017	Dining Center Manager	9.0		9.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
11/5/2017	Bus	12.0		12.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.5	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	0.5	0.0	0.0	0.0	0.0
11/5/2017	Cook	8.0		8.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
11/5/2017	Dining Center Manager	9.0		9.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
11/5/2017	Dishwasher		19.0	-19.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-1.0	-1.0	-0.5	-1.0	-2.5	-2.0	-1.5	-2.0	-2.5	-3.0	-0.5	-1.0	-0.5	0.0	0.0	0.0
11/11/2017	Dishwasher		12.0	-12.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-1.0	-1.0	-0.5	-1.0	-1.5	-1.0	-0.5	-1.0	-1.5	-1.0	-0.5	-1.0	-0.5	0.0	0.0	0.0

10.3.5 Editing Shift Information

1. Select Templates from the main menu.
2. Select Shifts. Use the Menu button to select a template.
   Shifts display in a List view.
3. Select Details.
4. Select the shift you would like to edit.
   Shift details display.
5. To edit shift information, select the Edit tab.
6. To view availability and assign an employee, select the Assign tab.
7. Select an employee to assign.
   Window prompts: Assign employee?
8. Select OK to assign the employee.
   Remember: By selecting an employee, any other scheduling constraints are ignored.
9. To Split the shift, select the Split tab.
10. Select the end time for Split #1 using the time picker.
    Times display adjacent to Save.
11. Select the end time for Split #2 using the time picker.
    Times display adjacent to Save.

Example:



12. Select Save.

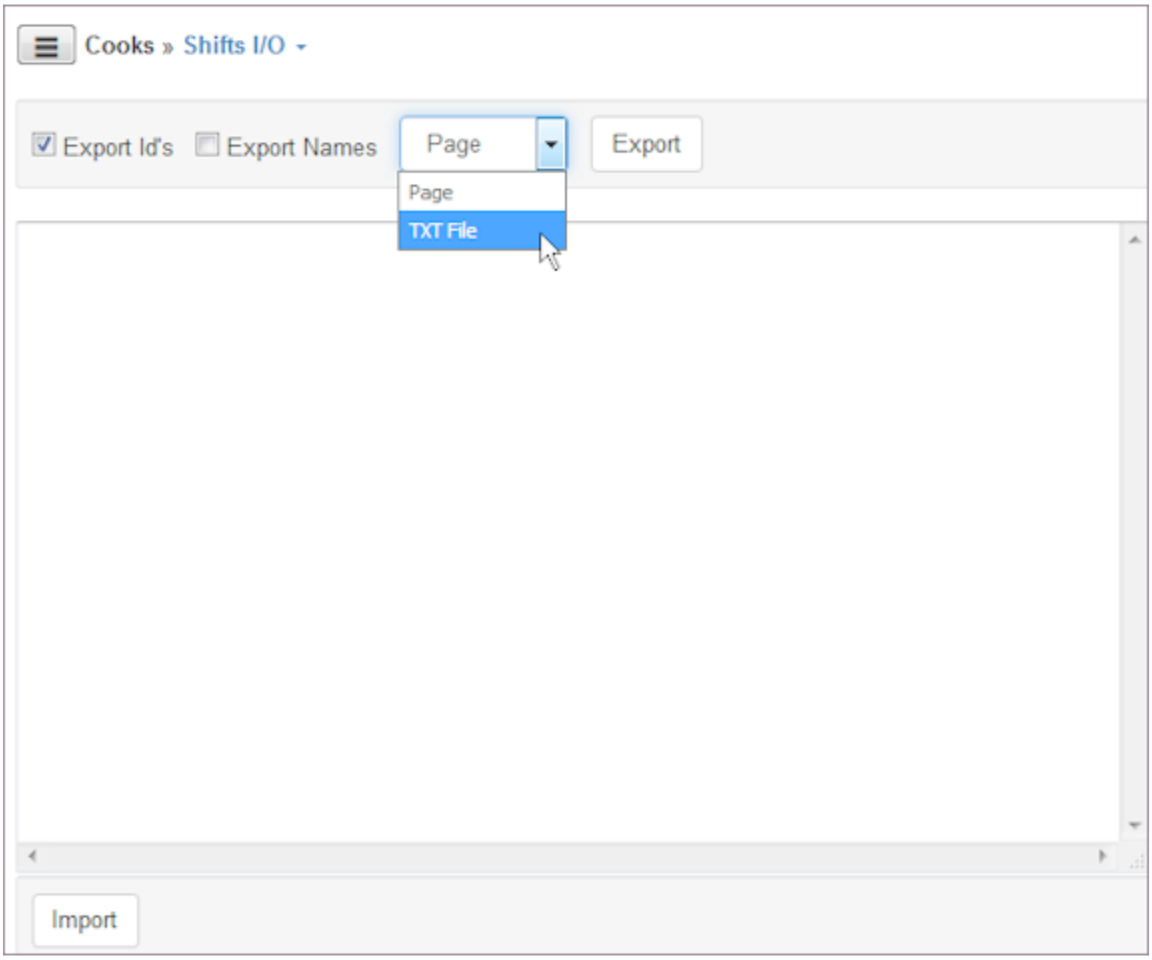
10.4 Tools

Use the Tools pages to export data from or import data into a template. You may choose to export a template to ensure you have the proper headings and spacing.

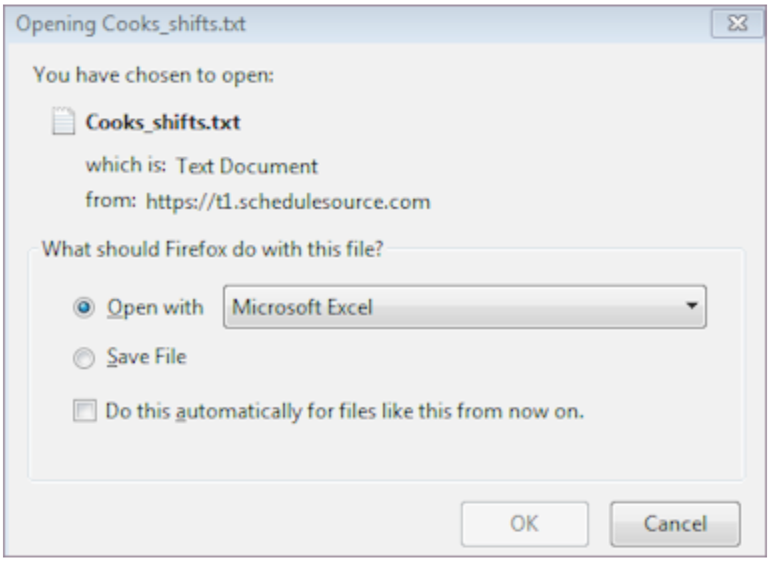
Important: Ensure you have the check box for Export Id's selected if you are going to edit data in another application and then import it back into TeamWork.

10.4.1 Shifts I/O

1. Select Templates from the main menu.
2. Select Tools.
   Note: Use the same template or use the Menu button to select another one.
3. Select Shifts I/O.
4. Select the Export Id's check box and the check box if you want to Export Names.
5. Select the type of file you would like, i.e., Page or TXT file.
6. Select Export.
   Example:



7. Prompt displays for managing the file.
   Example:



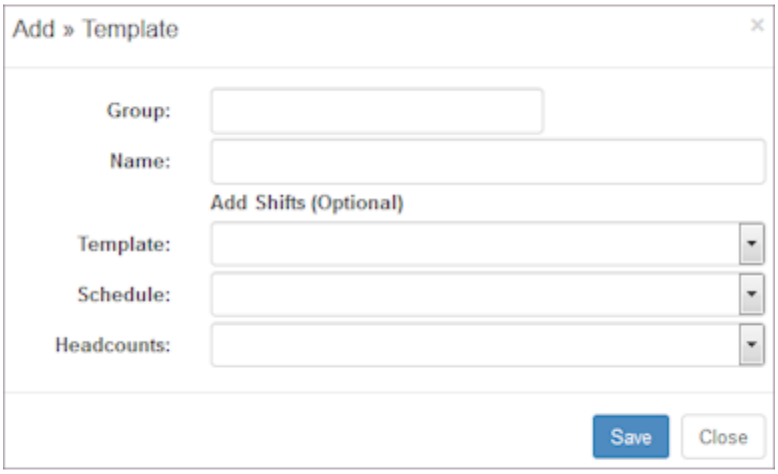
8. To open with Microsoft Excel, select OK.
   Note: The file is placed in your AppData\Local\Temp directory.
9. To make edits to the information and import the file into TeamWork. Copy and paste revised file into the Shifts I/O window.
10. Select Import.
    Imported message displays in green with a list of the results of the import.

10.5 Weekly Template

10.5.1 Weekly Template Features

- Using mass update to inactivate shifts and reactivate them as needed. Only active shifts are available for use in schedules.
- Viewing totals by station or employee and viewing costs, hours, and shifts.
- Reviewing coverage by date, station and various scheduling information. Compare plans versus templates.

10.5.2 Adding a Weekly Template

1. Select Templates from the main menu.
2. Select Templates > Add or Add to add a new template. Example: Add Template


3. Type a Group name if you want the template placed in a folder with a name. Note: This helps you collect a series of related templates into one folder. Remember, you can group the Templates table by any column.
4. Type a Name for the template.
5. If desired, add shifts from an existing template, schedule, or headcount plan.
6. Select Save.

10.6 Recurring Template

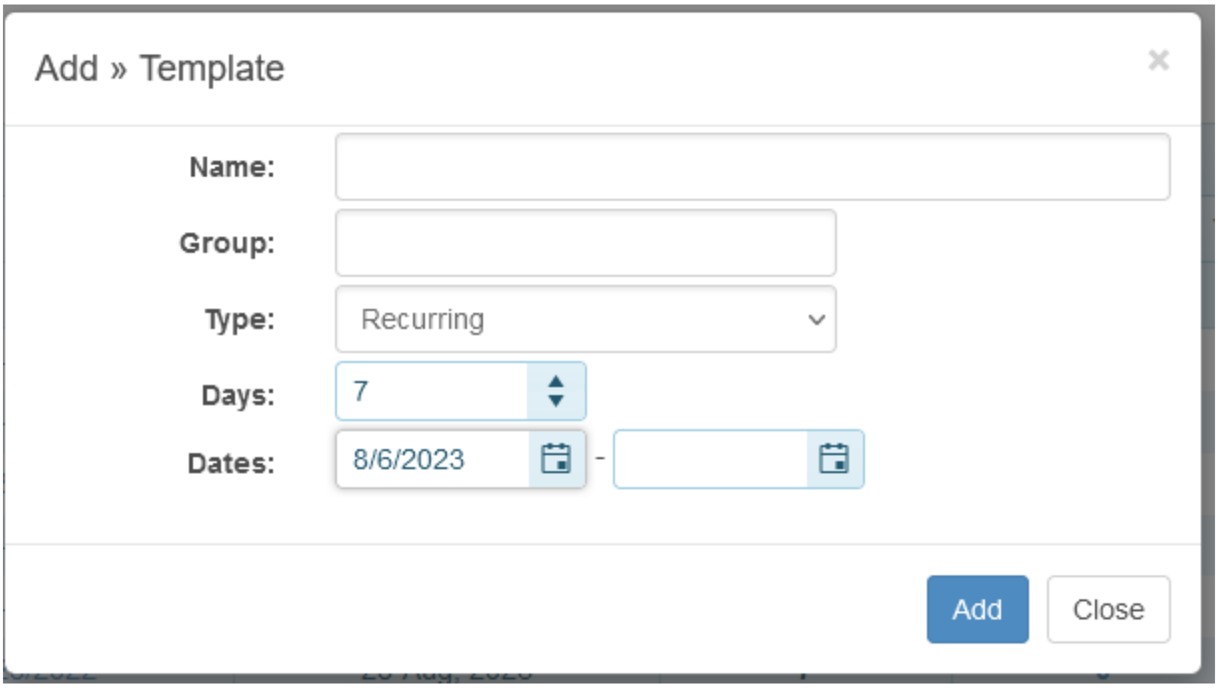
Recurring Templates:

• Are edited in a grid of item (station or employee) versus days.

• Allow for drag-drop, multi select copy/paste, and several other keyboard shortcuts detailed below.

10.6.1 Adding a Recurring Template

1. Select Templates from the main menu.
2. Select Templates > Add or Add to add a new template. Example: Add Template



3. Type a Group name if you want the template placed in a folder with a name. Note: This helps you collect a series of related templates into one folder. Remember, you can group the Templates table by any column.
4. Type a Name for the template.
5. Select Type: Recurring
6. Enter the number of days for the recurring pattern
7. Select a Start Date (Day 1 will be on this date and all shifts will recur after that.)
8. Select Save.

10.6.2 Editing in the grid

• Double-Click cell (or click "Add") to add shifts

• Double-Click shift to edit

• Click or Ctrl-Click to select cells

• Ctrl-Click to select shifts

• Double-Click row or column header to select all

• Esc key (or click "None") to un-select

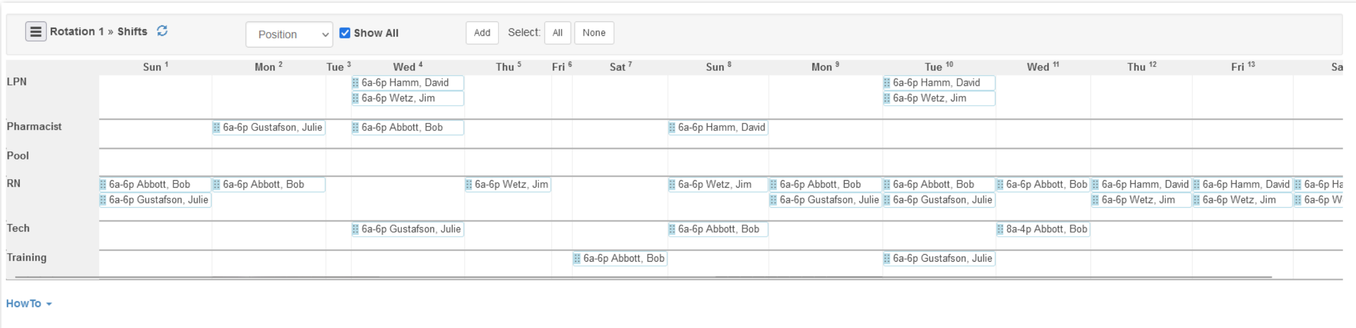
• Ctrl-C to copy

• Ctrl-X to cut

• Ctrl-V to paste (Relative to the top-left selected item)

• Delete key to delete

• Drag the handle (⋮ ⋮) to move a shift



• Click "HowTo" below the grid to see editing information.

11. Schedules

11.1 Schedules

Use the Schedules pages to help you organize your workforce and the work that needs to be done in your organization. Set up schedules, assign employees to shifts, and ensure shifts are covered at all stations in your location.

Refer to the following How To's.

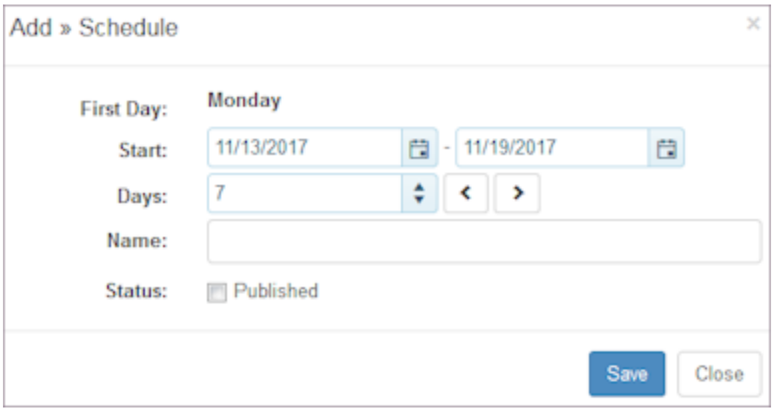
- List
- Settings
- Shifts
- Views
- Tools
- Analysis

Note: You must be logged into a location for the Schedules link to display.

11.2 Schedules List

The Schedules List shows all recent and future schedulers for a location.

11.2.1 Adding a Schedule

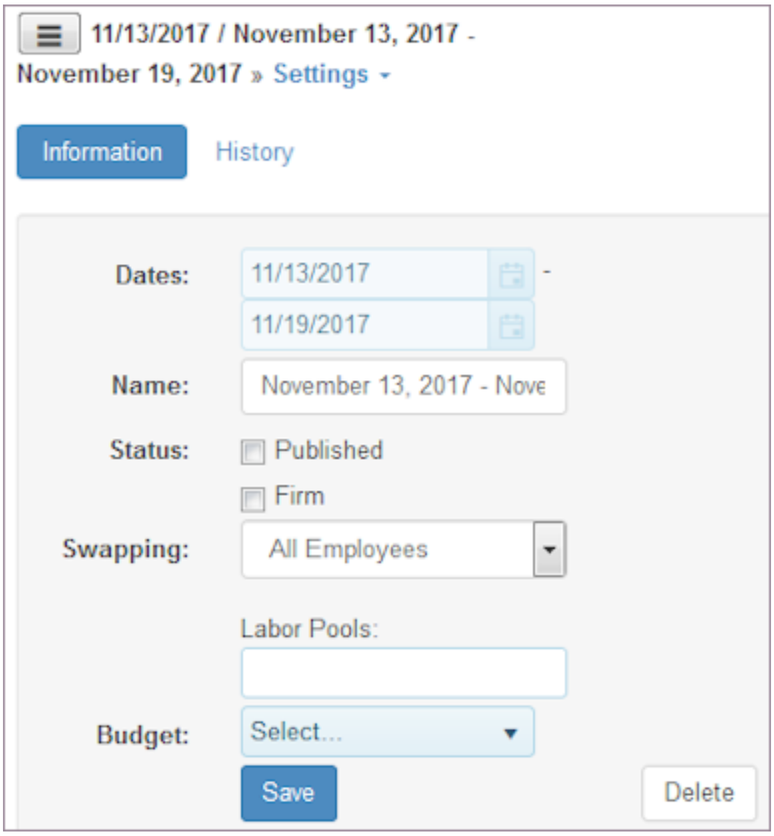
1. Select Schedules from the main menu.
2. Select Schedules > Add or Add to add a new schedule.
   Example:
   

3. Verify Start and end dates or change them using the calendar picker.
4. Verify the number of Days in the schedule.
   Note: Use up and down arrows to add days and left and right arrows to add weeks.
5. Type a Name for the schedule.
6. Select Save.
   Note: After you add shifts and Auto Fill employees, you can go to Settings and change the Status, i.e., select Published. A schedule must be published for it to display in the Employee Portal.

11.3 Settings

Use the Settings pages to establish and define schedules. A schedule identifies when and where employees are assigned to work. Once you have established a schedule, you can add shifts and use Auto Fill to assign employees to work them.

11.3.1 Adding Schedule Information

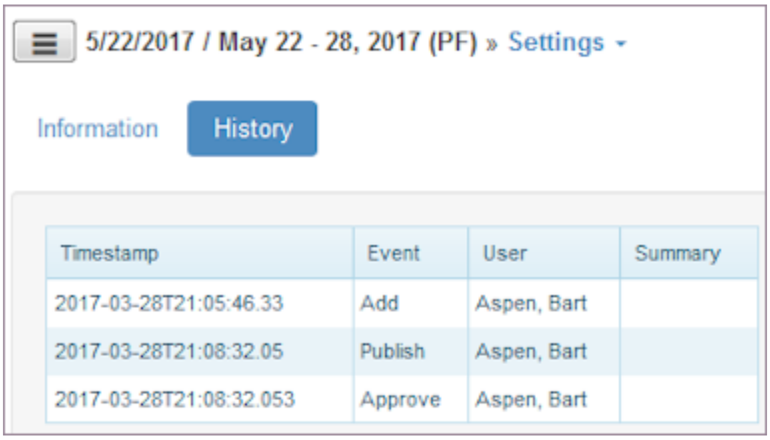
1. Select Schedules from the main menu. Select a schedule Name or use the Menu button.
   Schedule Settings Information displays.
   Example:
   

2. Make desired changes to Dates and Name.
3. Select Status check boxes when schedule is ready to be Published and Firm.
   Important: Only published schedules display in the Employee portal. Once a schedule is published and firm, (PF) appends the Settings name.

11.3.2 Reviewing Schedule History

1. Select Schedules from the main menu.
2. Select Schedules > Settings.

3. Select History.
   Schedule Settings History displays.
   Example:



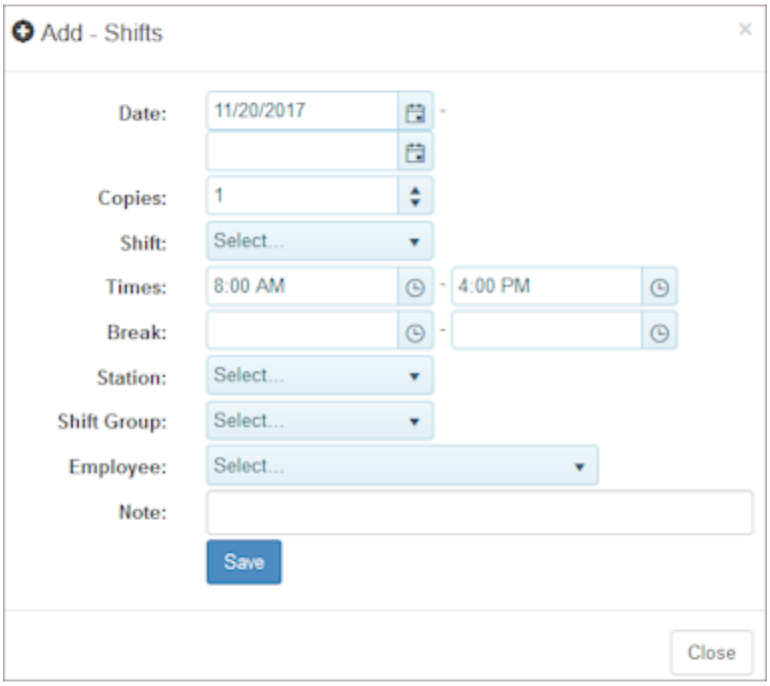
11.3.3 Deleting a Schedule

1. Select Schedules from the main menu.
2. Select Schedules > Settings.
   Schedule Settings displays.
3. Select Delete.
   Window prompts: Delete Item?
4. Select OK.

11.4 Shifts

Use the Shifts pages to add shifts to a schedules. Add shifts from a template, copy a previous schedule, or manually add shifts. Use tools to Auto Fill shifts, create breaks, and merge shifts. Use Mass Update to manage shifts and make assignments, switch assignments, clear assignments, and post empty shifts on the Swap Board or Bid Board. View a schedule using a list, weekly, and detailed view. View totals and coverage. Edit shift information including assigning a shift to an employee, splitting the shift into three shifts, reviewing shift history.

11.4.1 Adding Shifts Manually

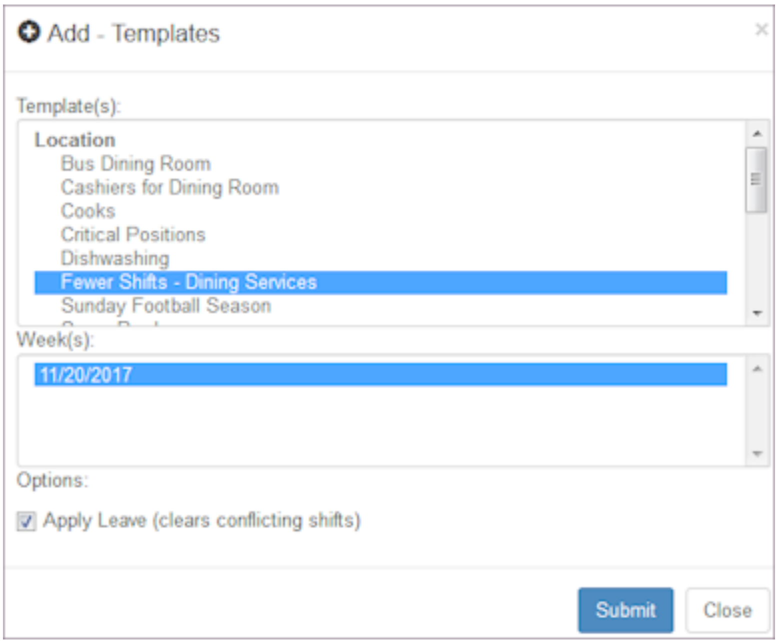
1. Select Schedules from the main menu.
2. Select a Schedule and select Shifts or select a schedule Start date or Shifts count.
   Shifts window displays.
3. Select Add > Shifts.
   Add - Shifts window displays.
   Example:
   

4. Select the Date (start) and end date if this shift is scheduled on multiple days.
5. Select Copies, i.e., number of employees required to work the shift each day.
6. Select the Shift if you are using shift names.
   Note: To add Shift Names and make them available for selection, go to Organization > Lists > Shift Names. Role permissions are required.
7. Select the Times using the time picker.

8. Select a Break start and end time if desired.
   Note: You can also add breaks using Tools > Create Breaks.
9. Select one Station for this shift.
10. Select a Shift Group if you are using shift groups.
11. If this shift should be worked by a specific employee, select that Employee. Otherwise leave blank.
    Note: If you select an employee, all other scheduling constraints are ignored.
12. Type Notes as desired. They display in the Note column in the Employee Portal.
13. Select Save.
    Saved message with timestamp displays.
14. Select Close.

11.4.2 Adding Shifts using Templates

1. Select Schedules from the main menu.
2. Select a Schedule and select Shifts or select a schedule Start date or Shifts count.
   Shifts window displays.
3. Select Add > Templates.
   Add - Templates window displays.
   Example:

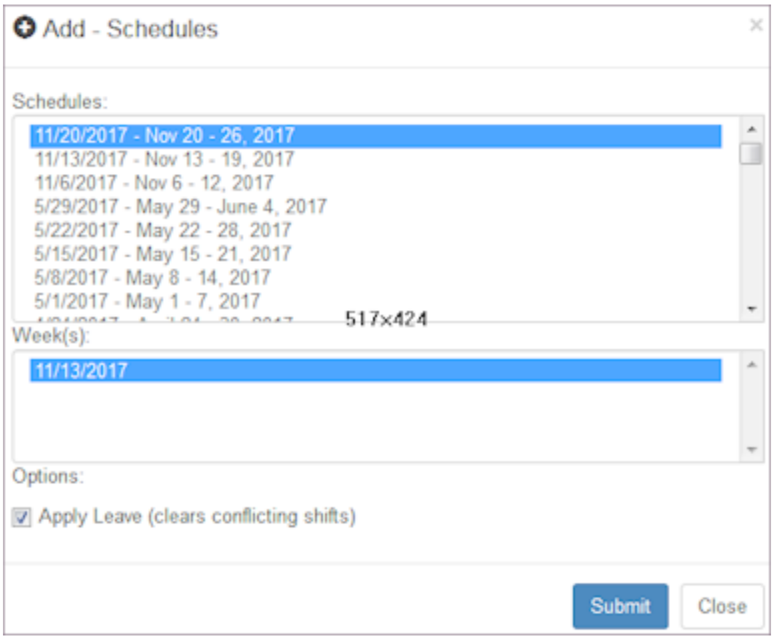


4. Select Submit.

11.4.3 Adding Shifts using Existing Schedules

1. Select Schedules from the main menu.

2. Select a Schedule and select Shifts or select a schedule Start date or Shifts count.
   Shifts window displays.
3. Select Add > Schedules.
   Add - Schedules window displays.
   Example:

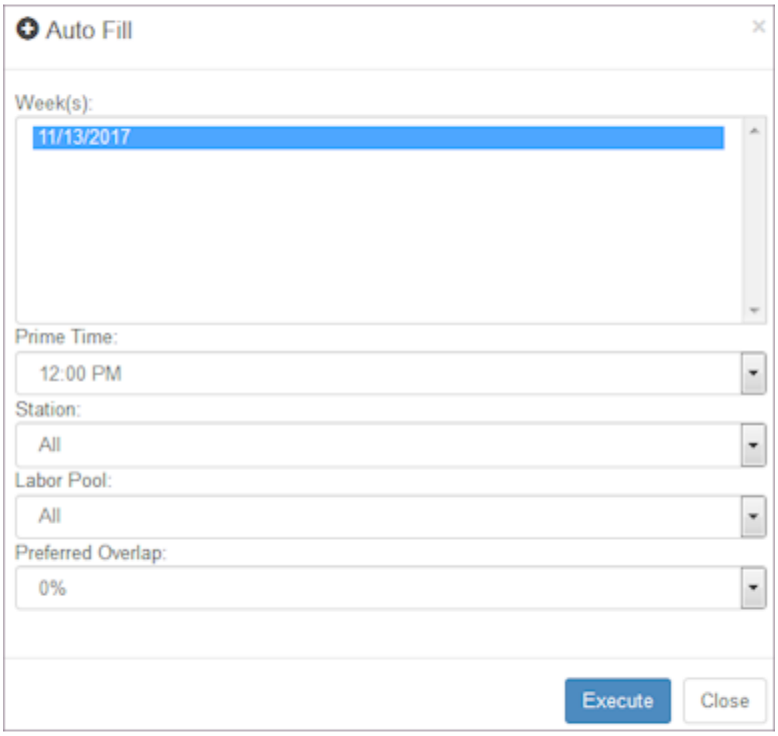


4. Select Submit.
   Shifts from the schedule you selected display on this schedule, including employee assignments.

11.4.4 Using Auto Fill

1. Select Schedules > Shifts.
   Note: Use the schedule you added shifts to or use the Menu button to select another one. You should have a list of empty shifts.
2. Select Tools > Auto Fill.
   Auto Fill window displays.

Example:

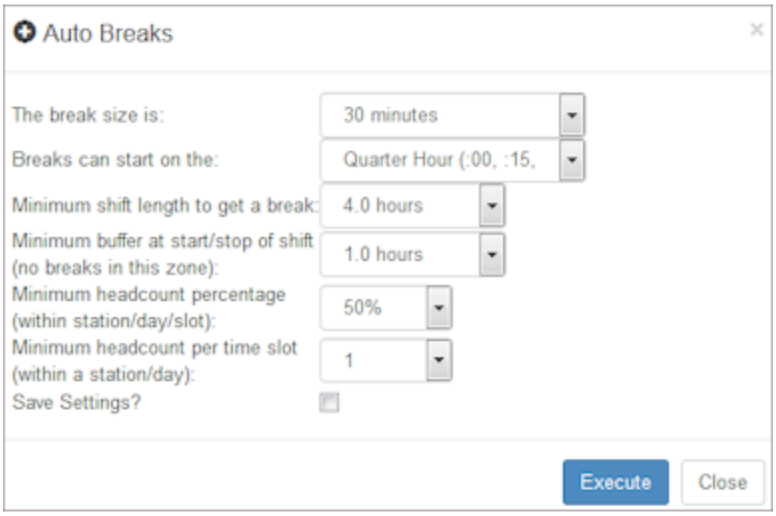


3. Verify information is correct or select other options.
   Note: Auto Fill loads employee names into shifts using an algorithm that is based on settings you enter under Locations > Settings > Schedule. Role permissions are required.
4. Select Execute.
   The number of shifts filled displays in the lower left corner highlighted in green. Shifts Filled = # of # and length of time Auto Fill took.
5. Select Close.
   Names of employees assigned to each shift display in the schedule. Red check boxes indicate an empty shift.

11.4.5 Creating Breaks

1. Select Schedules > Shifts.
   Note: Use the schedule you made shift assignments to or use the Menu button to select another one.
2. Select Tools > Create Breaks.
   Auto Breaks window displays.

Example:



3. Select Execute.
   The number of breaks added displays in the lower left corner highlighted in green.
4. Select Close.
   Breaks display on the schedule. The number of hours is reduced by the break time.

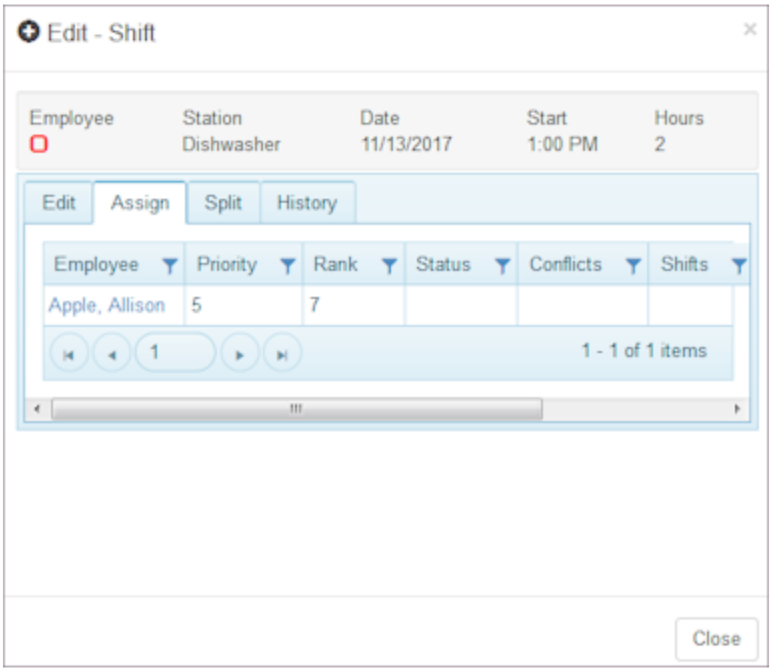
11.4.6 Merging Shifts

1. Select Schedules > Shifts.
   Note: Use the schedule you made shift assignments to or use the Menu button to select another one.
2. Select Tools > Merge Shifts.
   Window prompts: Merge Back-to-back shifts?
3. Select OK.
   Two shifts become one shift. Hours are updated.

11.4.7 Assigning Employee to Shift Manually

1. Select Schedules > Shifts.
   Note: Use the schedule you made shift assignments to or use the Menu button to select another one.
2. Select the date of a shift that is empty, i.e., there is a red check box and no employee assigned.
   Edit shift window displays.
3. Select Assign.
   Employees available for assignment displays.
   Note: If you select the red check box, the Edit Shift window displays with the Assign tab active.

Example:

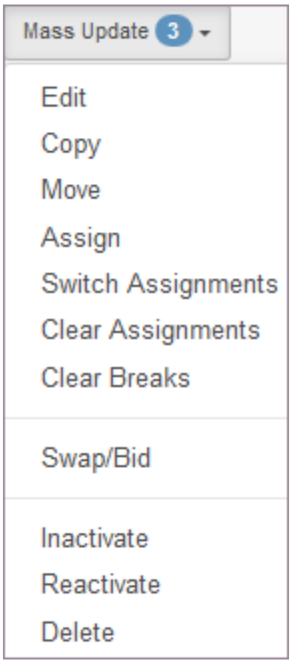


4. Select the employee you want to assign.
   Window prompts: Assign employee?
5. Select OK.
6. Select Close.
   Employee assigned is added to the shift on the schedule.

11.4.8 Using Mass Update

1. Select Schedules > Shifts.
   Note: Use the schedule you made shift assignments to or use the Menu button to select another one.
2. Select the check boxes of the shifts you would like to update.
   Number of shifts displays in the Mass Update button.
   Note: Select All to select all check boxes and None to clear all check boxes.

3. Select the action you would like to perform.
   Example:



4. Window prompts: Update selected?
5. To update, select OK.
   Changes to the shifts display.
   Remember: You can post an empty shift on the Swap Board or Bid Board.

11.4.9 Viewing Schedule Information

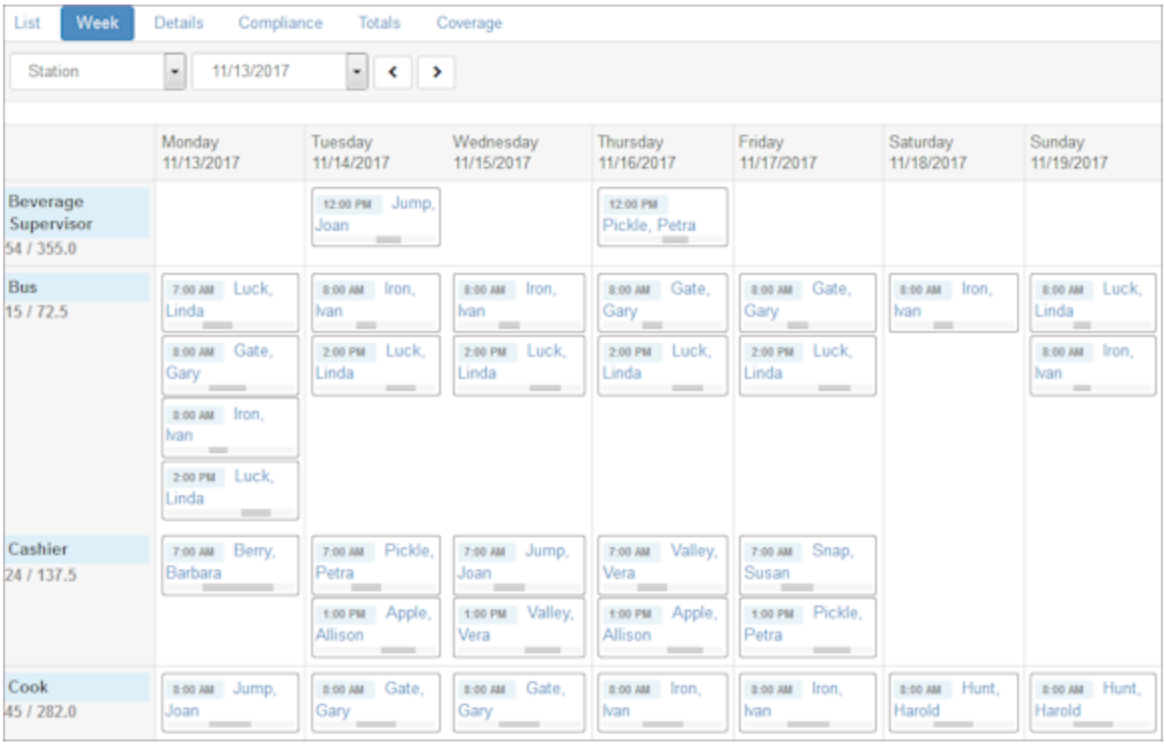
1. Select Schedules > Shifts.
   Shifts display in a List view.
   Example:

List Week Details Compliance Totals Coverage

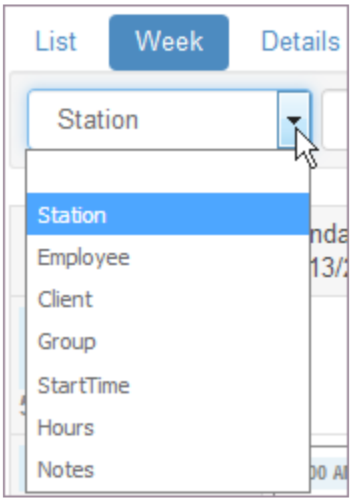
Drag a column header and drop it here to group by that column

	Date	Start	End	Group	Station	Employee	Hours	Break	Notes
☐	11/13/2017	7:00 AM	1:00 PM		Bus	Luck, Linda	5.50	0.50	
☐	11/13/2017	7:00 AM	8:00 PM		Cashier	Berry, Barbara	13.00	0.00	
☐	11/13/2017	7:00 AM	3:00 PM		Dishwasher	Apple, Allison	8.00	0.00	
☐	11/13/2017	8:00 AM	4:00 PM		Bus	Gate, Gary	7.00	1.00	
☐	11/13/2017	8:00 AM	12:00 PM		Bus	Iron, Ivan	3.50	0.50	
☐	11/13/2017	8:00 AM	4:00 PM		Cook	Jump, Joan	8.00	0.00	
☐	11/13/2017	8:00 AM	5:00 PM		Dining Center Manager	Door, Dave	9.00	0.00	
☐	11/13/2017	2:00 PM	8:00 PM		Bus	Luck, Linda	5.50	0.50	
☐	11/13/2017	3:00 PM	7:00 PM		Dishwasher	Evergreen, Erik	4.00	0.00	
☐	11/14/2017	7:00 AM	1:00 PM		Cashier	Pickle, Petra	6.00	0.00	

2. To view the schedule in a Week view, select Week.
   Example:

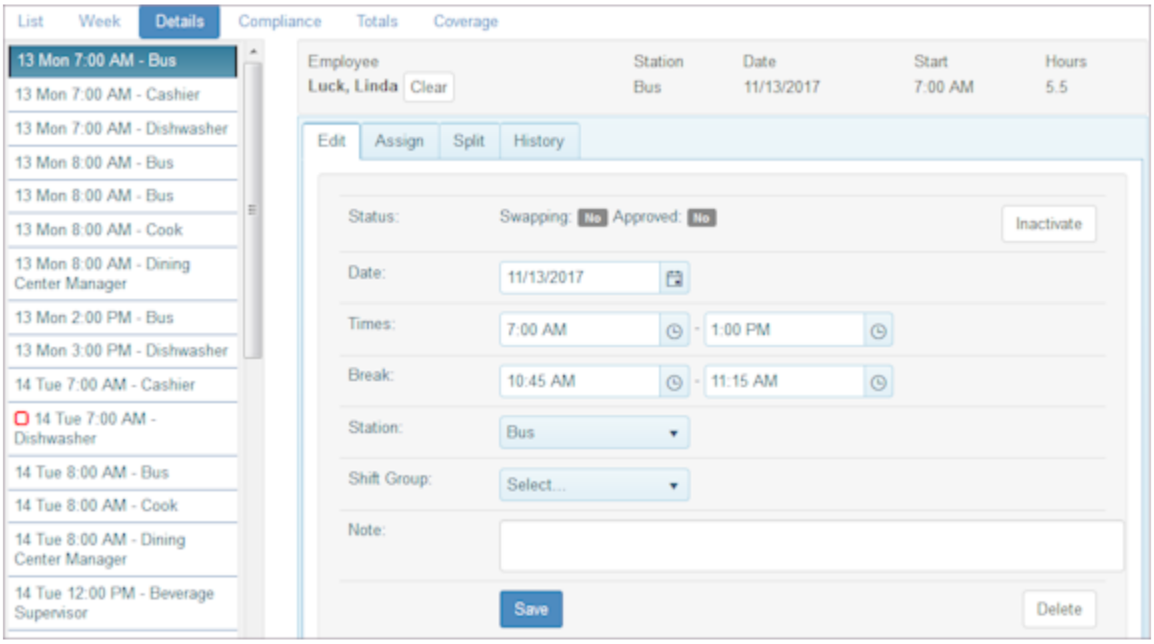


3. Select different criteria to sort by and the display reorganizes information accordingly.
   Example:



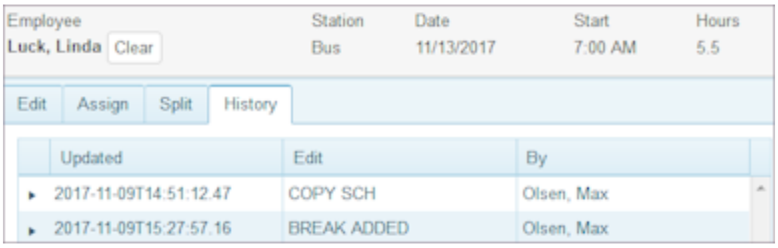
4. To view shift details, select Details.
5. Select a shift.
   Shift details display.

Example:



6. To edit the shift, assign to an employee, or split the shift, see Editing Schedule Information.
7. To view shift history, select History.

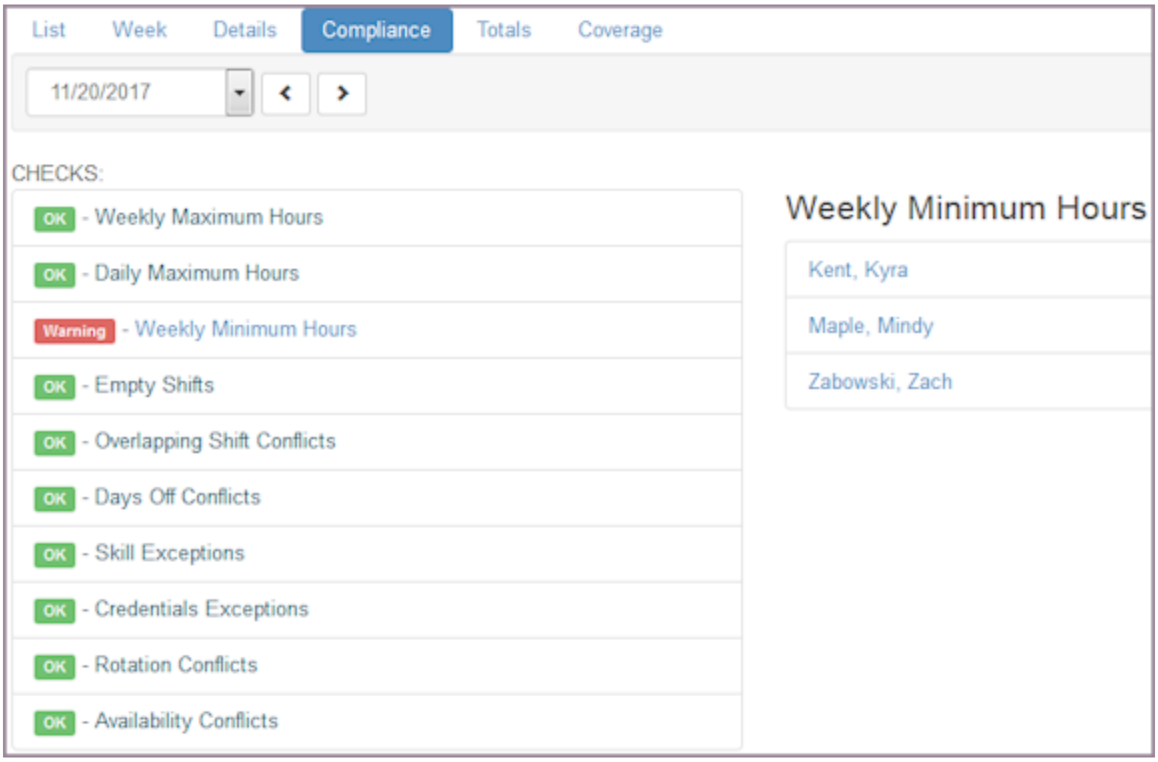
   Example:



8. To check compliance with location settings, select Compliance.

   TeamWork summarizes schedule compliance with location settings and displays discrepancies.

Example:



9. To view schedule totals, select Totals.

10. To view schedule coverage, select Coverage.

    Example:

List | Week | Details | Compliance | Totals | Coverage

11/20/2017 | Versus: | Interval: 60 | Breaks: Remove

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

Date	Station	SCH	VS	NET	12A	1A	2A	3A	4A	5A	6A	7A	8A	9A	10A	11A	12P	1P	2P	3P	4P	5P	6P	7P	8P	9P	10P	11P
11/20/2017	Bus	24.0			0	0	0	0	0	0	0	1	3	3	3	3	2	1	2	2	1	1	1	1	0	0	0	0
11/20/2017	Cashier	13.0			0	0	0	0	0	0	0	1	1	1	1	1	1	1	1	1	1	1	1	1	0	0	0	0
11/20/2017	Cook	8.0			0	0	0	0	0	0	0	0	1	1	1	1	1	1	1	1	0	0	0	0	0	0	0	0
11/20/2017	Dining Center Manager	9.0			0	0	0	0	0	0	0	0	1	1	1	1	1	1	1	1	1	0	0	0	0	0	0	0
11/21/2017	Cashier	13.0			0	0	0	0	0	0	0	1	1	1	1	1	1	1	1	1	1	1	1	1	0	0	0	0
11/21/2017	Bus	10.0			0	0	0	0	0	0	0	0	1	1	1	1	0	0	1	1	1	1	1	1	0	0	0	0
11/21/2017	Cook	8.0			0	0	0	0	0	0	0	0	1	1	1	1	1	1	1	1	0	0	0	0	0	0	0	0
11/21/2017	Dining Center Manager	9.0			0	0	0	0	0	0	0	0	1	1	1	1	1	1	1	1	1	0	0	0	0	0	0	0
11/21/2017	Beverage Supervisor	5.0			0	0	0	0	0	0	0	0	0	0	0	0	1	1	1	1	1	0	0	0	0	0	0	0
11/22/2017	Cashier	13.0			0	0	0	0	0	0	0	1	1	1	1	1	1	1	1	1	1	1	1	1	0	0	0	0
11/22/2017	Bus	10.0			0	0	0	0	0	0	0	0	1	1	1	1	0	0	1	1	1	1	1	1	0	0	0	0
11/22/2017	Cook	8.0			0	0	0	0	0	0	0	0	1	1	1	1	1	1	1	1	0	0	0	0	0	0	0	0
11/22/2017	Dining Center Manager	9.0			0	0	0	0	0	0	0	0	1	1	1	1	1	1	1	1	1	0	0	0	0	0	0	0
11/23/2017	Beverage Supervisor	5.0			0	0	0	0	0	0	0	0	0	0	0	0	1	1	1	1	1	0	0	0	0	0	0	0
11/23/2017	Dining Center Manager	9.0			0	0	0	0	0	0	0	0	1	1	1	1	1	1	1	1	1	0	0	0	0	0	0	0
11/23/2017	Cashier	13.0			0	0	0	0	0	0	0	1	1	1	1	1	1	1	1	1	1	1	1	1	0	0	0	0
11/23/2017	Bus	10.0			0	0	0	0	0	0	0	0	1	1	1	1	0	0	1	1	1	1	1	1	0	0	0	0
11/23/2017	Cook	8.0			0	0	0	0	0	0	0	0	1	1	1	1	1	1	1	1	0	0	0	0	0	0	0	0
11/24/2017	Cashier	13.0			0	0	0	0	0	0	0	1	1	1	1	1	1	1	1	1	1	1	1	1	0	0	0	0
11/24/2017	Bus	10.0			0	0	0	0	0	0	0	0	1	1	1	1	0	0	1	1	1	1	1	1	0	0	0	0
11/24/2017	Cook	8.0			0	0	0	0	0	0	0	0	1	1	1	1	1	1	1	1	0	0	0	0	0	0	0	0
11/24/2017	Dining Center Manager	9.0			0	0	0	0	0	0	0	0	1	1	1	1	1	1	1	1	1	0	0	0	0	0	0	0
11/25/2017	Bus	4.0			0	0	0	0	0	0	0	0	1	1	1	1	0	0	0	0	0	0	0	0	0	0	0	0
11/25/2017	Cook	8.0			0	0	0	0	0	0	0	0	1	1	1	1	1	1	1	1	0	0	0	0	0	0	0	0
11/25/2017	Dining Center Manager	9.0			0	0	0	0	0	0	0	0	1	1	1	1	1	1	1	1	1	0	0	0	0	0	0	0
11/26/2017	Cook	8.0			0	0	0	0	0	0	0	0	1	1	1	1	1	1	1	1	0	0	0	0	0	0	0	0
11/26/2017	Bus	8.0			0	0	0	0	0	0	0	0	2	2	2	2	0	0	0	0	0	0	0	0	0	0	0	0
11/26/2017	Dining Center Manager	9.0			0	0	0	0	0	0	0	0	1	1	1	1	1	1	1	1	1	0	0	0	0	0	0	0

11.4.10 Editing Schedule Information

1. Select the shift you would like to edit.
2. Select Details.

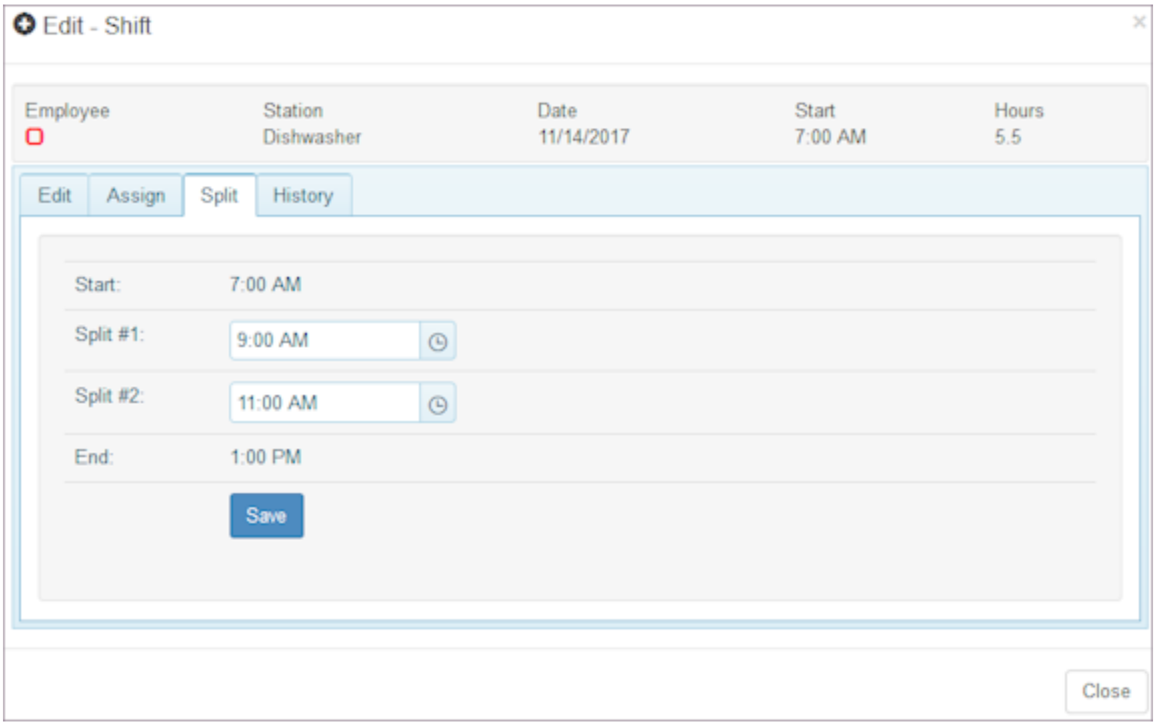
   Shift details display.
3. To edit shift information, select the Edit tab.
4. To view availability and assign an employee, select the Assign tab.
5. Select an employee to assign.

   Window prompts: Assign employee?
6. Select OK to assign the employee.

   Remember: If zero employees are available, you can split the shift into one or two shifts
7. To split the shift, select the Split tab.
8. Select the end time for Split #1 using the time picker.

   Times display adjacent to Save.

9. Select the end time for Split #2 using the time picker.
   Times display adjacent to Save.
   Example:

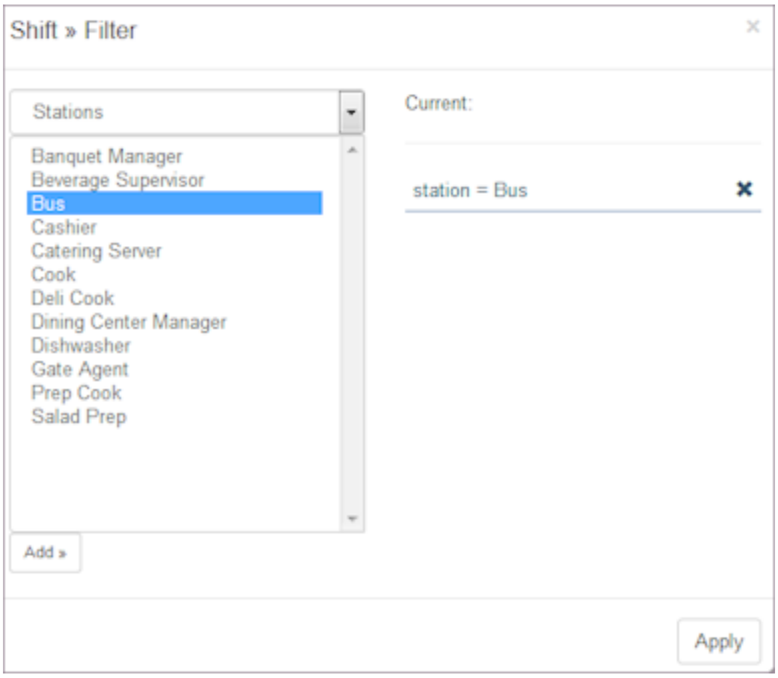


10. Select Save.
11. Select Close.

11.4.11 Filtering Schedule Information

1. To filter schedule information and focus on one part of the schedule, select Filter.
   Shift >> Filter window displays. Options include TeamWork elements as well as your organization's custom fields.
   Note: To add Custom fields, go to Organization > Custom > Fields. Role permissions are required.
2. Select an element to filter by, i.e.,Station.
3. Select Add.
   Filter selected lists under Current.

Example:



4. Select Apply.

   View is filtered by your selection. Filter button displays On.

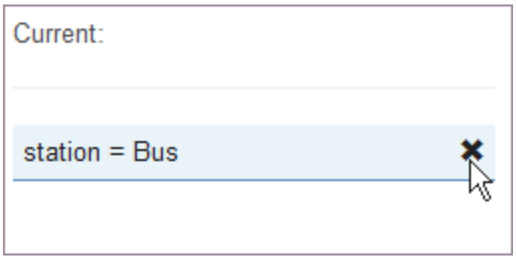
   Example:

5. To remove the filter, select the X next to it and select Apply.

   Filter is removed and full schedule displays.

   Example:

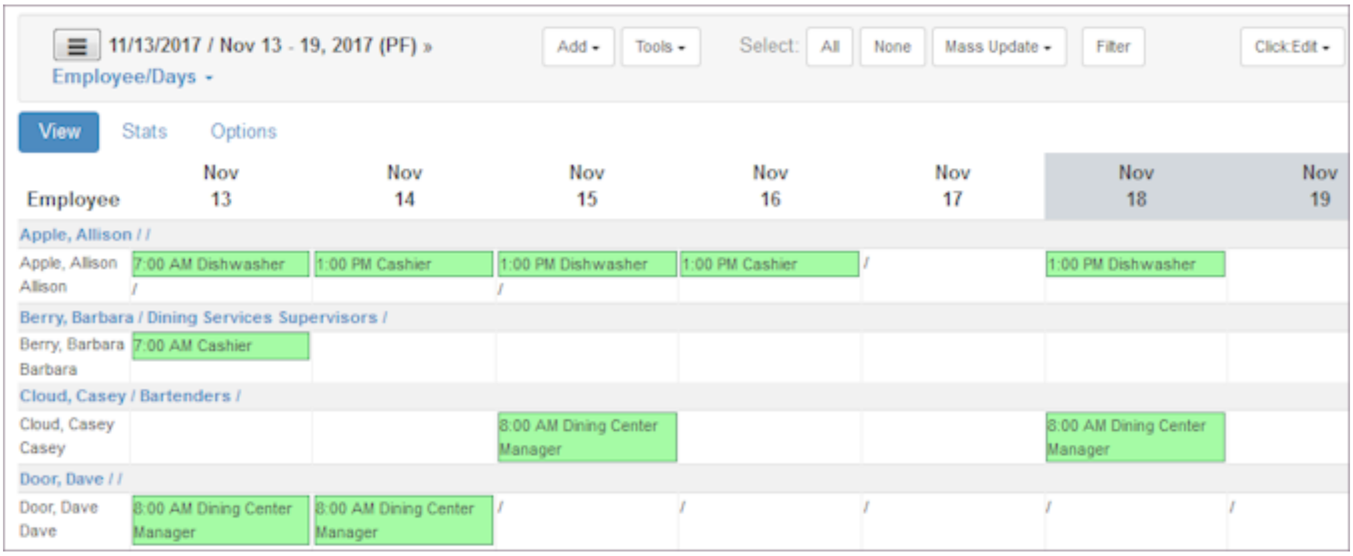
11.5 Views

Use the Views pages to review Employee/Days for past or present, weekly or monthly schedules. It lists all active employees with a column for each day in the schedule. Both shifts and leave display. Once you select a schedule, you can add shifts, run Auto Fill, and use Mass Update. You can view statistics and change the way you sort or group the information using name, crews, rotations as well as any number of user-defined fields unique to your organization.

Important: You can perform all of the tasks related to shifts in the Employee/Days page. Refer to Shifts How To's for detailed procedures.

11.5.1 Viewing Employees/Days

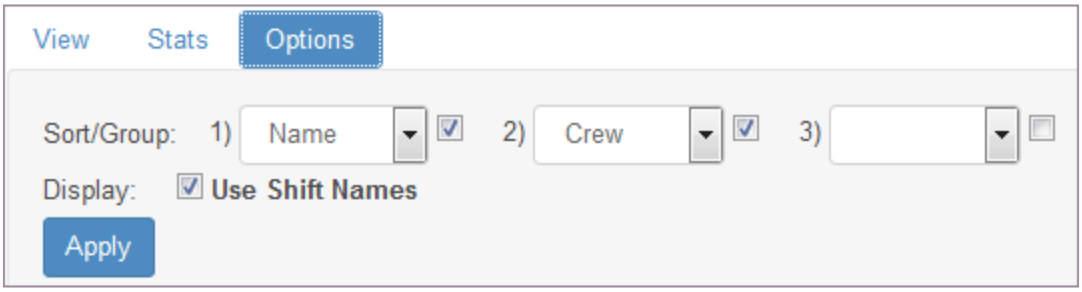
1. Select Schedules > Views.
2. Select the Schedule you would like to view.
   Example:



3. To change the view, select Options.
4. Select the Sort/Group and select the check boxes next to each item.
5. Select whether or not the display should Use Shift Names.

6. Select Apply.

   Example:



7. To print Employee/Days, select the Printable link.

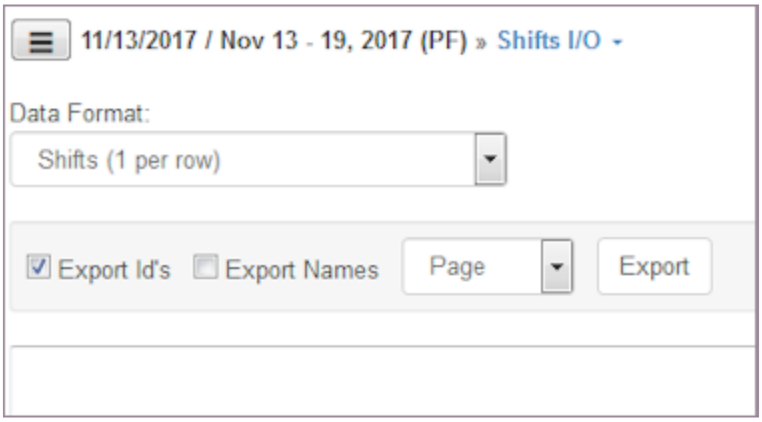
   Example:

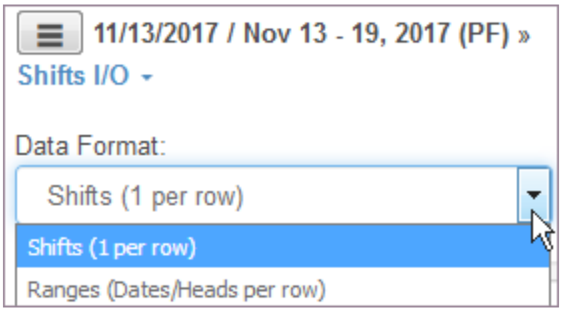
11.6 Tools

Use the Tools pages to input and output data to use in a schedule. In addition, use Tools pages to use the Swap Board, Bid Boards, and replace empty shifts or employees with other employees.

- Pending - indicates a shift is claimed, but requires manager approval. Pending does not display if approval is not required.
  Note: This setting is enabled in Locations > Settings > Employee under Swap Board Enabled.
- Posted - indicates an employee posted a shift to the Swap Board.
- Empty - indicates a shift is automatically posted to the Swap Board because it is empty.
- Bid Boards - fills empty shifts in your schedules. When shifts are placed on the Bid Board, multiple employees can bid on them and you can select criteria to Auto Fill the bids or manually assign them. This page is currently under development.
- Replace Employee - supports replacing one employee with another employee for one day or a date range.

11.6.1 Shifts I/O

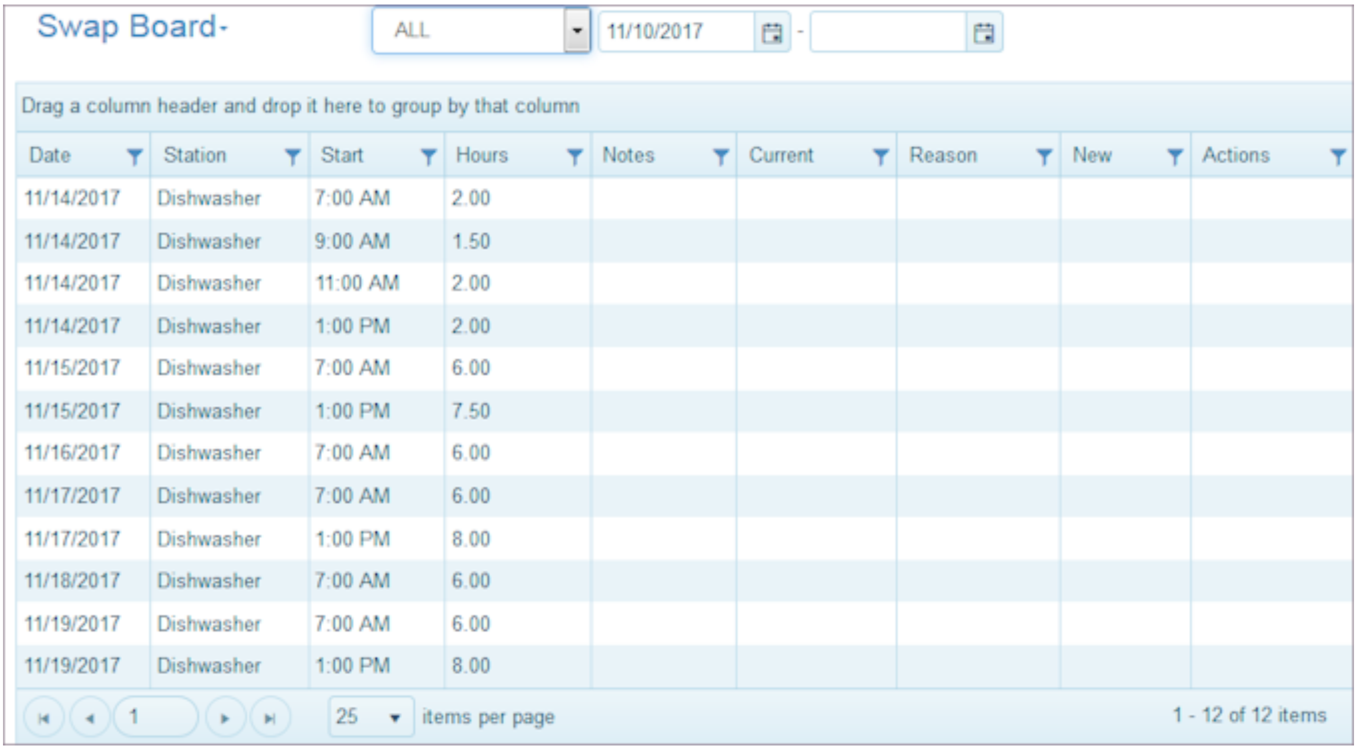
1. Select Schedules > Tools > Shift I/O.
   Example:
   

2. Select the Schedule you would like to work with.
3. Select the Data Format.
   Example:
   

4. Paste data from a spreadsheet to the text box.
5. Select Import.

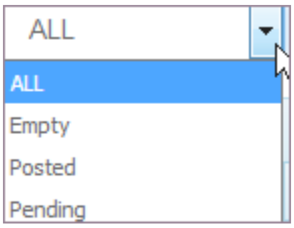
11.6.2 Swap Board

1. Select Schedules > Tools > Swap Board.
   Example:



Date	Station	Start	Hours	Notes	Current	Reason	New	Actions
11/14/2017	Dishwasher	7:00 AM	2.00					
11/14/2017	Dishwasher	9:00 AM	1.50					
11/14/2017	Dishwasher	11:00 AM	2.00					
11/14/2017	Dishwasher	1:00 PM	2.00					
11/15/2017	Dishwasher	7:00 AM	6.00					
11/15/2017	Dishwasher	1:00 PM	7.50					
11/16/2017	Dishwasher	7:00 AM	6.00					
11/17/2017	Dishwasher	7:00 AM	6.00					
11/17/2017	Dishwasher	1:00 PM	8.00					
11/18/2017	Dishwasher	7:00 AM	6.00					
11/19/2017	Dishwasher	7:00 AM	6.00					
11/19/2017	Dishwasher	1:00 PM	8.00					

2. Select the display.
   Example:



3. Select the dates you want to view, either a date or a range.

11.6.3 Replace Employee

1. Select Schedules > Tools > Replace Employee.
   Example:

2. Use the drop-down list for Replace and select either Empty or an employee name.
3. Use the drop-down list for With and select either Empty or an employee name.
4. Select the Dates for the Replace Employee to begin. Only one date for starting the replacement is necessary.
5. Select Preview.
   Replacement window displays a list of shifts that the replacement covers. Check boxes next to the Shifts that have conflicts are empty
6. Clear the check boxes of the shifts you do not want to replace.
7. (Optional) Type a note to display with the shifts being replaced.
8. Select Replace.

11.7 Analysis

Use the Analysis pages to review Over and Under Analysis, Budget Analysis, Coverage Analysis, and Overtime Estimator.

Refer to the following How To's.

- Over and Under Analysis - provides current schedule information for all employees.
- Budget Analysis - This page is currently under development.
- Coverage Analysis - This page is currently under development.
- Overtime Estimate - This page estimates overtime for the current pay period.

11.7.1 Using Over/Under Analysis

1. Select Schedules > Analysis > Over/Under Analysis.
2. Select the schedule you want to review.
   Example:

Over Under Monday, November 20, 2017 - Sunday, November 26, 2017 11/24/2017

Name	Under	Min	Hours	Max	Over
Apple, Allison	0.00	5.00	14.00	40.00	0.00
Berry, Barbara	0.00	5.00	13.00	40.00	0.00
Cloud, Casey	0.00	5.00	18.00	40.00	0.00
Door, Dave	0.00	5.00	18.00	40.00	0.00
Evergreen, Erik	0.00	5.00	9.00	40.00	0.00
Ferry, Fern	0.00	5.00	9.00	40.00	0.00
Gate, Gary	0.00	5.00	32.00	40.00	0.00
Hunt, Harold	0.00	5.00	16.00	40.00	0.00
Iron, Ivan	0.00	5.00	36.00	40.00	0.00
Jump, Joan	0.00	5.00	19.00	40.00	0.00
Kent, Kyra	5.00	5.00	0.00	40.00	0.00
Luck, Linda	0.00	5.00	40.00	40.00	0.00
Maple, Mindy	5.00	5.00	0.00	40.00	0.00
Pickle, Petra	0.00	5.00	18.00	40.00	0.00
Snap, Susan	0.00	5.00	15.00	40.00	0.00
Valley, Vera	0.00	5.00	13.00	40.00	0.00
Zabowski, Zach	5.00	5.00	0.00	40.00	0.00

1 1... items per page 1 - 17 of 17 items

3. Review each employee's scheduling. Under, Min, Hours, and Max, and Over.
4. Select the arrows at the top of the page to display previous and future schedules.

12. Time

12.1 Time

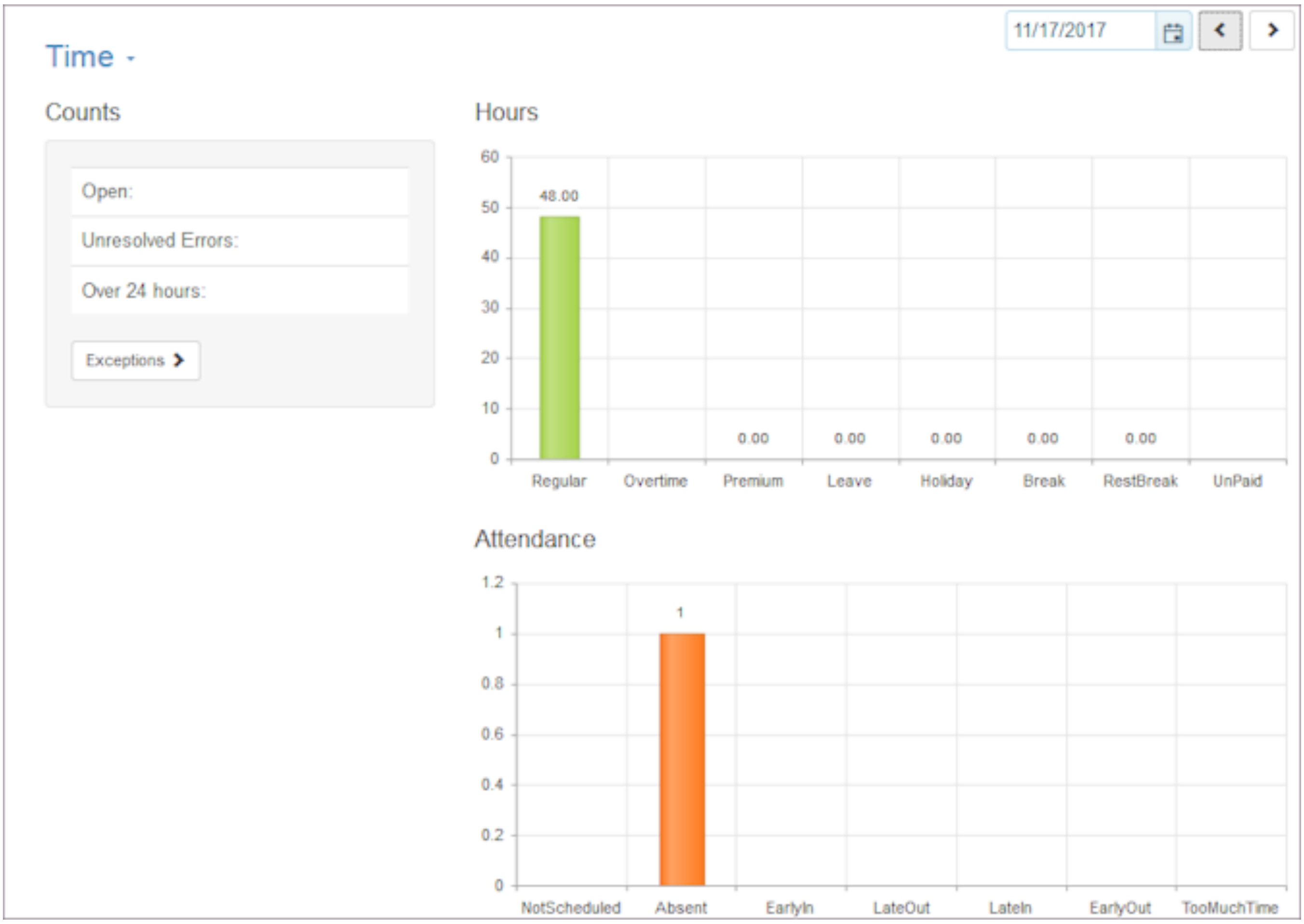
Use the Time pages to approve time worked in your organization. Review absences, actual time worked, issues, exceptions, and clock on photos. Analyze totals, headcounts, variance, and view the attendance specifics for an employee as well as the location.

Refer to the following How To's.

- Review
- Analyze
- Pay Period
- Configuration

Review summarized time information when you open the Time section.

Example:



12.2 Review

Use the Review pages to quickly get an idea of a location's time and attendance. Examine Absent/On to track absences, employees, and time periods. Review time-related issues and make adjustments. Fix time entry exceptions. Monitor employees as they clock in and clock out. Photos can be used to take a picture of an employee clocking on if using a device with a camera. Quickly sort by location, employee, and/or date.

12.2.1 Using Icons to Access Information

Use icons in the Status column to quickly access related information.

- When you hover over the icon, a description displays.
- When you select the icon, it launches the related information.

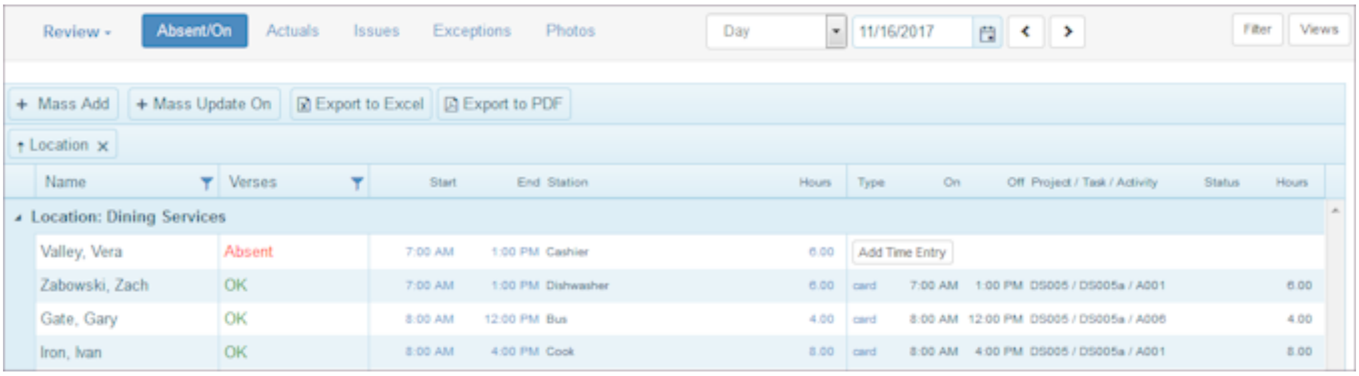
The following table shows the icons and describes the information they provide.

Select Icon	to...
	display employee's contact information
	display employee's three-week schedule
	display employee's time sheet
	display employee's time entry in error status
	display employee's time entry in void status
	display employee's entry with note. Hover over the icon to view the note contents.
	display employee's time entry selected to alert the manager

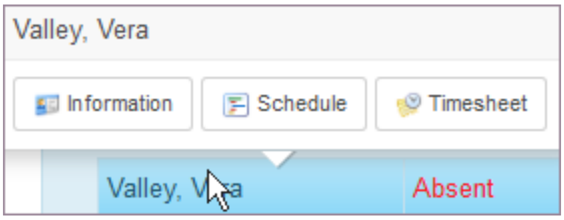
12.2.2 Absent/On

1. Select Time from the main menu.

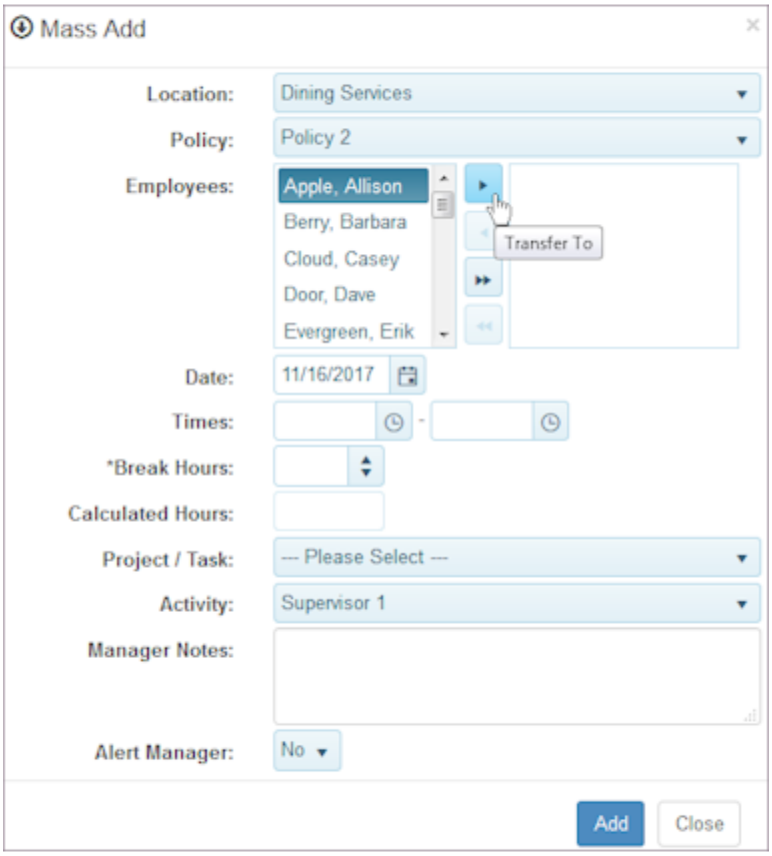
2. Select Review > Absent/On.
   Example:



3. Select a time period. The default is Day. Select Week, Pay Period, or Range if desired.
4. Sort the table in the most useful format, i.e., use the employee Name column or Location column.
   Absent/On window refreshes to reflect your selection.
5. Select an employee name to display employee contact Information, employee's three-week Schedule, and employee's Timesheet.
   Example:

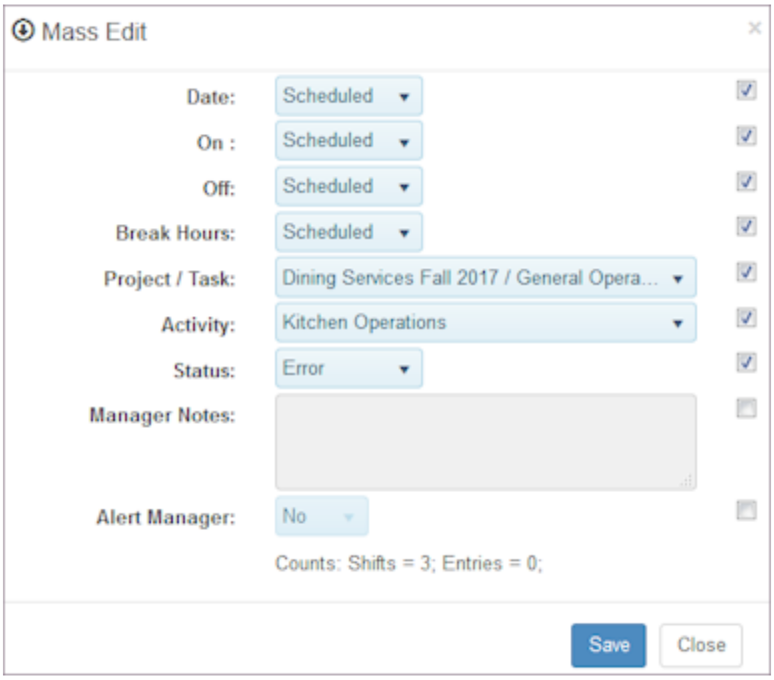


6. Select Mass Add to display the Mass Add window.
   Example:



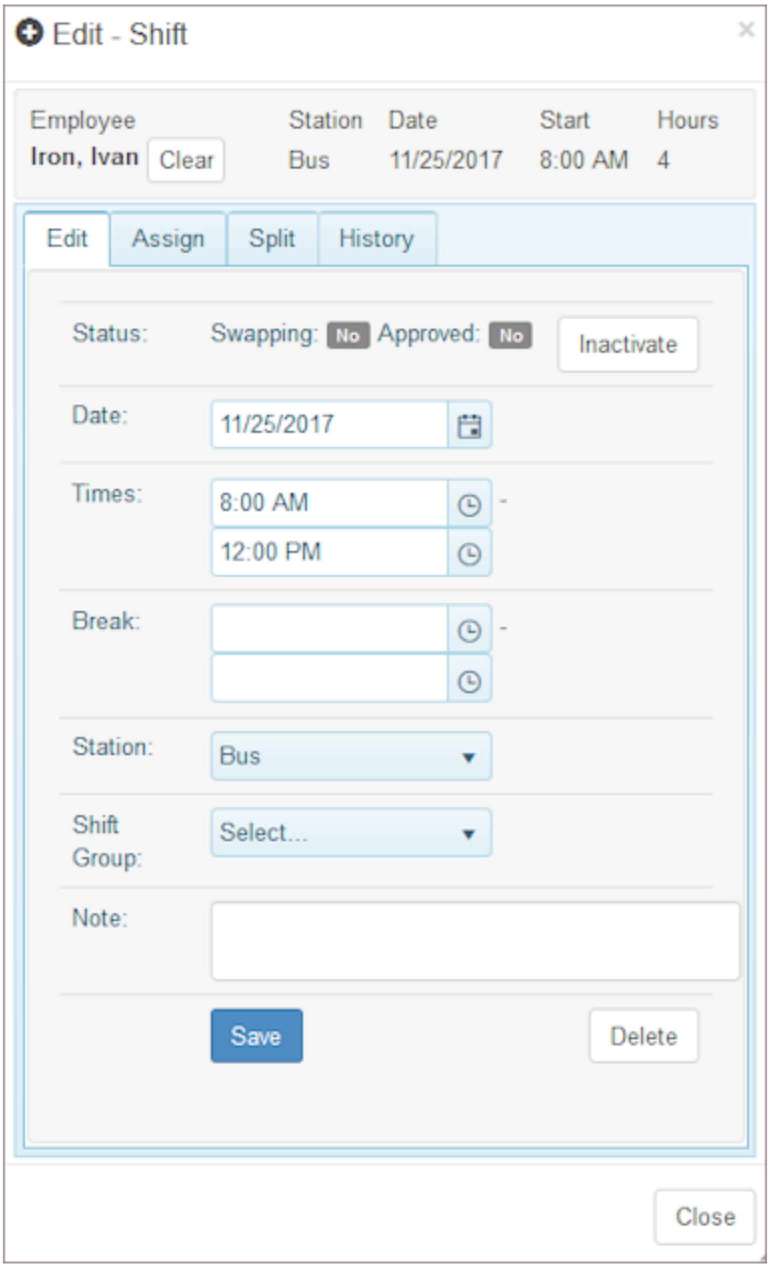
7. Select the employees to add information to and use the arrow buttons to transfer them. Use the double arrow to add information to all employees.
8. Make desired changes and select Add.
9. Select Mass Update On to display check boxes to the right of Hours.
10. Select the check boxes by the employees whose time information you would like to change.

11. Select Mass Update to display the Mass Edit window.
    Example:

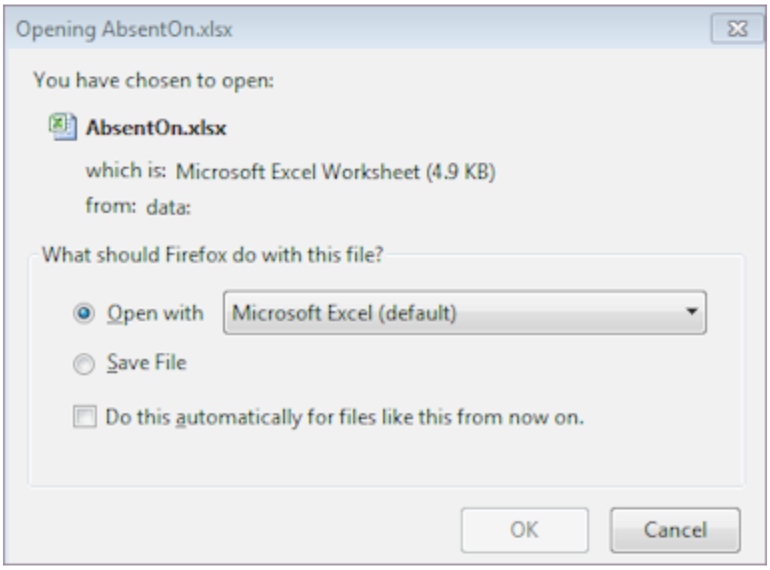


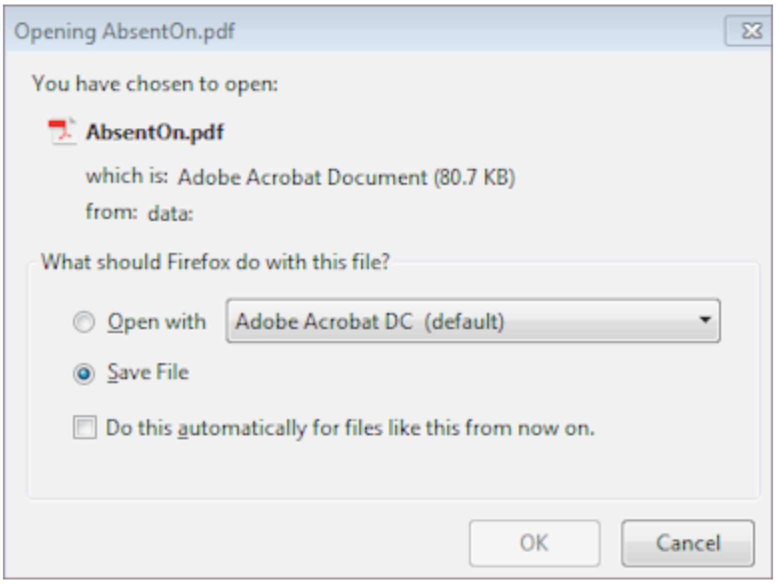
12. Select check boxes by the information you would like to change.
13. Make the desired changes and select Save.
14. Select the Start or End time or Hours to edit shift information.
    Edit Shift window displays.

Example:



15. Make changes to the shift information, employee assignment, split the shift, or view shift history.
16. Select Save.

17. Select Export to Excel to export the Absent/On window information.
    Example:
    

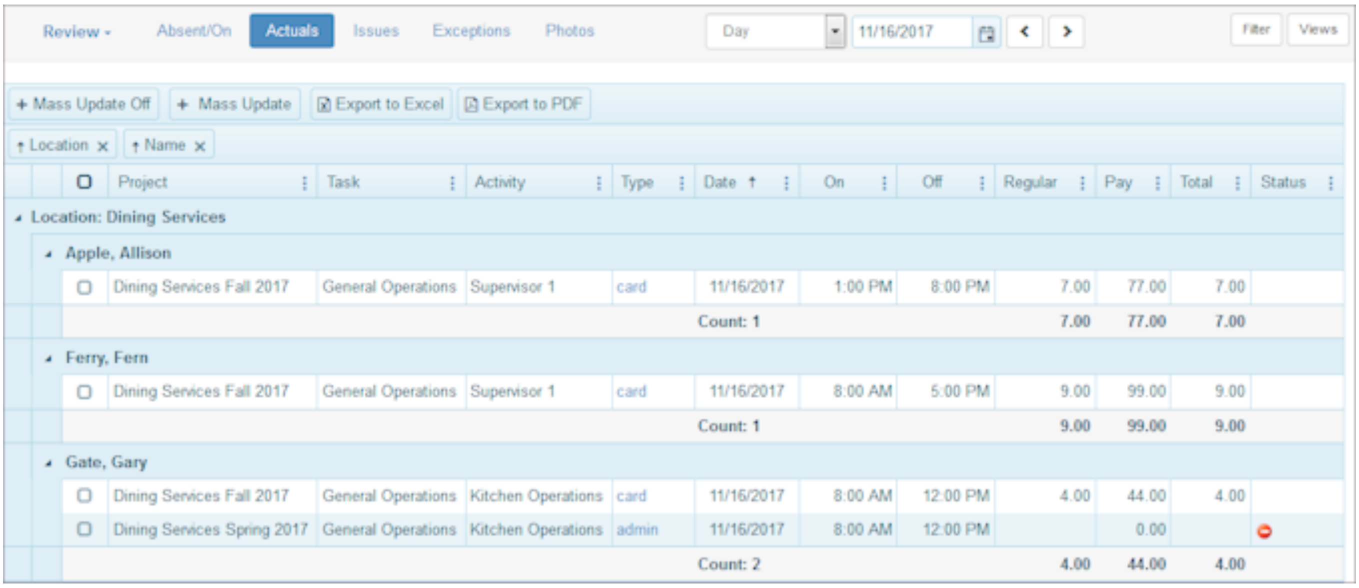
18. Select Export to PDF to export the Absent/On window information.
    Example:
    

12.2.3 Actuals

1. Select Time from the main menu.

2. Select Review > Actuals.

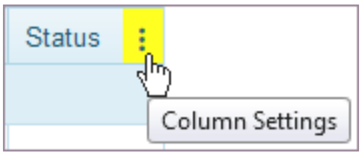
   Example:



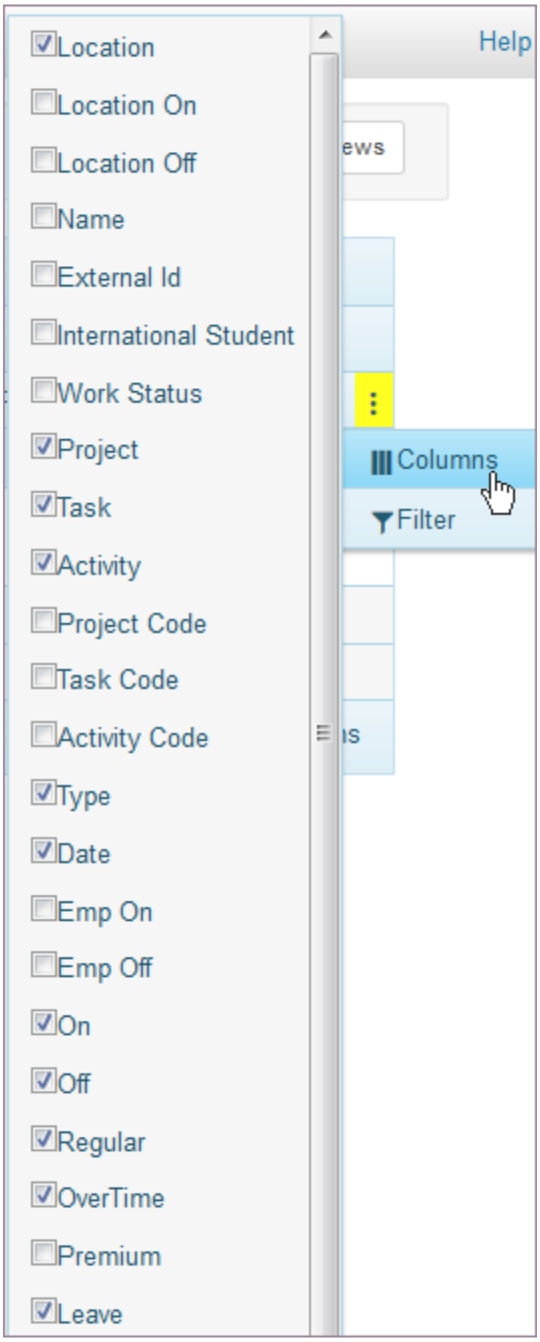
3. Select a time period. The default is Day. Select Week, Pay Period, or Range if desired.

4. You can change the information that displays in the Actuals window. To do so, select the three dots after a column name.

   Example:

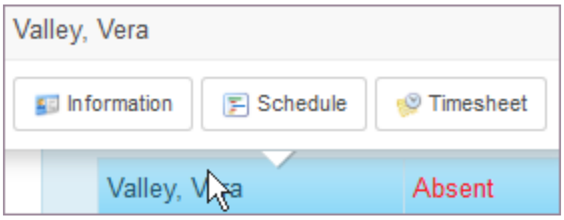


5. Select Columns and select the check boxes of the information you would like to display.
   Example:

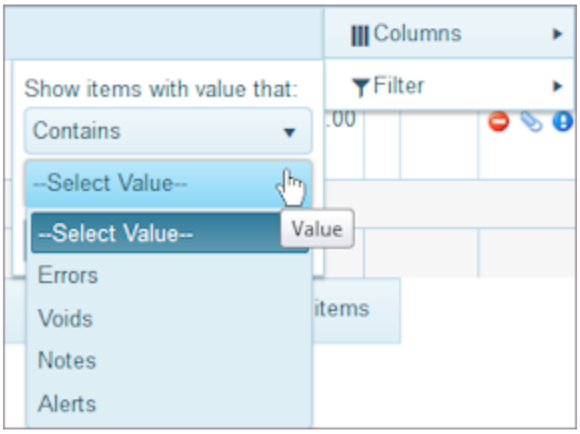


6. Sort the table in the most useful format, i.e., use the employee Name column or Location column.
   Actuals window refreshes to reflect your selection.
7. Select an employee name to display employee contact Information, employee's three-week Schedule, and employee's Timesheet.

Example:

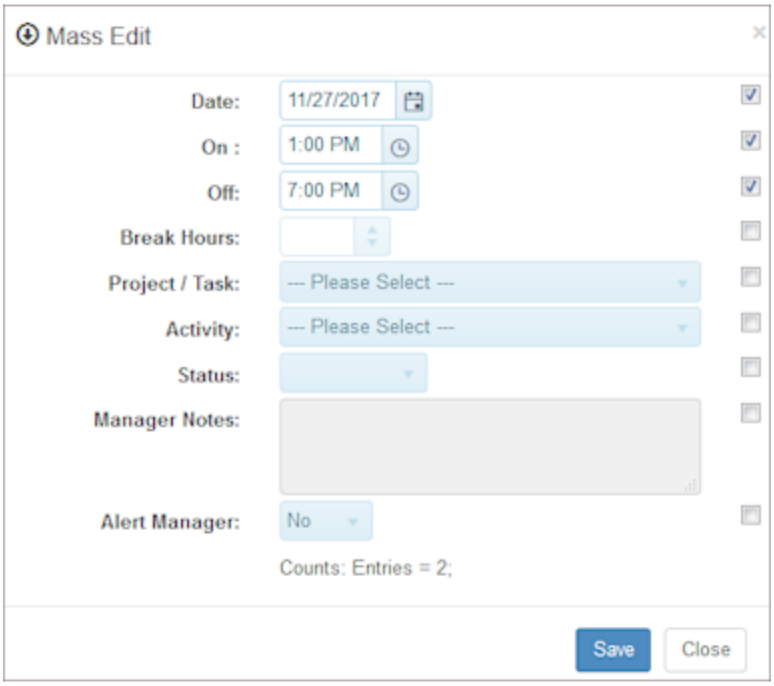


8. Select card, clock, or admin under the Type column to make changes to the dates and times or other information.
   Edit >> Entry window displays for that employee.
   Note: If your organization requires that employees approve their time sheets, you cannot make changes to an approved time sheet unless an employee first unapproves that time sheet.
9. Select Save.
   Actuals window reflects the changes.
10. Customize the Status column to display icons that depict time entry values. To do so, select Status > Filter and select a value.
    Note: The Status column filter applies to all Review windows. When you select to display or clear Status values, they display or are cleared on all Review windows.
    Example:



11. Under the Type column, select: All or admin, clock, or card time entries. Select Filter to only display card, clock, or admin time entries or Select All.
12. Select a specific Date using the calendar icon or select a specific On time or Off time using the time picker.
13. Select Mass Update On to add time entries to many employees in a location.
    Check boxes display next to each location assignment.
14. Select the Locations and the Employees with records you want to change.
15. Select Mass Update.
    Mass Edit window displays.

Example:

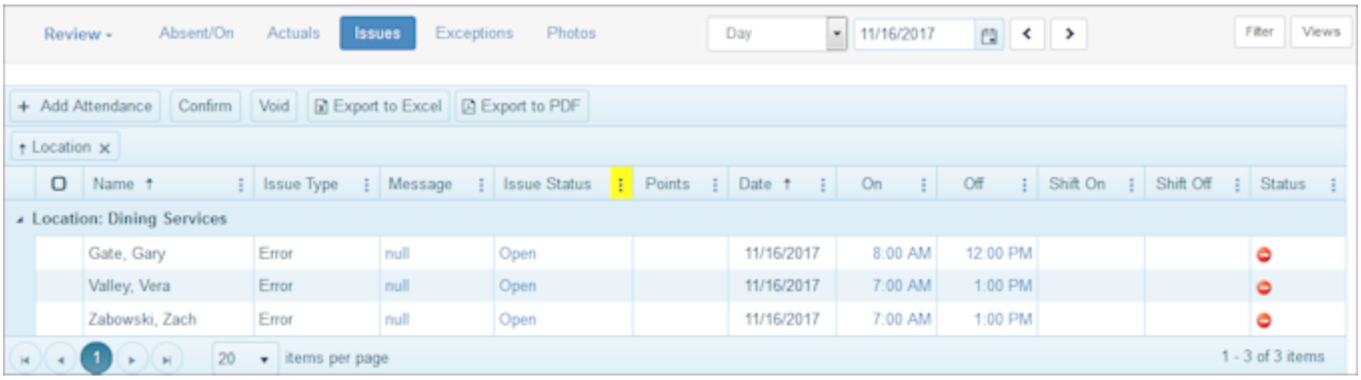


16. Select the check boxes by the fields you want to change, correct them, and select Save.
17. When finished, select Mass Update Off.
18. Select Export to Excel to export the Actuals window information.
19. Select Export to PDF to export the Actuals window information.

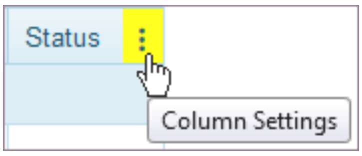
12.2.4 Issues

Important: If a time entry is flagged as an error, the employee is not paid no matter how many hours are worked. If a time entry is flagged as an alert, the employee is paid. If a time entry is flagged as void, none of the time entry is paid. However, you can void a time entry and then submit a new time entry.

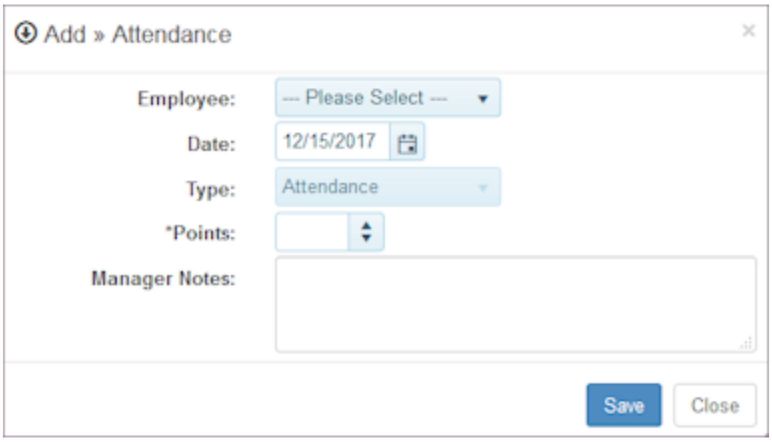
1. Select Time from the main menu.
2. Select Review > Issues.
   Example:



3. Select a time period. The default is Day. Select Week, Pay Period, or Range if desired.
4. You can change the information that displays in the Issues window. To do so, select the three dots after a column name.
   Example:



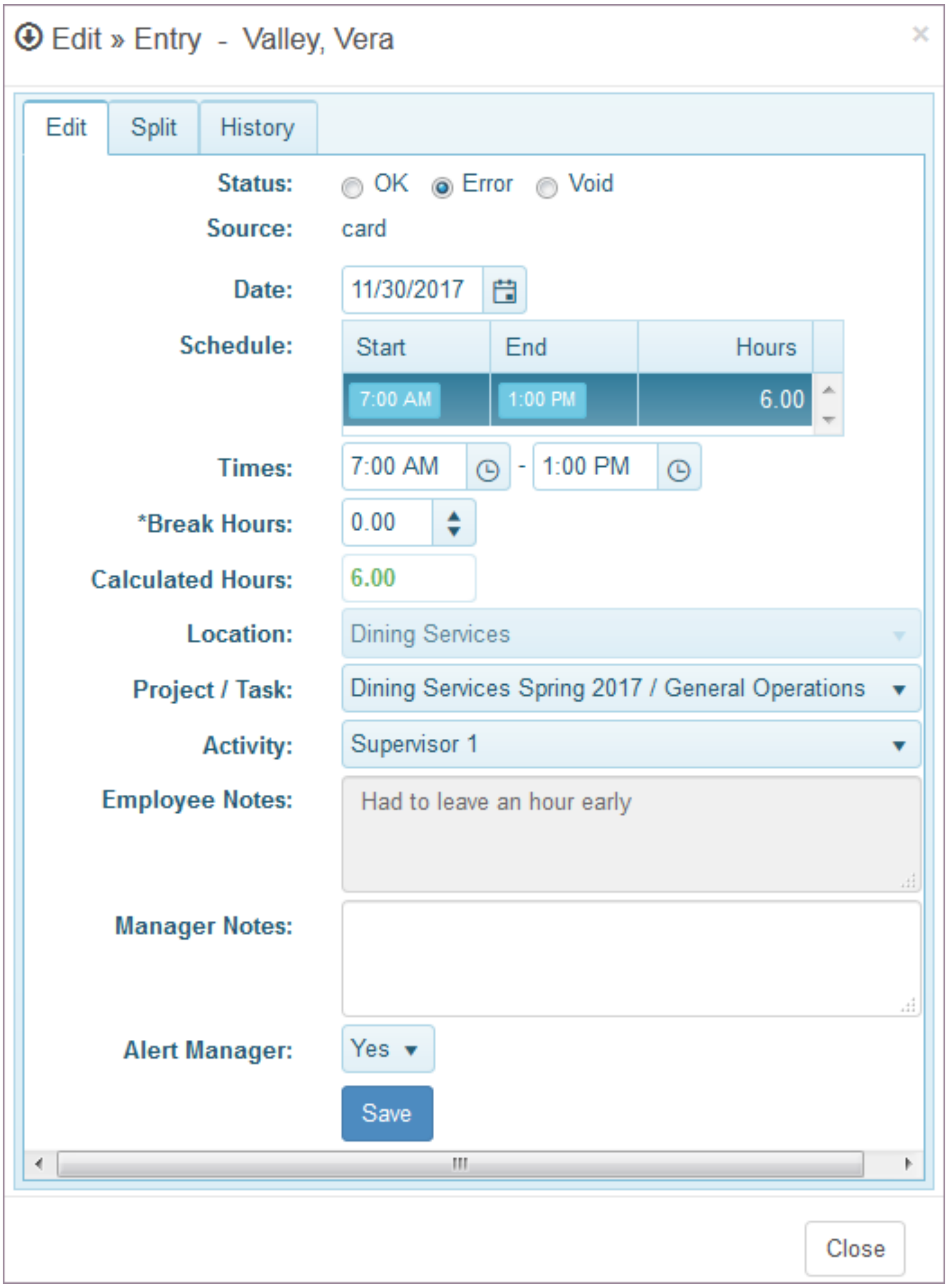
5. Select Columns and select the check boxes of the information you would like to display.
6. Sort the table in the most useful format, i.e., use the employee Name column or Location column.
   Issues window refreshes to reflect your selection.
7. Select an employee name to display employee contact Information, employee's three-week Schedule, and employee's Timesheet.
8. Select filters for any column to display the information you are looking for.
9. To add attendance information to an employee, select Add Attendance.
   Add Attendance window displays.
   Example:



10. Select the Employee and the Date.

11. Enter the Points added to this employee's record and any Manager Notes.
12. Select Save.
13. To Void an issue, select the check box by the Location and Employee whose time you want to void.
    Window prompts: Void Selected.
14. To Void, select OK.
    Issue Status changes to Void.
15. To Confirm attendance, select the check box by the Location and Employee whose time you want to confirm.
    Window prompts: Confirmed Selected.
16. To Confirm, select OK.
    Issue Status changes to Confirmed.
17. Open a time entry to make desired changes to Dates and Times and select Save.
    Edit >> Entry window displays.

Example:



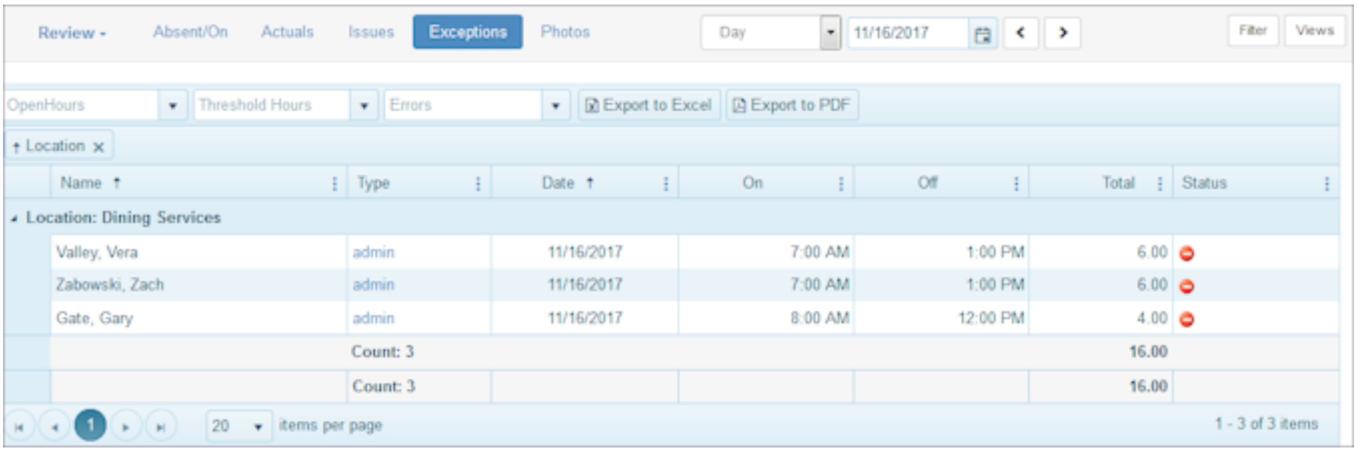
18. To change an Error status, change the Status to OK and select Save.
    Window prompts: Undo ERROR status? This will add the hours to all roll-ups.
    If you select OK, the time entry status is OK. When you save the window, the issue no longer displays in the Issues window.
    Note: If a time entry is flagged as an error, the employee does not get paid for the hours unless the Status is OK.
    OR
    Change the status to VOID.
    Window prompts: Do you want to VOID this entry? This will remove the hours from timesheets.

If you select OK, the time entry is Void. When you save the window, the issue no longer displays in the Issues window.
Remember: An employee does not get paid for a time entry that is void. Resubmit a correct time entry.

19. Make changes and select Save.
20. Select Export to Excel to export the Issues window information.
21. Select Export to PDF to export the Issues window information.

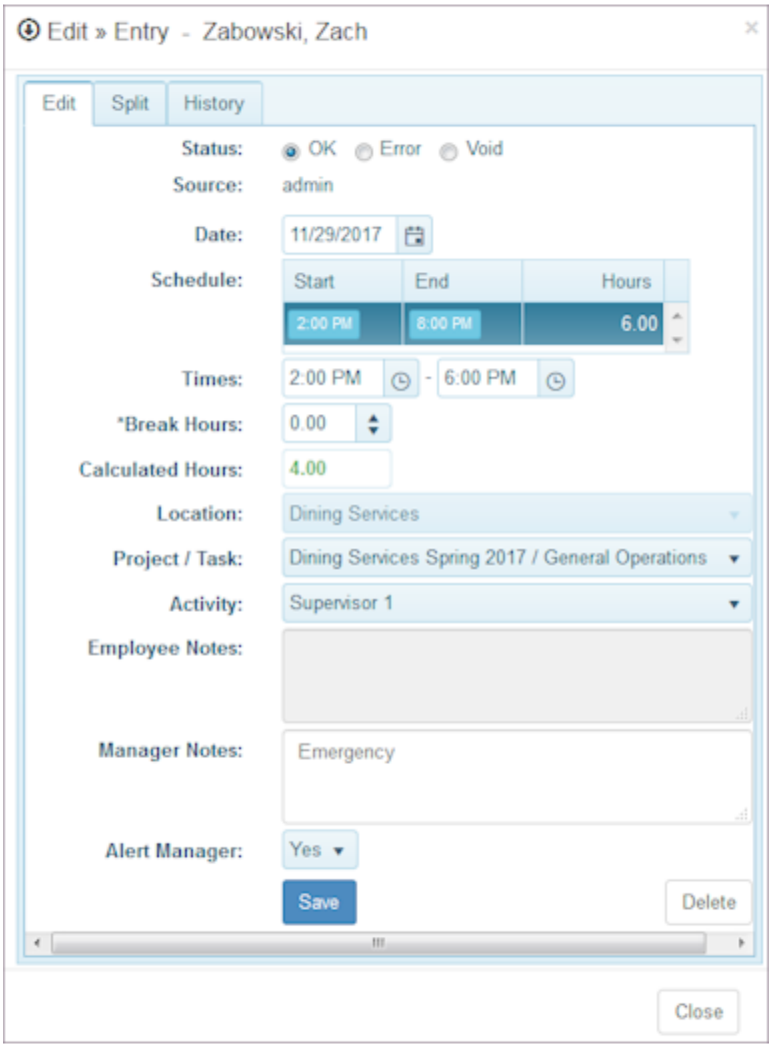
12.2.5 Exceptions

1. Select Time from the main menu.
2. Select Review > Exceptions.
   Example:



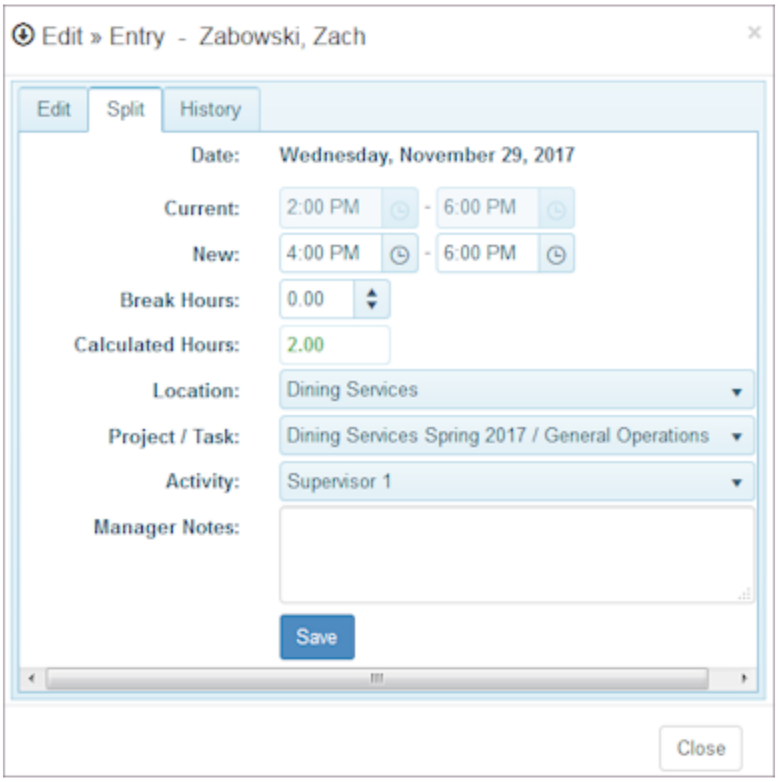
3. Select a time period. The default is Day. Select Week, Pay Period, or Range if desired.
4. Sort the table in the most useful format, i.e., use the employee Name column or Location column.
   Absent/On window refreshes to reflect your selection.
5. Select an employee name to display employee contact Information, employee's three-week Schedule, and employee's Timesheet.
6. Customize the Status column to display icons that depict time entry values. To do so, select Status > Filter and select a value.
   Note: The Status column filter applies to all Review windows. When you select to display or clear Status values, they display or are cleared on all Review windows.
7. Open a time entry to make desired changes to Dates and Times and select Save.
   Edit >> Entry window displays.

Example:



8. To change an Error status, change the Status to OK and select Save.
   Window prompts: Undo ERROR status? This will add the hours to all roll-ups.
   If you select OK, the time entry status is OK. When you save the window, the issue no longer displays in the Issues window.
   Note: If a time entry is flagged as an error, the employee does not get paid for the hours unless the Status is OK.
   OR
   Change the status to VOID.
   Window prompts: Do you want to VOID this entry? This will remove the hours from timesheets.
   If you select OK, the time entry is Void. When you save the window, the issue no longer displays in the Issues window.
   Remember: An employee does not get paid for a time entry that is void. Resubmit a correct time entry.
9. To view Issues, select the Issues tab.
   Edit Entry window displays the issue information.
10. To split the shift, select the Split tab.
    Edit Entry window displays an option for splitting the shift.

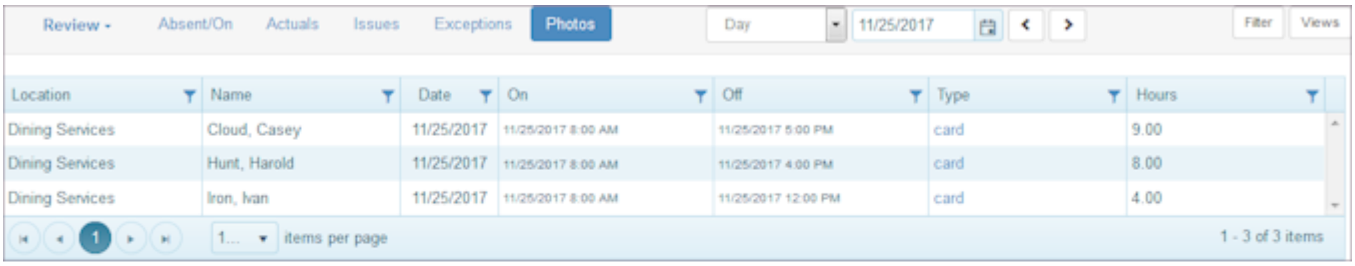
Example:



11. Make the changes and select Save.
12. Select Export to Excel to export the Exceptions window information.
13. Select Export to PDF to export the Exceptions window information.

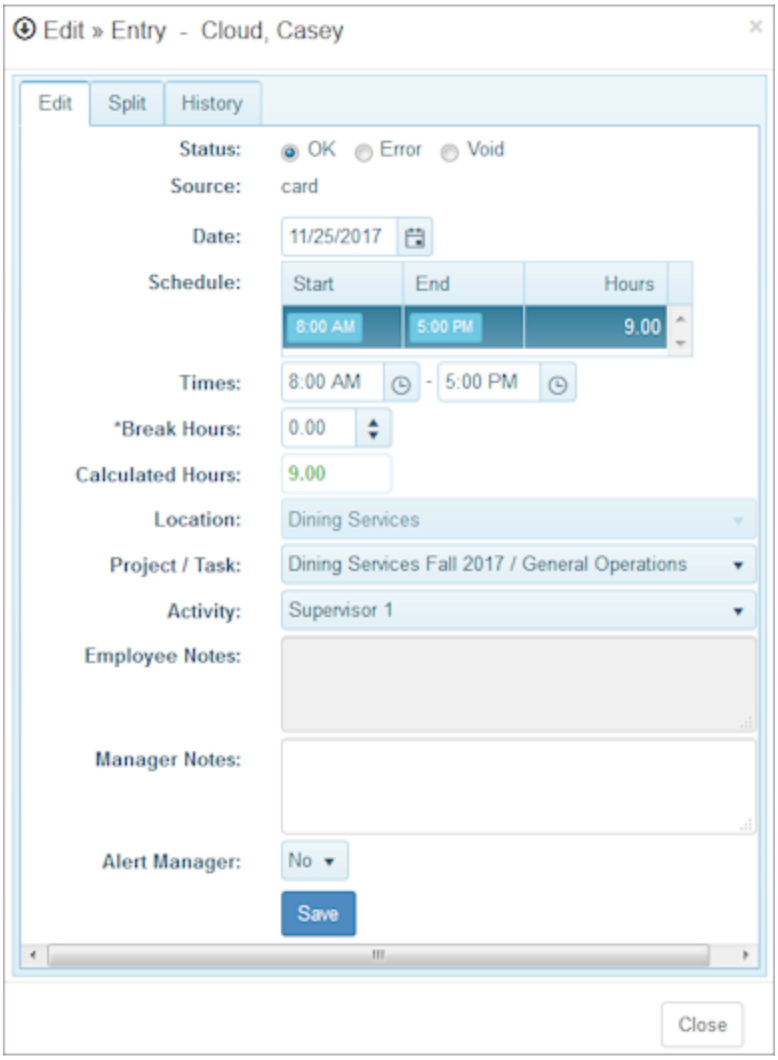
12.2.6 Photos

1. Select Time from the main menu.
2. Select Review > Photos.
   Example:



3. Select Type.
   Edit Entry window displays.

Example:



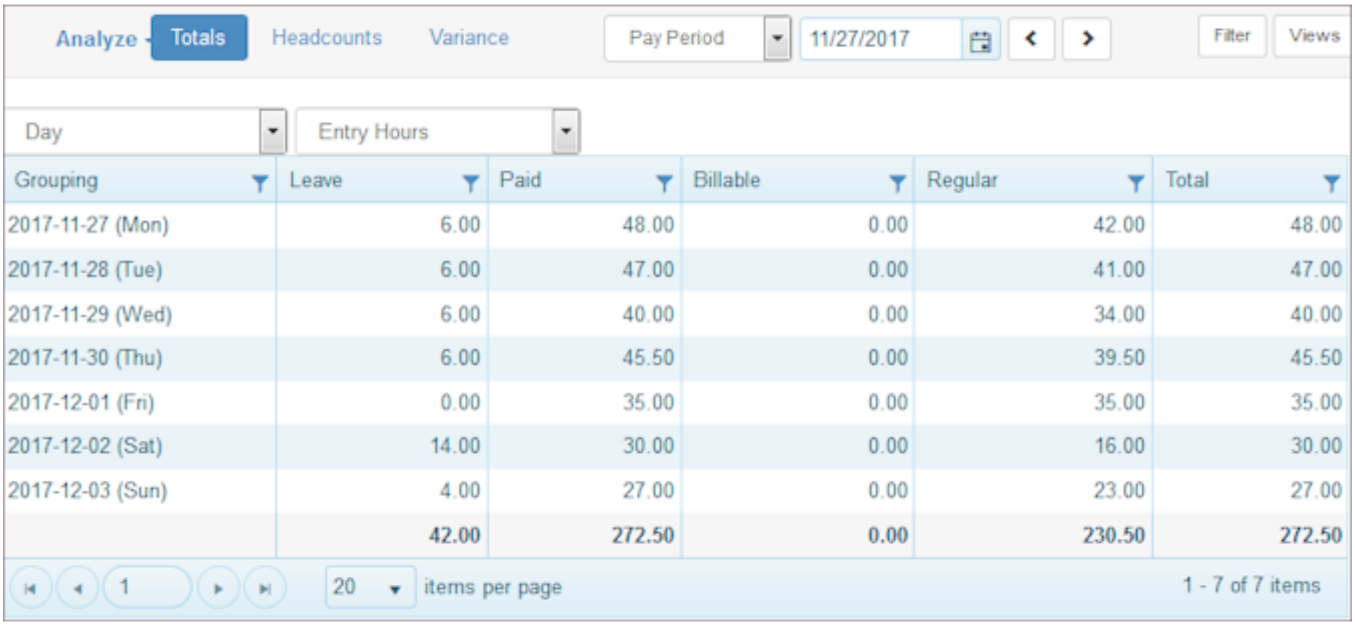
4. Make any changes and select Save.

12.3 Analyze

Use the Analyze pages to view entry hours or calculated totals by project, project/task, activity, day, location, or employee. View headcount variance, scheduled headcount, and headcounts by time interval. Display scheduled hours, actual hours worked, and variance between them for schedules and schedules and leave. If you are logged into the organization, display attendance for employees and locations. If you are logged into one location, estimate overtime for that location.

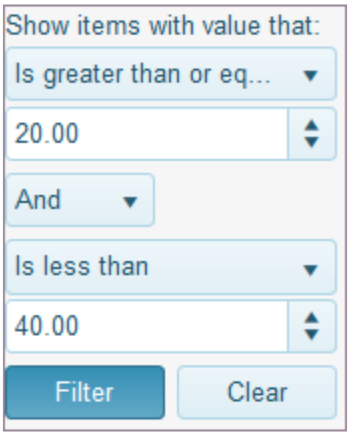
12.3.1 Totals

1. Select Time from the main menu.
2. Select Analyze > Totals.
   Example:



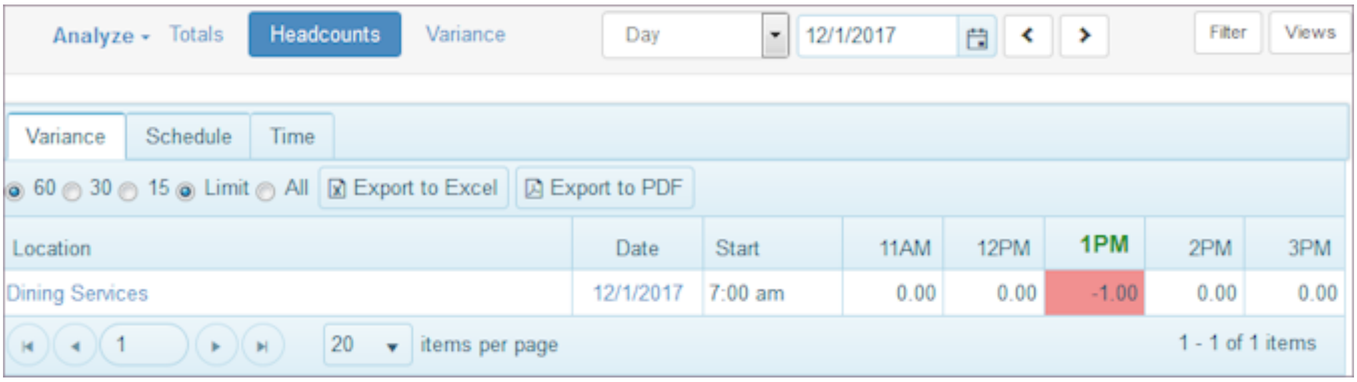
Grouping	Leave	Paid	Billable	Regular	Total
2017-11-27 (Mon)	6.00	48.00	0.00	42.00	48.00
2017-11-28 (Tue)	6.00	47.00	0.00	41.00	47.00
2017-11-29 (Wed)	6.00	40.00	0.00	34.00	40.00
2017-11-30 (Thu)	6.00	45.50	0.00	39.50	45.50
2017-12-01 (Fri)	0.00	35.00	0.00	35.00	35.00
2017-12-02 (Sat)	14.00	30.00	0.00	16.00	30.00
2017-12-03 (Sun)	4.00	27.00	0.00	23.00	27.00
	42.00	**272.50**	**0.00**	**230.50**	**272.50**

3. To filter contents, select the filter symbol, enter the information, and select Filter.
   Example: For Regular hours over 20 hours per week but less than 40.

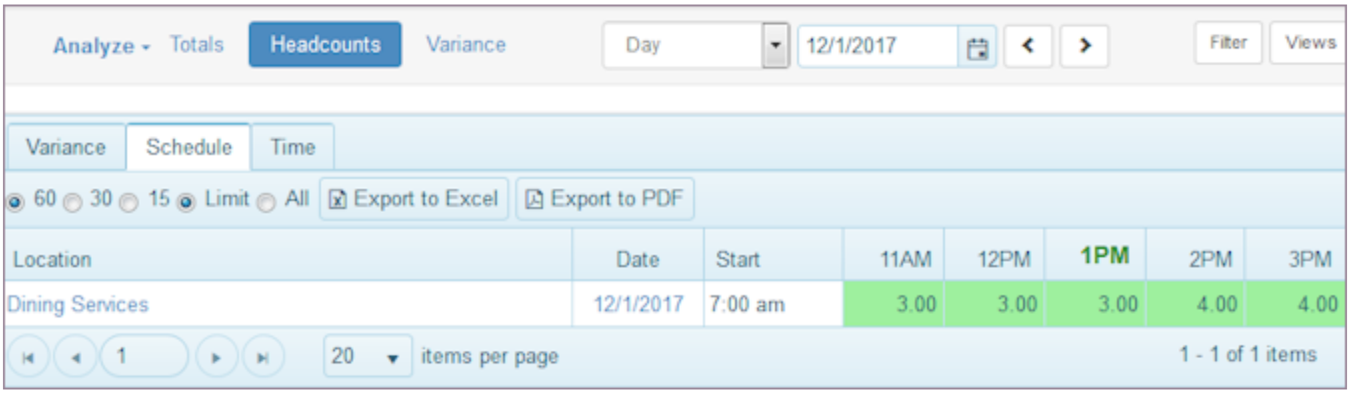


12.3.2 Headcounts

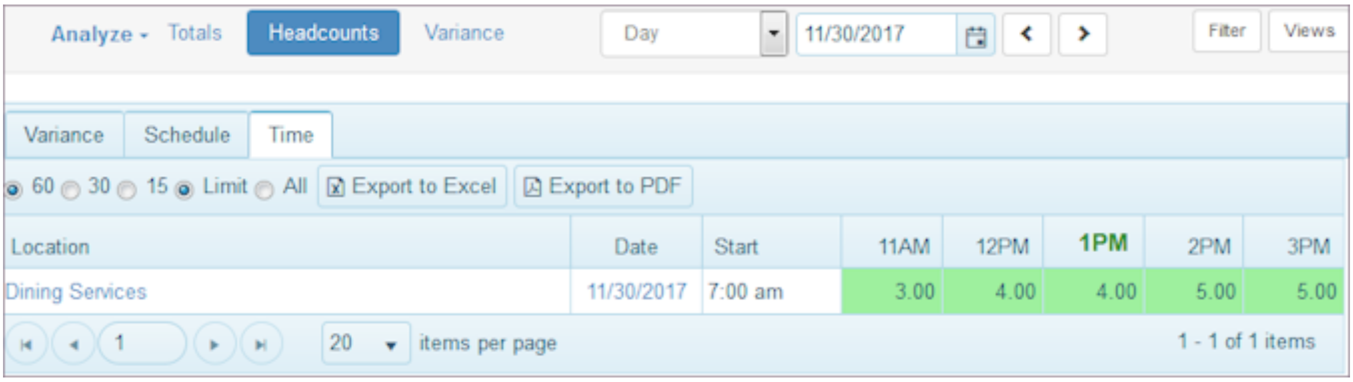
1. Select Time from the main menu.
2. Select Analyze > Headcounts.
3. Select a time period. The default is Day. Select Week, Pay Period, or Range if desired.
4. Select the time interval: 60, 30, or 15 minutes.
5. Select whether to limit it to the schedule or display all 24 hours.
6. Select Variance to display headcount variance from the schedule.
   Example:



7. Select Schedule to display the number of employees who worked during an interval.
   Example:



8. Select Time to display the number of employees who are working at a given time.
   Example:

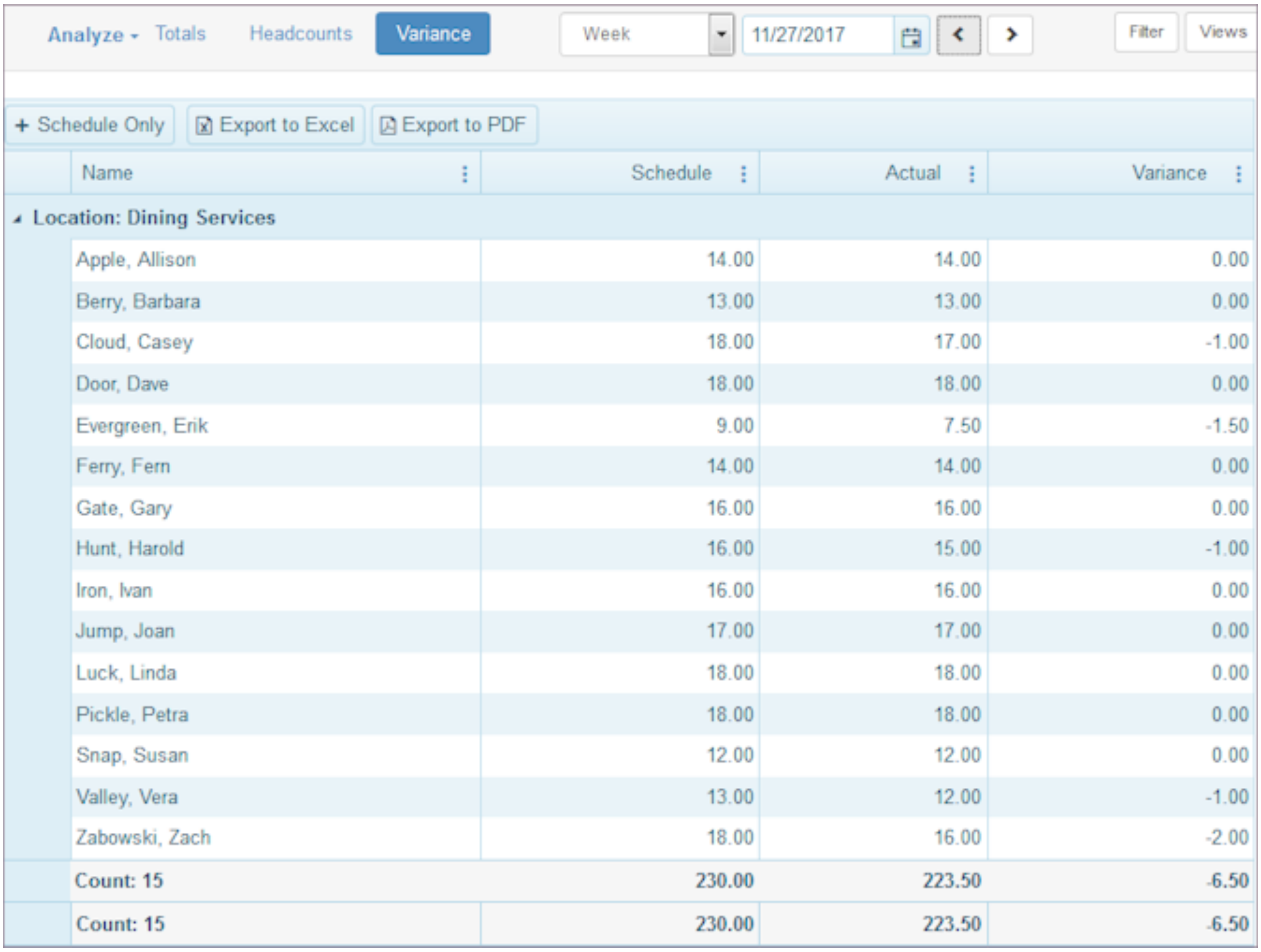


9. Select Export to Excel to export the Headcounts window information.
10. Select Export to PDF to export the Headcounts window information.

12.3.3 Variance

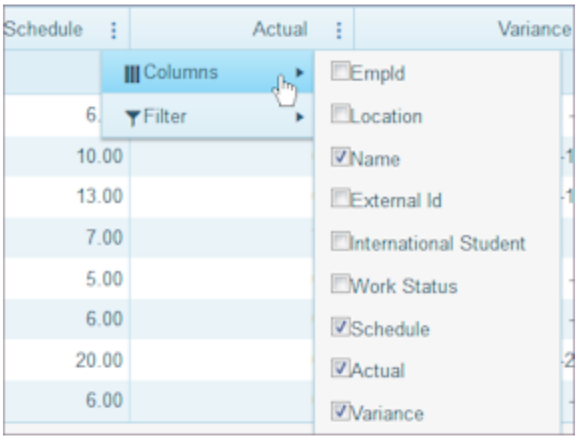
1. Select Time from the main menu.
2. Select Analyze > Variance.

   Example:



Name	Schedule	Actual	Variance
Location: Dining Services			
Apple, Allison	14.00	14.00	0.00
Berry, Barbara	13.00	13.00	0.00
Cloud, Casey	18.00	17.00	-1.00
Door, Dave	18.00	18.00	0.00
Evergreen, Erik	9.00	7.50	-1.50
Ferry, Fern	14.00	14.00	0.00
Gate, Gary	16.00	16.00	0.00
Hunt, Harold	16.00	15.00	-1.00
Iron, Ivan	16.00	16.00	0.00
Jump, Joan	17.00	17.00	0.00
Luck, Linda	18.00	18.00	0.00
Pickle, Petra	18.00	18.00	0.00
Snap, Susan	12.00	12.00	0.00
Valley, Vera	13.00	12.00	-1.00
Zabowski, Zach	18.00	16.00	-2.00
Count: 15	230.00	223.50	-6.50
Count: 15	230.00	223.50	-6.50

3. Select a time period. The default is Day. Select Week, Pay Period, or Range if desired.

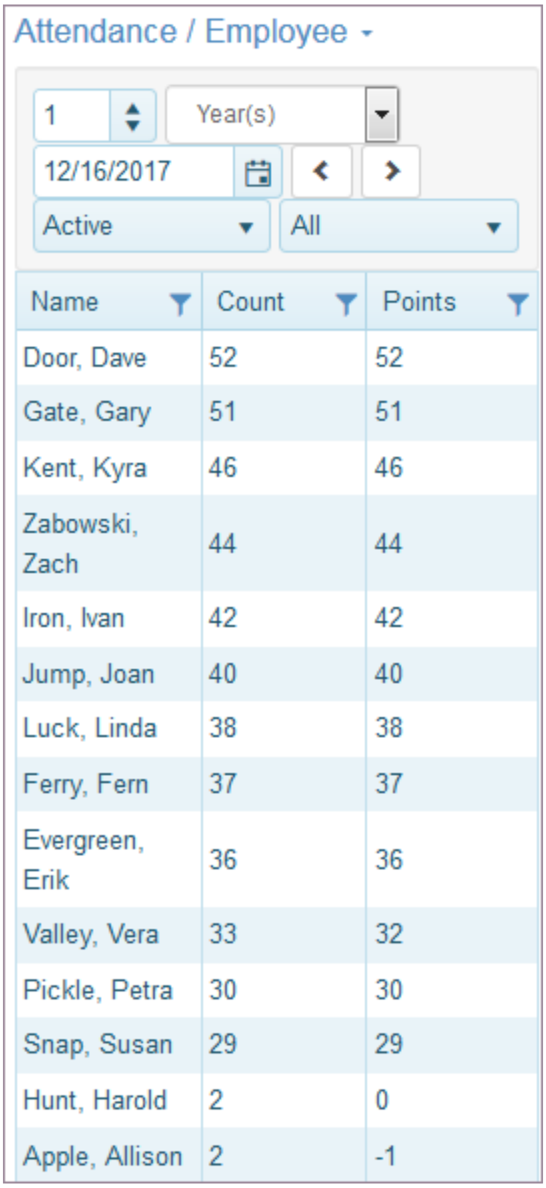
4. Change the information that displays in the Variance window. To do so, select the three dots after a column name.
   Example:
   

5. Select Columns and select the check boxes of the information you would like to display.
6. To filter contents, select the filter symbol, enter the information, and select Filter.
7. Select Schedule Only or Schedule and Leave.
8. Select Export to Excel to export the Variance window information.
9. Select Export to PDF to export the Variance window information.

12.3.4 Attendance/Employee

1. Select Time from the main menu.
2. Select Analyze > Attendance/Employee.
   Note: You must be logged in to the organization.

Example:

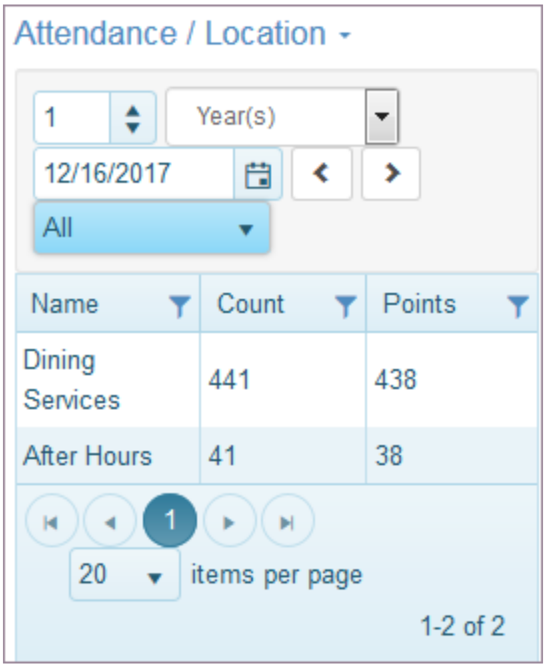


3. Select a time period. The default is Year(s). Other options are Range, Days(s), Week(s), Months(s), Quarter(s).
4. Select a date.
5. Select employee status: All, Active, Inactive.
6. Select timesheet status: All, ConfirmedOrOpen, Confirm, Open, Void.
7. Select an employee Name to display attendance details for that employee.

12.3.5 Attendance/Location

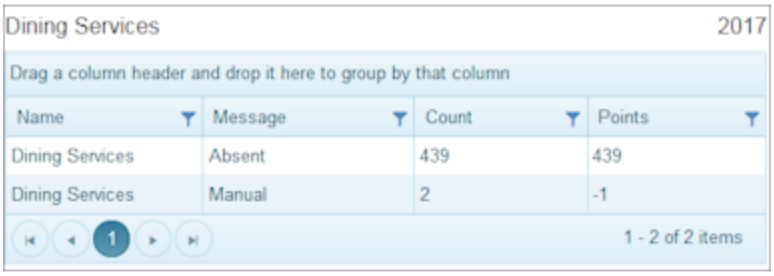
1. Select Time from the main menu.
2. Select Analyze > Attendance/Location.
   Note: You must be logged in to the organization.

Example:



3. Select a time period. The default is Year(s). Other options are Range, Days(s), Week(s), Months(s), Quarter(s).
4. Select a date.
5. Select timesheet status: All, ConfirmedOrOpen, Confirm, Open, Void.
6. Select a location Name to display attendance details for that location.

   Example:



12.3.6 Overtime

1. Select Time from the main menu.
2. Select Analyze > Overtime.

   Note: You must be logged in to one location.

Example:

Overtime Estimate

Name	Totals	12/11/2017	12/12/2017	12/13/2017	12/14/2017	12/15/2017	12/16/2017	12/17/2017
Apple, Allison								
Berry, Barbara	Absent 15.68 : Reg						Absent 6.68 : Reg	9.00 : Reg
Cloud, Casey	Absent 1.68 : Reg						Absent 1.68 : Reg	
Door, Dave								
Evergreen, Erik	9.00 : D0							9.00 : D0
Ferry, Fern	9.00 : D0							9.00 : D0
Gate, Gary	6.00 : D0							6.00 : D0
Hunt, Harold								
Iron, Ivan								
Jump, Joan								
Kent, Kyra	Absent 10.18 : D0						Absent 4.18 : D0	6.00 : D0
Luck, Linda	Absent 1.68 : D0						Absent 1.68 : D0	
Pickle, Petra								
Snap, Susan								
Valley, Vera								
Zabowski, Zach								

1 100 items per page 1 - 16 of 16 items

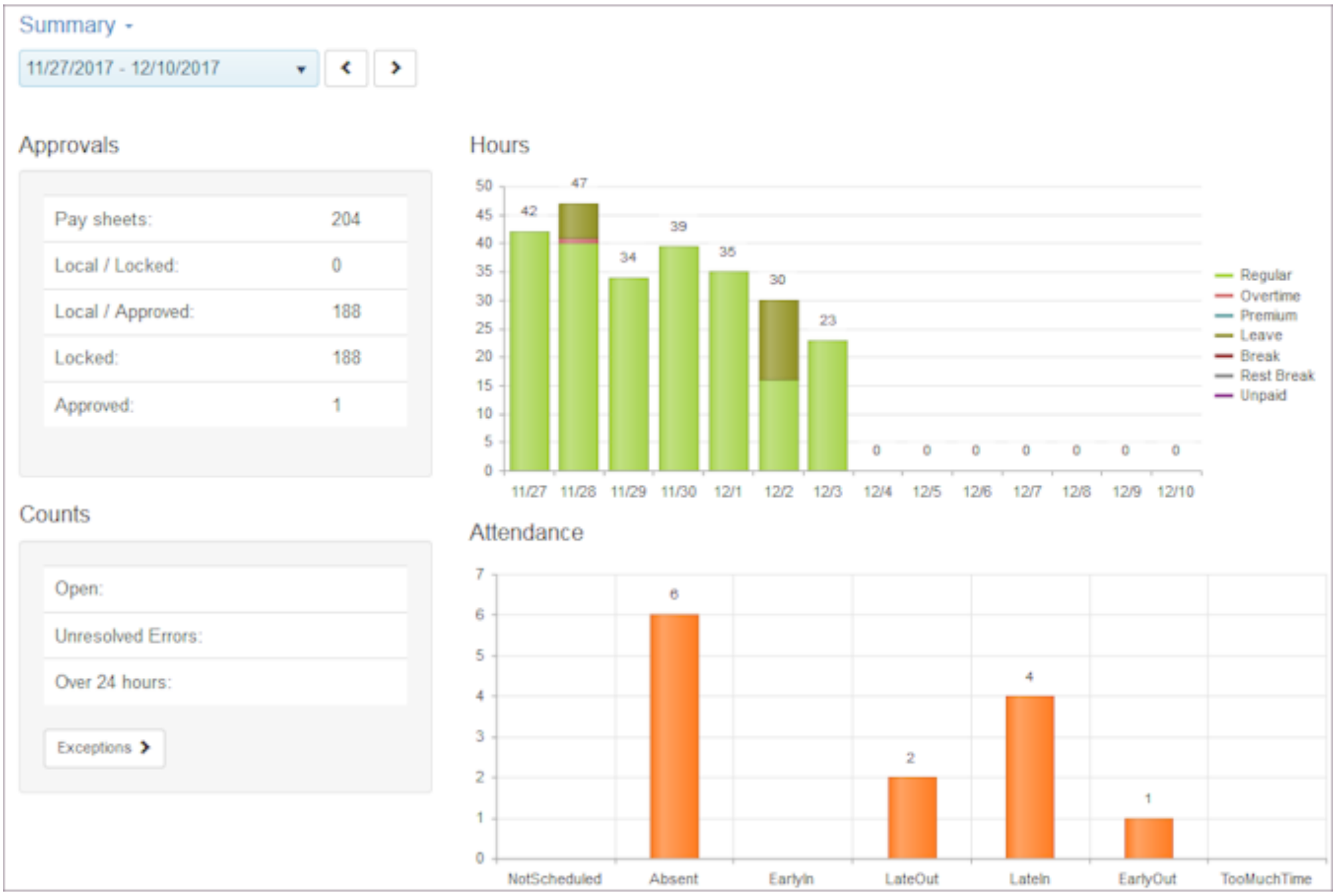
12.4 Pay Period

Use the Pay Period pages to view a summary of hours worked, attendance, approvals, and counts of errors. Display individual timesheets so you can make adjustments to them. Review and approve all time related information such as count, open, errors, voids, regular hours as well as overtime, premium hours, leave hours as well as unpaid time, and total time. Complete a pay period for export.

Export time-related data to an external payroll system. To set up a payroll export, contact ScheduleSource and open a support case.

12.4.1 Summary

1. Select Time from the main menu.
2. Select Pay Period > Summary.
   Example:

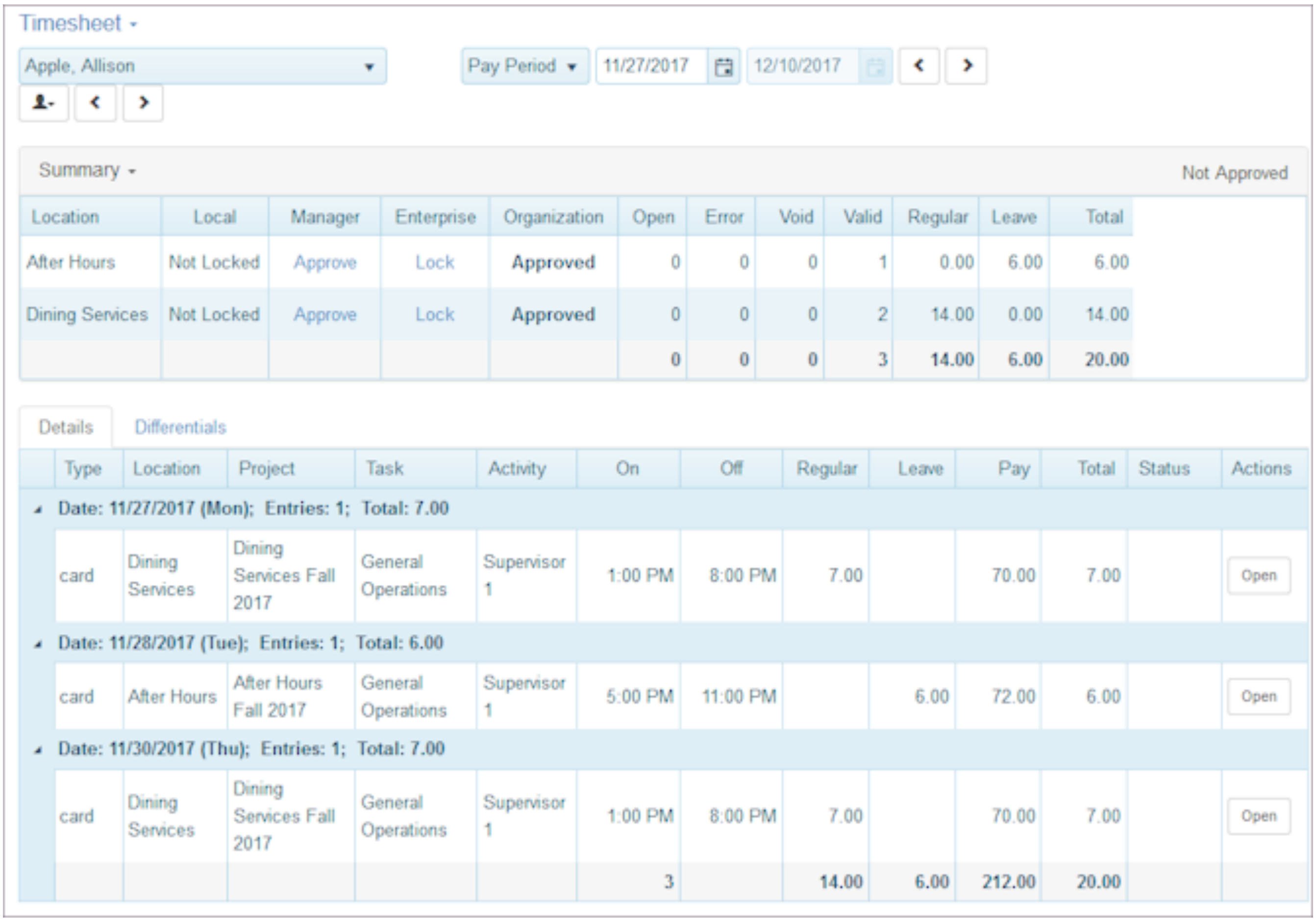


3. Select a pay period.
   Approvals, Hours, Counts, and Attendance information displays.

4. Use the left and right arrows to scroll back to previous pay periods or forward to subsequent pay periods.
   Important: Pay Periods are established and managed at the organization level. To do so, you must have Time role permissions enabled. See Setting Up Pay Periods.

12.4.2 Timesheets

1. Select Time from the main menu.
2. Select Pay Period > Timesheets.
   Example:


Timesheet
Apple, Allison
Pay Period 11/27/2017 12/10/2017

Summary — Not Approved

Location	Local	Manager	Enterprise	Organization	Open	Error	Void	Valid	Regular	Leave	Total
After Hours	Not Locked	Approve	Lock	**Approved**	0	0	0	1	0.00	6.00	6.00
Dining Services	Not Locked	Approve	Lock	**Approved**	0	0	0	2	14.00	0.00	14.00
					0	**0**	**0**	3	**14.00**	**6.00**	**20.00**

Details | Differentials

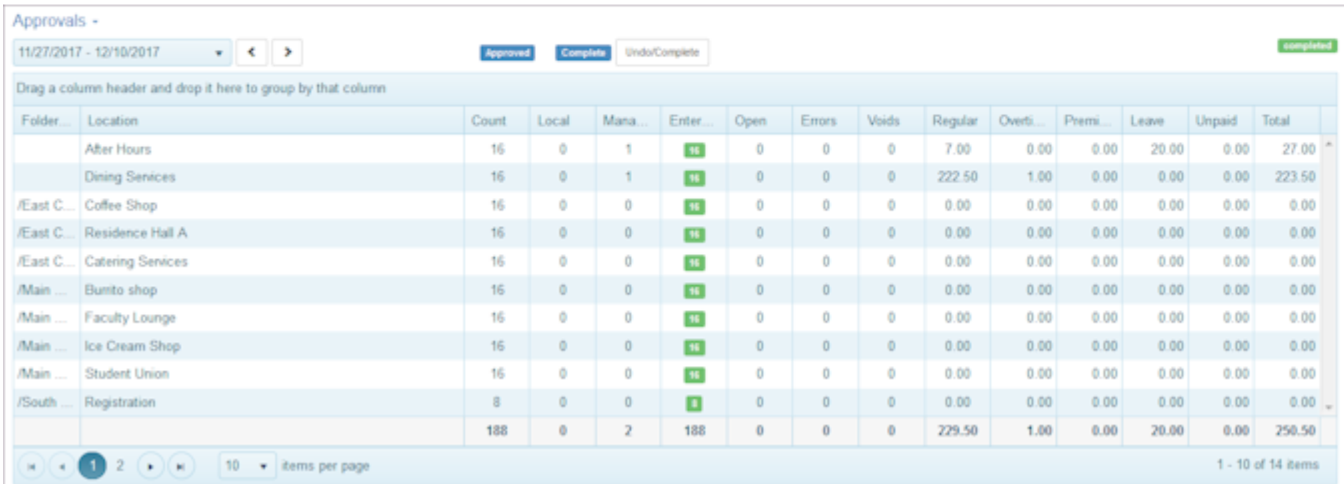
Type	Location	Project	Task	Activity	On	Off	Regular	Leave	Pay	Total	Status	Actions
Date: 11/27/2017 (Mon); Entries: 1; Total: 7.00												
card	Dining Services	Dining Services Fall 2017	General Operations	Supervisor 1	1:00 PM	8:00 PM	7.00		70.00	7.00		Open
Date: 11/28/2017 (Tue); Entries: 1; Total: 6.00												
card	After Hours	After Hours Fall 2017	General Operations	Supervisor 1	5:00 PM	11:00 PM		6.00	72.00	6.00		Open
Date: 11/30/2017 (Thu); Entries: 1; Total: 7.00												
card	Dining Services	Dining Services Fall 2017	General Operations	Supervisor 1	1:00 PM	8:00 PM	7.00		70.00	7.00		Open
					3		**14.00**	**6.00**	**212.00**	**20.00**		

3. Select the employee whose time sheet you would like to review. Use the drop-down list to select a specific employee, or use the arrows after the Timesheet text box to scroll forward and backward through the list of employees.
4. If you have not already locked and approved the time sheets, you can make changes to time entries and use the links under Summary to Lock and approve an individual employee time sheet.
5. If you have already locked, approved the pay period, these actions are no longer available. See Approvals.

12.4.3 Approvals

1. Select Time from the main menu.

2. Select Pay Period > Approvals.
   Example:



Approvals -

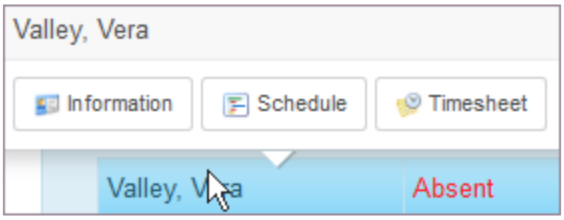
11/27/2017 - 12/10/2017 | Approved | Complete | Undo/Complete | completed

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

Folder...	Location	Count	Local	Mana...	Enter...	Open	Errors	Voids	Regular	Overti...	Premi...	Leave	Unpaid	Total
	After Hours	16	0	1	16	0	0	0	7.00	0.00	0.00	20.00	0.00	27.00
	Dining Services	16	0	1	16	0	0	0	222.50	1.00	0.00	0.00	0.00	223.50
/East C...	Coffee Shop	16	0	0	16	0	0	0	0.00	0.00	0.00	0.00	0.00	0.00
/East C...	Residence Hall A	16	0	0	16	0	0	0	0.00	0.00	0.00	0.00	0.00	0.00
/East C...	Catering Services	16	0	0	16	0	0	0	0.00	0.00	0.00	0.00	0.00	0.00
/Main ...	Burrito shop	16	0	0	16	0	0	0	0.00	0.00	0.00	0.00	0.00	0.00
/Main ...	Faculty Lounge	16	0	0	16	0	0	0	0.00	0.00	0.00	0.00	0.00	0.00
/Main ...	Ice Cream Shop	16	0	0	16	0	0	0	0.00	0.00	0.00	0.00	0.00	0.00
/Main ...	Student Union	16	0	0	16	0	0	0	0.00	0.00	0.00	0.00	0.00	0.00
/South ...	Registration	8	0	0	8	0	0	0	0.00	0.00	0.00	0.00	0.00	0.00
		188	0	2	188	0	0	0	229.50	1.00	0.00	20.00	0.00	250.50

1 2 | 10 items per page | 1 - 10 of 14 items

3. Select the location you would like to approve.
4. Select an employee name to display employee contact Information, employee's three-week Schedule, and employee's Timesheet.
   Example:



5. Lock, Unlock, and Approve timesheets using the buttons provided. Explanations:

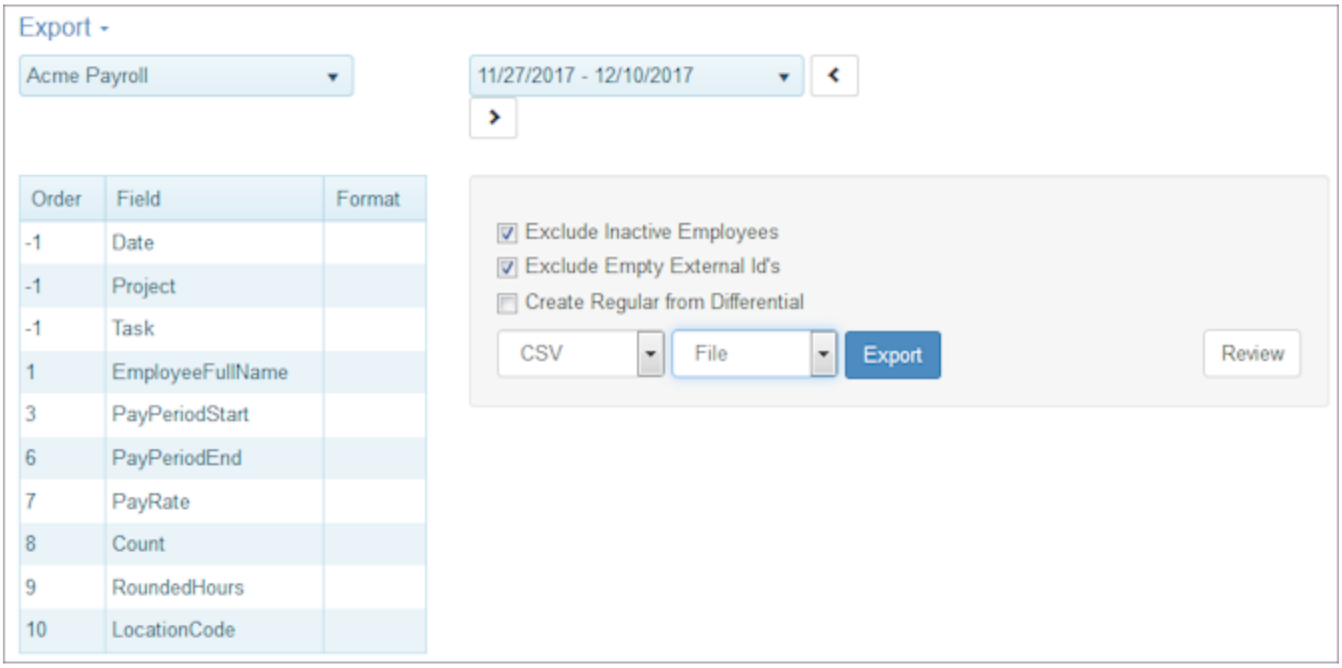
- Lock - lock timesheets. No time entries can be entered or edited.
- Unlock - unlock timesheets. Time entries can be entered or edited.
- Approve Pay Period - approve pay period so it can be completed. Approving also Locks the time sheets.

6. When a pay period is locked and approved, a Complete button displays. Select the Complete button to complete the pay period for export.
7. To filter contents, select the filter symbol, enter the information, and select Filter.
8. To view, lock, and approve an individual employee timesheet, see Timesheets.

12.4.4 Payroll Export

1. Select Time from the main menu.

2. Select Pay Period > Payroll Export.
   Example:



3. Select the Export that defines Order, Field, and Format.
   Important: Payroll Exports are established and managed at the organization level. To do so, you must have Time role permissions enabled. See Setting Up Payroll Exports.
4. Select the pay period you would like to export.
5. Select the criteria to include and exclude.
6. Select export format and file or page.
7. Select Review to examine the export.
8. Select Export.

12.5 Configuration

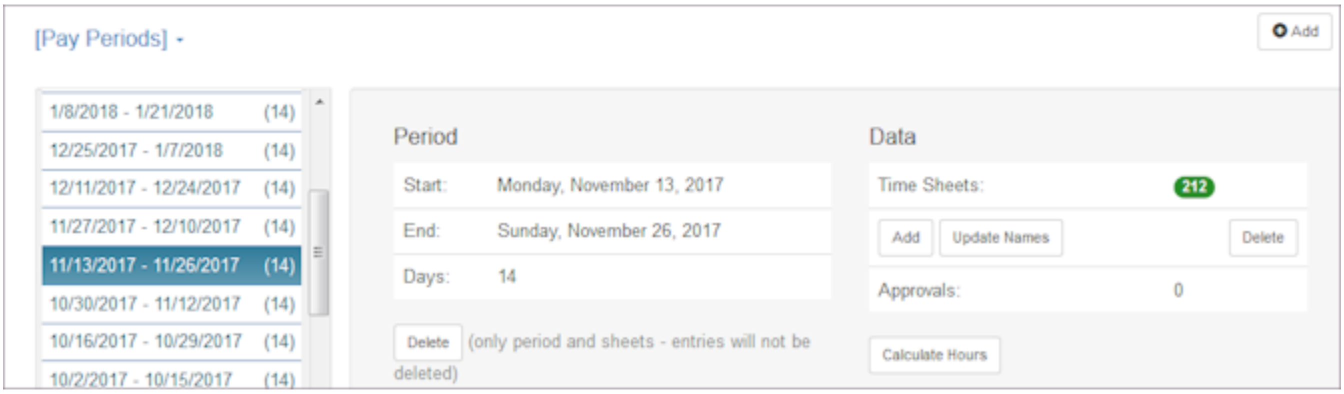
Use the Configuration pages to set up the framework you use in the Time section. A brief explanation of each of the Configuration pages follows.

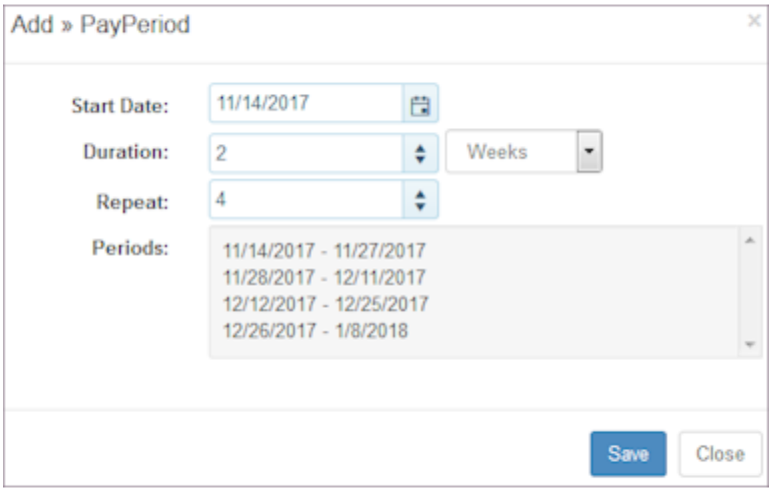
Important: Time is configured at the organization level. To do so, you must have Time role permissions enabled.

12.5.1 Setting Up Pay Periods

Use the Configuration section under Time to set up pay periods. You can set up one pay period and then repeat it multiple times. Pay periods provide the containers for viewing time-related information. All time data is stored in UTC.

To set up Pay Periods:

1. Select Time from the main menu.
2. Select Configuration > Pay Periods.
   Pay Periods window displays.
   Example:
   

3. Select Add Pay Periods > Add or Add to add a new pay period.
4. Select the Start Date.
5. Select the type of unit: Days, Weeks or Months.
6. Select the Duration units in each Pay Period.
7. Select the Repeat.
   Note: Allows you to add multiple pay periods at one time.
8. Select Save.
   Example:
   

   Note: If a pay period is incorrect, you can delete it and add the correct dates for the pay period. This does not affect the actual time data. It only affects the period in which you view the data.

12.5.2 Setting Up Projects / Tasks

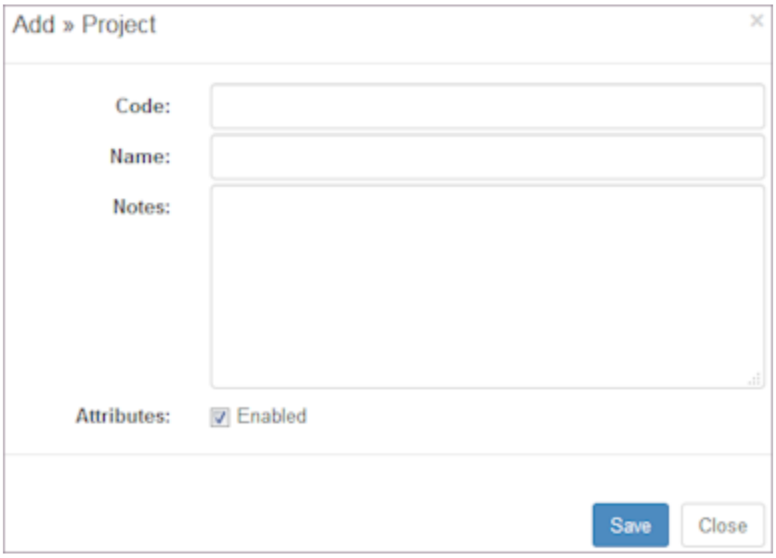
Use the Configuration pages to set up Projects and Tasks. Once you establish them, enable them and deploy them to locations so they can be used for employees to assign time to.

To set up Projects / Tasks:

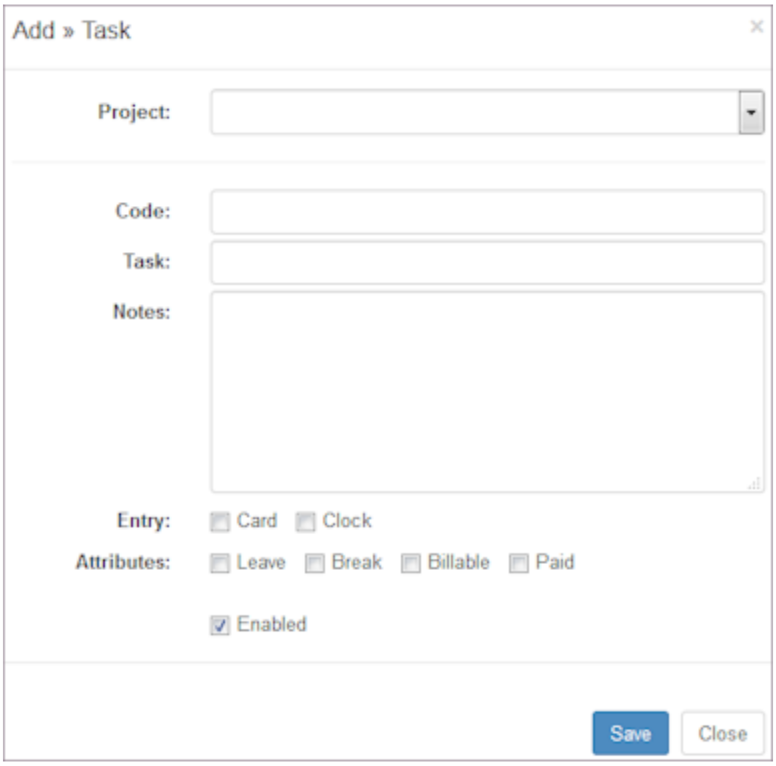
1. Select Time from the main menu.
2. Select Configuration > Projects / Tasks.
   Projects / Tasks window displays.
   Example:

Project		Task		Allow Entry		Attributes					
Name	Code	Name	Code	Card	Clock	Leave	Break	Billable	Paid	OT Exempt	Enabled
Recruitment 2016	R001	Spring 2016	R001a	Yes	Yes	Yes			Yes		Yes
Recruitment 2016	R001	Summer 2016	R001b	Yes	Yes	Yes			Yes		Yes
Dining Services Spring 2017	DS004	Exams	DS004b	Yes	Yes				Yes		Yes
Dining Services Spring 2017	DS004	General Operations	DS004a	Yes	Yes				Yes		Yes
Dining Services Spring 2017	DS004	Inventory	DS004c	Yes	Yes				Yes		Yes

3. On the Projects / Tasks window, select Add Project.
   Add >> Project window displays.
   Example:

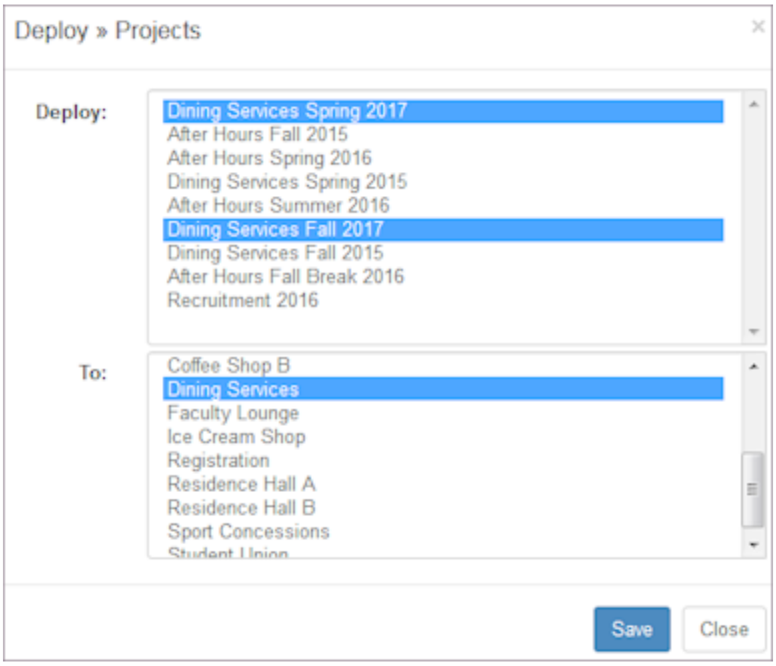


4. Type a project Code.
   Note: It is important for this code to match your payroll code so that exported data can be loaded into your payroll system.
5. Type a project Name.
6. Add notes as desired.

7. Select the Attributes check box Enabled.
   Note: If not enabled, the project does not display in the list of projects for employee assignment. On the Projects / Tasks window, it displays in the project list as crossed-off, with a line through it.
8. Select Save.
9. On the Projects / Tasks window, select Add Task.
   Add >> Task window displays.
   Example:
   

10. Select the Project name.
    Note: Every project must have at least one task.
11. Type Code and Task name.
12. Select check boxes for time keeping Entry: Clock and/or Card.
13. Select the check boxes of Attributes that apply to time accrual: Leave, Billable, Paid, and Break.
14. Select check box Enabled to make this task active.
15. Select Save.
    Note: You cannot edit a task code. You must delete it and start over to make a change. However, you can edit the task name, notes, and attributes.
16. Select Deploy.
17. Select Locations and Projects this project and tasks are deployed to.
18. Select Deploy.
    Deploy >> Projects window.
19. Select the name of the projects you would like to Deploy.

20. Select the name of the locations you would like to deploy To.
21. Select Save.
    Example:



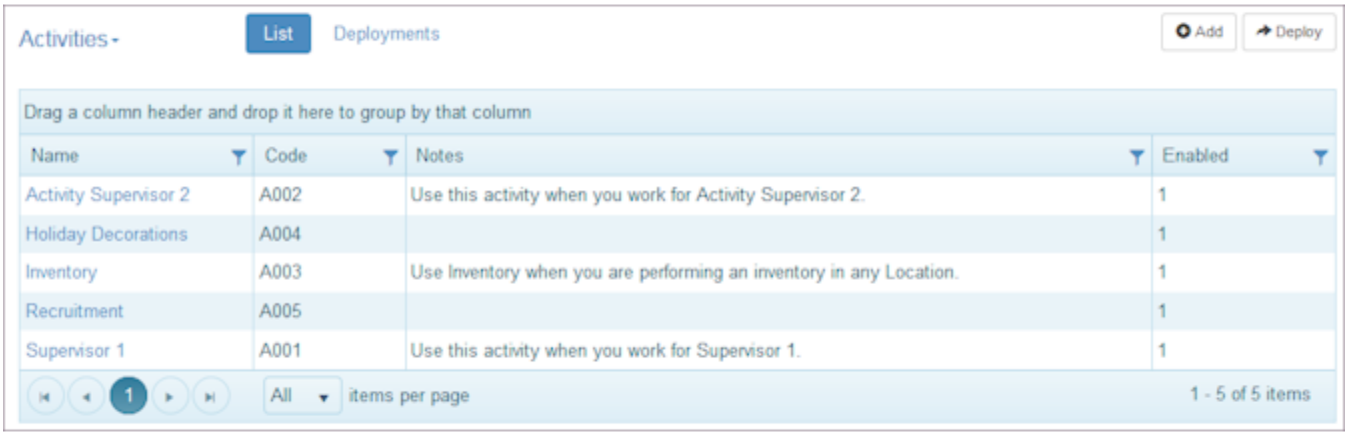
22. To remove a project and the related tasks from being used at a location, select Deployments.
23. Select Remove.
    Window prompts: Remove selected?
24. To remove the project from the deployment list, select OK.
    Note: This does not delete the project, but it does remove it from use at that location.

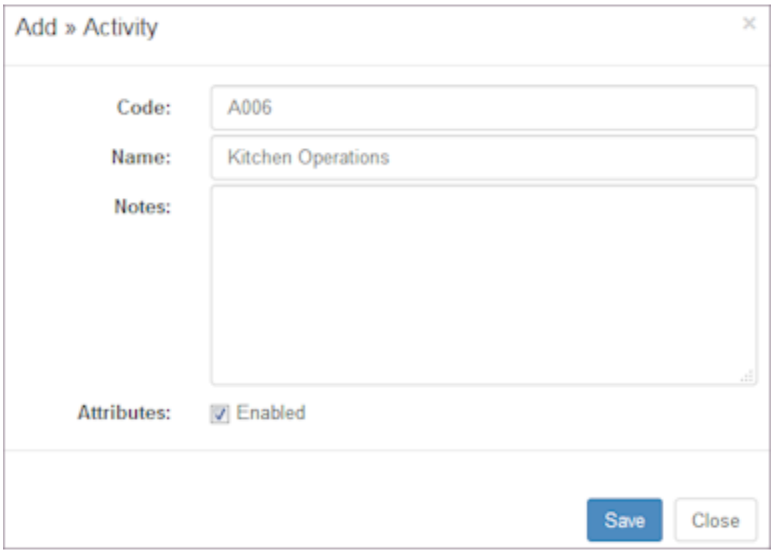
12.5.3 Setting Up Activities

Use the Configuration pages to set up Activities. Once you establish them, enable them and deploy them to locations so they can be used.

Activities cross all projects/tasks and can be used for additional buckets you want to view time by, however, they are not needed for payroll purposes. For example, you may want to see the amount of time spent working at a specific station or activity within a department. The employee then clocks on to the specific project/task and the activity they are working on.

To set up Activities:

1. Select Time from the main menu.
2. Select Configuration > Activities.
   Activities window displays.
   Example:
   

3. On the Activities window, select Add.
   Add >> Activity window displays.
4. Type an activity Code.
5. Type an activity Name.
6. Add notes as desired.
7. Select the Attributes check box Enabled.
   Note: If not enabled, the activity does not display in the list of activities for employee assignment.
8. Select Save.
   Example:
   

9. To deploy the activity to locations, select Deploy.
10. Select Deploy this activity.
11. Select the name of the locations you would like to deploy To.
12. Select Save.

13. To remove an activity from being used at a location, select Deployments.
14. Select the check box next to the location and activity you would like to remove.
    Select Remove.
    Window prompts: Remove selected?
15. To remove the activity from the deployment list, select OK.
    Note: This does not delete the activity, but it does remove it from use at that location.

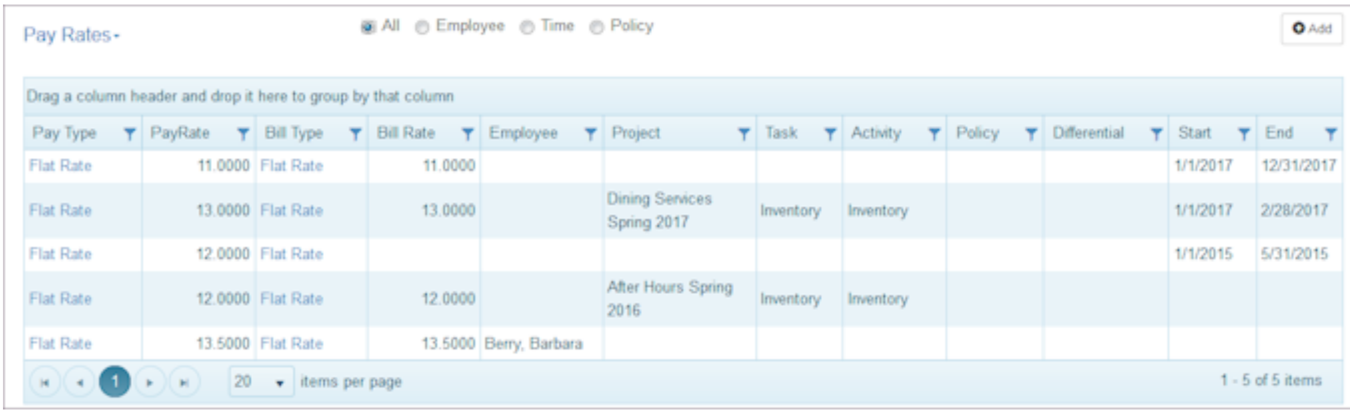
12.5.4 Setting Up Pay Rates

Use the Configuration pages to set up Pay Rates. Once you establish pay rates, they provide the hourly rate of pay for employee time associated with the project, task, or activity you designate. This pay rate applies to all employees, however, you can set up a pay rate for one employee in this window or assign the employee a specific rate of pay in the Employees > Deployments > Locations.

Note: If your organization is using the Policies section, you can deploy the pay rate to a policy, and then can also designate a pay differential.

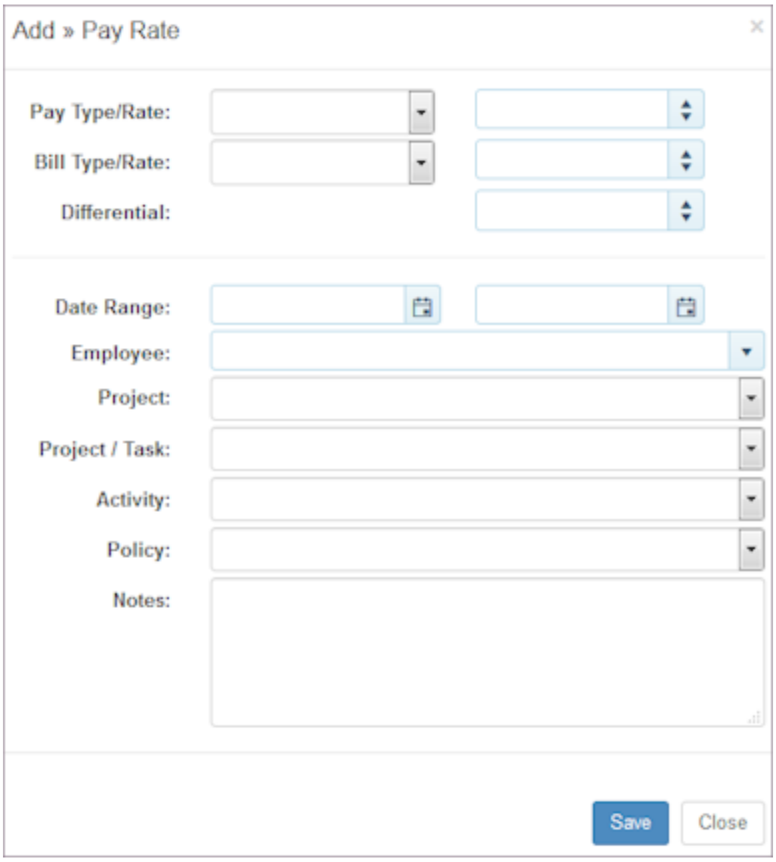
To set up Pay Rates:

1. Select Time from the main menu.
2. Select Configuration > Pay Rates.
   Pay Rates window displays.
   Example:



Pay Type	PayRate	Bill Type	Bill Rate	Employee	Project	Task	Activity	Policy	Differential	Start	End
Flat Rate	11.0000	Flat Rate	11.0000							1/1/2017	12/31/2017
Flat Rate	13.0000	Flat Rate	13.0000		Dining Services Spring 2017	Inventory	Inventory			1/1/2017	2/28/2017
Flat Rate	12.0000	Flat Rate								1/1/2015	5/31/2015
Flat Rate	12.0000	Flat Rate	12.0000		After Hours Spring 2016	Inventory	Inventory				
Flat Rate	13.5000	Flat Rate	13.5000	Berry, Barbara							

3. Select the tab for the type of Pay Rate you are interested in: All, Employee, Time, or Policy (if used).
4. On the Pay Rates window, select Add.
   Add >> Pay Rate window displays.
   Example:



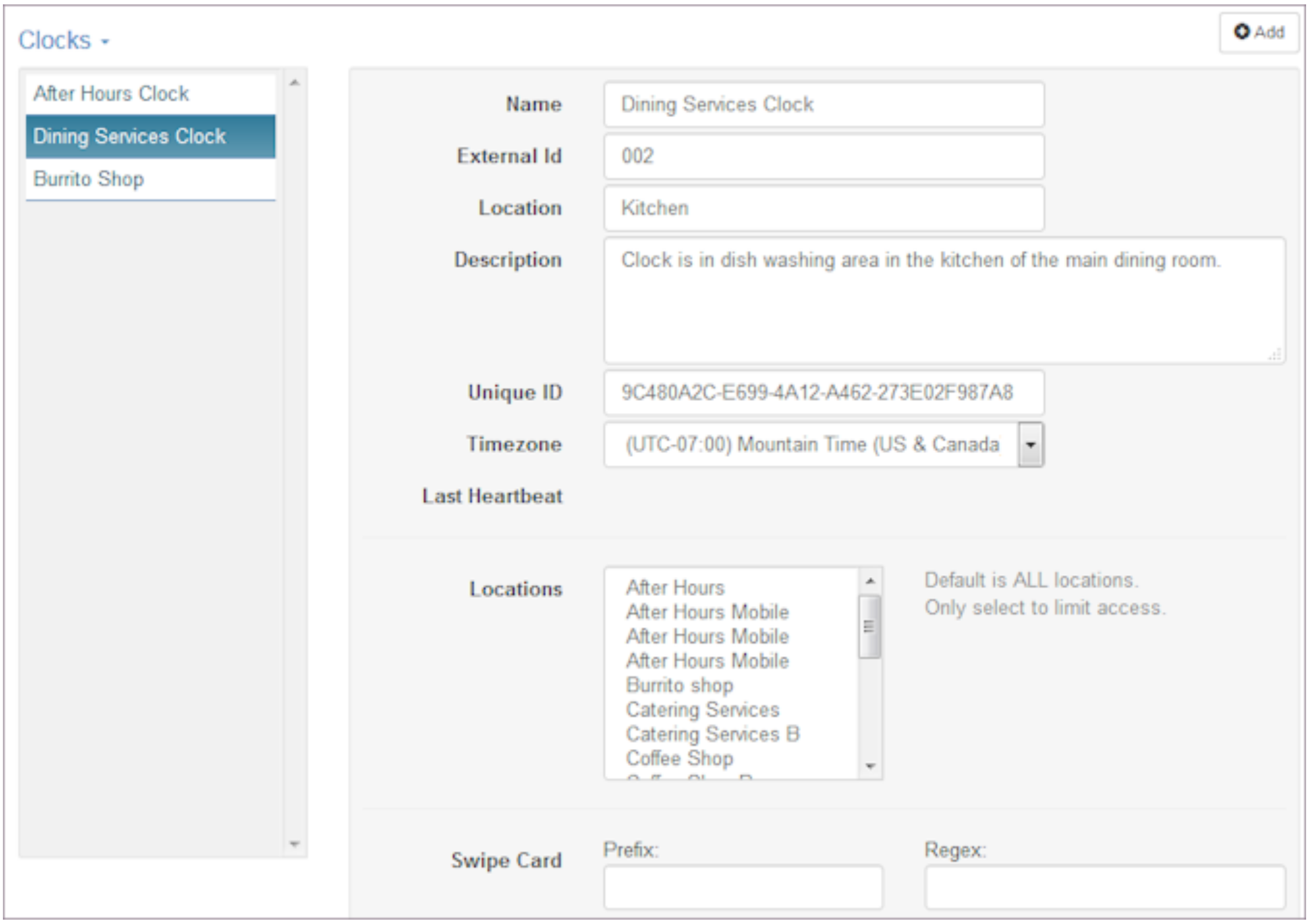
5. Select the Pay Type/Rate using the drop-down list: Flat Rate, Add To Rate, Multiply Rate.
6. Select an hourly dollar amount.

7. Select the Bill Type/Rate using the drop-down list: Flat Rate, Add To Rate, Multiply Rate, and select an hourly dollar amount.
   Note: This Bill Type/Rate is often used when you are directly billing clients.
8. Select a Differential amount (if used).
9. Select a Date Range.
10. If this pay rate if for a specific employee, select the Employee.
11. Select the Project.
12. Select the Project / Task.
13. Select the Activity.
14. Select the Policy (if used).
15. Enter Notes as desired.
16. Select Save.
    New pay rate displays in Pay Rates table with the information you selected.

12.5.5 Setting Up Clocks

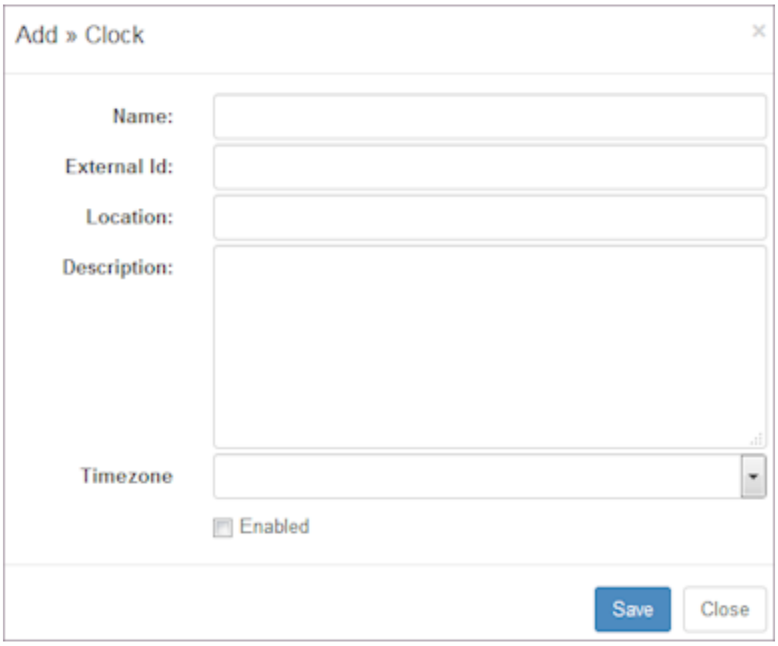
Use the Configuration pages to set up clocks. Employees use physical or virtual machines to indicate when they start and stop working their shifts. To set up clocks, open a Support Ticket and contact ScheduleSource.

1. Select Time from the main menu.
2. Select Configuration > Clocks.
3. Select a Clock using the Menu button.
   Clocks window displays.
   Example:



4. To add a clock, select Add Clock.
   Add >> Clock window displays.

Example:



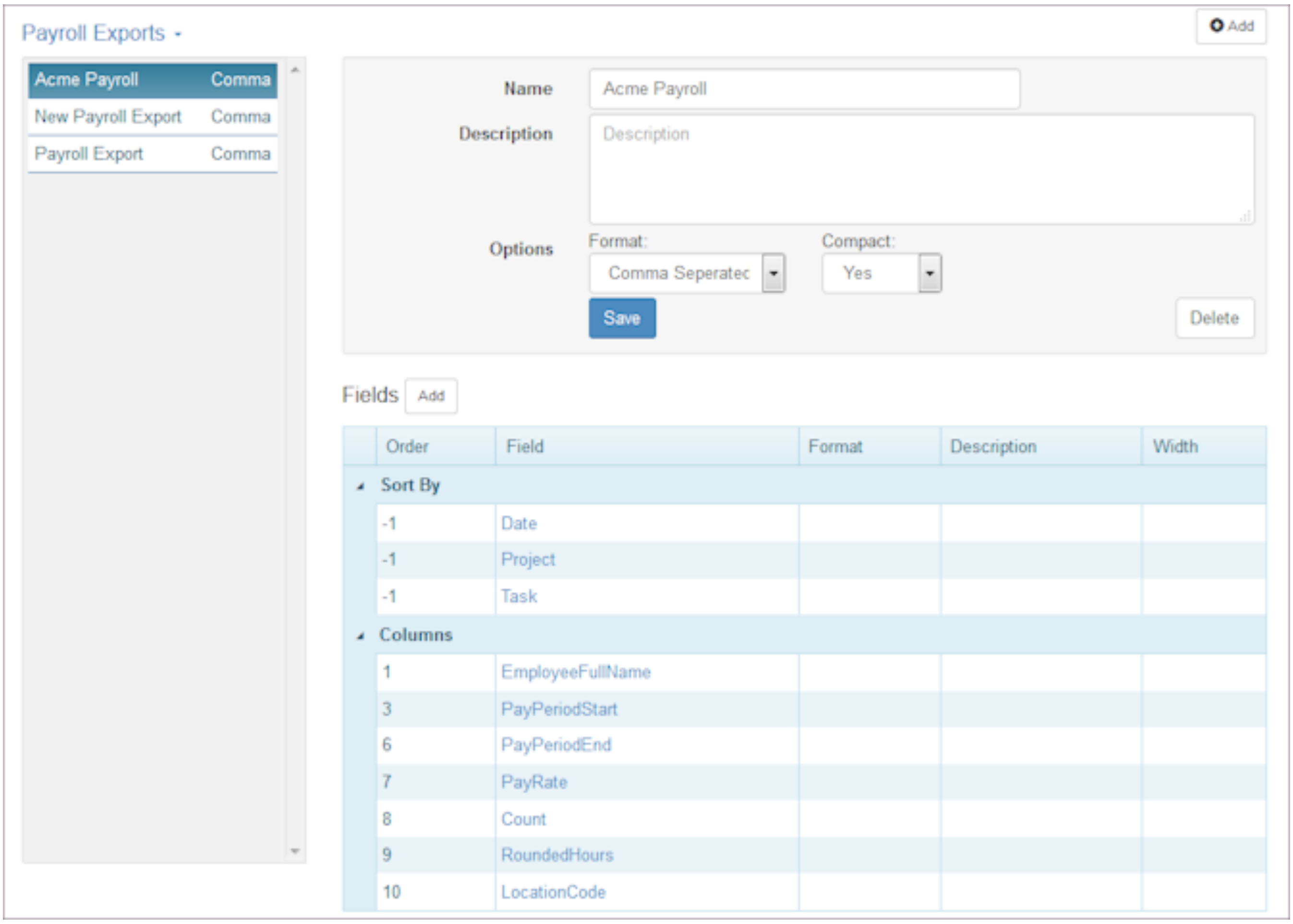
5. Type a Name.
6. Type an External Id.
7. Type a Location.
8. Type a Description.
9. Select a TimeZone using the drop-down list.
10. Select the check box for Enabled to indicate whether the clock can be used.
11. Select Save.
    New clock displays in Clocks table with the information you selected.

12.5.6 Setting Up Payroll Exports

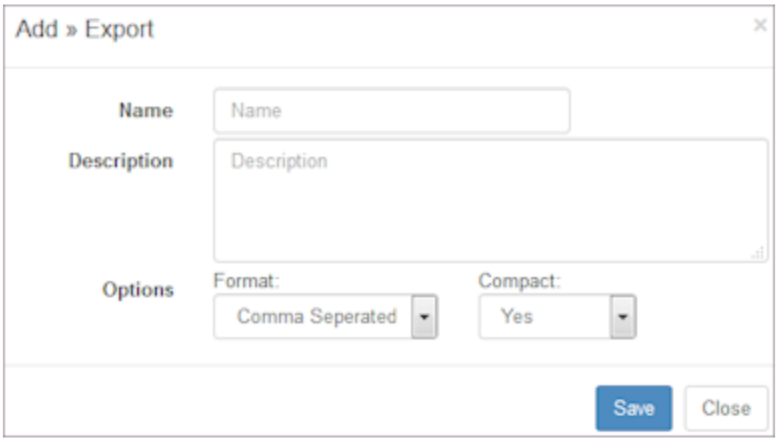
Use the Configuration pages to set up Payroll Exports. You can identify the name, format, whether or not it is compact, and enter a description. To Payroll Exports, open a Support Ticket and contact ScheduleSource.

To set up Payroll Exports:

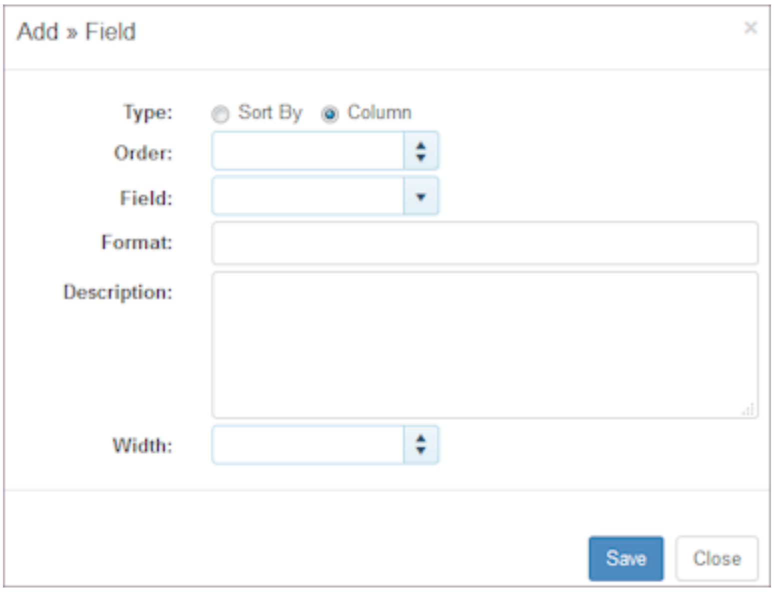
1. Select Time from the main menu.
2. Select Configuration > Payroll Exports.
3. Select a Payroll Export using the Menu button.
   Payroll Export window displays.
   Example:



4. To add a Payroll Export, select Add.
   Add >> Export window displays.
   Example:



5. Type the Name.

6. Type a Description if desired.
7. Select the Format: Comma Separated is default.
8. Select whether or not it is Compact: Yes or No
9. Select Save.
   New record displays in Payroll Exports window.
10. To specify Payroll Export settings, select the new export name.
    Payroll Export - Setup window displays.
11. Make any desired changes to the Name, Options, and Fields.
12. Select Fields Add.
    Add >> Field window displays.
    Example:
    

13. Select Type.
14. Select Order.
15. Use the drop-down list to select a new data Field from the available list. See Data Sources for more information.
16. Select the format. See References for Formatting Dates and Numbers.
17. Type a Description if desired.
18. Select Width.
19. Select Save.

13. Credentials

13.1 Credentials

Use the Credentials pages to establish and view settings, assignments, deployments and reports that summarize credential status and non-compliant shifts. Credential information can be added in Employee information and displays in the Employee portal in Settings. Use Credentials to do the following:

- Establish a qualification, training class, or certification and require it for a station.
- Assign the qualification, training class, or certification to employees who possess the appropriate qualification, training, and certification.
- Track the status of the qualification, training class, or certification and monitor effective dates.
- Maintain information for each type of qualification, training, and certification.
- Import and export credential information from and to external sources.
- Set enforcement levels and effective schedule range checks on a location-by-location basis.
- Run schedules using Auto Fill. If credentials are required, only employees who possess the required credentials are automatically assigned to shifts.
- Clear non-compliant shifts using the tool provided.

Important: Credentials are established and managed at the organization level. To do so, you must have Credential role permissions enabled.

Example:

Credentials

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

Type	Name	Code	ExternalId
Qualification	Cash Register	CR	Cash_Register
Qualification	Supervisor	Supv	
Training Class	CPR Training	CPR123	CPR-XXX
Training Class	Fire Safety Training	FireSafety_Train	FireSafety_Train
Training Class	Sanitation	Sanitation	Sani
Training Class	Washing Fruit and Vegetables	Veg_Fruit101	Veg_Fruit101
Certification	Bartender Certification	BC_123	
Certification	Fire Safety	FS_123	FireSafety

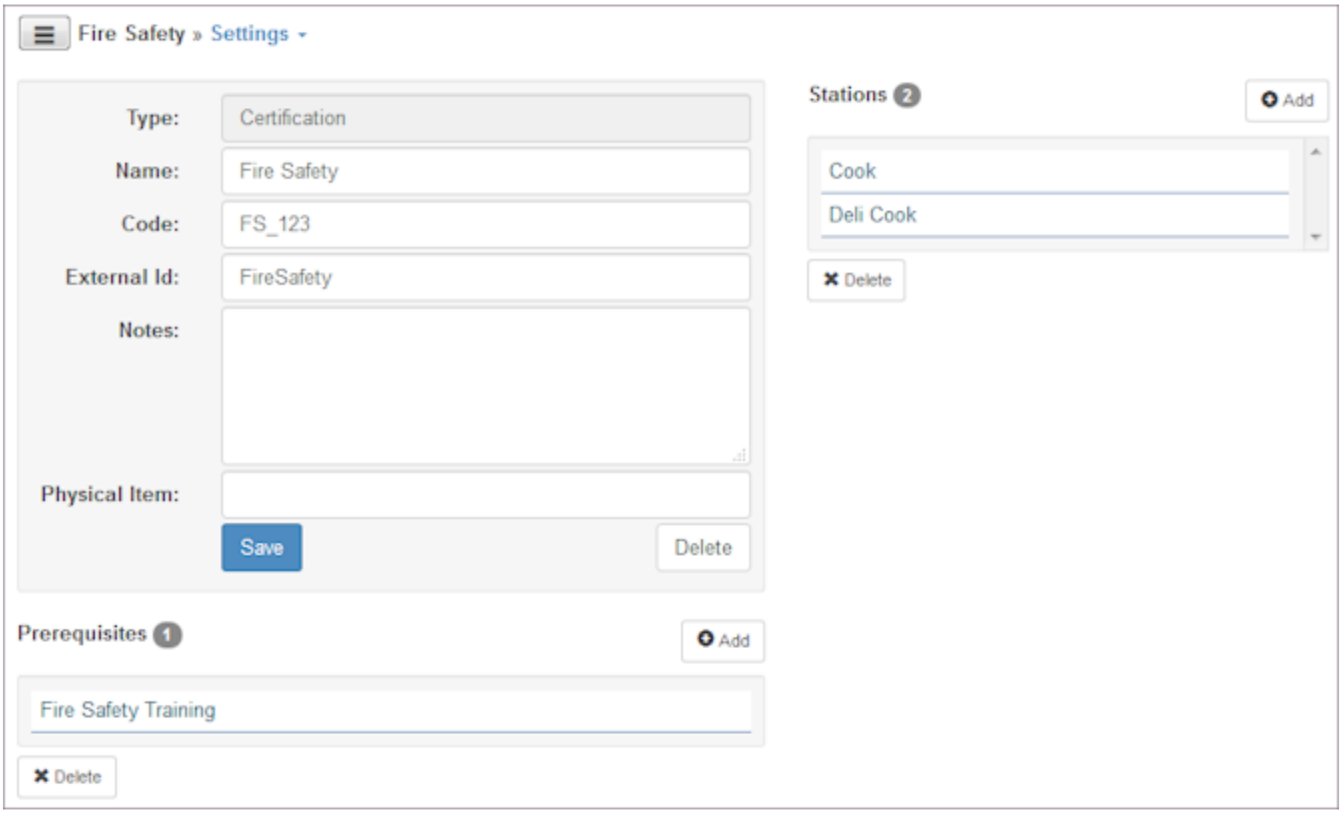
Refer to the following How To's.

- Settings
- Assignments
- Deployments
- Reports

13.2 Settings

Use the Settings page to edit a credential and add additional information such as prerequisites and required stations. Use the Menu Button to locate the credential you would like to work with. Search by credential type or credential name.

Example:



13.2.1 Adding a Credential

1. Select Credentials from the main menu.
2. Select Credentials > Add.
   Add >> Credentials window displays.
3. Select the Type of credential you would like to add.
4. Type the Code.
5. Type the Name.
6. Type the External Id.
7. Select Save.
   Credential and associated information display in Credentials window.

13.2.2 Editing a credential

1. Select Credentials from the main menu.
2. Select Settings.
3. Select the credential you would like to work with.
4. Make desired changes.
5. Select Save.

13.2.3 Adding a prerequisite to a credential

1. Select Credentials from the main menu.
2. Select Settings.
3. Select Add adjacent to Prerequisites.
   Add >> Prerequisites window displays.
4. Select the credential you would like to add this prerequisite to.
5. Select Save.

13.2.4 Adding a credential as a requirement at a station

1. Select Credentials from the main menu.
2. Select Settings.
3. Select Add adjacent to Stations.
   Add >> Stations window displays.
4. Select the station you would like to add this requirement to.
5. Select Save.

13.3 Assignments

Use the Assignments page to review credential assignments. Use the Menu Button to locate the credential you would like to view. Search by credential type or credential name.

Example:

Name	Status	Due	Completed	Start	End
Apple, Allison	valid	12/31/2014	12/5/2014	12/5/2014	1/31/2018
Berry, Barbara	valid	12/31/2014	12/5/2014	12/5/2014	1/31/2018
Cloud, Casey	valid	12/31/2014	12/5/2014	12/5/2014	1/31/2018
Door, Dave	valid	12/31/2014	12/5/2014	12/5/2014	1/31/2018
Evergreen, Erik	valid	12/31/2014	12/5/2014	12/5/2014	1/31/2018
Ferry, Fern	valid	12/31/2014	12/5/2014	12/5/2014	1/31/2018
Gate, Gary	valid	12/31/2014	12/5/2014	12/5/2014	1/31/2018
Hunt, Harold	valid	12/31/2014	12/5/2014	12/5/2014	1/31/2018
Iron, Ivan	valid	12/31/2014	12/5/2014	12/5/2014	1/31/2018
Jump, Joan	valid	12/31/2014	12/5/2014	12/5/2014	1/31/2018
Kent, Kyra	valid	12/31/2014	12/5/2014	12/5/2014	1/31/2018
Luck, Linda	valid	12/31/2014	12/5/2014	12/5/2014	1/31/2018
Pickle, Petra	valid	12/31/2014	12/5/2014	12/5/2014	1/31/2018
Snap, Susan	valid	12/31/2014	12/5/2014	12/5/2014	1/31/2018
Valley, Vera	valid	12/31/2014	12/5/2014	12/5/2014	1/31/2018
Zabowski, Zach	valid	12/31/2014	12/5/2014	12/5/2014	1/31/2018

13.3.1 Adding an Assignment

1. Select Credentials from the main menu.
2. Select a Credential from the list.
3. Select Assignments.
4. Select the Add button.
5. Select one or more employees, select status, and enter any other optional information.
6. Select Save.

13.3.2 Deleting an Assignment

1. Select Credentials from the main menu.
2. Select Assignments.
3. Select the assignment you would like to delete. The entire row in the grid should be highlighted.
4. Select Delete.
   Window displays prompt: Delete Selected?
5. Select OK.

13.4 Deployments

Use the Deployments page to view an employee's credentials or the employee credentials for a station. Use the drop-down list to locate an employee or station and display related credentials.

13.4.1 Example Employee Deployment

» Employee Credentials: Zabowski, Zach

Name	Status	Due	Completed	Start	End	Notes
Busperson Training	Complete	10/20/2017	10/20/2017	10/16/2017	10/20/2017	
Cash Register	Complete	1/6/2015	1/4/2015	1/4/2015	1/5/2018	Qualified
Fire Safety	Complete	12/31/2014	12/5/2014	12/5/2014	1/31/2018	
Fire Safety Training	Complete	12/31/2014	12/5/2014	12/5/2014	1/31/2018	
Washing Fruit and Vegetables	Complete	1/2/2015	12/31/2014	12/23/2014	1/31/2018	

13.4.2 Example Station Deployment

» Employee Credentials: Station

Bus

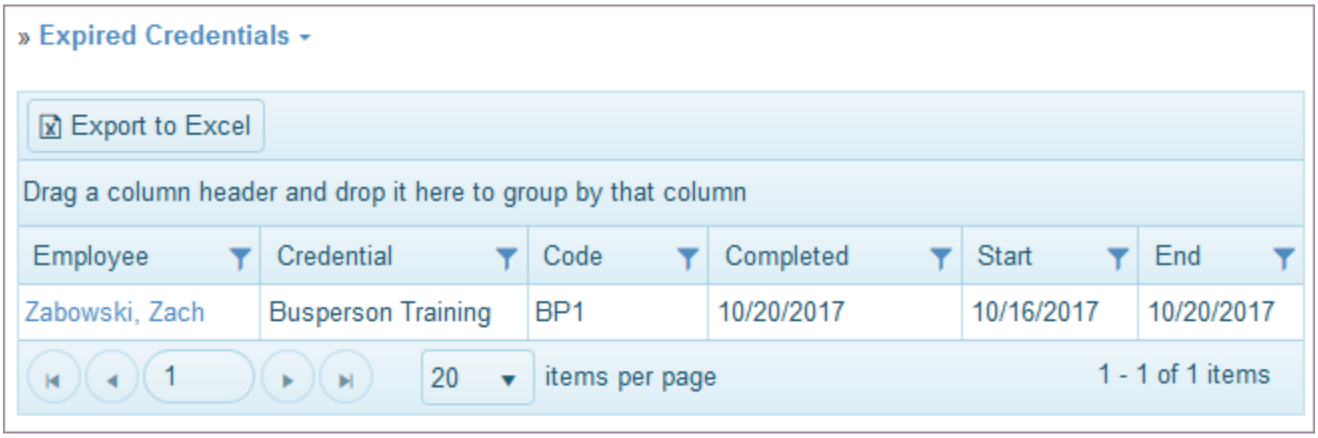
Drag a column header and drop it here to group by that column

Name ↑	Code	Employee	Status	Due	Completed	Start	End	Notes
Busperson Training	BP1	Gate, Gary	Complete	10/20/2017		10/16/2017		
Busperson Training	BP1	Hunt, Harold	Complete	10/20/2017		10/16/2017		
Busperson Training	BP1	Iron, Ivan	Complete	10/20/2017		10/16/2017		
Busperson Training	BP1	Kent, Kyra	Complete	10/20/2017		10/16/2017		
Busperson Training	BP1	Luck, Linda	Complete	10/20/2017		10/16/2017		
Busperson Training	BP1	Zabowski, Zach	Complete	10/20/2017		10/16/2017		

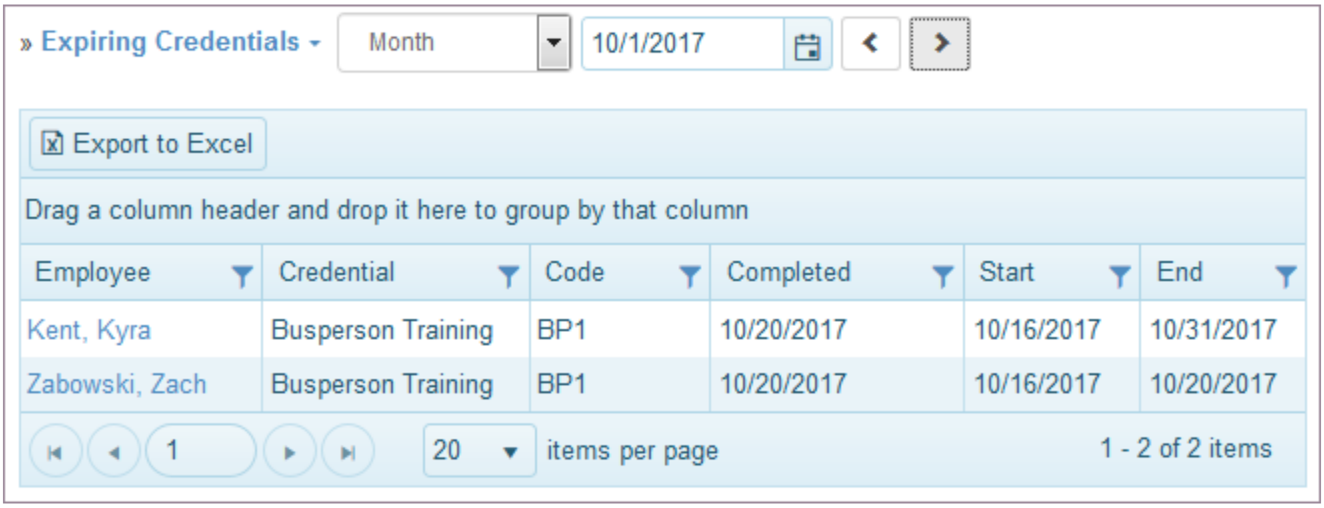
13.5 Reports

Use the Reports page to view credential reports.

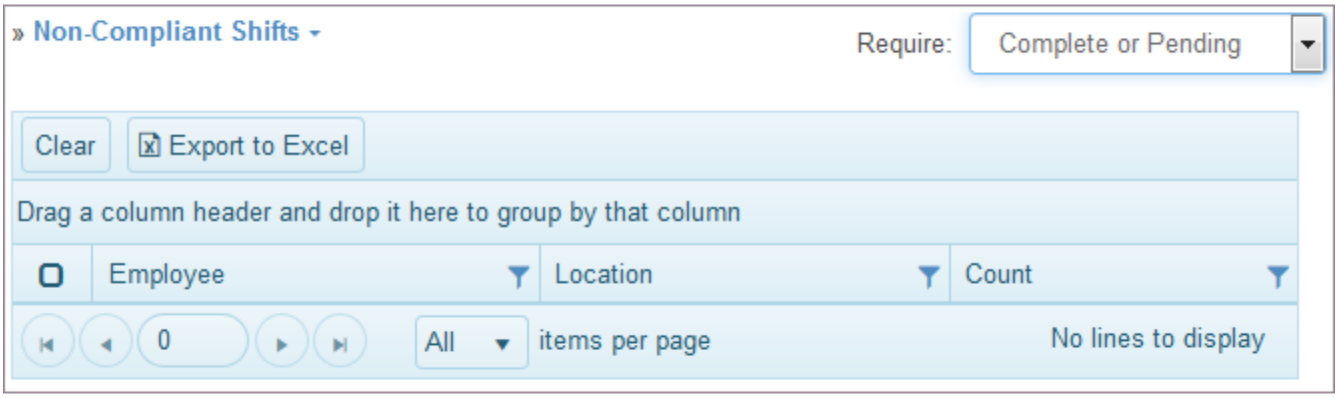
13.5.1 Example Expired Credentials



13.5.2 Example Expiring Credentials



13.5.3 Example Non-Compliant Shifts

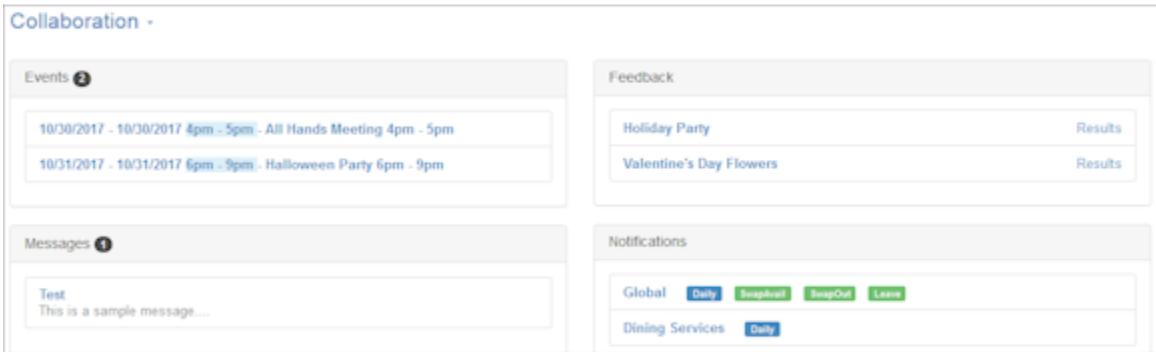


14. Collaboration

14.1 Collaboration

Use the Collaboration pages to view a summary of Events, Messages, Notifications, and Feedback. In addition, the Collaboration pages allow you to post events to an organizational calendar, create and distribute messages and alerts, set up email notifications, and build a survey to gather feedback. If you are an administrator, you can set up notifications for employees and managers and monitor events in a specified time frame.

14.1.1 Screenshot



14.1.2 How To's

- Events
- Messages and Alerts
- Notifications
- Feedback
- Admin

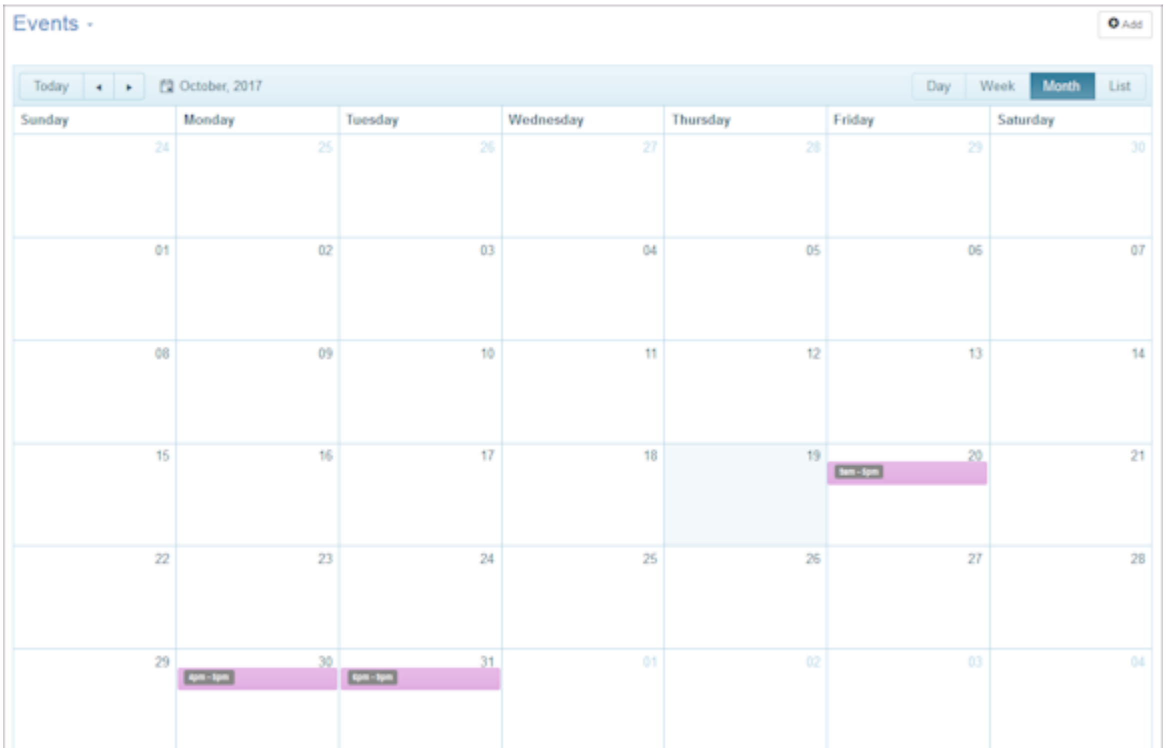
14.2 Events

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

14.2.1 Reviewing Events

1. Select Collaboration from the main menu.
2. Select the Events tab.
   Events Calendar displays.
3. To view the information in a list view, select the List tab.
4. Select Month, Week, or Day.
5. Use the arrow buttons to scroll backwards and forwards.

Example:

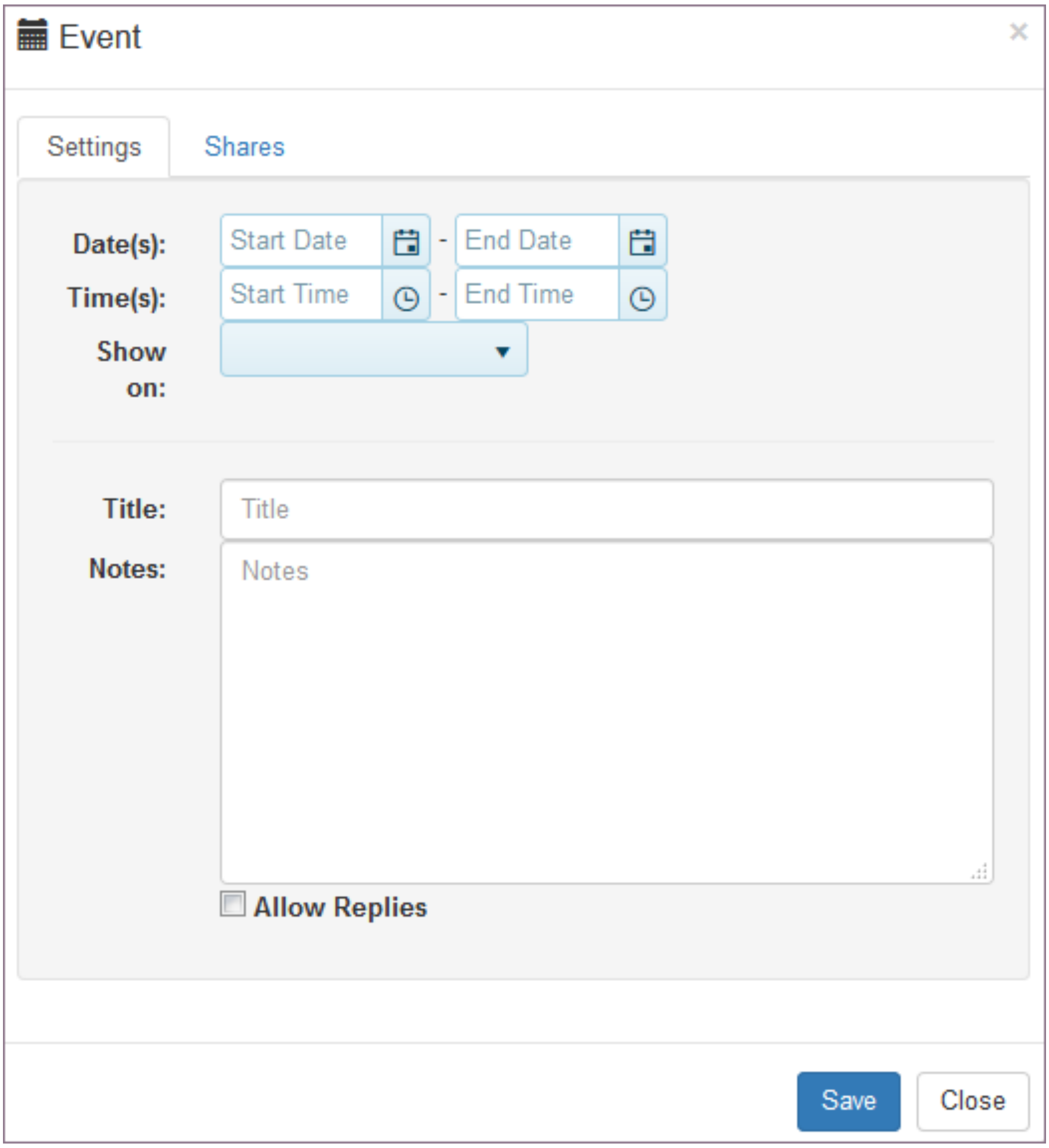


14.2.2 Adding an Event

1. Select Collaboration from the main menu.

2. Select the Events tab.
   Events Calendar displays.
3. Select Add or Events > Add.
   Event window displays. Settings tab is active.
4. Select Dates and Times for the Event.
5. Select Show on: using the drop-down menu, i.e., All dates, days, calendar days.
6. Type a Title for the Event.
7. Type Notes. They display when a cursor hovers over the Event name on the calendar.
8. Select Save. This places the event on ONLY YOUR calendar.
9. To place the Event on individual employee, manager, folder, or location calendars, select the Shares tab.
   Shares window for the Event displays.
10. Select By: Folder, Individual, or Location.
    Note: If you select a Location, the message is delivered to everyone in that Location. If you select Individuals, you can choose the employees and users to share the event with.
11. Select With: Any, Employee, or Manager.
12. Select List.
    The window refreshes and displays a list of names depending on whether you selected Individuals or Location.
13. Select names to share this event with and select Add.
    Names display in Shared window.
14. Use the Remove or Remove All buttons to remove selected or all names.
15. Select Save.
    The window refreshes and the event is posted in the calendar of those identified in the Shared text box. A Broadcast tab displays.
16. To send this Event by email, select the Broadcast tab.
    Broadcast window displays.
17. Select Broadcast.
    An email is sent to everyone listed in the Shared text box and results display.
    Note: Users and Employees must have an email address entered in TeamWork 5 or they cannot receive an email that is broadcast.
18. Select Save.
19. Select Close.

Example:


Event
Settings
Shares
Date(s):
Start Date
End Date
Time(s):
Start Time
End Time
Show on:
Title:
Title
Notes:
Notes
Allow Replies
Save
Close

14.2.3 Editing an Event

1. Select Collaboration from the main menu.
2. Select the Events tab.
   Events Calendar displays.
3. To edit the Event, select the Event.
   Event window displays.
4. Make changes to the Event. Any changes you make to the Event display on the calendars of those identified in the Shared text box.
5. Select Save.
6. If you need to add more Locations or Individuals, select the Shares tab, add the information, and select Save.
7. If you added more Locations and Individuals, select the Broadcast tab and select Broadcast.
8. Select Close.

14.2.4 Deleting an Event

1. Select Collaboration from the main menu.
2. Select the Events tab.
   Events Calendar displays.
3. To delete the Event, select the Event.
   Event window displays and there is a Delete button.
   Note: You need to be the Event creator to delete the Event.
4. Select Delete.
   Window prompts: Delete item?
5. Select OK to delete the Event.

14.3 Messages

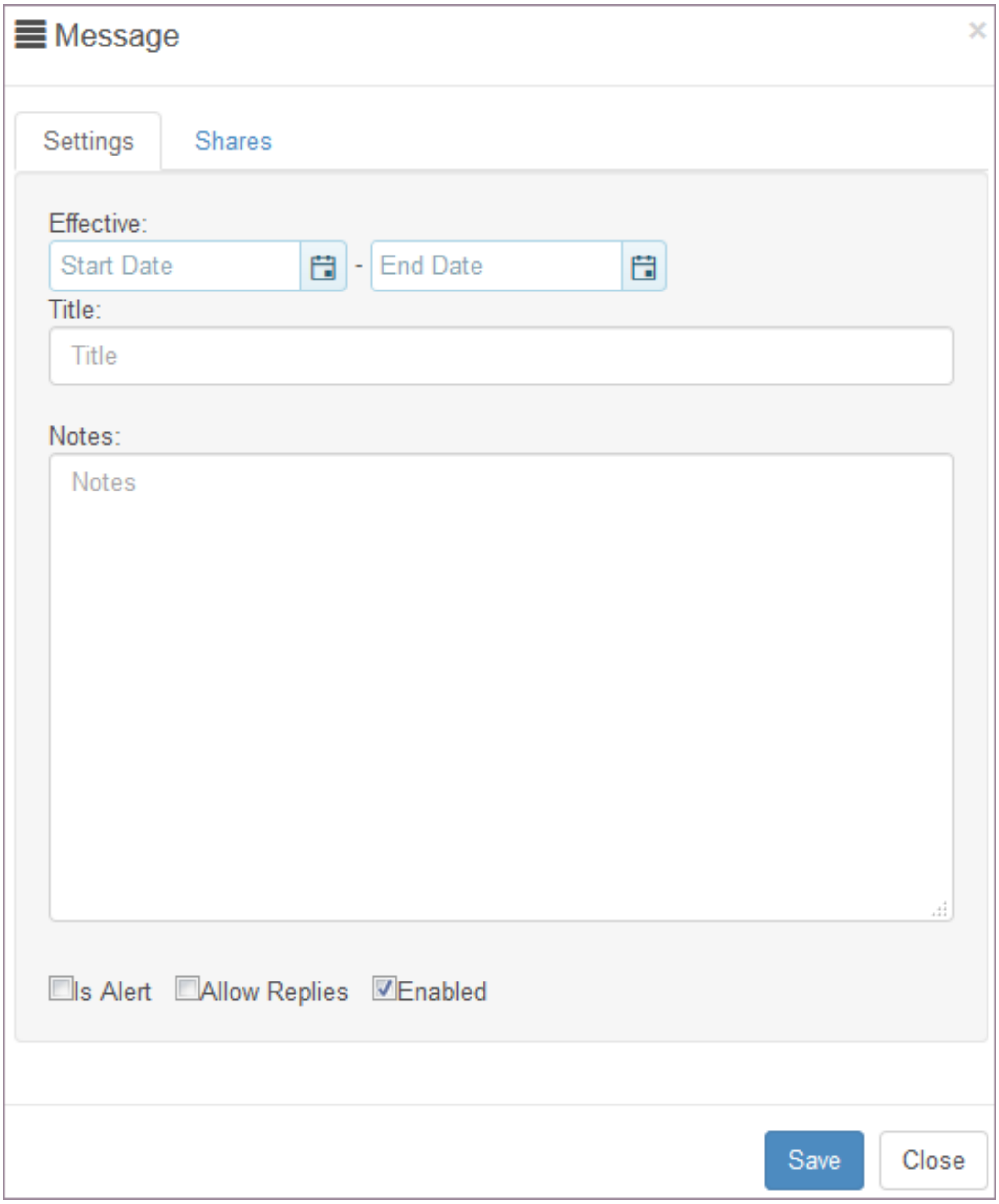
Use the Messages page to add messages and alerts and review previous messages and alerts. You can also reply to a message and edit or delete a message you have created.

14.3.1 Adding a Message

1. Select Collaboration from the main menu.
2. Select the Messages tab.
3. Select Add or Messages > Add.
   Message window displays. Settings tab is active.
4. Select Effective Dates.
5. Type a Title for the Message.
6. Type Notes to display as part of the message.
7. Select Is Alert if the message is an alert.
   Note: A red caution symbol displays to indicate it is an alert.
8. Select Allow Replies to allow message recipients to reply to you about the message. All replies are listed with a timestamp.
9. The Enabled check box is selected by default. This displays the message immediately.
   Note: To disable the message and save it for future use, clear the Enabled check box.
10. Select Save.
    Message window is saved. Sharing and Broadcast tabs display.
11. To place the Message or Alert on User or Employee Calendars, select the Shares tab.
    Shares window for the Message or Alert displays.
12. Select By: Individual or Location. Folders-is not applicable.
    Note: If you select a Location, the message is delivered to everyone in that Location. If you select Individuals, you can individually choose the employees and users with whom to share the message or alert.
13. Select With: Any, Employee, or Manager.
14. Select List.
    The List window refreshes and displays a list of names, either employees, managers, or locations depending on your earlier selection.
15. Select Names or Locations to share this message with and select Add.
    Names display in Shared window.
16. Use the Remove or Remove All buttons to remove selected or all names.
17. Select Save.
    The window refreshes and the Message or Alert is posted in the calendar of those identified in the Shared text box.

18. To send this Message or Alert as an email, select the Broadcast tab.
    Broadcast window displays.
19. Select Broadcast.
    An email is sent to everyone listed in the Shared text box and a timestamp displays.
    Note: Users and Employees must have an email address entered in TeamWork 5 or they cannot receive a message or alert that is broadcast.

Example:



14.3.2 Replying to a Message

1. Select Collaboration from the main menu.
   Collaboration window lists Events, Messages, Feedback and Notifications.
2. Select the Messages tab.
3. Select message you would like to reply to.
4. Under Replies, select Add.
   Reply window displays.
5. Type the Reply in the text box provided.
6. Select Save.
   Your reply is received by the person who posted the message. It includes a date and timestamp..

14.3.3 Editing a Message

1. Select Collaboration from the main menu.
2. Select the Messages tab.
3. Select message you would like to edit.
4. Make the changes you would like to make.
5. Select Save.
   Message updates display on the message.

14.3.4 Deleting a Message

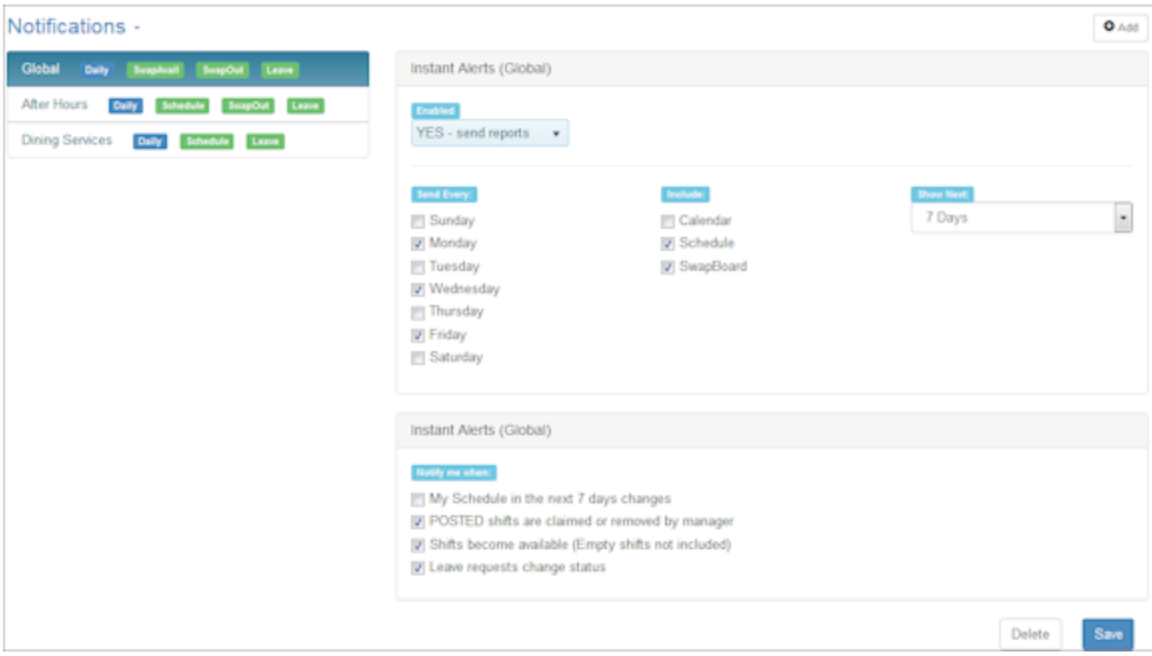
1. Select Collaboration from the main menu.
2. Select the Messages tab.
3. Select message you would like to delete.
   Note: You need to have been the message creator to delete a message.
4. Select Edit.
   Message window displays.
5. Select Delete.
   Window prompts: Delete item?
6. Select OK to delete the Message.

14.4 Notifications

Use the Notifications page to request that notifications, instant alerts, and reports be sent to you when changes occur for a location or globally, for all locations. Notifications can include changes to the calendar, schedule, and swapboard. Instant alerts can include schedule changes and leave requests.

> **Note**
>
> Note: An administrator with Collaboration Administrator role settings can set notifications and events for other employees and managers.

14.4.1 Screenshot



14.4.2 Adding a Notification

1. Select Collaboration from the main menu.
2. Select the Notifications tab.
3. Select Add or Notifications > Add.
4. Select the location this notification applies to or Global, i.e., it applies to all locations.
5. Select Save.
   Notifications window displays. A check box identifies the first day of your work week by default.
6. Select whether or not you would like to receive a Daily Report: Yes - send reports or No.
   Note: It includes the information you select and arrives by email on the day or days you request.
7. Select the day or days of the week you want to receive a report.

8. Select the content to include: Calendar, Schedule, and SwapBoard.
9. Select the amount of information you want included: 7 Days, 14 Days, 21 Days, or 28 days.
10. Select the check boxes of events that should trigger an instant alert. You will receive an email notification.
11. Select Save.
    The Notification displays in the drop-down list. When you select a location or Global, the settings you chose display. Reports that include the selected information are sent to the email you enter in My Settings.

14.4.3 Editing a Notification

1. Select Collaboration from the main menu.
2. Select the Notifications tab.
3. Select the Notification to edit.
   Related details display.
4. Make changes and select Save.

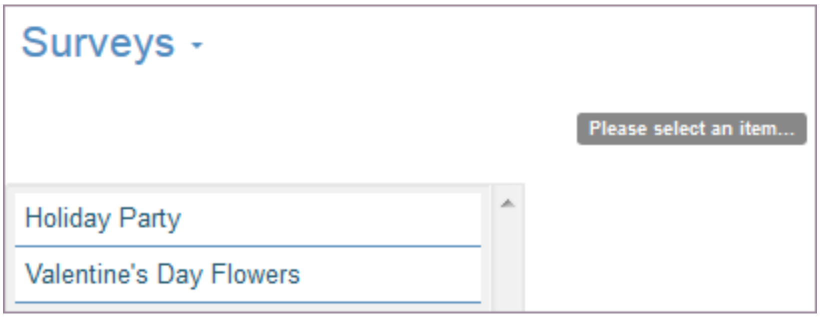
14.4.4 Deleting a Notification

1. Select Collaboration from the main menu.
2. Select the Notifications tab.
3. Select the Notification to delete.
4. Select Delete.
   Window prompts: Delete?
5. Select OK to delete the notification.

14.5 Feedback / Surveys

Use the Feedback pages to design surveys and gather results.

14.5.1 Screenshot

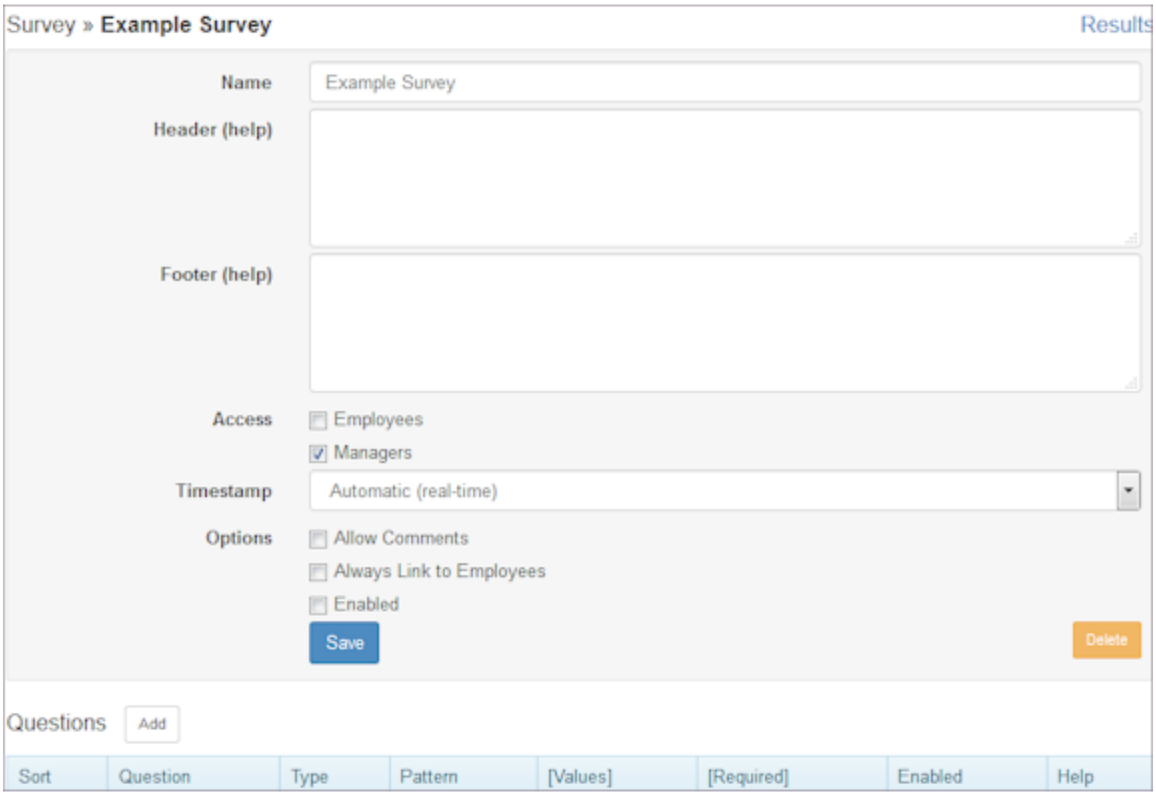


14.5.2 Adding a Survey

1. Select Collaboration from the main menu.
2. Select the Feedback tab.
3. Select Add or Surveys > Add.
   Add >> Survey window displays.
4. To use a copy of a previous survey, select the previous survey name.
5. Type the Name of the Survey.
6. Select Save.
   New survey displays in list.
7. Select Survey.
8. If desired, make changes to the Name.
9. Type or change Header (help).
   Example: Give instructions on filling out the survey, i.e., select the best day for the holiday party.
10. Type or change Footer (help).
11. Select check boxes to provide Access: Employees and/or Managers who receive the survey.
12. Select Timestamp: automatic (real time log) or manual (date/time entered). If manual, survey recipient enters a date.
13. Select Options: Link to Employee and Allow Comments
    Explanation: Link to Employee - records the employee internal id when they respond to the survey.
    Allow Comments - allows comments in addition to choosing a multiple choice answer.
    Enabled - posts the Survey so it is active and can be used.
14. Select Save.
    Items entry area displays below Survey.

15. Select Add to add a question.
    Question window displays.
16. Select Order.
17. Type Question (up to 30 characters).
18. Select Type of question using the drop-down list.
    Explanation: If you choose Single or Multi Select values, use the Values box to enter the value choices recipients will select from. You enter one value per line.
19. Type Pattern. Optionally used for validating input. For assistance with this, please open a new support ticket.
20. Type any additional Help instructions.
21. Select Required (if recipient must complete the Survey) and Enabled (so the question is active and can be used).
22. Repeat the previous steps for as many Questions as you desire and when done, select Save.
23. Select Save to save the survey.
    Note: The Survey is delivered to Manager and/or Employee accounts in the TeamWork portal they log in to. Results display in your Feedback tab under Results. See Adding a Survey Result.

Example:



14.5.3 Reviewing Survey Results

1. Select Collaboration from the main menu.
2. Select the Feedback tab.

3. Select Results.
4. Use the Menu Button to select the survey with the results you want to view.
   Results display.
5. Select Summary to display the summary of results.
6. Change the date information.
7. Select Details to display details. Use filters to search information.
8. Select Comments to display comments.

14.5.4 Adding a Survey Result

1. Select Collaboration from the main menu.
2. Select the Feedback tab.
3. Select Results.
4. Select Add.
   Feedback window displays the survey.
5. Select answers to survey questions.
6. Select Save.

14.6 Admin

Use the Admin page to set notifications and events for other employees and managers. To do so, you must have Collaboration Administrator role permissions enabled.

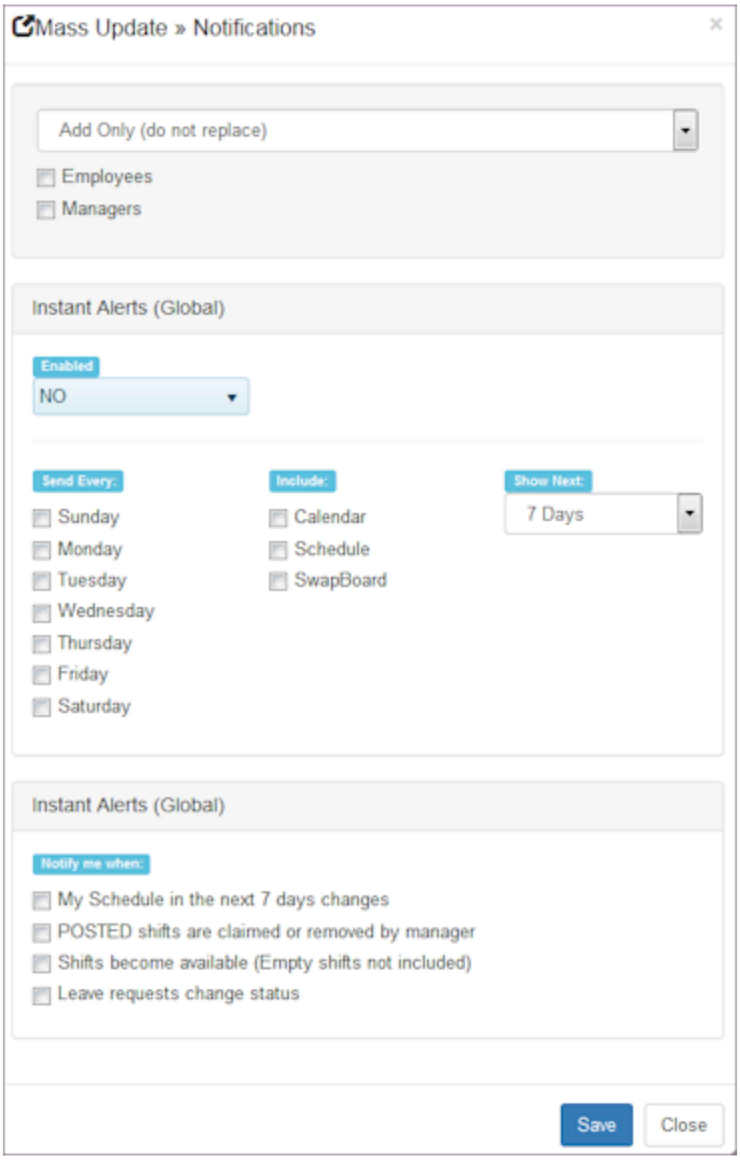
14.6.1 Settings

1. Select Collaboration from the main menu.
2. Select the Admin tab.
3. Select Settings.
4. Select the check boxes for Employee Sharing: Employees and/or Managers.
   Explanation: This determines who receives messages and events.
5. Select Save.

14.6.2 Notifications

1. Select Collaboration from the main menu.
2. Select the Admin tab.
3. Select Notifications.
4. Select the radio buttons of those who receive notifications: Employees and/or Managers.
5. Select Mass Update.
   Mass Update >> Notifications window displays.

Example:



1. Select notification action: Add Only (do not replace), REPLACE, DELETE LOCAL, DELETE ALL.
2. Select those who receive the updated notifications: Employees and/or Managers.
3. Select Instant Alerts (Global) as well as when to send notifications.
4. Select Save.

14.6.3 Monitor

1. Select Collaboration from the main menu.
2. Select the Admin tab.
3. Select Monitor.
4. Select the dates of events and messages you want to monitor: Range, Day, Week, Month, Quarter, or Year.

15. Reports

15.1 Reports

Use the Reports page to view a report, run a fixed report, and design and distribute reports. Organize your data using a variety of report designs and charts. Filter information and apply styles. Assemble packages and send information to users or locations on a scheduled basis.

- Use report packages to view organization, employee, scheduling, and time-related data.
- Use fixed reports to view summarized availability days, employee days, scheduling data related to headcounts, and a month view, as well as location crews, location settings, location shift groups, and location week days.
- Run reports on a scheduled basis and automatically email reports to users and locations.
- Set up reports to be delivered only when an alert exists.
- Multi-select columns and add criteria to quickly build reports.
- Develop user-defined custom fields and include custom field data in reports.
- Create new values based on other values in the report, and use "if" statement logic.
- Change the display of chart data simply by selecting a chart type: bar, column, line, and pie.

15.1.1 References

Refer to the following References.

- Understanding Report Designs
- Column Formulas
- Formatting Dates and Numbers
- Data Sources
- Examples

15.1.2 Report How To's

Refer to the following How To's.

- View
- Designs
- Charts
- Filters
- Styles
- Packages
- Fixed
- Users

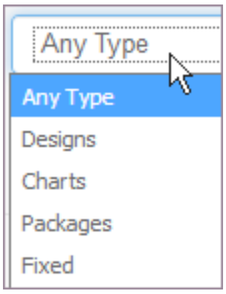
15.2 View

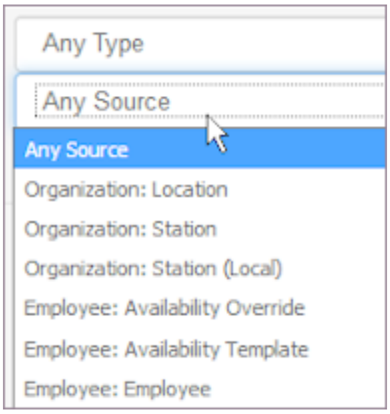
Use the View page to locate and display a report you created or one that has been created and shared with you. Quickly locate and select a report filter or style, and print a report. In addition, access report information in one of the following formats: PDF, CSV, TXT, XML, and json.

Note: You can also view reports from any of the report pages: Designs, Charts, Filters, Styles, and Packages.

15.2.1 Viewing a Report

1. Select Reports from the main menu.
2. Select View and select the report you would like to view.
   Example:
   

3. Select Any Type.
   Example:
   

4. Select Any Source.
   Example:
   

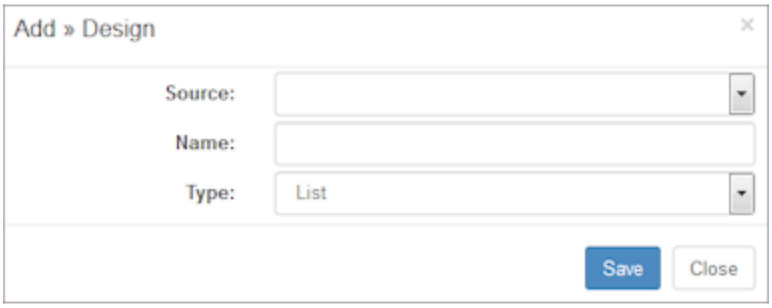
5. To edit the report, select Edit.
6. To view the report, select View and select the format: PDF, CSV, TXT, XML, or json.
7. To display this report with data from the past or future, select the calender picker or the forward or backward arrows.

8. To change the data, select Filter and select Fields > Add. You may also delete a current filter in the window.
9. To change the display style, select Style and select the new style. Select Save.
10. To print the report, select Print and complete the information.
11. To change the amount of time the report covers, use the drop-down list to select: Range, Day(s), Week(s), Month(s), Quarter(s), or Year(s).
    Note: When you view the report, this is the time period that displays until you select a different Range.

15.3 Designs

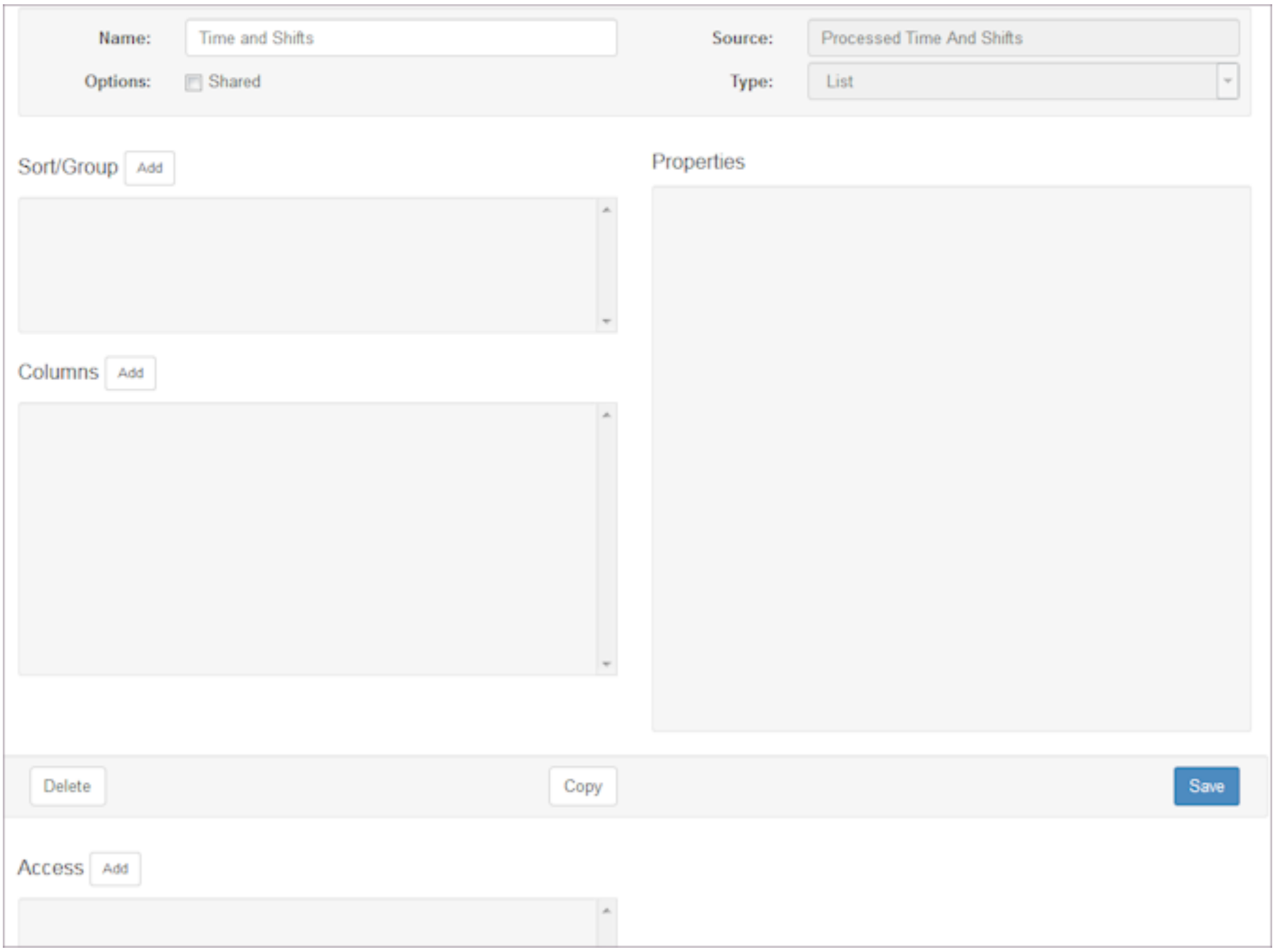
Use the Designs page to create a new list or crosstab report.

15.3.1 Designing a new Report

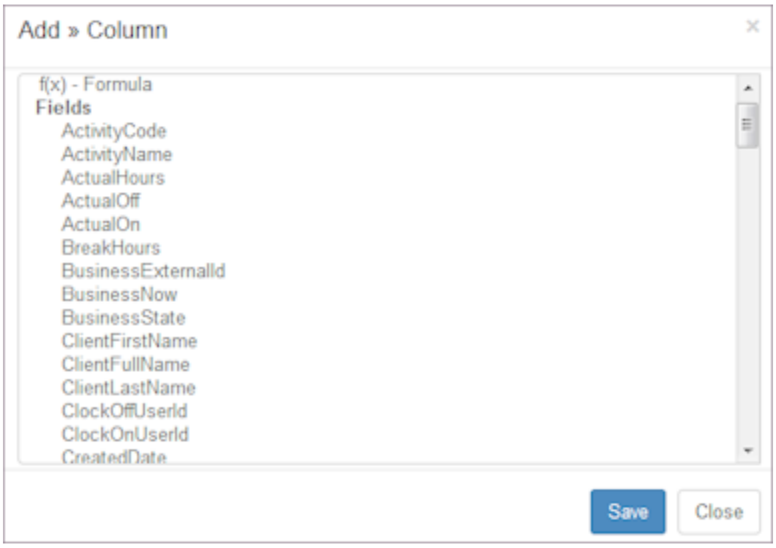
1. Select Designs and select Add.
   Add >> Design window displays.
   Example:
   

2. Select the Source.
3. Type a Name.
4. Select the Type: List or Crosstab.
5. Select Save.
   Window refreshes and displays design options.

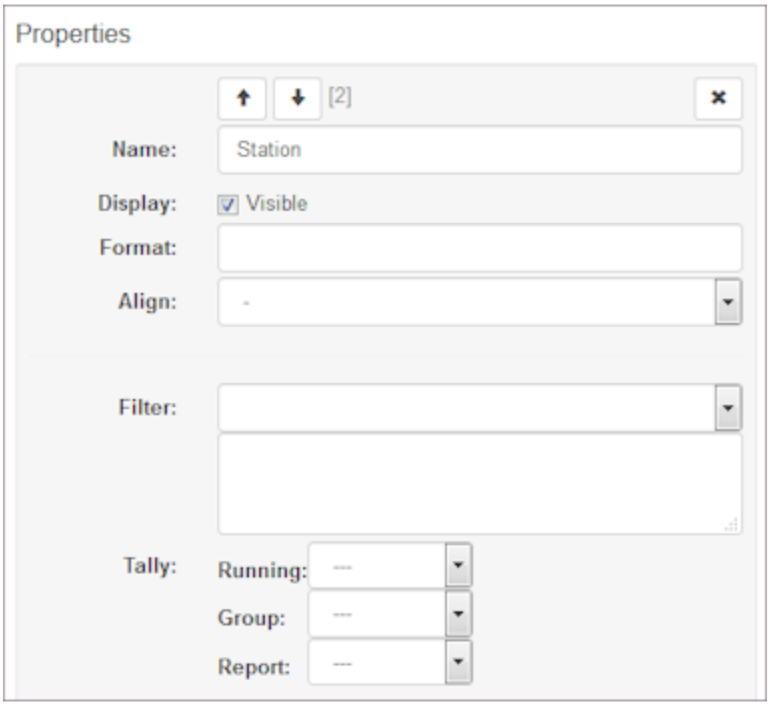
Example:



6. To share the report, select the Shared check box.
7. Choose the columns for data you want to display. Under Columns, select Add.
   Add >> Column window displays.
   Example:



8. Select the fields to add and select Save.
   Note: Multi-select capabilities are available.
9. Select the names of columns to change the properties, i.e., name, display, format, align, filter, and tally. See Understanding Report Designs.
   Example:



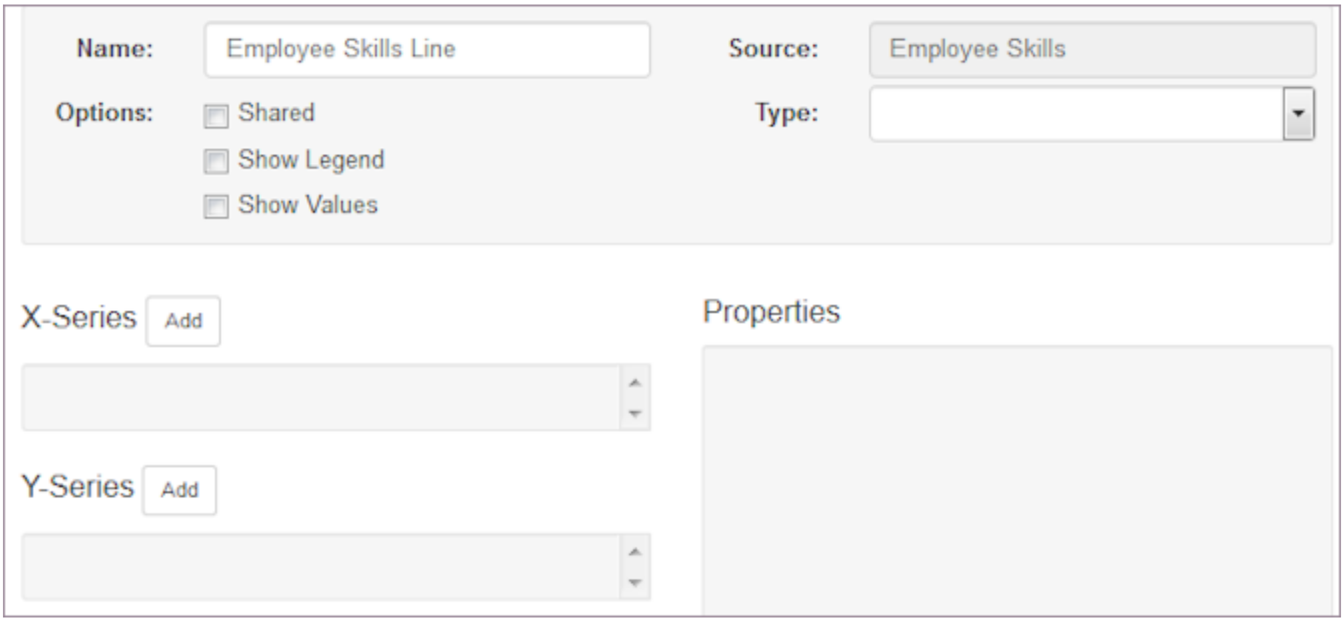
10. Use the arrow keys in the Properties window to move fields up and down.
11. Under Sort/Group, select Add.
    Add >> Column window displays list of available fields.
12. To display a different name in a report, select the name and change Name in the Properties window.
13. On the Properties window, select the Sort: Ascending, Descending, or None.
14. On the Sort/Group window, select the check box for Visible (Group By) to identify fields to group data under.
    Remove the check to hide the field when you view the report.
15. Select Save to save the Properties window and the report design.
16. Select View to view the report.
    Remember: Include or exclude fields by selecting or clearing the Display check box in the Properties window.
17. To delete a report column, select X in the Properties window.
18. To share this design with other users, select Access Add.
    Add Users window displays.
19. Select the check boxes to the left of users to provide access.
20. Select Save.
21. To delete the report, select Delete.

15.4 Charts

Use the Charts pages to create a new bar, column, line, or pie chart report.

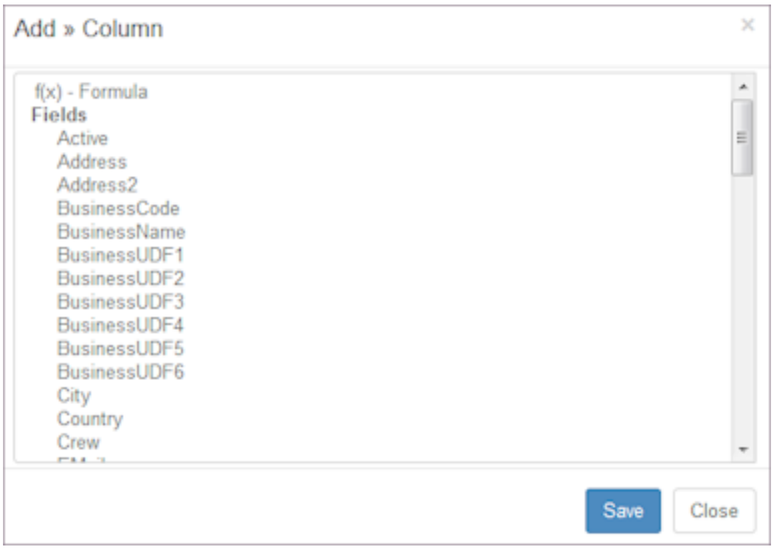
15.4.1 Building a new Chart

1. Select Reports from the main menu.
2. Select Charts and select Add.
   Add >> Chart window displays.
   Example:
   

3. Select the Source.
4. Type a Name.
5. Select the Type: Bar, Column, Line, or Pie.
6. Select Save.
   Window refreshes and displays areas for X-Series and Y-Series selections.
   Example:
   

Note: You can always change the Type and display the same data in a different chart. However, when you select a Pie chart, it can only have one X-Series column and one Y-Series column.

7. Choose the Options.
   In addition to Shared, select the check boxes to Show Legend, Show Values, and if unsorted or if data displays in Ascending or Descending order.
   Note: You can always edit these Options.
8. Select Add to choose the X-Series columns.
   Add >> Column window displays.
   Note: These are the grouping fields for calculated data.
   Example:



9. Select fields to add and select Save.
   Note: Multi-select capabilities are available.
10. To change the name of the column, select the name.
    Properties window displays.
11. Enter the name to display in the Name field and select Save.
    Note: Select the Display check box in the Properties window to display the name in the report.
12. Select Add to choose Y-Series columns.
    Add Y-Series window displays.
    Note: This is the calculated data to display for each X-Series grouping.
13. To change the name of the column, select the name and change Name in the Properties window.
14. Enter the name in the Name field and select Save.
    Note: If you have more than one column choice, you can select the Display check box on the Properties window to display it in the report. To hide the column data, clear the Display check box. If this is a Pie Chart, you can only display one Y-Series column.
15. To delete a report column, select X in the Properties window.
16. To view the chart, select Save and View.
    Chart displays data using the chart type you selected.
17. To share this chart with other users, select Access Add.
    Add Users window displays.

18. Select the check boxes to the left of users to provide access.
19. Select Save.

15.5 Filters

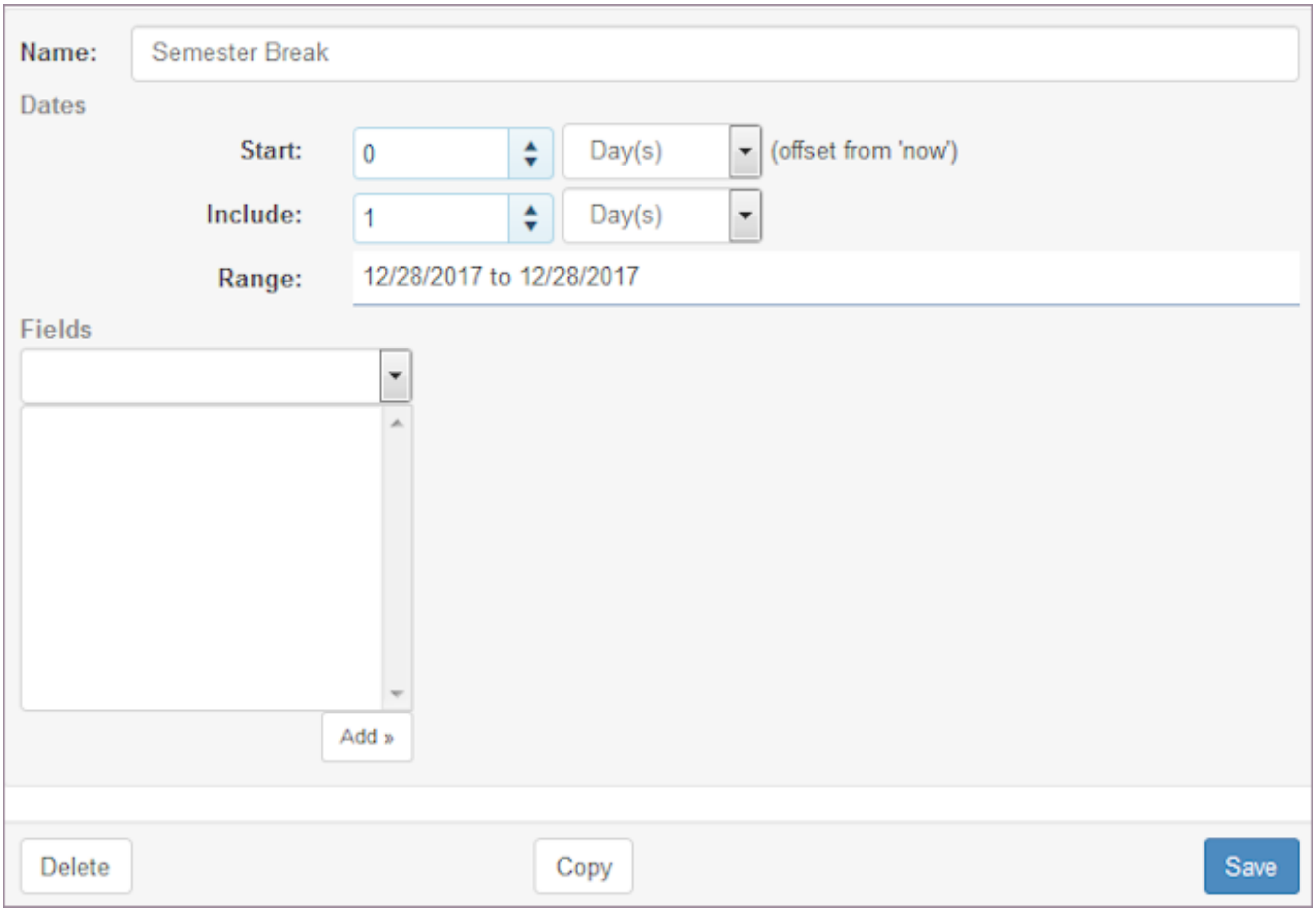
Use the Filters page to create a filter for report data. You can slice and dice your data into many different views or hone in on specific information.

15.5.1 Create a Report Filter

1. Select Reports from the main menu.
2. Select Filters and select Add.
   Add >> Filter window displays.
   Example:
   

3. Type a Name.
4. Select Save.
   Window refreshes and displays filter options.
   Note: If you selected an existing filter instead of Add, you can select Copy and use the existing filter parameters to build a new filter. Values display in the expanded filters window.
5. Type the Name and click Save.
   Filters window refreshes and information options display.

Example:



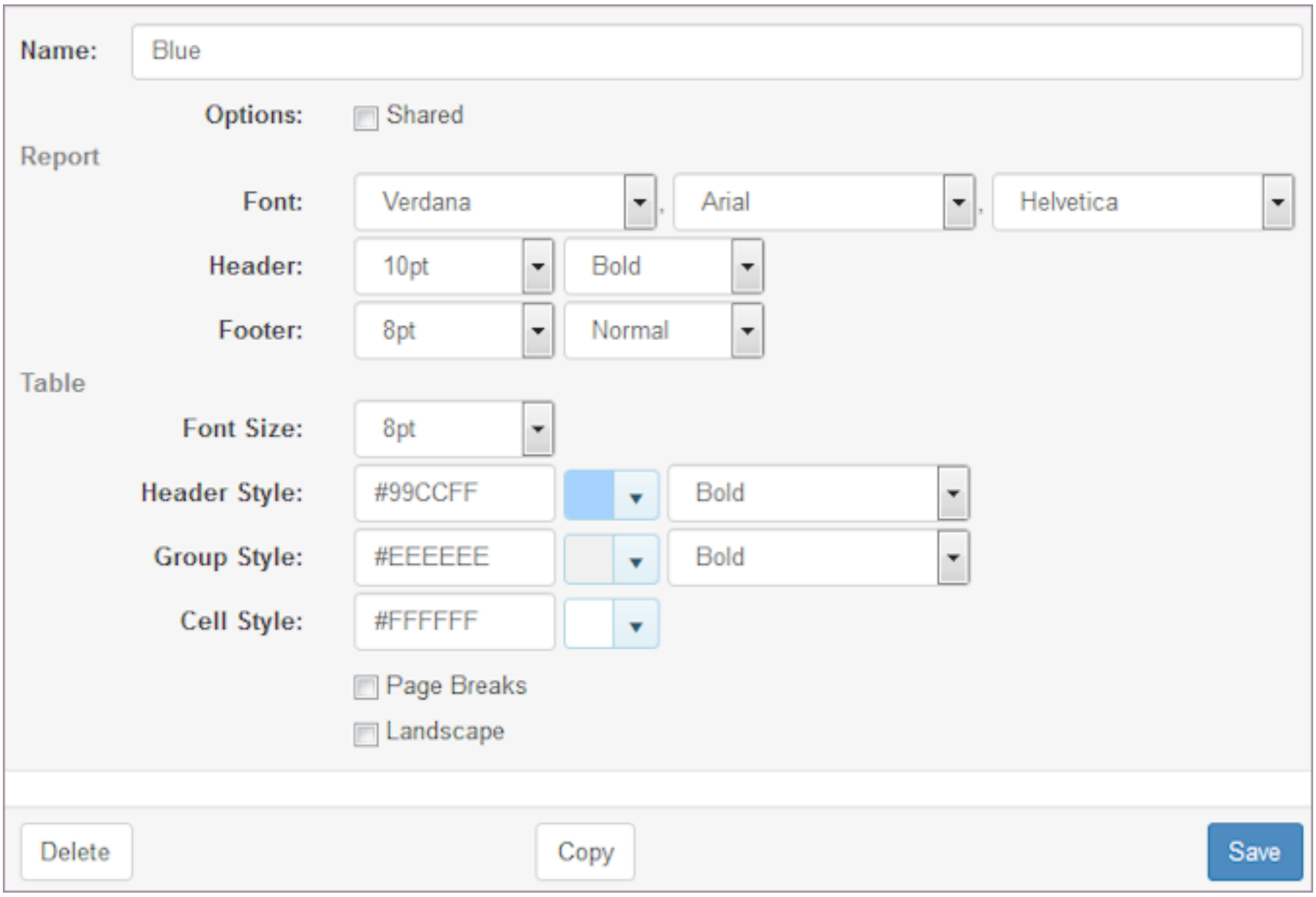
6. Select the Start increment and select the offset from now: Day(s), Week(s), Month(s), Quarter(s), Year(s), or Range.
7. Select Include and select the increment to include: Day(s), Week(s), Month(s), Quarter(s), Year(s), or Range.
8. Type the Range.
9. Select Fields to add using the drop-down list, i.e., Employees, Schedules, or Projects.
   Drop-down list expands to include the records in that category.
10. Select each record you want to include.
    Note: Multi-select capabilities are available for records.
11. Select Add >> to include the selected records.
12. Repeat for additional fields and Add >> selected records.
13. Select Save.
    Fields and values display.
14. Select X to remove records and select other fields and records.
15. To delete the filter and start over, select Delete.

15.6 Styles

Use the Styles page to create report styles. View the default style that is pre-loaded and add new styles.

15.6.1 Create a Report Style

1. Select Reports from the main menu.
2. Select Styles and select Add.
   Add >> Style window displays.
   Example:
   

3. Type a Name.
4. Select Save.
   Window refreshes and displays style information options.
   Example:
   

Note: If you selected an existing style instead of Add, you can select Copy and use the existing style parameters to build a new style.

5. To share the style, select the Shared check box.
6. Select Report information: Font, Header, and Footer size and display.
7. Select Table information: Font Size, Header Style, Group Style, and Cell Style.
8. Select the check boxes to include Page Breaks or print Landscape.
9. Select Save.

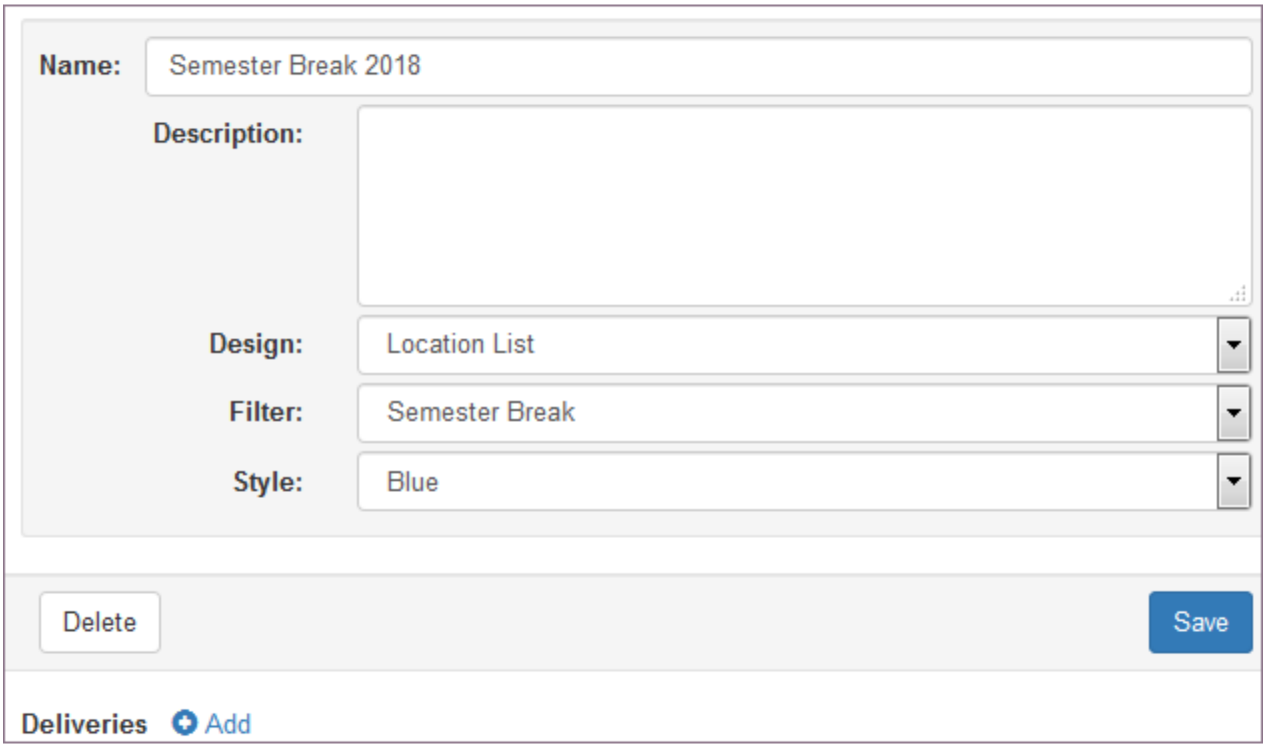
15.7 Packages

Use the Packages pages to build custom report packages. Use the report designs, filters, and styles you have created and put them together into a single report package.

15.7.1 Create a Report Package

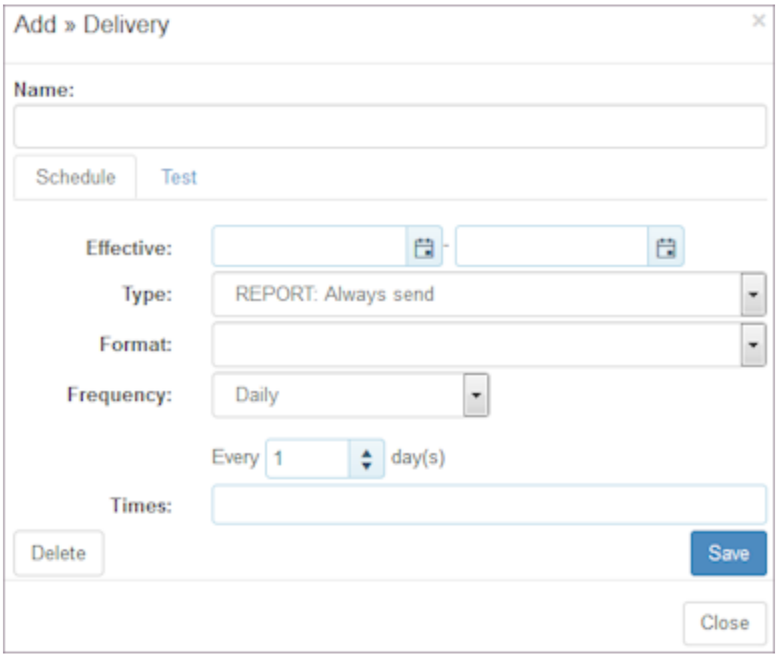
1. Select Reports from the main menu.
2. Select Packages and select Add.
   Add >> Package window displays.
   Example:
   

3. Type a Name.
4. Select a Design from the drop-down list.
5. Select a Filter from the drop-down list.
6. Select a Style from the drop-down list or use the Default.
7. Select Save.
   Window refreshes and displays Packages options.
   Example:



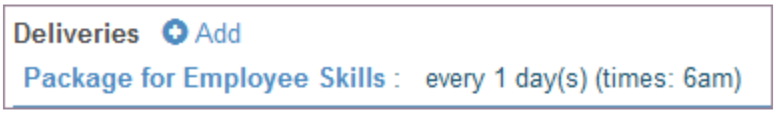
Note: If you selected an existing package instead of Add, you can use the existing package information to build a new package.

8. Select Deliveries + Add. This schedules the report to run automatically and have an email sent to the subscribers you choose.
   Add >> Delivery window displays.
   Example:

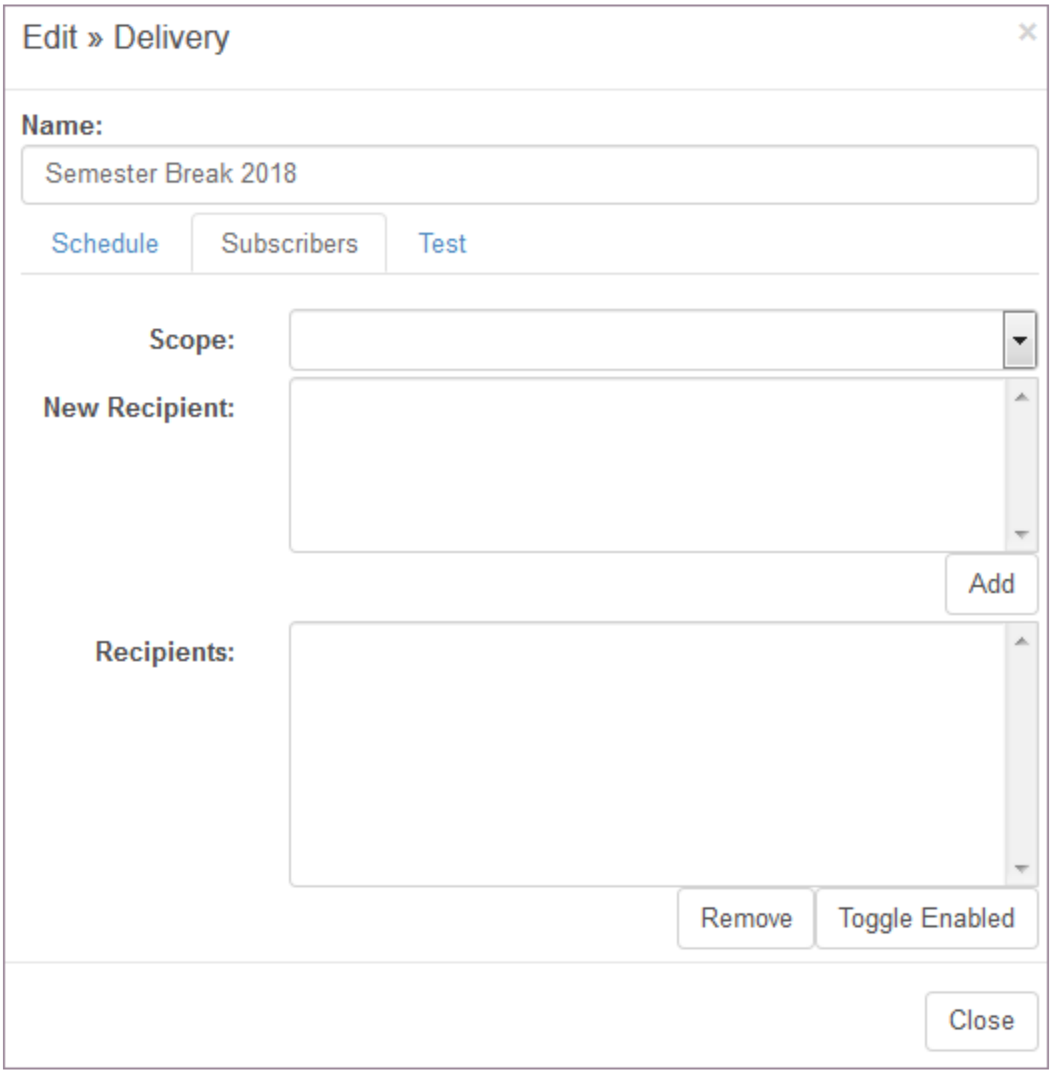


9. Type a report Name.
10. Select Schedule.
11. Select the Effective: start and end dates.

12. Select the Type: REPORT: ALWAYS send or ALERT: Only send if containing data.
13. Select Format: Html Email, PDF Attachment, CSV Attachment, TXT Attachment, JSON Attachment, XML Attachment.
14. Select Frequency: Daily, Weekly, Monthly, Yearly.
    Important: Depending on the frequency selected, the Add >> Delivery window refreshes. Enter the additional frequency information requested.
15. Select Times report is sent.
16. Select Save.
    Message indicates delivery information is saved.
    Packages window under Deliveries updates and displays delivery information.
    Example:



17. Select subscribers on far right of Deliveries.
    Edit >> Delivery window dispalys.
    Example:



18. Select the Subscribers Tab.
19. Select the Scope and select New Recipient. Select Add.
    Window refreshes and the subscribers who will receive the package email display under Recipients.
20. To disable a subscriber from receiving the email, select the subscriber and select the Toggle Enabled button.
21. To delete a recipient, select Remove and the recipient is removed.
22. Select Close when finished.
    Number of subscribers displays on Packages window under Deliveries.
23. To add additional schedules and deliveries, click Add next to Deliveries.
24. To add additional Packages, select Add on the top of the window.

15.8 Fixed

Use the Fixed report pages to view the reports TeamWork pre-loads into your account. Select the report to load it.

Note: The fixed reports at the organization level do not include the reports for locations.

15.8.1 Location Crews

The following is an example of this report.

Example:

Name
Bartenders
Bus
Cashiers
Dining Services Supervisors

15.8.2 Location Settings

The following is an example of this report.

Example:

Setting	Value
Name	Dining Services
Code	diningservices
Address	
Address2	
City	Westminster
State	CO
Postal Code	
Country	
Phone	444-444-4444
Fax	
EMail	
Allow Swapping	Yes

15.8.3 Location Shift Groups

The following is an example of this report.

Example:

Name
Food Preparation
Night Shifts

15.8.4 Location Week Days

The following is an example of this report.

Example:

Day	Rank	Order	Start Time	End Time	Max Headcount
Monday	1	1			
Tuesday	1	2			
Wednesday	1	3			
Thursday	1	4			
Friday	1	5			
Saturday	1	6			
Sunday	1	7			

15.8.5 Available Days

The following is an example of this report.

Example:

1 = full, ~ = partial, x = leave

Available Days **Dining Services**

Employee	Nov 27	Nov 28	Nov 29	Nov 30	Dec 1	Dec 2	Dec 3
Dining Services							
Apple, A.	~	1	~	1	~	1	1
Berry, B.	1	1	1	1	1	1	1
Cloud, C.	1	1	1	1	1	1	1
Door, D.	~	~	~	~	~	~	~
Evergreen, E.	~	1	~	~	1	1	1
Ferry, F.	~	~	~	~	~	~	1
Gate, G.	1	1	1	1	1		1
Hunt, H.	1	1	1	1	1	1	1
Iron, I.	~	~	~	~	1	1	1
Jump, J.	1	1	1	1	1	1	1
Kent, K.	~	~	~	~	~	1	1
Luck, L.	~	~	~	~	~	~	~
Pickle, P.	~	~	~	~	~	1	1
Snap, S.	~		~		~	1	1
Valley, V.	~	~	~	~	~	1	1
Zabowski, Z.	1	1	1	1	1	1	1
Available	16	15	16	15	16	15	16

15.8.6 Employee Days

The following is an example of this report.

Example:

~ = partial availability

Employee Days **Dining Services**

Employee	Nov 27	Nov 28	Nov 29	Nov 30	Dec 1	Dec 2	Dec 3
Dining Services							
Apple, A. Allison	13:00 Cashier		~	13:00 Cashier	~		
Berry, B. Barbara		07:00 Cashier 13:00 Cashier					
Cloud, C. Casey					08:00 Dining Center Manager	08:00 Dining Center Manager	
Door, D. Dave	~	08:00 Dining Center Manager	08:00 Dining Center Manager	~	~	~	~
Evergreen, E. Erik	~		~	08:00 Dining Center Manager			
Ferry, F. Fern	08:00 Dining Center Manager	12:00 Beverage Supervisor	~	~	~	~	
Gate, G. Gary	08:00 Cook			08:00 Cook			
Hunt, H. Harold						08:00 Cook	08:00 Cook
Iron, I. Ivan	~	~	08:00 Cook	~	08:00 Cook		
Jump, J. Joan		08:00 Cook					08:00 Dining Center Manager
Kent, K. Kyra	~	~	~	~	~		
Luck, L. Linda	07:00 Bus	~	~	14:00 Bus	14:00 Bus	~	~
Pickle, P. Petra	07:00 Cashier	~	13:00 Cashier	12:00 Beverage Supervisor	~		
Snap, S. Susan	~		07:00 Cashier		07:00 Cashier		
Valley, V. Vera	~	~	~	07:00 Cashier	13:00 Cashier		
Zabowski, Z. Zach	14:00 Bus	14:00 Bus	14:00 Bus				
Available	16	15	16	15	16	15	16
Scheduled	6	6	5	6	5	2	2
Capacity	10	9	11	9	11	13	14

15.8.7 Headcounts by Station

The following is an example of this report.

Example:

	Mon Nov 27	Tue Nov 28	Wed Nov 29	Thu Nov 30	Fri Dec 1	Sat Dec 2	Sun Dec 3
7:00 AM - Bus	1	0	0	0	0		
7:00 AM - Cashier	1	1	1	1	1		
7:30 AM - Bus	1	0	0	0	0		
7:30 AM - Cashier	1	1	1	1	1		
8:00 AM - Bus	1	0	0	0	0		
8:00 AM - Cashier	1	1	1	1	1		
8:00 AM - Cook	1	1	1	1	1	1	1
8:00 AM - Dining Center Manager	1	1	1	1	1	1	1
8:30 AM - Bus	1	0	0	0	0		
8:30 AM - Cashier	1	1	1	1	1		
8:30 AM - Cook	1	1	1	1	1	1	1
8:30 AM - Dining Center Manager	1	1	1	1	1	1	1
9:00 AM - Bus	1	0	0	0	0		
9:00 AM - Cashier	1	1	1	1	1		
9:00 AM - Cook	1	1	1	1	1	1	1
9:00 AM - Dining Center Manager	1	1	1	1	1	1	1
9:30 AM - Bus	1	0	0	0	0		
9:30 AM - Cashier	1	1	1	1	1		
9:30 AM - Cook	1	1	1	1	1	1	1
9:30 AM - Dining Center Manager	1	1	1	1	1	1	1
10:00 AM - Bus	1	0	0	0	0		
10:00 AM - Cashier	1	1	1	1	1		
10:00 AM - Cook	1	1	1	1	1	1	1
10:00 AM - Dining Center Manager	1	1	1	1	1	1	1

15.8.8 Headcounts Variance

The following is an example of this report.

Example:

Awaiting Development...

15.8.9 Headcount Totals

The following is an example of this report.

Example:

	Mon Nov 27	Tue Nov 28	Wed Nov 29	Thu Nov 30	Fri Dec 1	Sat Dec 2	Sun Dec 3
7:00 AM	2	1	1	1	1	0	0
7:30 AM	2	1	1	1	1	0	0
8:00 AM	4	3	3	3	3	2	2
8:30 AM	4	3	3	3	3	2	2
9:00 AM	4	3	3	3	3	2	2
9:30 AM	4	3	3	3	3	2	2
10:00 AM	4	3	3	3	3	2	2
10:30 AM	4	3	3	3	3	2	2
11:00 AM	4	3	3	3	3	2	2
11:30 AM	4	3	3	3	3	2	2
12:00 PM	4	4	3	4	3	2	2
12:30 PM	4	4	3	4	3	2	2
1:00 PM	3	4	3	4	3	2	2
1:30 PM	3	4	3	4	3	2	2
2:00 PM	4	5	4	5	4	2	2
2:30 PM	4	5	4	5	4	2	2
3:00 PM	4	5	4	5	4	2	2
3:30 PM	4	5	4	5	4	2	2
4:00 PM	3	4	3	4	3	1	1
4:30 PM	3	4	3	4	3	1	1
5:00 PM	2	2	2	2	2	0	0
5:30 PM	2	2	2	2	2	0	0
6:00 PM	2	2	2	2	2	0	0
6:30 PM	2	2	2	2	2	0	0
7:00 PM	2	2	2	2	2	0	0
7:30 PM	2	2	2	2	2	0	0

15.8.10 Schedule Month

The following is an example of this report.

Example:

December, 2017

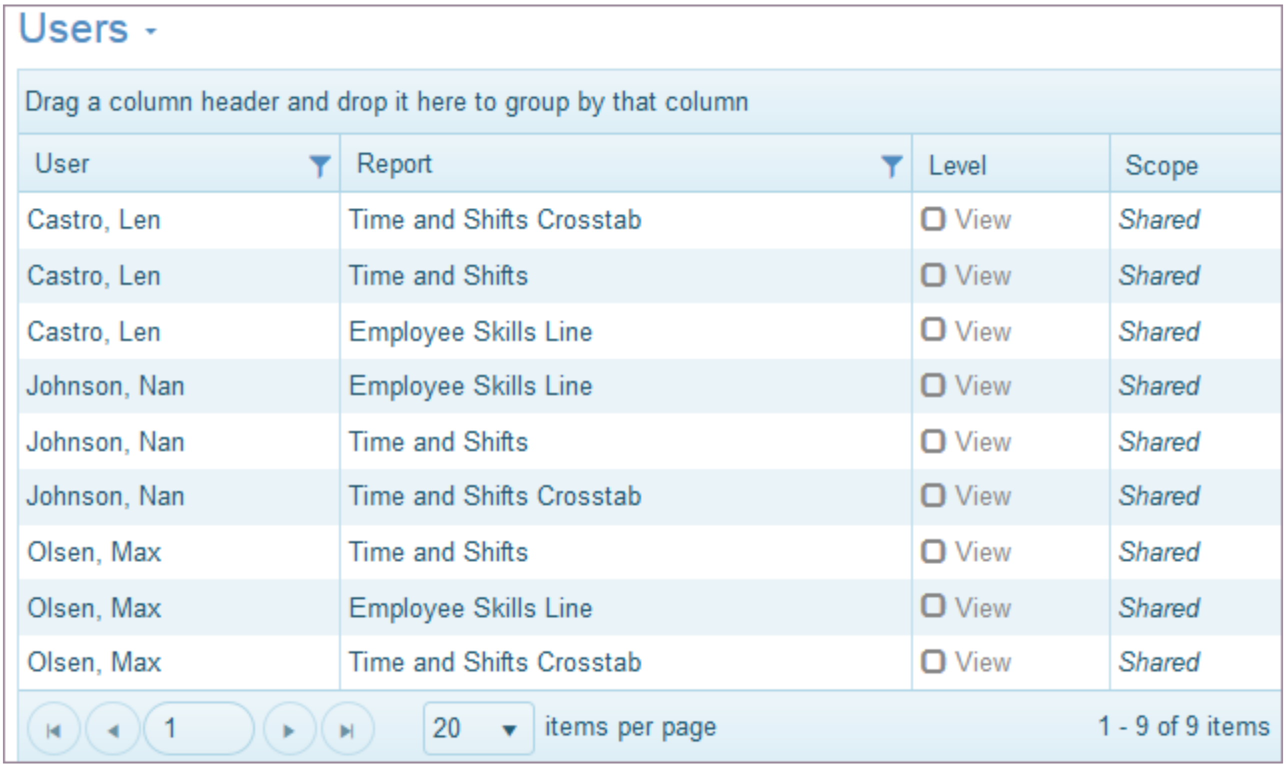
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
26	27	28	29	30	01 Cashier, Dining Services 7a-1p: Snap, Susan Dining Center Manager, Dining Services 8a-5p: Cloud, Casey Cook, Dining Services 8a-4p: Iron, Ivan Cashier, Dining Services 1p-8p: Valley, Vera Bus, Dining Services 2p-8p: Luck, Linda	02 Dining Center Manager, Dining Services 8a-5p: Cloud, Casey Cook, Dining Services 8a-4p: Hunt, Harold
03 Dining Center Manager, Dining Services 8a-5p: Jump, Joan Cook, Dining Services 8a-4p: Hunt, Harold	04	05	06	07	08	09
10	11 Cashier, Dining Services 6a-2p: Cloud, Casey Bus, Dining Services 7:30a-11:30a: Zabowski, Zach Salad Prep, Dining Services 8a-2p: Berry, Barbara Deli Cook, Dining Services 8a-5p: Kent, Kyra Cook, Dining Services 8a-4p: Luck, Linda Deli Cook, Dining Services 8a-2p: Ferry, Fern Bus, Dining Services 8a-5p: Door, Dave Cashier, Dining Services 8a-5p: Pickle, Petra Cook, Dining Services 8a-5p: Gate, Gary Prep Cook, Dining Services 8a-4p: EMPTY Bus, Dining Services 11:30a-1:30p: Iron, Ivan Cook, Dining Services 12p-7p: Jump, Joan Bus, Dining Services 1:30p-7:30p: Hunt, Harold Cashier, Dining Services 2p-10p: Apple, Allison	12 Cashier, Dining Services 6a-2p: Ferry, Fern Bus, Dining Services 7:30a-11:30a: Pickle, Petra Deli Cook, Dining Services 8a-2p: Luck, Linda Cook, Dining Services 8a-4p: Jump, Joan Salad Prep, Dining Services 8a-2p: EMPTY Prep Cook, Dining Services 8a-4p: EMPTY Cook, Dining Services 8a-5p: Gate, Gary Bus, Dining Services 8a-5p: Cloud, Casey Cashier, Dining Services 8a-5p: Berry, Barbara Deli Cook, Dining Services 8a-5p: Zabowski, Zach Bus, Dining Services 11:30a-1:30p: Pickle, Petra Cook, Dining Services 12p-7p: Iron, Ivan Bus, Dining Services 1:30p-7:30p: Door, Dave Cashier, Dining Services 2p-10p: Apple, Allison	13 Cashier, Dining Services 6a-2p: Snap, Susan Bus, Dining Services 7:30a-11:30a: Cloud, Casey Prep Cook, Dining Services 8a-4p: Door, Dave Deli Cook, Dining Services 8a-2p: Kent, Kyra Bus, Dining Services 8a-5p: Ferry, Fern Cook, Dining Services 8a-5p: Iron, Ivan 8a-4p: Jump, Joan Cashier, Dining Services 8a-5p: Apple, Allison Deli Cook, Dining Services 8a-5p: Zabowski, Zach Salad Prep, Dining Services 8a-2p: EMPTY Bus, Dining Services 11:30a-1:30p: Luck, Linda Cook, Dining Services 12p-7p: Gate, Gary Bus, Dining Services 1:30p-7:30p: Hunt, Harold Cashier, Dining Services 2p-10p: Berry, Barbara	14 Cashier, Dining Services 6a-2p: Zabowski, Zach Bus, Dining Services 7:30a-11:30a: Iron, Ivan Deli Cook, Dining Services 8a-5p: Luck, Linda Salad Prep, Dining Services 8a-2p: EMPTY Prep Cook, Dining Services 8a-4p: EMPTY Bus, Dining Services 8a-5p: Door, Dave Cook, Dining Services 8a-4p: Gate, Gary Deli Cook, Dining Services 8a-2p: Evergreen, Erik Cook, Dining Services 8a-5p: Jump, Joan Cashier, Dining Services 8a-5p: Apple, Allison Bus, Dining Services 11:30a-1:30p: Ferry, Fern Cook, Dining Services 12p-7p: Valley, Vera Bus, Dining Services 1:30p-7:30p: Hunt, Harold Cashier, Dining Services 2p-10p: Pickle, Petra	15 Cashier, Dining Services 6a-2p: Zabowski, Zach Bus, Dining Services 7:30a-11:30a: Cloud, Casey 8a-5p: Kent, Kyra Cook, Dining Services 8a-4p: Luck, Linda Prep Cook, Dining Services 8a-4p: Door, Dave Cook, Dining Services 8a-5p: Iron, Ivan Deli Cook, Dining Services 8a-2p: Snap, Susan 8a-5p: Jump, Joan Cashier, Dining Services 8a-5p: Valley, Vera Salad Prep, Dining Services 8a-2p: Apple, Allison Bus, Dining Services 11:30a-1:30p: Gate, Gary Cook, Dining Services 12p-7p: Evergreen, Erik Bus, Dining Services 1:30p-7:30p: Cloud, Casey Cashier, Dining Services 2p-10p: Pickle, Petra	16 Cashier, Dining Services 6a-2p: Valley, Vera Bus, Dining Services 7:30a-11:30a: Evergreen, Erik Deli Cook, Dining Services 8a-5p: Luck, Linda Bus, Dining Services 8a-5p: Cloud, Casey Deli Cook, Dining Services 8a-2p: Ferry, Fern Cook, Dining Services 8a-5p: Hunt, Harold 8a-4p: Snap, Susan Cashier, Dining Services 8a-5p: Pickle, Petra Bus, Dining Services 11:30a-1:30p: Kent, Kyra 1:30p-7:30p: Kent, Kyra Cashier, Dining Services 2p-10p: Berry, Barbara

15.9 Users

Use the Users page to review the users who you have provided access to your reports. It only displays in the organization-level Reports.

15.9.1 Limit Reports by User

1. Select Reports from the main menu.
2. Select Users.
   Users window displays.
   Example:



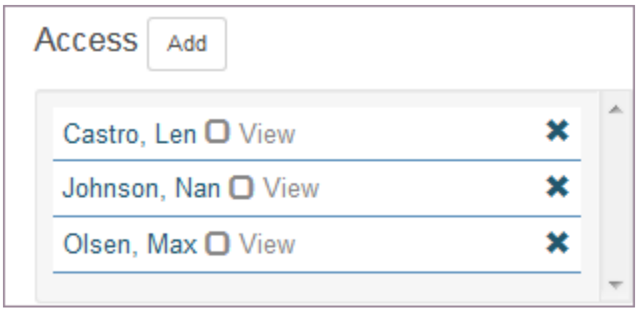
Users

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

User	Report	Level	Scope
Castro, Len	Time and Shifts Crosstab	View	Shared
Castro, Len	Time and Shifts	View	Shared
Castro, Len	Employee Skills Line	View	Shared
Johnson, Nan	Employee Skills Line	View	Shared
Johnson, Nan	Time and Shifts	View	Shared
Johnson, Nan	Time and Shifts Crosstab	View	Shared
Olsen, Max	Time and Shifts	View	Shared
Olsen, Max	Employee Skills Line	View	Shared
Olsen, Max	Time and Shifts Crosstab	View	Shared

1 · 20 items per page · 1 - 9 of 9 items

3. Use filters to search for specific User or Report access.
   Note: Access to view a report is granted on the Report itself in Access.
   Example:



15.10 Understanding Report Designs

TeamWork provides a flexible report design interface. Create reports that include different types of information and combinations of data. Configure reports to address a specific need or purpose and view every aspect of your organization.

15.10.1 Building a Report

Begin building a report by thinking about the information you would like to pull.

Example: How many shifts do you have at each location and what are the total number of hours they include?

- Go to Designs and select Add.
- On the Add >> Design window, enter the following:
  Source: Scheduling : Schedule Shifts
  Name: Hours by Location
  Type: List
- To share with other locations, select the check box Shared.
- Under Columns, select Add. These are the header names that display across the top of the report.
  Select BusinessName. It is the data source for locations.
  Explanation: When you set up organization information, you added location names. BusinessName is the field that holds the location name information. When you started designing this report, you selected Schedule Shifts as the data source. BusinessName is a field that is included in the data. See Data Sources for a complete list of fields available.

  Make it Easy to Read: Since our report is pulling information by location, it would be more convenient to have that column named Location. To do this, select BusinessName and the Properties window displays. You use this window to change the name to Location and Save. The name changes to Location on your Columns window, although the original field name (BusinessName) still displays in parenthesis.
- Under Columns, select Add and select the field names that indicate how many shifts we have and total hours or hours scheduled so we select ShiftCount and HoursTotal.

  Note: TeamWork provides summary fields that contain automatic formulas. Scroll down to summary fields. Field names indicate fields are being summed, i.e., ShiftCount and HoursTotal.

  Make it Easy to Read: Rename fields. Select the name to display the Properties window and change the names to Shifts and Hours, and Save.

  Note: By default, values display in the table on the left. If it is easier to read another way, you can use the Properties window to change how values display, i.e., centered or right-justified.
- View the way this report looks at any time in the design process. Select Save and View. If it is not what you are looking for, make changes and additions, and select Save and View again.
- Select more information for this report. Add the station. From the View window, click Edit to return to the Design window. Under Columns, select Add, select the StationName and Save. Change StationName to Station using the Properties window.

  Note: Notice that the Properties window has a Display check box. When it is selected, this data displays. If the check box is cleared, the information does not display on the report.
- Now, let's tell the report how to Sort or Group the information on the report. Under Sort/Group, select Add.
  Since we are asking for Hours by Location and we've added Station, let's group the information by StationName or Station (change on Properties window).
  List or Sort the Stations in Ascending or Descending order. Let's choose Ascending. Select Save.

  Explanation: Notice that the name changes to Station on your Sort/Group window and Asc is appended to the name to indicate that the order is ascending.
- Under Sort/Group, let's see who is working and select Add and select EmployeeFullName. Change it to Name on the Properties window.

- Once again, view the way this report looks by clicking Save and then View. Ensure Display check boxes are selected in the Properties window for the fields you want displayed.
- Since we're now sorting the report information by Station, we may not want to display it as a heading at the top of the report. So, select Edit to return to the Design window. Under Columns, we clear the check box next to Station. When we Save and View the report, it categorizes the information by Station and no longer lists it as a header of the report.
- To make changes and additions, simply do so, and select Save and View again.

15.10.2 Understanding the Columns and Sort/Group Windows

Columns - When you design a report, use the Columns window to tell the report what information it should pull. Once you define your data source, use the Columns window to identify the specific fields of information you want listed in the report. In the previous example, we selected fields for BusinessName, HoursTotal, ShiftCount, and Station. HoursTotal and ShiftCount are summarized data.

Sort/Group - You can use the Sort/Group window to help you group or identify subsets of data within the report. Select the check box for Display Visible (Group By) on the Properties window to group the report by that field name. In our example, we used Sort/Group to display the Location, Hours, and Shifts by Station and Name.

Configure and reconfigure the report as many times as necessary to ensure you display exactly what it is you are looking for. Make additions, use the arrow keys in the Properties window to move a field up or down in the display, select the check box to group by a field, or use the X in the corner to delete a field. Remember to select Save and then View to view the report.

15.10.3 Understanding the Properties Window

The Properties window provides you with the following capability.

- Renaming a field from a data source so that it displays in a more recognizable, common term. Simply type the new name in the Name text box.
- Specifying the order in which data is sorted and displayed in the Sort/Group window. Choose either ascending or descending.
- Filtering to display less information. Remember to put a specific string of text or dates in single quotes. The filtering information is saved with the report and is useful for items that may not be in generic filters. When you select Save, the reports function tests the syntax you entered and provides an error message in red or an OK in green. Refer to Formula Columns and become familiar with generic filters TeamWork provides.
- Tallying functions are available for sum, count, average, minimum, and maximum. You can select to get a running tally, group, or report. You can also provide ways of manipulating data.
- Specifying specific formulas by selecting a column name of f(x) Formula. When you select f(x) Formula, the Properties window displays and you can enter specific formulas. Formulas display in the column list and are used by the report. Fields a formula uses must be in the column list so they can be used, but they do not have to be selected for display. See Column Formula Quick Reference. For assistance with developing a formula for a report, open a new support case and send it to ScheduleSource Support. See Opening a New Support Case.

15.10.4 Understanding Crosstab Reports

You design Crosstab reports in much the same way as you design List reports, except that you also specify Crosstab Fields and use the Properties window to further define their properties. These reports show the relationship between the data fields you identify. Generally, the values that display in a Crosstab report are calculated data, and information from the fields you identify is combined in the report.

15.10.5 Using Data Sources in Reports

When you design reports, you can choose between reporting fields that tally data and calculated fields that are statistical in nature. Statistical fields calculate information based on the data you select. Therefore, when you select a calculated field, the report becomes a summary of that data. It is grouped based on the fields you identify as well as the calculations you ask to be performed. See Report Examples.

15.11 Column Formulas

Reports use formula columns to read and manipulate data of other columns. Use adding, subtracting, multiplication, division, and logical operands as well as logic functions and math functions. Refer to the following formula quick references.

15.11.1 Operators

Name	Symbols
Multiplication, Division, Modulus	*,/,%
Addition, Subtraction	+, -
Logical AND, XOR, OR	&, ^, |

15.11.2 Logic Function

Name	Description	Example
(<condition> ? <true> : <false>)	If condition evaluates to "true", returns <true>, otherwise returns <false>.	(a > b ? a + b : 0)

15.11.3 Math Functions

Name	Description	Example
Abs	Returns absolute value of a specified number.	Abs(x)
Acos	Returns the angle whose cosine is the specified number.	Acos(x)
Asin	Returns the angle whose sine is the specified number.	Asin(x)
Atan	Returns the angle whose tangent is the specified number.	Atan(x)
Atan2	Returns the angle whose tangent is the quotient of two specified numbers.	Atan2(x,y)
Ceiling	Returns the smallest integer greater than or equal to the specified number.	Ceiling(x)
Cos	Returns the cosine of the specified angle.	Cos(x)
Cosh	Returns the hyperbolic cosine of the specified angle.	Cosh(x)
Exp	Returns e raised to the specified power.	Exp(x)
Floor	Returns the largest integer less than or equal to the specified number.	Floor(x)
Remainder	Returns the remainder resulting from the division of a specified number by another specified number.	Remainder(x,y)
Log	Returns the logarithm of a specified number.	Log(x)
Log10	Returns the base 10 logarithm of a specified number.	Log10(x)
Max	Returns the larger of two specified numbers.	Max(x,y)
Min	Returns the smaller of two numbers	Min(x,y)
Pow	Returns a specified number raised to the specified power.	Pow(x,y)

Round	Rounds a value to the nearest integer or specified number of decimal places.	Round(x), Round(x, d)
Sign	Returns a value (-1 or 1) indicating the sign of a number.	Sign(x)
Sin	Returns the sine of the specified angle.	Sin(x)
Sinh	Returns the hyperbolic sine of the specified angle.	Sinh(x)
Sqrt	Returns the square root of a specified number.	Sqrt(x)
Tan	Returns the tangent of the specified angle.	Tan(x)
Tanh	Returns the hyperbolic tangent of the specified angle.	Tanh(x)
Truncate	Calculates the integral part of a number.	Truncate(x)
MaxN	Returns the largest of a set of numbers.	MaxN(x,y,z,a,b,...)
MinN	Returns the smallest of a set of numbers.	MinN(x,y,z,a,b,...)
Avg	Returns the average of a set of numbers.	Avg(x,y,z,a,b,...)
Sum	Returns the sum of a set of numbers.	Sum(x,y,z,a,b,...)
PI	Returns the value of pi.	PI()
E	Returns the value of e.	E()

15.11.4 String Functions

Name	Description	Example	Result
Min	Returns the minimum of two string values.	Min('a', 'b')	a
Max	Returns the maximum of two string values.	Max('y', 'z')	z
MinN	Returns the minimum of n string values.	MinN('a', 'b', 'c')	a
MaxN	Returns the maximum of n string values.	MaxN('x', 'y', 'z')	z
Format	Returns a string with n values inserted and formatted.	Format('I have {0:0.00} hours in {1} shifts', 12, 2)	I have 12.00 hours in 2 shifts
Left	Returns the leftmost number of specified characters.	Left('aaabbbcccdddeeefff',5)	aaabb
Right	Returns the rightmost number of specified characters.	Right('A good thing', 5)	thing
Substring	Extracts a string given a larger one. Uses start index (starts a 0) and length.	Substring('A good thing', 2, 4)	good
Replace	Replaces all occurrences of a string within a string.	Replace('A good thing is good', 'good', 'bad')	A bad thing is bad
Reverse	Reverses a string	Reverse('AbCd')	dCbA
PadLeft	Creates a fixed length string and pads the left with a given character (or space if none specified).	PadLeft('333', 10, 'x')	xxxxxxx333
PadRight	Creates a fixed length string and pads the right with a given character (or space if none specified).	PadRight('444', 5, 'b')	444bb

Trim	Removes leading and trailing whitespace	Trim(' dog ')	dog
ToLower	Converts a string to lowercase characters	ToLower('MY Car')	my car
ToUpper	Converts a string to uppercase characters	ToUpper('some title')	SOME TITLE
Length	Return the number of characters	Length('aaabbb')	6
ToDate	Converts a string to a date	ToDate('6/1/2014 10 PM')	6/1/2014 22:00
Contains	Checks if the second string is contained in the first.	Contains('aaabbbccc', 'bc')	1
		Contains('aaabbbccc', 'R')	0
IsEmpty	Returns true if value is null or zero length, false otherwise.	IsEmpty('')	TRUE
Concat	Appends N strings together.	Concat(55, 33, 'test message')	5533test message

15.11.5 Date Functions

Name	Description	Example	Result
Min	Returns the minimum of two date values.	Min('6/1/04', '6/1/10')	6/1/2004
Max	Returns the maximum of two date values.	Max('6/1/04', '6/1/10')	6/1/2010
MinN	Returns the minimum of n date values.	MinN('6/1/04', '6/1/10','1/1/1970')	1/1/1970
MaxN	Returns the maximum of n date values.	Max('6/1/04', '6/1/10','1/1/1970')	6/1/2010
TotalWeeks	Returns the total (fractional) number of weeks between two dates.	TotalWeeks('6/1/2014', '6/8/2014')	1
		TotalWeeks('6/1/2014', '6/2/2014')	0.142857143
TotalDays	Returns the total (fractional) number of days between two dates.	TotalDays('6/1/2014', '6/8/2014')	7
		TotalDays('6/1/2014', '6/2/2014')	1
		TotalDays('6/1/2014', '6/2/2014 12 PM')	1.5
TotalHours	Returns the total (fractional) number of hours between two dates.	TotalHours('6/1/2014 1 PM', 6/2/2014 11 AM')	22
		TotalHours('6/1/2014 1 PM', 6/1/2014 1:30 PM')	0.5
TotalMinutes	Returns the total (fractional) number of minutes between two dates.	TotalMinutes('6/1/2014 6:01 AM', '6/1/2014 8:30 AM')	149
TotalSeconds	Returns the total (fractional) number of seconds between two dates.	TotalSeconds('6/1/2014 6:01 AM', '6/1/2014 8:30 AM')	8940

DiffYears	Returns the integer difference in calendar years of two dates.	DiffYears('1/1/2014', '7/1/2014')	0
		DiffYears('3/1/2014', '1/1/2015')	1
DiffMonths	Returns the integer difference in calendar months of two dates.	DiffMonths('3/1/2014', '5/15/2014')	2
		DiffMonths('3/1/2014', '1/20/2014')	-2
DiffWeeks	Returns the integer difference in calendar weeks of two dates. Optionally accepts a string indicating the first day of the week. D	DiffWeeks('6/1/2014', '6/5/2014')	0
		DiffWeeks('6/1/2014', '6/8/2014')	1
		DiffWeeks('6/1/2014', '6/5/2014', 'Monday')	1
DiffDays	Returns the integer difference in calendar days of two dates.	DiffDays('6/1/2014', '6/5/2014')	4
		DiffDays('6/1/2014 1 AM', '6/1/2014 11: 30 PM')	0
DiffHours	Returns the integer difference in calendar hours of two dates	DiffHours('6/1/2014 9 AM', '6/1/2014 2: 30 PM')	5
DiffMinutes	Returns the integer difference in calendar minutes of two dates.	DiffMinutes('6/1/2014 9 AM', '6/1/2014 2: 30 PM')	330
DiffSeconds	Returns the integer difference in calendar seconds of two dates.	DiffSeconds('6/1/2014 9 AM', '6/1/2014 2: 30 PM')	19800
AddYears	Add the integer number of years to the given date	AddYears('3/1/14',1)	3/1/2015

AddMonths	Add the integer number of months to the given date.	AddMonths('3/1/14',1)	4/1/2014
AddWeeks	Add the integer number of weeks to the given date.	AddWeeks('3/1/14' 2)	3/15/2015
AddDays	Adds the fractional number of days to the given date.	AddDays('3/1/14' 3)	3/4/2014
		AddDays('3/1/14' 1.5)	3/2/2014 12pm
AddHours	Adds the fractional number of hours to the given date.	AddHours('2/2/14 3 PM', 2.5)	2/2/2014 5:30pm
		AddHours('2/2/14 3 PM', 50)	2/4/2014 5pm
AddMinutes	Adds the fractional number of minutes to the given date.	AddMinutes('4/1/2014 4:45 PM', 30)	4/1/2014 5:15pm
AddSeconds	Adds the fractional number of seconds to the given date.	AddSeconds('4/1/2014 3:30 PM, 60)	4/1/2014 3:31pm
Year	Returns the year of given date.	Year('6/1/2014 1:23:45 PM')	2014
Month	Returns the month of given date.	Year('6/1/2014 1:23:45 PM')	6
Week	Returns the week of the year, based on Sunday start and the first week having at least 4 days in year.	Week('6/1/2014')	23
Day	Returns the day of given date.	Year('6/1/2014 1:23:45 PM')	7
Hour	Returns the hour of given date.	Year('6/1/2014 1:23:45 PM')	13
Minute	Returns the minute of given date.	Year('6/1/2014 1:23:45 PM')	23

Second	Returns the second of given date.	Year('6/1/2014 1:23:45 PM')	45
WeekDay	Returns the an integer for the week day (1-7), Sunday - Saturday	WeekDay('6/8/2014')	1
Now	Returns the current timestamp for local timezone.	Now()	7/1/2014 12:30
UtcNow	Returns the current timestamp for utc timezone.	UtcNow()	7/1/2014 18:30
IsEmpty	Returns true if value is null or zero length, false otherwise.	IsEmpty('')	TRUE

15.12 Formatting Dates and Numbers

You can specify the date and number formatting and apply string functions after formatting. Refer to the following specifiers and example outputs.

15.12.1 Date and Number Formatting

A user-specified format string for dates and numbers. Create your custom format string using the specifiers below. Be sure to use date specifiers with date values and numeric specifiers with numeric values.

Date Formatting

Specifier	Type	Example Output
dd	Day	10
ddd	Day abbreviation	Tue
dddd	Full day name	Tuesday
hh	2 digit hour	10
HH	2 digit hour, 24hr format	22
mm	Minute 00-59	38
MM	Month 01-12	12
MMM	Month appreviation	Dec
MMMM	Full month name	December
tt	AM or PM	PM
yy	Year, 2 digits	02
yyy	Year	2002
:	Separator	hh:mm:ss 10:43:20
/	Separator	dd/MM/yyyy 10/12/2002

Example: hh:mm tt yields 9:28 am or 9:28 pm

15.12.2 Number Formatting

Name	Type	Example	Output (Passed 1340.89)
0	Zero placeholder	00.0000	1340.8900
#	Digit placeholder	(#).##	(1340).89
.	Decimal	0.0	1340.9
,	Thousand separator	0,0	1,300
%	Percent	0%	134089%
e	Exponent placeholder	00e+0	13e+2

15.12.3 String Functions

Optional string functions applied after formatting. If a string function requires parameters (i.e. specifies values in parenthesis) they you must provide the exact number of values in the (inputs) field. String values (str) should be enclosed in quotes ("). Integer values are specified by (int).

String Formatting

Function	Type	Example	Output (Passed AbC123)
Left(int)	Returns the (int) leftmost characters	Left(4)	AbC1
Right(int)	Returns the (int) rightmost characters	Right(2)	23
Replace(str,str)	Replaces all instances of the first string with the second string	Replace("C","-----")	Ab-----12
Substring(int,int)	Returns the substring that starts at the first integer (0 is start of string) with a length of the second integer	Substring(1,3)	bC1
ToUpper()	Converts string to Upper Case characters	ToUpper()	ABC123
ToLower()	Converts string to Lower Case characters	ToLower()	abc123
MonthName()	Returns the full month name if passed a integer value 1-12	MonthName()	na

Note: For detailed string functions, see Column Formula Quick Reference and go to String Functions.

15.13 Reporting Data Sources

You can report on organization data. Reports gather information from all of the different sections of TeamWork.

The following tables describe the data sources for reports. They list the fields available and provide a brief description of contents.

15.13.1 Location

Field	Description of contents
Address1	The street address of the location or business site. (*Entered in Address in the Locations > Settings > Information window.*)
Address2	Additional information for Address1 (i.e., Suite 202). (*Entered in Address Line 2 in the Locations > Settings > Information window.)*
BusinessCode	The code that Location users type in when they log on to the Location portal and Employee portal for that location. (*Entered in Code field in the Locations > Settings > Information window.*)
BusinessExternalId	The External Id is used to coordinate TeamWork with external systems. It is blank unless your company integrates data with an external system.
BusinessName	The name of a location. (*Entered in Name in the Locations > Settings > Information window.)*
City	The name of the city for the location. (*Entered in City in the Locations > Settings > Information window.*)
Deployed	Yes or No status of whether your location is fully set/up. If deployed, must be Yes - it is fully set up. (*Entered in Deployed in the Locations > Settings > Information window.)*
Enabled	ACTIVE or INACTIVE. Indicates whether location is enabled. (*Entered in Enabled in the Locations > Settings > Information window.)*
LicenseDate	Set by ScheduleSource. (Optional, depending on license agreement.)
Phone	The phone number of the location. (*Entered in Phone in the Locations > Settings > Information window.*)
State	The two-letter designation of the state for the location. (*Entered in State in the Locations > Settings > Information window*.)
UserDefined1 - UserDefined6	Custom field(s) identified in Organization > Custom Fields > Location.

Zip	The zip code of the location. (*Entered in ZIP in the Locations* > *Settings* > *Information window.)*
Count	A count of the Locations, grouped by the other fields selected.

15.13.2 Station

Field	Description of contents
AllowSwap	Flag that indicates the station allows employees to post to the swapboard. Displays on reports as True if posting is allowed and False if posting is not allowed. *(Entered in Stations > Settings > Information window.)*
Name	The name of the station. (*Entered in Name in the Stations > Settings > Information window.*)
Notes	Additional textual information about the station.
OrgStationExternalId	The External Id is used to coordinate TeamWork with external systems. It is blank unless your company coordinates with an external system. (*Entered in External ID field in the Station information window.*)
OrgStationId	Unique ID generated by ScheduleSource.
PayRate	The estimated or average pay rate for the station. *(Entered in Stations > Settings > Information window.)*
SecurityGroupName	The name of the security group the station is assigned to. Optional. Security Groups are a special feature of roles used to limit editing of shifts.
TimeActivityCode	The code of the default Activity assigned to the station.
TimeActivityName	The name of the default Activity assigned to the station.
TimeProjectCode	The code of the default Project assigned to the station.
TimeProjectName	The name of the default Project assigned to the station.
TimeTaskCode	The code of the default Task assigned to the station.
TimeTaskName	The name of the default Task assigned to the station.
	Custom field(s) identified in Organization > Custom Fields > Station.

UserDefined1 - UserDefined6	
Count	A count of the Stations, grouped by the other fields selected.

15.13.3 Station (Local)

Field	Description of contents
AllowSwap	Flag to indicate that the station (local) allows employees to post to the swapboard. Displays on reports as True if posting is allowed and False if posting is not allowed.
BusinessCode	The Code that Location users type in when they log on to the Location.
BusinessExternalId	The External Id of the Location. It is blank unless your company coordinates with an external system.
BusinessName	The name of the Location that the Station resides in.
LocationUserDefined1 - LocationUserDefined6	Custom field(s) identified in Organization > Custom Fields > Location.
Name	The name in the Station.
Notes	Additional textual information about the station.
OrgStationExternalId	The External Id is used to coordinate TeamWork with external systems. It is blank unless your company coordinates with an external system. (*Entered in External ID field in the Station information window.*)
OrgStationId	Unique ID generated by ScheduleSource.
Rank	Relative priority of a shift ranked against other shifts. The higher the rank, the more likely the day's shifts will be filled. If empty shifts occur, they will be pushed to the lower priority days.
StationId	Unique ID generated by ScheduleSource
TimeActivityCode	The code of the default Activity assigned to the station.
TimeActivityName	The name of the default Activity assigned to the station.
TimeProjectCode	The code of the default Project assigned to the station.

TimeProjectName	The name of the default Project assigned to the station.
TimeTaskCode	The code of the default Task assigned to the station.
TimeTaskName	The name of the default Task assigned to the station.
UserDefined1 - UserDefined6	Custom field(s) identified in Organization > Custom Fields > Station.
Count	A count of the Local Stations, grouped by the other fields selected.

15.13.4 Availability Override

Field	**Description of contents**
Active	A flag that indicates whether employee is available for use in scheduling shifts. Displays on reports as True if active and False if inactive. Status is active unless an inactive date is set on Employee Status window.
Address	Employee's street address. (*(Entered in Address in the Employees > Settings > Contact window.)*
Address2	Additional information for employee address. (*Entered in Address2 in the Employees > Settings > Contact window.*)
AvailableRange	Specific times employee is available or unavailable for assignment (depends on value of EnabledYesNo). (*Employee selects Available Times on Single Day Override window.*)
BusinessName	The name of the location, for local overrides.
City	The city of the employee's address.
Country	The country of the employee's address.
Date	Date of the override.
DayId	Day ID of the date (Sunday - Saturday ~ 1-7).
DayName	Name of weekday for the date.
EMail	Employee's email address.
EmployeeId	Unique ID set by ScheduleSource. Will be unique for each Location/Employee.
Enabled	Flag (0 or 1) to indicate whether the availability is "Off" or "On". If O, the date (or times therein) are set to "Off". If 1, the date/Times are set to "On".
EnabledYesNo	Same as "Enabled" but displays text values "Yes" or "No".

EnterpriseEmployeeId	Unique ID for the employee, set by ScheduleSource.
FirstName	Employee's first name.
FullName	Employee's full name. Displayed as "Last, First".
HireDate	Employee's Start Date.
Hours	Number of hours in the AvailableRange.
LastName	Employee's last name.
Name	Name or type of the Availability Override. Report displays either Global Day Override or Local Day Override.
Notes	Textual notes related to the Employee. (*Entered on Employees > Settings > Personal window*.)
OverridePriority	UNUSED
PhoneNo	Employee's phone number. *(Entered in Phone in Employees > Settings > Contact window*.)
PhoneNo2	Additional employee phone number. (*Entered in Phone in Employees > Settings > Contact window.*)
PhoneNo3	Additional employee phone number. (*Entered in Phone in Employees > Settings > Contact window.*)
PostalCode	Employee's zip code or postal code.
PreferredEnd	End time of Preferred Range. (Overrides default preferred times for a date.)
PreferredStart	Start time of Preferred Range. (Overrides default preferred times for a date.)

ScopeText	Name of override's scope or availability. Report displays either Global or Local.
State	Employee's state. (*from Address settings*.)
TermDate	Termination date of employee. (*Entered in Terminate Date in Employees > Settings > Personal window*.)
UserDefined1 - UserDefined6	Custom field(s) identified in Organization > Custom Fields > Location.
UserName	Employee's username. (*Entered in Username in Employees > Settings > Personal window*.)
Count	A count of the Availability Overrides, grouped by the other fields selected.
EnabledCount	A count of the Enabled Availability Overrides, grouped by the other fields selected.
TotalHours	A sum of the Availability Overrides Hours, grouped by the other fields selected.

15.13.5 Availability Template

Field	Description of contents
Active	A flag that indicates whether employee is available for use in scheduling shifts. Displays on reports as True if active and False if inactive. Status is active unless an inactive date is set on Employee Status window.
Address	Employee's address. (*Entered in Address in the Employees > Settings > Contact window.*)
Address2	Additional information for employee address. (*Entered in Address2 in the Employees > Settings > Contact window*.)
AvailableRange	Specific times employee is available.(*Employee enters Available Times in the Availability Templates window.*)
BusinessName	Name of the location, for local templates.
City	The city of the employee's address.
Country	The country of the employee address.
DayId	Day ID of the date (Sunday - Saturday ~ 1-7).
EffectiveEnd	Date the availability template ends, if Date-Based
EffectiveStart	Date the availability template starts, if Date-Based
EMail	Employee's email address.
EmployeeId	Unique ID set by ScheduleSource. Will be unique for each Location/Employee.
Enabled	Indicates whether employee is available for assignment based on an Availability template. Report displays 0 if the employee is unavailable for the entire day and 1 if the employee is available to work.
EnabledYesNo	Same as "Enabled" but displays text values "Yes" or "No".

EnterpriseEmployeeId	Unique ID for the employee, set by ScheduleSource.
FirstName	Employee's first name.
FullName	Employee's full name. Displayed as "Last, First".
HireDate	Employee's Start Date.
Hours	Number of hours an employee is available based on Enabled and Available Range values.
LastName	Employee's last name.
Name	Name or type of the Availability Override. Report displays either Global Day Override or Local Day Override.
Notes	Textual notes related to the Employee. (*Entered on Employees* > *Settings* > *Personal window*.)
PhoneNo	Employee’s phone number.
PhoneNo2	Additional employee phone number.
PhoneNo3	Additional employee phone number.
PostalCode	Employee's zip code or postal code.
PreferredEnd	End time of Preferred Range. (Overrides default preferred times for a date.)
PreferredStart	Start time of Preferred Range. (Overrides default preferred times for a date.)
Rank	Employee rank indicating relative priority of working shifts on at day in the template
ScopeText	Name of template. Reports displays either Global, Local, or Datebased
State	Employee's state.

TemplatePriority	Relative priority of this template. Report displays 0 if it is a Global template, 1 if it is a Local template, and 2 if it is a Datebased template. Schedulers create these templates in the Location portal under Employee > Availability, and based on your company's settings, Employees can create these templates under Availability > Templates in the Employee portal.
TermDate	Termination or Inactive date of employee. (*Entered in Inactive Date in Employee Status window.*)
UserDefined1 - UserDefined6	Custom field(s) identified in Organization > Custom Fields >Employee.
UserName	Employee's username.
Count	A count of the Template Days, grouped by the other fields selected.
EnabledCount	A count of the Enabled Template Days, grouped by the other fields selected.
TotalHours	A sum of the Template Days’ Hours, grouped by the other fields selected.

15.13.6 Employee

Field	Description of contents
Active	A flag that indicates whether employee is available for use in scheduling shifts. Displays on reports as True if active and False if inactive. Status is active unless an inactive date is set on Employee Status window.
Address	Employee's street address. (*Entered in Address in the Employees > Settings > Contact window.*)
Address2	Additional information for employee address. (*Entered in Address2 in the Employees > Settings > Contact window*.)
AgreementEndDate	End date of current employee agreement. When an agreement is added to an employee, any previous agreement is terminated on the day before the new agreement begins. An employee can only be under one agreement at one time.
AgreementStartDate	Start date of current employee agreement. Agreements are entered under Organization > Lists > Agreement Types. When you assign an agreement to an employee using Employees > Tools > Manage Agreements or add a new employee agreement in Employees > Deployments > Agreements, you designate an Effective Date, which is the AgreementStartDate.
AgreementType	Indicates the name of the agreement. Add an Agreement Type under Organization > Lists > Agreement Types.
BioId	Employee's BioId. (*Entered in BioID in the Employees > Settings > Personal window*.)
BirthDate	Employee's birthdate. (*Entered in Birth Date in the Employees > Settings > Personalwindow.*)
CardId	Employee's CardId *(Entered in Card Id in the Employees > Settings > Personal window.*)
City	City of the employee address. (*Entered in City in Employees > Settings > Contact window.*)

Country	Country of the employee address. (*Entered in Country in Employees > Settings > Contact window.*)
DefaultLocation	Indicates the location chosen as an employee's the primary work location. To edit the DefaultLocation, go to Employees > Deployments> Locations and select a Location in the list of locations for that employee. Select Yes or No for Default.
DefaultLocationExternalId	The External ID of the DefaultLocation.
DefaultLocationId	Unique ID of the default location set by ScheduleSource.
DefaultTaskId	Unique ID of the default Task set by ScheduleSource.
EMail	Email of the employee.
ExternalId	Employee number for use with an external system, such as HR or Payroll.
FirstName	Employee's first name.
FullName	Employee's full name. Displayed as "Last, First".
HireDate	Employee Start Date.
IVRPinCode	Employee's Pin number issued for clocking via a telephone. (*Entered in IVR Pin in Employees > Settings > Personal window.*)
LastName	Employee's last name.
MaxDays	Maximum number of working days per week this employee can be assigned to work. The Automatic scheduling system honors this setting and does not assign an employee to a shift that exceeds MaxDays.
MaxHours	Maximum number of hours per week this employee can be assigned to work. The Automatic scheduling system honors this setting and does not assign an employee to a shift that exceeds MaxHours.

MaxHoursPerDay	Maximum number of hours per day this employee can be assigned to work. The Automatic scheduling system honors this setting and does not assign an employee to a shift that exceeds MaxHoursPerDay.
MaxShiftsPerDay	Maximum number of shifts per day this employee can be assigned to work. The Automatic scheduling system honors this setting and does not assign an employee to a shift that exceeds MaxShiftsPerDay.
MinHours	Minimum number of hours per week for this employee. Used only for reports and analysis.
Notes	Textual notes related to the Employee. (*Entered on Employees > Settings > Personal window.*)
OrgEmployeeId	Unique ID set by ScheduleSource.
PhoneNo	Employee's phone number.
PhoneNo2	Additional employee phone number. (*Entered in Ph2 Employees > Settings > Contact window.*)
PhoneNo3	Additional employee phone number (*Entered in Ph3 (other) in Employee Information window*.)
Policy	Name of effective Employee Policy. *(Entered in Organization > Policies and assigned to an employee when you assign an employee agreement.*)
Position	Name of effective position. (*Entered into Organization > Lists > Employee Positions and assigned to an employee when you assign an employee agreement.*)
PostalCode	Employee's zip code or postal code.
Rank	Rank of the employee versus other employees. Used in seniority considerations.
State	Employee’s state.

TermDate	Termination or Inactive date of employee. *(Entered in Inactive Date in Employees > Settings > Personal window under Terminate Date.)*
TimeZoneOffset	The hour difference between UTC time and the time zone setting for the employee. (*Selected under Employee Information > Time & Attendance.*)
TimeZoneUSDay	Indicates daylight savings for time zone: 1=Yes, i.e., Auto Adjust for daylight savings time or 0=No, i.e., do not adjust for daylight savings time.
UserDefined1 - UserDefined6	Custom field(s) identified in Organization > Custom Fields > Employee.
UserName	Employee's username.
Count	A count of the Employees, grouped by the other fields selected.

15.13.7 Employee (Local)

Field	Description of contents
Active	A flag that indicates whether employee is available for use in scheduling shifts. Displays on reports as True if active and False if inactive. Status is active unless an inactive date is set on Employee Status window.
Address	Employee's street address. (*Entered in Address in the Employees* > *Settings* > *Contact window*.)
Address2	Additional information for employee address. (*Entered in Address2 in the Employees* > *Settings* > *Contact window.*)
AgreementEndDate	End date of current employee agreement. When an agreement is added to an employee, any previous agreement is terminated on the day before the new agreement begins. An employee can only be under one agreement at one time.
AgreementStartDate	Start date of current employee agreement. Agreements are entered under Organization > Lists > Agreement Types. When you assign an agreement to an employee using Employees > Tools > Manage Agreements or add a new employee agreement in Employees > Deployments > Agreements, you designate an Effective Date, which is the AgreementStartDate.
AgreementType	Employee's agreement type. *(Entered in Employees* > *Deployments* > *Agreements.)*
BirthDate	Employee's birthdate. (*Entered in Birth Date in the Employees* > *Settings* > *Personal window*.)
BusinessCode	The code that location users and employees type in when they log in to a location. (*Entered in Code field in the Locations Settings* > *Information window.*)
BusinessExternalId	The External Id is used to coordinate TeamWork with external systems. It is blank unless your company integrates data with an external system.
BusinessName	The name of a location. (*Entered in Name in the Locations* > *Settings* > *Information window*.)

BusinessTimeZoneOffset	The hour difference between UTC time and the time zone setting for the location. (*Selected on Location Information window*.)
BusinessTimeZoneUSDay	Indicates daylight savings for location time zone: 1=Yes, i.e., Auto Adjust for daylight savings time or 0=No, i.e., do not adjust for daylight savings time.
BusinessUDF1 - BusinessUDF6	Custom field(s) identified in Organization > Custom Fields > Location.
CardId	Employee's CardId. (*Entered in BadgeID in the Employees > Settings > Personal window*.)
City	City of the employee address. (*Entered in City in Employees > Settings > Contactl window*.)
Country	Country of the employee address. (*Entered in Country in Employees > Settings > Contact window.)*
Crew	Name of the crew the employee's crew assignment. (*Crews are established in the Location portal under Location > Crews. Crews are assigned to an employee in the Location portal under the Scheduling tab in the Employee Information window*.)
DefaultActivity	The employee’s default Activity. (*Selected under Employee Information > Time & Attendance*).
DefaultLocation	Indicates the location chosen as an employee's the primary work location. To edit the DefaultLocation, go to Employees > Deployments> Locations and select a Location in the list of locations for that employee. Select Yes or No for Default.
DefaultLocationId	Unique ID of the default Location set by ScheduleSource.
DefaultTaskId	Unique ID of the default Task set by ScheduleSource.
EMail	Email of the employee. (*Entered in Email in Employee> Settings > Contact window*.)
ExternalId	Employee ID for use with an external system, such as HR or Payroll

FirstName	Employee's first name. (*Entered in First Name in Employees > Settings > Personal window*.)
FullName	Employee's full name. Displayed as "Last, First".
HireDate	Employee Start Date.
IVRPinCode	Employee's Pin number issued for clocking via a telephone. (*Entered in IVR Pin in Employees > Settings > Personal window*.)
LastName	Employee's last name.
MaxDays	Maximum number of working days per week this employee can be assigned to work. The Automatic scheduling system honors this setting and does not assign an employee to a shift that exceeds MaxDays.
MaxHours	Maximum number of hours per week this employee can be assigned to work. The Automatic scheduling system honors this setting and does not assign an employee to a shift that exceeds MaxHours.
MaxHoursPerDay	Maximum number of hours per day this employee can be assigned to work. The Automatic scheduling system honors this setting and does not assign an employee to a shift that exceeds MaxHoursPerDay.
MaxShiftsPerDay	Maximum number of shifts per day this employee can be assigned to work. The Automatic scheduling system honors this setting and does not assign an employee to a shift that exceeds MaxShiftsPerDay.
MinHours	Minimum number of hours per week for this employee. Used only for reports and analysis.
Notes	Textual notes related to the Employee. (*Entered on Employees > Settings > Personal window.*)
PayRate	Estimated or average hourly rate of pay. (*PayRate is assigned to an employee in a location in the Employees > Settings > Schedule window*.)

PhoneNo	Employee's phone number.
PhoneNo2	Additional employee phone number. (*Entered in Employees > Settings > Contact window.*)
PhoneNo3	Additional employee phone number (*Entered in Employees > Settings > Contact window*.)
Policy	Name of effective Employee Policy. *(Entered in Organization > Policies and assigned to an employee when you assign an employee agreement in Employees > Deployments > Agreements or Employees > Tools > Manage Agreements.*)
Position	Name of effective position. (*Entered into Organization > Lists > Position Types and assigned to an employee when you assign an employee agreement.*)
PostalCode	Employee's zip code or postal code.
RotationId	Unique ID for local rotation pattern. Created by ScheduleSource.
State	Employee’s state.
TermDate	Termination or Inactive date of employee. *(Entered in Inactive Date in Employees > Settings > Personal window under Terminate Date.)*
TimeZoneOffset	The hour difference between UTC time and the time zone setting for the employee. (*Selected under Employee Information > Time & Attendance.*)
TimeZoneUSDay	Indicates daylight savings for time zone: 1=Yes, i.e., Auto Adjust for daylight savings time or 0=No, i.e., do not adjust for daylight savings time.
UserDefined1 - UserDefined6	Custom field(s) identified in Organization > Custom Fields > Employee.
UserName	Employee's username.
BusinessCount	A count of the Employees’ unique Locations, grouped by the other fields selected.

ClientCount	A count of the Employees’ unique Client assignments, grouped by the other fields selected.
Count	A count of the Local Employees, grouped by the other fields selected.
OrgEmployeeCount	A count of the Employees, grouped by the other fields selected.

15.13.8 Employee Accruals

Field	Description of contents
AccrualDescription	Description of the accrual type. (*Entered in the Description field in the Accrual Type window under Organization > Lists > Accrual Types*.)
AccrualExternalId	The External ID is used to coordinate TeamWork with external systems. It is blank unless your company coordinates with an external system. (*Entered in the External ID field in the Accrual Type window*.)
AccrualId	Unique ID set by ScheduleSource.
AccrualType	Name of the accrual type.
Active	A flag that indicates whether employee is available for use in scheduling shifts. Displays on reports as True if active and False if inactive. Status is active unless an inactive date is set on Terminate Date window.
Address	Employee's street address. (*Entered in Address in the Employees > Settings > Contact window*.)
Address2	Additional information for employee address. (*Entered in Address2 in the Employees > Settings > Contact window.*)
Balance	Accrual balance.
City	City of the employee address. (*Entered in City in Employees > Settings > Contact window.*)
Country	Country of the employee address. (*Entered in City in Employees > Settings > Contact window.*)
DefaultLocation	Indicates the location chosen as an employee's the primary work location. To edit the DefaultLocation, go to Employees > Deployments> Locations and select a Location in the list of locations for that employee. Select Yes or No for Default.
DefaultLocationExternalId	

	External ID for the default location. The External Id is used to coordinate TeamWork with external systems. It is blank unless your company integrates with an external system.
DefaultLocationId	Unique ID for default location set by ScheduleSource.
Email	Email of the employee.
EmployeeFullName	Employee full name. Displayed as “Last, First”.
EmployeeId	Unique ID set by ScheduleSource. (Equals OrgEmployeeId)
ExternalId	Employee ID for use with an external system, such as HR or Payroll.
FirstName	Employee's first name.
LastName	Employee's last name.
Notes	Textual notes related to the Employee. (*Entered on Employees* > *Settings* > *Personal window.*)
PhoneNo	Employee's phone number.
PhoneNo2	Additional employee phone number. (*Entered in Employees* > *Settings* > *Contact window.*)
PhoneNo3	Additional employee phone number (*Entered in Employees* > *Settings* > *Contact window*.)
PostalCode	Employee's zip code or postal code.
Project	Name of Project linked to accrual.
State	Employee’s state (from Address settings).

Task	Name of Task linked to accrual.
Updated	Timestamp of last update to accrual balance.
UserDefined1 - UserDefined6	Custom field(s) identified in Organization > Custom Fields > Employee.
UserName	Employee's username. (*Entered in Username/ID in Employee Information window*.)
Count	A count of the Employee Accruals, grouped by the other fields selected.

15.13.9 Employee Credentials

Field	Description of contents
Active	A flag that indicates whether employee is available for use in scheduling shifts. Displays on reports as True if active and False if inactive. Status is active unless an inactive date is set on Employee Status window.
Address	Employee's street address. (*Entered in Address in the Employees > Settings > Contact window*.)
Address2	Additional information for employee address. (*Entered in Address2 in the Employees > Settings > Contact window.*)
BioId	Employee's BioId. (*Entered in BioID in the Employees > Settings > Personal n window*.)
BirthDate	Employee's birthdate. (*Entered in Birth Date in the Employees > Settings > Personal window.*)
CardId	Employee's CardId *(Entered in BadgeID in the Employees > Settings > Personal window.*)
City	City of the employee address. (*Entered in City in Employees > Settings > Contact window.*)
Country	Country of the employee address. (*Entered in Country in Employees > Settings > Contact window.*)
DefaultLocation	Indicates the location chosen as an employee's the primary work location. To edit the DefaultLocation, go to Employees > Deployments> Locations and select a Location in the list of locations for that employee. Select Yes or No for Default.
DefaultLocationExternalId	The External ID of the DefaultLocation. The External Id is used to coordinate TeamWork with external systems. It is blank unless your company integrates with an external system.
DefaultLocationId	Unique ID of the default location set by ScheduleSource.

Email	Email of the employee. (*Entered in Email in Employees > Settings > Contact window.*)
ExternalId	Employee ID for use with an external system, such as HR or Payroll.
FirstName	Employee first name. (*Entered in First Name in Employees > Settings > Personal window*.)
FullName	Employee full name. Displayed as “Last, First”.
HireDate	Employee Start Date.
IVRPinCode	Employee's Pin number issued for clocking via a telephone. (*Entered in IVR Pin in Employees > Settings > Personal window*.)
LastName	Employee's last name. (*Entered in Last Name in Employees > Settings > Personal window*.)
MaxDays	Maximum number of working days per week this employee can be assigned to work. The Automatic scheduling system honors this setting and does not assign an employee to a shift that exceeds MaxDays.
MaxHours	Maximum number of hours per week this employee can be assigned to work. The Automatic scheduling system honors this setting and does not assign an employee to a shift that exceeds MaxHours.
MaxHoursPerDay	Maximum number of hours per day this employee can be assigned to work. The Automatic scheduling system honors this setting and does not assign an employee to a shift that exceeds MaxHoursPerDay.
MaxShiftsPerDay	Maximum number of shifts per day this employee can be assigned to work. The Automatic scheduling system honors this setting and does not assign an employee to a shift that exceeds MaxShiftsPerDay.
MinHours	Minimum number of hours per week for this employee. Used only for reports and analysis.
Notes	

	Textual notes related to the Employee. (*Entered on Employees* > *Settings* > *Personal window.*)
OrgEmployeeId	Unique ID set by ScheduleSource.
PhoneNo	Employee's phone number.
PhoneNo2	Additional employee phone number. (*Entered in Employees* > *Settings* > *Contact window.*)
PhoneNo3	Additional employee phone number (*Entered in Employees* > *Settings* > *Contact window*.)
PostalCode	Employee's zip code or postal code.
QualificationCode	Code associated with this qualification or certification. (*Entered in Code in the Add >> Credential window*.)
QualificationCompletedBy	Date employee qualification must be completed by for an employee. (*Entered in the Assignments Credential window*.)
QualificationCompleted	Date employee completed the qualification or certification. (*Entered in the Assignments Credential window*.)
QualificationEffectiveEnd	Last date qualification is effective for an employee. (*Entered in the Assignments Credential window*.)
QualificationEffectiveStart	Date qualification begins being effective for an employee. (*Entered in the Assignments Credential window*.)
QualificationEmployeeNote	Notes related to the qualification for an employee. (*Entered in the Assignments Credential window*.)
QualificationId	ID for the employee’s qualification. *(Entered in Id in employee Assignments Credential window.*)

QualificationName	Name associated with this qualification or certification. (*Entered in Name in the Add >> Credential window.)*
QualificationNote	Notes associated with this qualification or certification. *(Entered in Notes in the Qualification or Certification window.*)
QualificationStatus	Indicates qualification status: Complete = valid and Pending = pending
QualificationType	Set by ScheduleSource to distinguish qualification type: QUAL = Qualification, CLASS = Training, CERT = Certification
Rank	Rank of the employee versus other employees. Used in seniority considerations.
State	Employee’s state.
TermDate	Termination or Inactive date of employee. *(Entered in Inactive Date in Employees > Settings > Personal window under Terminate Date.)*
TimeZoneOffset	The hour difference between UTC time and the time zone setting for the employee. (*Selected under Employee Information > Time & Attendance.*)
TimeZoneUSDay	Indicates daylight savings for time zone: 1=Yes, i.e., Auto Adjust for daylight savings time or 0=No, i.e., do not adjust for daylight savings time.
UserDefined1 - UserDefined6	Custom field(s) identified in Organization > Custom Fields > Employee.
UserName	Employee's username.
Count	A count of the Employee Credentials, grouped by the other fields selected.

15.13.10 Employee Leave

Field	Description of contents
Active	A flag that indicates whether employee is available for use in scheduling shifts. Displays on reports as True if active and False if inactive. Status is active unless an inactive date is set on Employee Status window.
Address	Employee's street address. (*Entered in Address in the Employees* > *Settings* > *Contact window*.)
Address2	Additional information for employee address. (*Entered in Address2 in the Employees* > *Settings* > *Contact window.*)
City	City of the employee address. (*Entered in City in Employees* > *Settings* > *Contact window.*)
Comment	Comment employee enters when leave is requested.
Country	Country of the employee address. (*Entered in Country in Employees* > *Settings* > *Contact window*.)
DateEnd	Ending effective date of the leave entry.
DateStart	Starting effective date of the leave entry.
Days	Count of days in the effective leave date range.
DefaultLocationCode	Employee’s default location Code.
DefaultLocationExternalId	Employee’s default location External ID.
DefaultLocationName	Employee’s default location Name.
DefaultLocationPhone	Employee’s default location Phone.
EMail	Employee’s email address.

EmployeeRequestTime	Timestamp of the entry in employee’s Time Zone, if different from location.
EndTime	Ending time of partial day off entry.
EnterpriseEmployeeId	Unique ID for employee, set by ScheduleSource. (Same as OrgEmployeeId)
EnterpriseRequestTime	Timestamp of the entry in enterprise Time Zone.
FirstName	Employee first name.
FullName	Employee full name. Displayed as “Last, First”.
HireDate	Employee Start Date.
Id	Unique ID of leave entry, set by ScheduleSource.
LastName	Employee's last name.
LastUpdatedDate	Timestamp of last update to leave entry.
LeaveHours	Total hours of leave entry.
LeaveTypeCode	Code associated with this leave type for the entry.
LeaveTypeId	Unique ID for the leave type, set by ScheduleSource.
LeaveTypeName	Name of the leave type for the entry.
LocationRequestTime	Timestamp of the entry in location’s Time Zone.
Notes	Notes related to the Employee. *(Entered on Employees > Settings > Personal window.*
OffType	UNUSED

PhoneNo	Employee's phone number.
PhoneNo2	Additional employee phone number. (*Entered in Employees > Settings > Contact window.*)
PhoneNo3	Additional employee phone number (*Entered in Employees > Settings > Contact window*.)
PostalCode	Employee's zip code or postal code.
RequestStatus	Numerical indication of leave request status: 1 = request initiated, 0 = request granted, 2 = request denied
RequestStatusText	Text indication of leave request status: REQUEST (request initiated), GRANTED (request granted), DENIED (request denied), CANCELLED (granted leave was cancelled by request)
RequestTime	Timestamp of entry creation.
StartMonth	Month formatted (MM) DateStart.
StartTime	Start time of partial day off.
StartYear	Year formatted (YYYY) DateStart.
State	Employee’s state.
TermDate	Termination or Inactive date of employee. *(Entered in Inactive Date in Employees > Settings > Personal window under Terminate Date.)*
TimeOff	Text representation of start/end times for partial day off.
UserDefined1 - UserDefined6	Custom field(s) identified in Organization > Custom Fields > Employee.
UserName	Employee's username.

CancelRequestedCount	A count of the Leave Entries that have been requested cancelled (but not yet cancelled), grouped by the other fields selected.
Count	A count of the Leave Entries, grouped by the other fields selected.
DeniedCount	A count of the Leave Entries with DENIED status, grouped by the other fields selected.
GrantedCount	A count of the Leave Entries with GRANTED status, grouped by the other fields selected.
LeaveHoursTotal	A sum of the Leave Entry Hours, grouped by the other fields selected.
RequestCount	A count of the Leave Entries with REQUEST status, grouped by the other fields selected.
TotalDays	A sum of the Leave Entry Days, grouped by the other fields selected.

15.13.11 Employee Skills

Field	Description of contents
Active	A flag that indicates whether employee is available for use in scheduling shifts. Displays on reports as True if active and False if inactive. Status is active unless an inactive date is set on Employee Status window.
Address	Employee's street address. (*Entered in Address in the Employees > Settings > Contact window*.)
Address2	Additional information for employee address. (*Entered in Address2 in the Employees > Settings > Contact window.*)
BusinessCode	The location Code for the employee’s skill.
BusinessName	The location Name for the employee’s skill.
BusinessUDF1 - BusinessUDF6	Custom field(s) identified in Organization > Custom Fields > Location.
City	The city of the employee’s address. (*Entered in City in the Employees > Settings > Contact window.*)
Country	The country of the employee’s address. (*Entered in Country in the Employees > Settings > Contact window.*)
Crew	Name employee’s crew assignment.
EMail	Employee’s email address.
EmployeeId	Unique ID for the local employee, set by ScheduleSorce.
EnterpriseEmployeeId	Unique ID for the employee, set by ScheduleSource.
EnterpriseStationId	Unique ID for the station, set by ScheduleSource.
ExternalId	Employee ID for use with an external system, such as HR or Payroll.

FirstName	Employee first name.
FullName	Employee full name. Displayed as “Last, First”.
HireDate	Employee Start Date.
LastName	Employee's last name.
Level	Level Skill level of the employee for the station and location. Highest = 9, lowest = 0.
MaxDays	Maximum number of working days per week this employee can be assigned to work. The Automatic scheduling system honors this setting and does not assign an employee to a shift that exceeds MaxDays.
MaxHours	Maximum number of hours per week this employee can be assigned to work. The Automatic scheduling system honors this setting and does not assign an employee to a shift that exceeds MaxHours.
MaxHoursPerDay	Maximum number of hours per day this employee can be assigned to work. The Automatic scheduling system honors this setting and does not assign an employee to a shift that exceeds MaxHoursPerDay.
MaxShiftsPerDay	Maximum number of shifts per day this employee can be assigned to work. The Automatic scheduling system honors this setting and does not assign an employee to a shift that exceeds MaxShiftsPerDay.
MinHours	Minimum number of hours per week for this employee. Used only for reports and analysis.
PhoneNo	Employee's phone number.
PhoneNo2	Additional employee phone number. (*Entered in Employees* > *Settings* > *Contact window.*)
PhoneNo3	Additional employee phone number (*Entered in Employees* > *Settings* > *Contact window*.)

PostalCode	Employee's zip code or postal code.
Rank	Rank of the employee versus other employees. Used in seniority considerations.
State	Employee’s state.
StationId	Unique ID generated by ScheduleSource.
StationName	The name of the station.
StationRank	Relative priority of a station ranked against other stations. The higher the rank, the more likely the station's shifts will be filled. If empty shifts occur, they will be pushed to the lower priority stations.
TermDate	Termination or Inactive date of employee. *(Entered in Inactive Date in Employees > Settings > Personal window under Terminate Date.)*
UserDefined1 - UserDefined6	Custom field(s) identified in Organization > Custom Fields > Employee.
UserName	Employee's username.
Count	A count of the Skill Assignments, grouped by the other fields selected.
EmployeeCount	Count of unique Employee/Location assignments, grouped by the other fields selected.
OrgEmployeeCount	Count of unique Employees, grouped by the other fields selected.
ShiftCount	Count of Shifts, grouped by the other fields selected, subject to the Date Range of the filter.
StationCount	Count of unique Stations, grouped by the other fields selected.

15.13.12 Enterprise Shifts

Field	Description of contents
BreakEnd	Break end time with day mm/dd/yyyy and time in AM or PM. (LOCAL SHIFT)
BreakEndText	Break end time only, as a text string, in military time. (LOCAL SHIFT)
BreakStart	Break start time with day mm/dd/yyyy and time in AM or PM (LOCAL SHIFT)
BreakStartText	Break start time only, as a text string, in military time. (LOCAL SHIFT)
BusinessCode	The code that location users and employees type in when they log in to a location. (*Entered in Code field in the Locations >Settings > Information window.*)
BusinessExternalId	The External Id is used to coordinate TeamWork with external systems. It is blank unless your company integrates data with an external system. (LOCAL SHIFT)
BusinessName	The name of a location. *(Entered in Name in the Locations > Settings> Information window.*) (LOCAL SHIFT)
BusinessPhone	The phone number of the location. (*Entered in Phone in the Locations > Settings> Information window.*) (LOCAL SHIFT)
ClientFirstName	ClientFirstName First name of client assigned to shift. (Optional, only available If Client Management Module is activated.) (LOCAL SHIFT)
ClientFullName	Full name of client, displayed as “Last, First”. (LOCAL SHIFT)
ClientId	If Client Management Module is activated; Displays the ID number of the client assigned.
ClientLastName	If Client Management Module is activated; displays last name of the client assigned.
EMail	Employee’s email address. (LOCAL SHIFT)
EmpApproved	

	Displays 0 for false (employee has not okayed shift or not required to approve shift) Displays -1 if shift approval is required and employee has okayed shift to work. (LOCAL SHIFT)
EmployeeFullName	Employee's full name. Displayed as "Last, First". (LOCAL SHIFT)
EmpSwapping	Flags that the shift is posted to swapboard by employee; Displays -1 if True (posted) or 0 if False (not posted). (LOCAL SHIFT)
EnterpriseEmployeeId	Unique ID for Employee, set by ScheduleSource.
EnterpriseEnd	Shift End time, in enterprise time zone.
EnterpriseScheduleId	Unique ID for Enterprise Schedule, set by ScheduleSource.
EnterpriseShiftId	Unique ID for Shift, set by ScheduleSource.
EnterpriseStart	Shift Start time, in enterprise time zone.
EnterpriseStationId	Unique ID for Station, set by ScheduleSource.
FirstName	Employee's first name. (LOCAL SHIFT)
Hours	Total hours of Enterprise Shift. (ShiftEnd – ShiftStart).
InactiveCode	Flags that the shift has been made inactive and no longer a valid shift; Displays -1 if True (shift is inactive) or 0 if False (shift is active).
LastName	Employee's last name. (LOCAL SHIFT)
LimitLocations	Flag on the Enterprise Schedule indicating that shifts can only be deployed to a limited list of locations.
LocalBusinessId	Unique ID for Location, set by ScheduleSource.

LocalDate	Date of Shift. (LOCAL SHIFT)
LocalDateText	Date of Shift in YYYYMMDD format. (LOCAL SHIFT)
LocalEmployeeId	Unique ID for employee/location. Set by ScheduleSource.
LocalHours	Net hours of shift. End-Start – BreakHours. (LOCAL SHIFT)
LocalNote	A comment added to shift. (LOCAL SHIFT)
LocalScheduleId	Unique ID for the location/schedule. (LOCAL SHIFT)
LocalShiftId	Unique ID for shift. (LOCAL SHIFT)
LocalStationId	Unique ID for the location/station. (LOCAL SHIFT)
LocationUserDefined1 - LocationUserDefined6	Custom field(s) identified in Organization > Custom Fields > Location.
Note	A comment added to the enterprise shift.
Phone1	Employee's phone number. *(Entered in Phone in Employees >Settings > Contact window*.)
Phone2	Additional employee phone number. *(Entered in Phone in Employees >Settings > Contact window*.)
Phone3	Additional employee phone number. *(Entered in Phone in Employees >Settings > Contact window*.)
ScheduleAllowSwap	Flag that indicates if Enterprise Schedule is Published and employees can claim shifts on SwapBoard. = Yes, 0 = No.
ScheduleDate	Start date of the schedule.

ScheduleDateText	Text value of start date of the schedule in format yyyy.mm.dd
ScheduleDateYear	Year portion of the start date.
ScheduleName	Name of the Enterprise Schedule.
SchedulePublished	Flag that indicates if Enterprise Schedule is Published and employees can claim shifts on SwapBoard. (*Same as ScheduleAllowSwap except displays True or False)*
ShiftEnd	End time of shift in AM or PM (shows fixed default date of 1/1/1900) (LOCAL SHIFT)
ShiftEndText	Text string of end time of shift; default in military time. (LOCAL SHIFT)
ShiftStart	Start time of shift in AM or PM (shows fixed default date of 1/1/1900)(LOCAL SHIFT)
ShiftStartText	Test string of start time of shift; default in military time.(LOCAL SHIFT)
ShiftType	UNUSED
StationAllowSwap	Displays True if allow swap is chosen for this station in Enterprise; False if not allowed to swap
StationName	Name of Station.
StationUDF1 - StationUDF6	Custom field(s) defined in Organization > Custom Fields > Station.
StationUserDefined1 - StationUserDefined6	Same as “StationUDF” fields above.
Swapping	Flag displaying if the shift has been posted to be swapped on the swap board. Displays -1 if True or 0 if false (not posted).(LOCAL SHIFT)
TimeActivityCode	The code of the Default Activity assigned to Station.

TimeActivityName	The name of the Default Activity assigned to Station.
TimeProjectCode	The code of the Default Project assigned to Station.
TimeProjectName	The name of the Default Project assigned to Station.
TimeTaskCode	The code of the Default Task assigned to Station.
TimeTaskName	The name of the Default Task assigned to Station.
UpdateReason	A custom feature displaying the reason a shift was updated. Currently only applied when cancelling a shift.
UserDefined1 - UserDefined6	Custom field(s) identified in Organization > Custom Fields > Employee.
UtcEnd	End time of Enterprise Shift in coordinated universal time (UTC).
UtcStart	Start time of Enterprise Shift in coordinated universal time (UTC).
AssignedCount	Count of shifts assigned to an employee; i.e. non-empty shifts, grouped by the other fields selected. (LOCAL SHIFT)
BusinessCount	Count of the unique locations represented in shifts, grouped by the other fields selected. (LOCAL SHIFT)
Count	Count of shifts, grouped by the other fields selected.(LOCAL SHIFT)
DateCount	Count of distinct dates, grouped by the other fields selected.
DayCount	Count of distinct week days represented in shifts, grouped by the other fields selected.
EmployeeCount	Count of distinct/employees represented in shifts, grouped by the other fields selected. (LOCAL SHIFT)

EnterpriseShiftCount	Count of shifts with enterprise ID's; Generated from Enterprise Schedule
LocalDateCount	Count of distinct dates, grouped by the other fields selected. (LOCAL SHIFT)
LocalDayCount	Count of distinct week days represented in shifts, grouped by the other fields selected. (LOCAL SHIFT)
LocalEmployeeCount	Count of distinct location/stations represented in shifts, grouped by the other fields selected. (LOCAL SHIFT)
LocalHoursTotal	Sum of hours, grouped by the other fields selected. (LOCAL SHIFT)
LocalScheduleCount	Count of local schedules represented in shifts, grouped by the other fields selected. (LOCAL SHIFT)
LocalStationCount	Count of distinct location/stations represented in shifts, grouped by the other fields selected. (LOCAL SHIFT)
ScheduleCount	Count of enterprise schedules represented in shifts, grouped by the other fields selected. (LOCAL SHIFT)
ShiftCount	Count of unique shifts, grouped by the other fields selected. (LOCAL SHIFT)
StationCount	Count of distinct stations represented in shifts, grouped by the other fields selected.

15.13.13 Schedule Archive

Field	Description of contents
BreakEnd	Break end time with day mm/dd/yyyy and time in AM or PM.
BreakEndText	Break end time only, as a text string, in military time.
BreakStart	Break start time with day mm/dd/yyyy and time in AM or PM
BreakStartText	Break start time only, as a text string, in military time.
BusinessCode	The code that location users and employees type in when they log in to a location. (*Entered in Code field in the Locations > Settings > Information window.*)
BusinessExternalId	The External Id is used to coordinate TeamWork with external systems. It is blank unless your company integrates data with an external system.
BusinessName	The name of a location. *(Entered in Name in the Locations > Settings> Information window.*)
BusinessPhone	The phone number of the location. *(Entered in Phone in the Locations > Settings> Information window*)
ClientFirstName	First name of client assigned to shift.*(Optional, only available If Client Management Module is activated.*)
ClientFullName	Full name of client, displayed as “Last, First”.
ClientId	Unique ID of client, set by ScheduleSource. *(Optional, only available If Client Management Module is activated.)*
ClientLastName	Last name of client assigned to shift. *(Optional, only available If Client Management Module is activated.*)
Crew	Name of employee’s crew assignment.
Date	Date of the shift start.

DateText	Text value of Date. (yyyyMMdd)
DayId	ID for the week day of the date. (Sunday – Saturday ~ 1-7).
EmpApproved	Displays 0 for false (employee has not okayed shift or not required to approve shift), displays -1 if shift approval is required and employee has okayed shift to work.
EmployeeFullName	Employee's full name. Displayed as "Last, First".
EmployeeId	Unique ID for the employee, set by ScheduleSource.
EmpSwapping	Flags that the shift is posted to swapboard by employee; Displays -1 if True (posted) or 0 if False (not posted).
FirstName	Employee's first name.
Hours	Total hours of the shift. (ShiftEnd – ShiftStart) – BreakHours.
InactiveCode	Flags that the shift has been made inactive and no longer a valid shift; Displays -1 if True (shift is inactive) or 0 if False (shift is active).
LastName	Employee's last name.
Note	A comment added to shift.
ScheduleDate	Start date of the schedule.
ScheduleDateText	Text value of start date of the schedule in format yyyy.mm.dd.
ScheduleDateYear	Year portion of the schedule start date.
ScheduleFirm	Flag indicating the schedule is firm and not actively being edited. -1 = Yes, 0 = No. *(Not enforced. User can choose how to implement.)*
ScheduleId	Unique ID for the schedule, set by ScheduleSource.

ScheduleName	Name of the schedule.
SchedulePublished	Flag that indicates if Enterprise Schedule is Published and employees can claim shifts on SwapBoard. *(Same as ScheduleAllowSwap except displays True or False*).
ShiftEnd	End date and time of shift.
ShiftEndText	Text string of end time of shift; default in military time.
ShiftGroup	Name of shift group the shift has been assigned.
ShiftId	Unique ID for a shift, set by ScheduleSource.
ShiftStart	Start date and time of shift.
ShiftStartText	Text string of start time of shift; default in military time.
StationId	Unique ID for station, set by ScheduleSource.
StationName	Name of Station.
Swapping	Flag displaying if the shift has been posted to be swapped on the swap board. Displays -1 if True or 0 if false (not posted).
SwappingToEmployeeId	Unique ID to whom a swap is being directed. The ID is for the employee at the location of the shift.
TimeActivityCode	The code of the Default Activity assigned to Station.
TimeActivityName	The name of the Default Activity assigned to Station.
TimeProjectCode	The code of the Default Project assigned to Station.
TimeProjectName	The name of the Default Project assigned to Station.

TimeTaskCode	The code of the Default Task assigned to Station.
TimeTaskName	The name of the Default Task assigned to Station.
UpdateAction	Internal code for the type of update performed on shift.
UpdateDate	Timestamp of the last edit of the shift.
UpdateReason	A custom feature displaying the reason a shift was updated. Currently only applied when cancelling a shift.
UpdateUserId	Unique ID for the user or employee updating the shift (by location).
UpdateUserType	Internal code to indicate if update was by a user or employee.
UserName	Employee’s username (same as EmployeeNum).
AssignedCount	Count of shifts assigned to an employee; i.e. non-empty shifts, grouped by the other fields selected.
BreakCount	Count of shifts with a break, grouped by the other fields selected.
BusinessCount	Count of the unique locations represented in shifts, grouped by the other fields selected.
Count	Count of shifts, grouped by the other fields selected.
DateCount	Count of distinct dates, grouped by the other fields selected.
DayCount	Count of distinct week days represented in shifts, grouped by the other fields selected.
EmployeeCount	Count of distinct/employees represented in shifts, grouped by the other fields selected.
EstCostTotal	Estimated cost of the shift based first on the employee pay rate but will use station pay rate if employee pay rate is zero.*(Pay Rates as set on employee and station records, not from Time and Attendance calculations*).

FridayHoursTotal	Sum of hours on Fridays, grouped by the other fields selected.
HoursMax	Hours of the longest shift, grouped by the other fields selected.
HoursMin	Hours of the shortest shift, grouped by the other fields selected.
HoursTotal	Sum of hours, grouped by the other fields selected.
InactiveTotal	Count of the inactive shifts, grouped by the other fields selected.
MondayHoursTotal	Sum of hours on Mondays, grouped by the other fields selected.
SaturdayHoursTotal	Sum of hours on Saturdays, grouped by the other fields selected.
ScheduleCount	Count of schedules represented in shifts, grouped by the other fields selected.
ShiftCount	Count of unique shifts, grouped by the other fields selected.
StationCount	Count of distinct stations represented in shifts, grouped by the other fields selected.
SundayHoursTotal	Sum of hours on Sundays, grouped by the other fields selected.
SwappingTotal	Count of shifts posted to SwapBoard (not empty shifts), grouped by the other fields selected.
ThursdayHoursTotal	Sum of hours on Thursdays, grouped by the other fields selected.
TuesdayHoursTotal	Sum of hours on Tuesdays, grouped by the other fields selected.
WednesdayHoursTotal	Sum of hours on Wednesdays, grouped by the other fields selected.

15.13.14 Schedule Audit

Field	Description of contents
BreakEnd	Break end time with day mm/dd/yyyy and time in AM or PM.
BreakEndText	Break end time only, as a text string, in military time.
BreakStart	Break start time with day mm/dd/yyyy and time in AM or PM
BreakStartText	Break start time only, as a text string, in military time.
BusinessCode	The code that location users and employees type in when they log in to a location. (*Entered in Code field in the Locations > Settings > Information window.*)
BusinessName	The name of a location. *(Entered in Name in the Locations > Settings> Information window.*)
BusinessPhone	The phone number of the location. *(Entered in Phone in the Locations > Settings> Information window.*)
ClientFirstName	First name of client assigned to shift. *(Optional, only available If Client Management Module is activated.*)
ClientFullName	Full name of client, displayed as “Last, First”.
ClientId	Unique ID of client, set by ScheduleSource. *(Optional, only available If Client Management Module is activated.*)
ClientLastName	Last name of client assigned to shift. *(Optional, only available If Client Management Module is activated.*)
Crew	Name employee’s crew assignment.
Date	Date of the shift start.
DateText	Text value of Date (yyyyMMdd).

DayId	ID for the week day of the date. (Sunday – Saturday ~ 1-7).
EmpApproved	Displays 0 for false (employee has not okayed shift or not required to approve shift), displays -1 if shift approval is required and employee has okayed shift to work.
EmployeeFullName	Employee's full name. Displayed as "Last, First".
EmployeeId	Unique ID for the employee, set by ScheduleSource.
EmployeeMaxHours	Employee's maximum number of hours per week setting.
EmployeeMinHours	Employee's minimum number of hours per week setting.
EmpSwapping	Flags that the shift is posted to swapboard by employee; Displays -1 if True (posted) or 0 if False (not posted).
ExternalEmployeeId	Employee ID for use with an external system, such as HR or Payroll.
FirstName	Employee's first name.
Hours	Total hours of the shift. (ShiftEnd – ShiftStart) – BreakHours.
InactiveCode	Flags that the shift has been made inactive and no longer a valid shift; Displays -1 if True (shift is inactive) or 0 if False (shift is active).
LastName	Employee's last name.
Note	A comment added to shift.
ScheduleDate	Start date of the schedule.
ScheduleDateText	Text value of start date of the schedule in format yyyy.mm.dd.
ScheduleDateYear	Year portion of the schedule start date.

ScheduleFirm	Flag indicating the schedule is firm and not actively being edited. -1 = Yes, 0 = No.*(Not enforced. User can choose how to implement.*)
ScheduleId	Unique ID for the schedule, set by ScheduleSource.
ScheduleName	Name of the schedule.
SchedulePublished	Flag that indicates if Enterprise Schedule is Published and employees can claim shifts on SwapBoard. *(Same as ScheduleAllowSwap except displays True or False*).
ShiftEnd	End date and time of shift.
ShiftEndText	Text string of end time of shift; default in military time.
ShiftGroup	Name of shift group the shift has been assigned.
ShiftId	Unique ID for a shift, set by ScheduleSource.
ShiftStart	Start date and time of shift.
ShiftStartText	Test string of start time of shift; default in military time.
StationId	Unique ID for station, set by ScheduleSource.
StationName	Name of Station.
Status	UNUSED
Swapped	This shift was swapped, according to the update tracking fields.
Swapping	Flag displaying if the shift has been posted to be swapped on the swap board. Displays -1 if True or 0 if false (not posted).
SwappingToEmployeeId	Unique ID to whom a swap is being directed. The ID is for the employee at the location of the shift.

SwapPostDate	Timestamp of when shift was posted to SwapBoard.
SwapReason	Optional Reason code selected by employee when posting shift.
SwapToEmployeeId	Same as SwappingToEmployeeId.
SwapToFullName	Full name of the employee the swapping shift is directed to.
TimeActivityCode	The code of the Default Activity assigned to Station.
TimeActivityName	The name of the Default Activity assigned to Station.
TimeProjectCode	The code of the Default Project assigned to Station.
TimeProjectName	The name of the Default Project assigned to Station.
TimeTaskCode	The code of the Default Task assigned to Station.
TimeTaskName	The name of the Default Task assigned to Station.
UpdateAction	Internal code for the type of update performed on shift.
UpdatedDate	Timestamp of the last edit of the shift.
UpdateEmployeeFullName	Employee’s full name, if the edit was done by an employee.
UpdateFullName	Full name of person who made update (either User or Employee).
UpdateReason	A custom feature displaying the reason a shift was updated. Currently only applied when cancelling a shift.
UpdateUserFullName	User’s full name, if the update was done by an employee.
UpdateUserId	Unique ID for the user or employee updating the shift (by location).

UpdateUserType	Internal code to indicate if update was by a user or employee.
UserName	Employee’s username (same as EmployeeNum).
AssignedCount	Count of shifts assigned to an employee; i.e., non-empty shifts, grouped by the other fields selected.
BusinessCount	Count of the unique locations represented in shifts, grouped by the other fields selected.
Count	Count of shifts, grouped by the other fields selected.
DateCount	Count of distinct dates, grouped by the other fields selected.
DayCount	Count of distinct week days represented in shifts, grouped by the other fields selected.
EmployeeCount	Count of distinct employees/locations represented in shifts, grouped by the other fields selected.
InactiveTotal	Count of the inactive shifts, grouped by the other fields selected.
OrgEmployeeCount	Count of distinct employees represented in shifts, grouped by the other fields selected.
OrgStationCount	Count of distinct stations represented in shifts, grouped by the other fields selected.
ScheduleCount	Count of distinct schedules, represented in shifts, grouped by the other fields selected.
ShiftCount	Count of unique shifts, grouped by the other fields selected.)
StationCount	Count of distinct stations/locations represented in shifts, grouped by the other fields selected.
SwappedTotal	Count of swaps.
SwappingTotal	Count of the shifts posted on swap board.

15.13.15 Schedule Report

Field	Description of contents
BreakEnd	Break end time with day mm/dd/yyyy and time in AM or PM.
BreakEndText	Break end time only, as a text string, in military time.
BreakStart	Break start time with day mm/dd/yyyy and time in AM or PM.
BreakStartText	Break start time only, as a text string, in military time.
BusinessCode	The code that location users and employees type in when they log in to a location. (*Entered in Code field in the Locations > Settings > Information window.*)
BusinessName	The name of a location. *(Entered in Name in the Locations > Settings> Information window.*)
Crew	Name employee's crew assignment.
Date	Date of the shift start. *(Start time not included*.)
ExternalEmployeeId	Employee ID for use with an external system, such as HR or Payroll.
FinalEmployeeId	Unique ID of the LAST employee the shift was assigned to.
FinalFirstName	First name of the final (LAST) employee the shift was assigned to.
FinalFullName	Full name of the final (LAST) employee the shift was assigned to.
FinalLastName	Last name of the final (LAST) employee the shift was assigned to.
FirstEmployeeId	Unique ID of the FIRST employee the shift was assigned to.
FirstFirstName	First name of the FIRST employee the shift was assigned to.
FirstFullName	Full name of the FIRST employee the shift was assigned to.

FirstLastName	Last name of the FIRST employee the shift was assigned to.
Hours	Total hours of the shift. (ShiftEnd – ShiftStart) – BreakHours.
ScheduleId	Unique ID for the schedule, set by ScheduleSource.
ShiftEnd	End time of shift in AM or PM (shows fixed default date of 1/1/1900).
ShiftGroup	Name of shift group the shift has been assigned.
ShiftId	Unique ID for a shift, set by ScheduleSource.
ShiftStart	Start time of shift in AM or PM (shows fixed default date of 1/1/1900).
StationId	Unique ID for station, set by ScheduleSource.
StationName	Name of Station.
StationUDF1 - StationUDF6	Custom field(s) identified in Organization > Custom Fields > Station.
AssignedCount	Count of shifts assigned to an employee, i.e., non-empty shifts, grouped by the other fields selected.
BusinessCount	Count of the unique locations represented in shifts, grouped by the other fields selected.
CancelledRatio	Ratio of shifts cancelled, grouped by the other fields selected.
CancelledTotal	Count of shifts made inactive (cancelled).
ChangeCountTotal	Count of edits to shifts.
DeletedRation	Ratio of shifts deleted, grouped by the other fields selected.
DeletedTotal	Count of shifts deleted.

EmployeeCount	Count of distinct location/employees represented in shifts.
EstCostTotal	Estimated cost of the shift based on employee or station pay rate (deprecated).
HoursMax	Hours of the longest shift, grouped by the other fields selected.
HoursMin	Hours of the shortest shift, grouped by the other fields selected.
HoursTotal	Sum of hours, grouped by the other fields selected.
OrgEmployeeCount	Count of distinct employees.
OrgStationCount	Count of distinct stations.
ReclaimedRatio	Ratio of shifts reclaimed, grouped by the other fields selected.
ReclaimedTotal	Count of shifts posted, then reclaimed by an employee, grouped by the other fields selected.
ScheduleCount	Count of schedules represented in shifts, grouped by the other fields selected.
ShiftCount	Count of unique shifts, grouped by the other fields selected.
StationCount	Count of distinct stations represented in shifts, grouped by the other fields selected.
SubstitutionRatio	Ratio between the number of scheduler reassignments to total shifts queried.
SubstitutionTotal	Count of shift reassignments completed by a scheduler.
SwapCountTotal	Count of swaps completed.
SwapExpiredRatio	Ratio between the number of swaps not claimed to total shifts queried.
SwapExpiredTotal	Count of swaps expired (posted but not claimed).

SwappedRatio	Ratio between the number of swaps that occurred to total shifts queried.
SwappedTotal	Count of swaps that occurred.

15.13.16 Schedule Shifts

Field	Description of contents
BidBoardId	Internal Unique ID for the Bid Board the shift is assigned to. Default is null.
BreakEnd	Break end time with day mm/dd/yyyy and time in AM or PM.
BreakEndText	Break end time only, as a text string, in military time.
BreakStart	Break start time with day mm/dd/yyyy and time in AM or PM.
BreakStartText	Break start time only, as a text string, in military time.
BusinessCode	The code that location users and employees type in when they log in to a location. (*Entered in Code field in the Locations > Settings > Information window.*)
BusinessExternalId	The External Id is used to coordinate TeamWork with external systems. It is blank unless your company integrates data with an external system.
BusinessName	The name of a location. *(Entered in Name in the Locations > Settings> Information window.*)
BusinessPhone	The phone number of the location. *(Entered in Phone in the Locations > Settings> Information window.*)
ClientFirstName	First name of client assigned to shift. (*Optional, only available If Client Management Module is activated.*)
ClientFullName	Full name of client, displayed as “Last, First”.
ClientId	Unique ID of client, set by ScheduleSource. *(Optional, only available If Client Management Module is activated.*)
ClientLastName	Last name of client assigned to shift. *(Optional, only available If Client Management Module is activated.*)

Crew	Name employee’s crew assignment.
Date	Date of the shift start.
DateMonth	Month of the shift start year.
DateQuarter	Quarter of the shift start, displayed as 1,2,3 or 4.
DateText	Text value of Date (yyyyMMdd).
DateWeek	Week of the shift start (within the year).
DateYear	Year of the shift start.
DateYearMonth	Year and month of shift start (yyyyMM).
DateYearQuarter	Year and quarter of shift start (yyyy0q).
DateYearWeek	Year and week of shift start (yyyyww).
DayId	ID for the week day of the date. (Sunday – Saturday ~ 1-7).
EMail	Employee’s email address.
EmpApproved	Displays 0 for false (employee has not okayed shift or not required to approve shift), displays -1 if shift approval is required and employee has okayed shift to work.
EmployeeFullName	Employee’s full name. Displayed as “Last, First”.
EmployeeId	Unique ID for the employee/location, set by ScheduleSource.
EmployeeMaxHours	Employee’s maximum number of hours per week setting.
EmployeeMinHours	Employee’s minimum number of hours per week setting.

EmployeePayRate	Employee’s pay rate (estimated).
EmpSwapping	Flags that the shift is posted to swapboard by employee; Displays -1 if True (posted) or 0 if False (not posted).
EnterpriseEmployeeId	Unique ID for employee, set by ScheduleSource.
EnterpriseShiftId	Unique ID for the Enterprise Shift that is the template for this local shift.
ExternalEmployeeId	Employee ID for use with an external system, such as HR or Payroll.
FirstName	Employee’s first name.
FiscalDayOfYear	Day of year of shift date, according to fiscal calendar. (*Default fiscal calendar is a 4-4-5 pattern starting on the week with nearest first day to Jan. 1. Will be configurable in the future.*)
FiscalMonth	Month of shift date, according to fiscal calendar.
FiscalQuarter	Quarter of shift date, according to fiscal calendar.
FiscalWeek	Week of shift date, according to fiscal calendar.
FiscalYear	Year of shift date, according to fiscal calendar.
HighestRankedStationName	Custom field - do not use.
Hours	Total hours of the shift. (ShiftEnd – ShiftStart) – BreakHours.
InactiveCode	Flags that the shift has been made inactive and no longer a valid shift; Displays -1 if True (shift is inactive) or 0 if False (shift is active).
LastName	Employee’s last name.

LocationUserDefined1 - LocationUserDefined6	Custom field(s) identified in Organization > Custom Fields > Location.
Note	A comment added to shift.
OrgEmployeeId	Unique ID for employee, set by ScheduleSource.
Phone1	Employee's phone number. *(Entered in Phone in Employees >Settings > Contact window*.)
Phone2	Additional employee phone number. *(Entered in Phone in Employees >Settings > Contact window*.)
Phone3	Additional employee phone number. *(Entered in Phone in Employees >Settings > Contact window*.)
ScheduleAllowSwap	Flag that displays True if allow swap is chosen on the schedule settings page; False if not allowed to swap.
ScheduleDate	Start date of the schedule.
ScheduleDateText	Text value of start date of the schedule in format yyyy.mm.dd.
ScheduleDateYear	Year portion of the schedule start date.
ScheduleFirm	Flag indicating the schedule is firm and not actively being edited.-1 = Yes, 0 = No. *(Not enforced. User can choose how to implement.*)
ScheduleId	Unique ID for the schedule, set by ScheduleSource.
ScheduleName	Name of the schedule.
SchedulePublished	Flag that indicates if Enterprise Schedule is Published and employees can claim shifts on SwapBoard. *(Same as ScheduleAllowSwap except displays True or False*).

ShiftEnd	End date and time of shift.
ShiftEndText	Text string of end time of shift; default in military time.
ShiftGroup	Name of shift group the shift has been assigned.
ShiftId	Unique ID for a shift, set by ScheduleSource.
ShiftStart	Start date and time of shift.
ShiftStartText	Test string of start time of shift; default in military time.
StationAllowSwap	Displays True if allow swap is chosen for this station in Enterprise; False if not allowed to swap.
StationCost	Cost of shift using Station PayRate.
StationFeatureId	Internal ID assigned to station when station-level security is implemented.
StationId	Unique ID for station.
StationName	Name of Station.
StationOverlap	Unused setting.
StationPayRate	Station’s estimated, or average pay rate.
StationRank	A rank value assigned to stations (1-9, with 9 being highest).
StationUDF1 - StationUDF6	Custom field(s) defined in Organization > Custom Fields > Station.
StationUserDefined1 - StationUserDefined6	Duplicates of StationUDF1-6.

SwappedFromAvailDate	The timestamp of when the shift was posted to swapboard, IF the currently assigned employee was from a swap.
SwappedFromEmployeeId	Unique ID for previous employee/location, IF the currently assigned employee was from a swap.
SwappedFromFullName	Full name of previously assigned employee, IF the currently assigned employee was from a swap.
SwappedFromOrgEmployeeId	Unique ID for previous employee, IF the currently assigned employee was from a swap.
SwappedFromSwapReason	The reason code for posting shift, IF the currently assigned employee was from a swap.
SwappedToDate	Timestamp the swap was completed, IF the currently assigned employee was from a swap.
SwappedToEmployeeId	Unique ID for current employee/location, IF the currently assigned employee was from a swap.
SwappedToFullName	Full name for current employee, IF the currently assigned employee was from a swap.
SwappedToOrgEmployeeId	Unique ID for current employee, IF the currently assigned employee was from a swap.
Swapping	Flag displaying if the shift has been posted to be swapped on the swap board. Displays -1 if True or 0 if false (not posted).
SwappingToEmployeeId	Unique ID for employee/location for whom the shift is swapping to.
SwappingToEnterpriseEmployeeId	Unique ID for employee for whom the shift is swapping to.
SwapReason	Optional Reason code selected by employee when posting shift.

SwapToEmployeeId	(Same as SwappingToEmployeeId)
SwapToFullName	Full name of employee for whom the shift is swapping to.
TimeActivityCode	The code of the Default Activity assigned to Station.
TimeActivityName	The name of the Default Activity assigned to Station.
TimeProjectCode	The code of the Default Project assigned to Station.
TimeProjectName	The name of the Default Project assigned to Station.
TimeTaskCode	The code of the Default Task assigned to Station.
TimeTaskName	The name of the Default Task assigned to Station.
UpdateAction	Internal code for the type of update performed on shift.
UpdateDate	Timestamp of the last edit of the shift.
UpdateReason	A custom feature displaying the reason a shift was updated. Currently only applied when cancelling a shift.
UpdateUserId	Unique ID for the user or employee updating the shift (by location).
UpdateUserType	Internal code to indicate if update was by a user or employee.
UserDefined1 - UserDefined6	Custom field(s) identified in Organization > Custom Fields > Employee.
UserName	Employee’s username (same as EmployeeNum).
AssignedCount	Count of shifts assigned to an employee; i.e. non-empty shifts, grouped by the other fields selected.
BreakCount	Count of shifts with a break, grouped by the other fields selected.

BusinessCount	Count of the unique locations represented in shifts, grouped by the other fields selected.
Count	Count of shifts, grouped by the other fields selected.
DateCount	Count of distinct dates represented in shifts.
DayCount	Count of distinct week days represented in shifts.
EmployeeCostTotal	Estimated cost of the shift based first on the employee pay rate.
EmployeeCount	Count of distinct employees/locations represented in shifts, grouped by the other fields selected.
EnterpriseShiftCount	Count of shifts with enterprise ID's; Generated from Enterprise Schedule.
EstCostTotal	Estimated cost of the shift based on employee pay rate (deprecated).
EstimatedCostTotal	Estimated cost of the shift based first on the employee pay rate but will use station pay rate if employee pay rate is zero.
FridayHoursTotal	Sum of hours on Fridays, grouped by the other fields selected.
HoursMax	Hours of the longest shift, grouped by the other fields selected.
HoursMin	Hours of the shortest shift, grouped by the other fields selected.
HoursTotal	Sum of hours, grouped by the other fields selected.
InactiveTotal	Count of the inactive shifts, grouped by the other fields selected.
MondayHoursTotal	Sum of hours on Mondays, grouped by the other fields selected.
OrgEmployeeCount	Count of unique employees, grouped by the other fields selected.

OrgStationCount	Count of distinct stations represented in shifts, grouped by the other fields selected.
SaturdayHoursTotal	Sum of hours on Saturdays, grouped by the other fields selected.
ScheduleCount	Count of schedules represented in shifts, grouped by the other fields selected.
ShiftCount	Count of unique shifts, grouped by the other fields selected.
ShiftStartTextMin	Minimum start time of the shifts as a text string.
StationCostTotal	Total cost of shifts based on station pay rate.
StationCount	Count of distinct stations represented in shifts, grouped by the other fields selected.
SundayHoursTotal	Sum of hours on Sundays, grouped by the other fields selected.
SwappingTotal	Count of shifts posted to SwapBoard (not empty shifts) , grouped by the other fields selected.
ThursdayHoursTotal	Sum of hours on Thursdays, grouped by the other fields selected.
TuesdayHoursTotal	Sum of hours on Tuesdays, grouped by the other fields selected.
WednesdayHoursTotal	Sum of hours on Wednesdays, grouped by the other fields selected.

15.13.17 Special Day

Special Days are specified in the Enterprise portal under Admin > Lists > Special Days. You first create special day types and then use them when creating special days for scheduling purposes.

Field	**Description of contents**
BusinessName	The name of a location. *(Entered in Name in the Locations* > *Settings*> *Information window.*)
Comment	Name of special day range.
DateEnd	End date of special day date range.
DateStart	Start date of special day date range.
Days	Number of days in date range.
HolidayType	Text string indicating if Scheduled Shifts are allowed during date range. Will display either “No Schedule” or “Allow Schedule”.
LeaveBlackout	Flag indicated whether or not leave can be scheduled during date range. 0 = Yes, 1 = No (it’s blacked out).
StartMonth	Month of the start date.
StartYear	Year of the start date.
Count	Count of the number of special days in the schedule.

15.13.18 Template

Field	Description of contents
BreakEnd	Break end time. (Date portion will be 01/01/1900).
BreakStart	Break start time. (Date portion will be 01/01/1900).
BusinessCode	The code that location users and employees type in when they log in to a location. (*Entered in Code field in the Locations > Settings > Information window.*)
BusinessName	The name of a location. *(Entered in Name in the Locations > Settings> Information window.*)
ClientFirstName	First name of client assigned to shift. *(Optional, only available If Client Management Module is activated.*)
ClientFullName	Full name of client, displayed as “Last, First”.
ClientId	Unique ID of client, set by ScheduleSource. *(Optional, only available If Client Management Module is activated.*)
ClientLastName	Last name of client assigned to shift. *(Optional, only available If Client Management Module is activated.*)
Crew	Name employee’s crew assignment.
DayId	ID for the week day of the date. (Sunday – Saturday ~ 1-7).
EmployeeFullName	Employee’s full name. Displayed as “Last, First”.
EmployeeId	Unique ID for the employee/location, set by ScheduleSource.
Enabled	Flag that indicates whether the shift is enabled or not enabled. Only enabled shifts are copied to schedules.
ExternalEmployeeId	Employee ID for use with an external system, such as HR or Payroll.

FirstName	Employee’s first name.
Hours	Total hours of the shift. (ShiftEnd – ShiftStart) – BreakHours.
LastName	Employee’s last name.
Note	A comment added to shift.
ShiftEnd	End time of shift in AM or PM (shows fixed default date of 1/1/1900).
ShiftEndText	End time of shift; default in military time.
ShiftGroup	Name of shift group the shift has been assigned.
ShiftId	Unique ID for a shift. Set by ScheduleSource.
ShiftStart	Start time of shift in AM or PM (shows fixed default date of 1/1/1900).
ShiftStartText	Start time of shift; default in military time.
StationName	Name of Station.
StationOverlap	UNUSED
TemplateGroupName	Group name entered when the template is created.
TemplateId	Unique ID of the Template, set by ScheduleSource.
TemplateName	Name of the template.
TimeActivityCode	The code of the Default Activity assigned to Station.
TimeActivityName	The name of the Default Activity assigned to Station.

TimeProjectCode	The code of the Default Project assigned to Station.
TimeProjectName	The name of the Default Project assigned to Station.
TimeTaskCode	The code of the Default Task assigned to Station.
TimeTaskName	The name of the Default Task assigned to Station.
UserName	Employee’s username (same as EmployeeNum).
AssignedCount	Count of shifts assigned to an employee; i.e. non-empty shifts, grouped by the other fields selected.
BreakCount	Count of shifts with a break, grouped by the other fields selected.
BusinessCount	Count of the unique locations represented in shifts, grouped by the other fields selected.
DayCount	Count of distinct week days represented in shifts.
EmployeeCostTotal	Estimated cost of the shift based first on the employee pay rate.
EmployeeCount	Count of distinct employees/locations represented in shifts, grouped by the other fields selected.
EnabledTotal	Count of enabled shifts in templates, grouped by the other fields selected.
EstimatedCostTotal	Estimated cost of the shift based first on the employee pay rate but will use station pay rate if employee pay rate is zero.
FridayHoursTotal	Sum of hours on Fridays, grouped by the other fields selected.
HoursMax	Hours of the longest shift, grouped by the other fields selected.
HoursMin	Hours of the shortest shift, grouped by the other fields selected.

HoursTotal	Sum of hours, grouped by the other fields selected.
MondayHoursTotal	Sum of hours on Mondays, grouped by the other fields selected.
OrgEmployeeCount	Count of unique employees, grouped by the other fields selected.
OrgStationCount	Count of distinct stations represented in shifts, grouped by the other fields selected.
SaturdayHoursTotal	Sum of hours on Saturdays, grouped by the other fields selected.
ShiftCount	Count of unique shifts, grouped by the other fields selected.
StationCostTotal	Total cost of shifts based on station pay rate.
StationCount	Count of distinct stations represented in shifts, grouped by the other fields selected.
SundayHoursTotal	Sum of hours on Sundays, grouped by the other fields selected.
TemplateCount	Count of templates represented in shifts, grouped by the other fields selected.
ThursdayHoursTotal	Sum of hours on Thursdays, grouped by the other fields selected.
TuesdayHoursTotal	Sum of hours on Tuesdays, grouped by the other fields selected.
WednesdayHoursTotal	Sum of hours on Wednesdays, grouped by the other fields selected.

15.13.19 Attendance

Field	Description of contents
Active	A flag that indicates whether employee is available for use in scheduling shifts. Displays on reports as True if active and False if inactive. Status is active unless an inactive date is set on Employees > Settings > Personal window under Terminate.
Address	Employee's street address. *(Entered in Address in the Employees > Settings > Contact window.)*
Address2	Additional information for employee address. *(Entered in Address2 in the Employees > Settings > Contact window.)*
AgreementType	Employee's agreement type. *(Entered in Employees > Deployments > Agreements.)*
AttendanceId	Unique ID set by ScheduleSource on attendance entries.
BirthDate	Employee's birthdate. *(Entered in Birth Date in the Employees > Settings > Personal window.)*
City	City of the employee address. *(Entered in City in Employees > Settings > Contact window.)*
Country	Country of the employee address. *(Entered in Country in Employees > Settings > Contact window.)*
Created	Timestamp of when attendance was created (UTC).
CreatedBy	If exception created manually, name of user creating it.
CreatedLocal	Timestamp of when attendance was created (Local).
Date	Date of the attendance occurring.
DefaultLocation	Name of employee’s default location.
DefaultLocationExternalId	External ID of employee’s default location.

DefaultLocationId	Unique ID of default location, set by ScheduleSource.
EMail	Email of the employee. *(Entered in Email in Employees > Settings > Contact window.)*
ExternalId	Employee ID for use with an external system, such as HR or Payroll
FirstName	Employee's first name. *(Entered in First Name in Employees > Settings > Personal window.)*
FullName	Employee full name. Displayed as "Last, First".
HireDate	Employee Start Date.
LastName	Employee last name. *(Entered in Last Name in Employees > Settings > Personal window.)*
Location	Name of location for shift or time entry.
LocationExternalId	External ID of the location.
Minutes	For some attendance records, how many minutes they were late or early.
Note	Note on the attendance record.
OrgEmployeeId	Unique ID of employee, set by ScheduleSource.
PhoneNo	Employee's phone number.
PhoneNo2	Additional employee phone number. *(Entered in Employees > Settings > Contact window.)*
PhoneNo3	Additional employee phone number. *(Entered in Employees > Settings > Contact window.)*
Points	Points for the attendance record, as defined on the attendance setup in the policy.

Policy	Indicates policy name entered in employee Policy window in Organization > Policies and assigned to an employee when you assign an employee agreement. Use Employees > Mass-Assign or add a new employee agreement in Employees > Agreements and designate a policy related to the agreement.
Position	Indicates position name entered into Organization > Lists > Employee Positions and assigned to an employee when you assign an employee agreement. Use Employees > Mass-Assign or add a new employee agreement in Employees > Deployments > Agreements and designate a position related to the agreement.
PostalCode	Employee's zip code or postal code.
Rule	Indicating the reason for the Attendance record (Late In, Late Out).
RuleId	Unique ID for rule, generated by ScheduleSource.
State	Employee’s state (from Address settings).
TermDate	Termination or Inactive date of employee. *(Entered in Inactive Date in Employees > Settings > Personal window under Terminate Date.)*
TimeZoneOffset	The hour difference between UTC time and the time zone setting for the employee. (*Selected under Employee Information > Time & Attendance.*)
TimeZoneUSDay	Indicates daylight savings for time zone: 1=Yes, i.e., Auto Adjust for daylight savings time or 0=No, i.e., do not adjust for daylight savings time.
UserDefined1 - UserDefined6	Custom field(s) identified in Organization > Custom Fields > Employee.
UserName	Employee's username. *(Entered in Username/ID in Employees > Settings > Personal window.)*
Valid	Confirmed =1, Open = 0, Void = -1.
Validated	Timestamp (UTC) for validation.

ValidatedBy	Name of user validating the record.
ValidatedLocal	Local timestamp for validation.
Count	A count of the Attendance records, grouped by the other fields selected.
MinutesAverage	Average of minutes of selected Attendance records, grouped by the other fields selected.
MinutesTotal	Sum of minutes of selected Attendance records, grouped by the other fields selected.
PointAverage	Average of points of selected Attendance records, grouped by the other fields selected.
PointTotal	Sum of points of selected Attendance records, grouped by the other fields selected.

15.13.20 Processed Time

Processed Time is the calculated data for payroll. It's based on time entries, but contains additional information and records depending on overtime, differentials, and other policy configurations.

Field	Description of contents
BillAmount	The product of the Bill Rate and the billable hours.
BillRate	Rate stored on the time entry. (Is set from the Time/Pay Rates configuration, with fallback to the Employee’s estimated Pay Rate.)
BreakHours	Number of hours in breaks.
BusinessExternalId	External ID of location. The External Id is used to coordinate TeamWork with external systems. It is blank unless your company integrates data with an external system.
BusinessName	The name of a location. (*Entered in Name in the Location information window.*)
Crew	Name employee’s crew assignment.
Date	Date of the calculated hours. If entries span the “start of day” (usually midnight) there will be a processed time record for each date.
EmployeeFullName	Employee full name. Displayed as “Last, First”.
EmployeeId	Unique ID for the employee/location, set by ScheduleSource.
EmployeeNote	Textual note related to the Employee.
EnterpriseEmployeeId	Unique ID for employee, set by ScheduleSource.
EntryId	Unique ID for a time entry, set by ScheduleSource.
EstimatedPayAmount	Calculated Hours. Employee’s estimated Pay Rate.
EstimatedPayRate	Pay rate entered in the Employees > Settings > Schedule window for a Location under PayRate.

ExternalId	Employee ID for use with an external system, such as HR or Payroll.
FirstName	Employee’s first name.
HolidayHours	Calculated Holiday hours.
LastName	Employee’s last name.
LeaveHours	Calculated Leave hours.
LocationUserDefined1 - LocationUserDefined6	Custom field(s) identified in Organization > Custom Fields > Location.
OverTimeHours	Calculated Overtime hours.
OvertimePlusPremiumours	Calculated Overtime plus double time (premium) hours.
PayAmount	Bill rate * calculated hours total. (Is set from the Time/Pay Rates configuration, with fallback to the Employee’s estimated Pay Rate.)
PayPeriodId	Unique ID for the pay period, set by ScheduleSource.
PayRate	Pay rate from calculated time hours (Is set from the Time/Pay Rates configuration, with fallback to the Employee’s estimated Pay Rate.)
PremiumHours	Calculated Double-time hours.
RegularHours	Calculated Regular hours.
RestBreakHours	Calculated Rest Break hours.
ScheduleDate	Date of the calculated hours. (Not time entry nor shift date.)
ScheduleDateMonth	Month of the schedule date.

ScheduleDateQuarter	Quarter of the schedule date.
ScheduleDateWeek	Week of the schedule date.
ScheduleDateYear	Year of the schedule date.
ScheduleDateYearMonth	The Year/Month of the schedule date.
ScheduleDateYearQuarter	The Year/Quarter of the schedule date.
ScheduleDateYearWeek	The Year/Week of the schedule date.
TotalHours	All calculated hours, minus Rest Breaks.
UnPaidHours	Calculated Unpaid hours.
UserDefined1 - UserDefined6	Custom field(s) identified in Organization > Custom Fields > Employee.
BreakHoursTotal	Sum of calculated break hours.
EntryCount	Count of all processed records.
HolidayHoursTotal	Sum of calculated Holiday hours.
HoursTotal	Summary of the total hours per a set filter.
LeaveHoursTotal	Sum of calculated Leave hours.
OvertimeHoursTotal	Sum of calculated Overtime hours.
PremiumHoursTotal	Sum of calculated Premium hours.
RegularHoursTotal	Sum of calculated Regular hours.

RestBreakHoursTotal	Sum of calculated Rest Break hours.
TotalBillAmount	Sum of Bill Amount.
TotalCalcHours	Sum of calculated Regular, Overtime, Premium, Leave, Break, Holiday, & Unpaid hours.
TotalCalcPaidHours	Sum of calculated Regular, Overtime, Premium, Leave, Break, & Holiday hours.
TotalCalcWorkHours	Sum of calculated Regular, Overtime, Premium, & Break hours.
TotalEstimatedPayAmount	Sum of estimated Pay Amount.
TotalPayAmount	Sum of Pay Amount.
UnPaidHoursTotal	Sum of calculated UnPaid Hours.

15.13.21 Processed Time And Shifts

This data source joins scheduled shifts to the time hour's data. Any shift that overlaps the time entry that is the source of the hours will be joined.
Note: There may be multiple shifts per hour and or time entry, which will produce duplicates in the report. Use this

data source for analysis, i.e., finding issues versus summarization (reporting totals). An example is to report on how many hours employees were paid (time data) by each station (schedule shift data).

Field	Description of contents
ActivityCode	Accounting code for a given activity entered in Time > Configuration > Activities. It is the code that identifies the activity.
ActivityName	Name of an activity entered in Time > Configuration > Activities. It is the name that identifies the activity.
ActualBreakHours	Break hours stored on the time entry.
ActualHours	Original clocked hours on time entry. (Before edits, rounding, etc.)
ActualOff	Original clock off time on time entry.
ActualOn	Original clock on time on time entry.
BillAmount	The product of the Bill Rate and the billable hours.
BillRate	Rate stored on the time entry. Is set from the Time/Pay Rates configuration, with fallback to the Employee’s estimated Pay Rate.
BreakHours	Number of hours in breaks.
BusinessExternalId	External ID of location. The External Id is used to coordinate TeamWork with external systems. It is blank unless your company integrates data with an external system.
BusinessName	The name of a location. (*Entered in Name in the Location* > *Settings* > *Information window.*)
ClientFirstName	First name of client assigned to shift. (Optional, only available If Client Management Module is activated.)
ClientFullName	Full name of client assigned to shift, displayed as “Last, First”.

ClientLastName	Last name of client assigned to shift. (Optional, only available If Client Management Module is activated.)
ClockOffUserId	Unique ID of User who clocked the employee off.
ClockOnUserId	Unique ID of User who clocked the employee on.
CreatedDate	Date the time entry was created.
Date	Date of the shift start, or schedule date on time entry.
DiffHolidayHours	Total calculated differential Holiday hours.
DiffOTHours	Total calculated differential Overtime hours.
DiffPremiumHours	Total calculated differential Premium hours.
DiffRegHours	Total calculated Regular Holiday hours.
EmpAlert	A flag for the employee to alert manager of note.
EmployeeFullName	Employee full name. Displayed as “Last, First”.
EmployeeId	Unique ID for the employee/location, set by ScheduleSource.
EmpNotes	Employee entered note on time entry.
EnterpriseRoundOff	Rounded Off time of time entry, in Enterprise time zone.
EnterpriseRoundOn	Rounded On time of time entry, in Enterprise time zone.
EnterpriseUpdated	Timestamp of last update, in Enterprise time zone.
EntryId	Unique ID for time entry, set by ScheduleSource.

FinalHours	Final Hours on time entry, after adjustments.
FinalOff	Final (same as rounded) Off time for time entry, in UTC.
FinalOn	Final (same as rounded) On time for time entry, in UTC.
FirstName	Employee’s first name.
HolidayHours	Calculated Holiday hours.
IsBillable	Flag that indicates whether the project/task used in the time entry is billable.
IsBreak	Flag that indicates whether the project/task used in the time entry is a break.
IsError	Flag that indicates if the time entry has been flagged as an error.
IsLeave	Flag that indicates whether the project/task used in the time entry is a leave.
IsPaid	Flag that indicates whether the project/task used in the time entry is paid.
IsVoid	Flag that indicates if the time entry is an error and *has* been reviewed.
LastName	Employee’s last name.
LeaveHours	Calculated Leave hours.
LocalRoundOff	Rounded Off time of time entry, in Location time zone.
LocalRoundOn	Rounded On time of time entry, in Location time zone.
LocalUpdated	Timestamp of last update, in Location time zone.
LocationOff	A string that stores a value that determines where the clock Off occurred. It might be an IP address, phone number, or the ID of a physical clock.

LocationOn	A string that stores a value that determines where the clock On occurred. It might be an IP address, phone number, or the ID of a physical clock.
MgrNotes	A note added to a time entry by the manager.
OverTimeHours	Calculated Overtime hours.
OverTimePlusPremiunHours	Calculated Overtime plus double time (premium) hours.
PayAmount	Bill rate * calculated hours total. Rate stored on the time entry. Is set from the Time/Pay Rates configuration, with fallback to the Employee's estimated Pay Rate.
PayRate	Pay rate from calculated time hours. Rate stored on the time entry. Is set from the Time/Pay Rates configuration, with fallback to the Employee's estimated Pay Rate.
PremiumHours	Calculated Double-time hours.
ProjectCode	The unique code for the Project of the time entry. *(Entered on the Add or Edit Project window under Time > Configuration > Project & Tasks.*)
ProjectName	The name for the Project of the time entry. (*Entered on the Add or Edit Project window under Time > Configuration > Project & Tasks*.)
RegularHours	Calculated Regular hours.
RestBreakHours	Calculated Rest Break hours.
SchDate	Date of the shift start, or schedule date on time entry. (This is the same as Date.)
ScheduleDate	Shift start date and time or date of time entry.
SchHours	Hours of the shift.

SchShiftBreak	Break hours of the shift.
SchShiftEnd	End time of shift. Only the time portion is returned.
SchShiftStart	Start time of shift. Only the time portion is returned.
ShiftId	Unique ID for a shift. Set by ScheduleSource.
ShiftNote	A comment added to shift.
ShiftOverlapEnd	The end time of overlapping time entry and shift segment.
ShiftOverlapHours	The hours within the time entry and shift overlapping segment.
ShiftOverlapStart	The start time of overlapping time entry and shift segment.
StationAllowSwap	Displays True if allow swap is chosen for this station in Stations > Settings > Information; False if not allowed to swap.
StationCost	Displays estimated cost of the shift based on the station’s rate and shift hours.
StationId	Unique ID for station, set by ScheduleSource.
StationName	Name of Station.
StationOverlap	UNUSED
StationPayRate	Estimated pay for station.
StationRank	Priority of station versus other stations. 1-9 with 9 being the highest.
StationUserDefined1 - StationUserDefined6	Custom field(s) identified in Organization > Custom Fields > Station.

TaskCode	The unique code for the Task of the time entry. (Entered on the Add or Edit Project window under Time > Configuration > Project & Tasks.)
TaskName	The name for the Task of the time entry. (Entered on the Add or Edit Project window under Time > Configuration > Project & Tasks.)
TimeCost	Estimated cost of time entry, based on time entry hours.
TimePayRate	Estimated pay rate, as stored on time entry.
TimeReason	Reason code for clocking.
TotalHours	All calculated hours, minus Rest Breaks.
Type	Type of time sheet entry, either a clock, card, or admin entry.
UnPaidHours	Calculated Unpaid hours.
UpdatedDate	Date of an update to an entry in a time sheet.
UpdateUserId	User ID of the person who made the update.
ActualHoursTotal	Sum of all hours clocked with no rounding or other adjustments. This is purely clocked hours (no rounding). If someone alters the entry, it is not reflected here.
BreakHoursTotal	Sum of BreakHours on time entries.
BusinessCount	Count of distinct locations for records selected.
EntryCount	Count of records selected.
FinalHoursTotal	Sums all hours clocked with adjustments per rounding rules and shift differentials. This is for all hours, i.e., clocked, admin, card, etc.

HoursTotal	Sums all hours clocked with only adjustments per rounding rules. This is total hours from the rule engine, i.e., regular, overtime, shift differentials, etc.
OrgStationCount	Count of distinct stations on associated shifts.
OvertimeHoursTotal	Sum of calculated Overtime hours.
OvertimePremiumHoursTotal	Sum of calculated Premium hours.
RegularHoursTotal	Sum of calculated Regular hours.
SchHoursTotal	Sum of shift hours.
ShiftOverlapHoursTotal	Sum of the overlapping hours of time entries and shifts.
StationCostTotal	Sum of estimated cost of shifts based on station pay rate.
StationCount	Count of distinct stations/locations.
TimeCostTotal	Sum of time entry estimated cost, based on pay rate and final hours of entry.

15.13.22 Time

Field	Description of Contents
ActivityCode	Accounting code for a given activity entered in Time > Configuration > Activities. It is the code that identifies the activity.
ActivityName	Name of an activity entered in Time > Configuration > Activities. It is the name that identifies the activity.
ActualHours	Original clocked hours on time entry. (Before edits, rounding, etc.)
ActualOff	Original clock off time on time entry.
ActualOn	Original clock on time on time entry.
BillAmount	The product of the Bill Rate and the billable hours.
BillRate	Rate stored on the time entry. Is set from the Time/Pay Rates configuration, with fallback to the Employee’s estimated Pay Rate.
BreakHours	Number of hours in breaks.
BusinessExternalId	External ID of location. The External Id is used to coordinate TeamWork with external systems. It is blank unless your company integrates data with an external system.
BusinessName	The name of a location. *(Entered in Name in the Location information window*.)
CalcBreakHours	Calculated Break hours associated with time entry.
CalcDate	Date associated with calculated hours.
CalcHolidayHours	Calculated Holiday hours associated with time entry.
CalcLeaveHours	Calculated Leave hours associated with time entry.

CalcOverTimeHors	Calculated Overtime hours associated with time entry.
CalcOvertimePlusPremiumHours	Calculated Overtime and Premium hours associated with time entry.
CalcPremiumHours	Calculated Premium hours associated with time entry.
CalcRegularHours	Calculated Regular hours associated with time entry.
CalcUnPaidHours	Calculated UnPaid hours associated with time entry.
ClockOffUserId	Unique ID of User who clocked the employee off.
ClockOnUserId	Unique ID of User who clocked the employee on.
CreatedDate	Date the time entry was created.
Crew	Name employee's crew assignment.
EMail	Employee's email address.
EmpAlert	A flag for the employee to alert manager of note.
EmployeeFullName	Employee full name. Displayed as "Last, First".
EmployeeId	Unique ID for the employee/location, set by ScheduleSource.
EmployeeNote	Employee entered note on time entry.
EmpNotes	Notes related to the Employee entered on Employees > Settings > Personal window
EnterpriseEmployeeId	Unique ID of employee, set by ScheduleSource.
EntryId	Unique ID for time entry, set by ScheduleSource.

EstimatedPayAmount	Final Hours times Estimated Pay Rate, for non-error entries. If error, then is zero.
EstimatedPayRate	Employee estimated hourly rate of pay. PayRate is assigned to an employee in the Location portal under the Schedule tab in the Employee Settings window.
ExternalId	Employee ID for use with an external system, such as HR or Payroll.
FinalEnterpriseOff	Rounded Off time of time entry, in Enterprise time zone.
FinalEnterpriseOn	Rounded On time of time entry, in Enterprise time zone.
FinalHours	Final Hours on time entry, after adjustments.
FinalLocalOff	Rounded Off time of time entry, in Location time zone.
FinalLocalOn	Rounded On time of time entry, in Location time zone.
FinalOff	Final (same as rounded) Off time for time entry, in UTC.
FinalOn	Final (same as rounded) On time for time entry, in UTC.
FirstName	Employee’s first name.
IsBillable	Flag that indicates whether the project/task used in the time entry is billable.
IsEmployeeApproved	Flag that indicates whether the employee has approved the time sheet.
IsError	Flag that indicates if the time entry has been flagged as an error.
IsLeave	Flag that indicates whether the project/task used in the time entry is a leave.

IsPaid	Flag that indicates whether the project/task used in the time entry is paid.
IsReviewed	Flag that indicates whether the time entry has been reviewed. If still an error and is reviewed, then the IsVoid flag is set.
IsSheetApproved	Flag that indicates if the employee time sheet has been approved at the location.
IsSheetEnterpriseLocked	Flag that indicates if the time sheet has been locked at the enterprise.
IsSheetLocked	Flag that indicates if the employee time sheet has been locked at the location.
IsVoid	Flag that indicates if the time entry is an error and *has* been reviewed.
LastName	Employee’s last name.
LocationOff	A string that stores a value that determines where the clock Off occurred. It might be an IP address, phone number, or the ID of a physical clock.
LocationOn	A string that stores a value that determines where the clock On occurred. It might be an IP address, phone number, or the ID of a physical clock.
LocationUserDefined1 - LocationUserDefined6	Custom field(s) identified in Organization > Custom Fields > Location.
OuterDate	UNUSED
PayAmout	Estimated pay based on time entry pay rate and final hours.
PayPeriodEnd	End date of the pay period.
PayPeriodId	Unique ID of the pay period, set by ScheduleSource.
PayPeriodStart	Start date of the pay period.

PayRate	Rate stored on the time entry. IIs set from the Time/Pay Rates configuration, with fallback to the Employee’s estimated Pay Rate.
Phone1	Employee’s phone number.
Phone2	Additional employee phone number.
Phone3	Additional employee phone number.
ProjectCode	The unique code for the Project of the time entry. (*Entered on the Add or Edit Project window under Time > Configuration > Project & Tasks.*)
ProjectName	The name for the Project of the time entry. (*Entered on the Add or Edit Project window under Time > Configuration > Project & Tasks.*)
ScheduleDate	Date of start of time entry, in location time zone (date portion only).
ScheduleDateMonth	Month of the schedule date.
ScheduleDateQuarter	Quarter of the schedule date.
ScheduleDateWeek	Week of the schedule date.
ScheduleDateYear	Year of the schedule date.
ScheduleDateYearMonth	Year/Month of the schedule date.
ScheduleDateYearQuarter	Year/Quarter of the schedule date.
ScheduleDateYearWeek	Year/Week of the schedule date.
SchNotes	Manager entered notes on the time entry.
SheetEmployeeFullName	The full name of the employee in the time sheet.

SheetEmployeeId	Employee Id from the time sheet.
TaskCode	The unique code for the Task of the time entry. (*Entered on the Add or Edit Project window under Time > Configuration > Project & Tasks.*)
TaskName	The name for the Task of the time entry. (*Entered on the Add or Edit Project window under Time > Configuration > Project & Tasks.*)
TimeReason	Reason code for clocking.
TimeSheetId	Unique ID of time sheet, set by ScheduleSource.
TimeZoneOffset	Location’s time zone number of minutes offset from UTC.
TimeZoneUsDay	Flag to indicate that the Location’s time zone honors daylight savings.
Type	Type of time sheet entry, either a clock, card, or admin entry.
UpdatedDate	Date of an update to an entry in a time sheet.
UpdateUserId	User ID of the person who made the update.
UserDefined1 - UserDefined6	Custom field(s) identified in Organization > Custom Fields > Employee.
UserName	Employee's username as entered in Username/ID in Employees > Settings > Personal window.
BillableHoursTotal	Sum of hours on time entries for Billable tasks, not including errors.
BusinessCount	Count of distinct locations.
EntryCount	Count of time entries.
HoursTotal	Sum of all time entry hours, including errors.

LeaveHoursTotal	Sum of hours on time entries for Leave tasks, not including errors.
NotLeaveHoursTotal	Sum of hours on time entries for non-Leave tasks, not including errors.
PaidHoursTotal	Sum of hours on time entries for Paid tasks, not including errors.
SheetCount	Count of distinct time sheets the time entries are associated with.
TotalBillAmount	Sum of Billable hours times billable rate.
TotalCalcHours	Sum of calculated Regular, Overtime, Premium, Leave, Break, Holiday, & Unpaid hours.
TotalCalcPaidHours	Sum of calculated Regular, Overtime, Premium, Leave, Break, & Holiday hours.
TotalCalcWorkHours	Sum of calculated Regular, Overtime, Premium, & Break hours.
TotalEstimatedPayAmount	Sum of estimated Pay Amount.
TotalPayAmount	Sum of Pay Amount.
UnBillableHoursTotal	Sum of hours on time entries for non-Billable tasks, not including errors.
UnPaidHoursTotal	Sum of hours on time entries for non-Paid tasks, not including errors.
ValidHoursTotal	Sum of hours on non-Error time entries.

15.13.23 Time and Shifts

Field	Description of contents
ActivityCode	Accounting code for a given activity entered in Time > Configuration > Activities. It is the code that identifies the activity.
ActivityName	Name of an activity entered in Time > Configuration > Activities. It is the name that identifies the activity.
ActualHours	Original clocked hours on time entry. (Before edits, rounding, etc.)
ActualOff	Original clock off time on time entry.
ActualOn	Original clock on time on time entry.
BreakHours	Number of hours in breaks.
BusinessExternalId	External ID of location. The External Id is used to coordinate TeamWork with external systems. It is blank unless your company integrates data with an external system.
BusinessName	The name of a location. (*Entered in Name in the Location information window.*)
BusinessNow	Current time at the location, when the report is run. (Useful in formulas)
ClientFirstName	First name of client assigned to shift. (*Optional, only available If Client Management Module is activated.*)
ClientFullName	Full name of client, displayed as “Last, First”.
ClientLastName	Last name of client assigned to shift. (*Optional, only available If Client Management Module is activated.*)
ClockOffUserId	Unique ID of User who clocked the employee off.
ClockOnUserId	Unique ID of User who clocked the employee on.

CreatedDate	Date the time entry was created.
EmpAlert	A flag for the employee to alert manager of note.
EmployeeFullName	Employee full name. Displayed as “Last, First”.
EmployeeId	Unique ID for the employee/location, set by ScheduleSource.
EmployeeRank	Rank of employee.
EmpNotes	Employee entered note on time entry.
EnterpriseRoundOff	Rounded Off time of time entry, in Enterprise time zone.
EnterpriseRoundOn	Rounded On time of time entry, in Enterprise time zone.
EnterpriseUpdated	Timestamp of last update, in Enterprise time zone.
EntryId	Unique ID for time entry, set by ScheduleSource.
FinalHours	Final Hours on time entry, after adjustments.
FinalOff	Final (same as rounded) Off time for time entry, in UTC.
FinalOn	Final (same as rounded) On time for time entry, in UTC.
FirstName	Employee’s first name.
IsBillable	Flag that indicates whether the project/task used in the time entry is billable.
IsError	Flag that indicates if the time entry has been flagged as an error.
IsLeave	Flag that indicates whether the project/task used in the time entry is a leave.

IsPaid	Flag that indicates whether the project/task used in the time entry is paid.
IsVoid	Flag that indicates if the time entry is an error and *has* been reviewed.
LastName	Employee’s last name.
LocalRoundOff	Rounded Off time of time entry, in Location time zone.
LocalRoundOn	Rounded On time of time entry, in Location time zone.
LocationOff	A string that stores a value that determines where the clock Off occurred. It might be an IP address, phone number, or the ID of a physical clock.
LocationOn	A string that stores a value that determines where the clock On occurred. It might be an IP address, phone number, or the ID of a physical clock.
MgrNotes	A note added to a time entry by the manager.
ProjectCode	The unique code for the Project of the time entry. *(Entered on the Add or Edit Project window under Time > Configuration > Project & Tasks.*)
ProjectName	The name for the Project of the time entry. *(Entered on the Add or Edit Project window under Time > Configuration > Project & Tasks.*)
SchDate	Schedule date of the time entry.
SchShiftBreak	Hours between break start and end.
SchShiftEnd	End time of shift. Only the time portion is returned.
SchShiftStart	Start time of shift. Only the time portion is returned.
ShiftId	Unique ID for a shift. Set by ScheduleSource.
ShiftNote	A comment added to shift.

ShiftOverlapEnd	The end time of overlapping time entry and shift segment.
ShiftOverlapHours	The hours within the time entry and shift overlapping segment.
ShiftOverlapStart	The start time of overlapping time entry and shift segment.
StationAllowSwap	Displays True if allow swap is chosen for this station in Enterprise; False if not allowed to swap.
StationCost	Displays estimated cost of the shift based on the station's rate and shift hours.
StationId	Unique ID for station, set by ScheduleSource.
StationName	Name of Station.
StationOverlap	UNUSED
StationPayRate	Estimated pay for station.
StationRank	Priority of station versus other stations. 1-9 with 9 being the highest.
StationUserDefined1 - StationUserDefined6	Custom field(s) identified in Organization > Custom Fields > Station.
TaskCode	The unique code for the Task of the time entry. *(Entered on the Add or Edit Project window under Time > Configuration > Project & Tasks.*)
TaskName	The name for the Task of the time entry. *(Entered on the Add or Edit Project window under Time > Configuration > Project & Tasks.*)
TimeCost	Estimated cost of time entry, based on time entry hours.
TimePayRate	Estimated pay rate, as stored on time entry.
TimeReason	Reason code for clocking.

Type	Type of time sheet entry, either a clock, card, or admin entry.
UpdatedDate	Date of an update to an entry in a time sheet.
UpdatedUserId	User ID of the person who made the update.
ActualHoursTotal	Sum of ActualHours on time entries.
BreakHoursTotal	Sum of BreakHours on time entries.
BusinessCount	Count of distinct locations for records selected.
EntryCount	Count of records selected.
FinalHoursTotal	Sum of FinalHours on time entries.
HoursTotal	Sum of calculated hours.
OrgStationCount	Count of distinct stations on associated shifts.
SchHoursTotal	Sum of shift hours.
ShiftOverlapHoursTotal	Sum of the overlapping hours of time entries and shifts.
StationCostTotal	Sum of estimated cost of shifts based on station pay rate.
StationCount	Count of distinct stations/locations.
TimeCostTotal	Sum of time entry estimated cost, based on pay rate and final hours of entry.

15.13.24 Time Audit

Field	Description of contents
ActivityCode	Accounting code for a given activity entered in Time > Configuration > Activities. It is the code that identifies the activity.
ActivityName	Name of an activity entered in Time > Configuration > Activities. It is the name that identifies the activity.
ActualHours	Original clocked hours on time entry. (Before edits, rounding, etc.)
ActualOff	Original clock off time on time entry.
ActualOn	Original clock on time on time entry.
BillAmount	The product of the Bill Rate and the billable hours.
BillRate	Rate stored on the time entry. Is set from the Time/Pay Rates configuration, with fallback to the Employee's estimated Pay Rate.
BreakHours	Number of hours in breaks.
BusinessExternalId	External ID of location. The External Id is used to coordinate TeamWork with external systems. It is blank unless your company integrates data with an external system.
BusinessName	The name of a location. (*Entered in Name in the Locations > Settings > Information window.*)
ClockOffUserId	Unique ID of User who clocked the employee off.
ClockOnUserId	Unique ID of User who clocked the employee on.
CreatedDate	Date the time entry was created.
Crew	Name employee's crew assignment.

EMail	Employee’s email address.
EmpAlert	A flag for the employee to alert manager of note.
EmployeeFullName	Employee full name. Displayed as “Last, First”.
EmployeeId	Unique ID for the employee/location, set by ScheduleSource.
EmployeeNote	Employee entered note on time entry.
EmpNotes	Employee’s email address.
EntryId	Unique ID for time entry, set by ScheduleSource.
EstimatedPayAmount	Final Hours times Estimated Pay Rate, for non-error entries. If error, then is zero.
EstimatedPayRate	Employee estimated hourly rate of pay. PayRate is assigned to an employee in the Employees > Settings > Schedule window.
ExternalId	Employee ID for use with an external system, such as HR or Payroll.
FinalHours	Final Hours on time entry, after adjustments.
FinalOff	Rounded Off time of time entry, in Location time zone.
FinalOn	Rounded On time of time entry, in Location time zone.
FirstName	Employee’s first name.
IsBillable	Flag that indicates whether the project/task used in the time entry is billable.
IsError	Flag that indicates if the time entry has been flagged as an error.
IsLeave	Flag that indicates whether the project/task used in the time entry is a leave.

IsPaid	Flag that indicates whether the project/task used in the time entry is paid.
IsSheetApproved	Flag that indicates if the employee time sheet has been approved at the location.
IsSheetLocked	Flag that indicates if the employee time sheet has been locked at the location.
LastName	Employee’s last name.
LocationOff	A string that stores a value that determines where the clock Off occurred. It might be an IP address, phone number, or the ID of a physical clock.
LocationOn	A string that stores a value that determines where the clock On occurred. It might be an IP address, phone number, or the ID of a physical clock.
LocationUserDefined1 - LocationUserDefined6	Custom field(s) identified in Organization > Custom Fields > Location.
OuterDate	UNUSED
PayAmount	Estimated pay based on time entry pay rate and final hours.
PayPeriodEnd	End date of the pay period.
PayPeriodId	Unique ID of the pay period, set by ScheduleSource.
PayPeriodStart	Start date of the pay period.
PayRate	Rate stored on the time entry. Is set from the Time/Pay Rates configuration, with fallback to the Employee’s estimated Pay Rate.
Phone1	Employee’s phone number.
Phone2	Additional employee phone number.

Phone3	Additional employee phone number.
ProjectCode	The unique code for the Project of the time entry. *(Entered on the Add or Edit Project window under Time > Configuration > Project & Tasks.)*
ProjectName	The name for the Project of the time entry. *(Entered on the Add or Edit Project window under Time > Configuration > Project & Tasks*.)
ScheduleDate	Date of start of time entry, in location time zone (date portion only).
ScheduleDateMonth	Month of the schedule date.
ScheduleDateQuarter	Quarter of the schedule date.
ScheduleDateWeek	Week of the schedule date.
ScheduleDateYear	Year of the schedule date.
ScheduleDateYearMonth	Year/Month of the schedule date.
ScheduleDateYearQuarter	Year/Quarter of the schedule date.
ScheduleDateYearWeek	Year/Week of the schedule date.
SchNotes	Manager entered notes on the time entry.
SheetEmployeeId	Employee Id from the time sheet.
TaskCode	The unique code for the Task of the time entry. (*Entered on the Add or Edit Project window under Time > Configuration > Project & Tasks.*)
TaskName	The name for the Task of the time entry. (*Entered on the Add or Edit Project window under Time > Configuration > Project & Tasks.*)
TimeSheetId	Unique ID of time sheet, set by ScheduleSource.

TimeZoneOffset	Location’s time zone number of minutes offset from UTC.
TimeZoneUsDay	Flag to indicate that the Location’s time zone honors daylight savings.
Type	Type of time sheet entry, either a clock, card, or admin entry.
UpdatedDate	Date of an update to an entry in a time sheet.
UpdateReason	Internal code for the type of update.
UpdateUserFullName	Full name of user who last updated the time entry.
UserDefined1 - UserDefined6	Custom field(s) identified in Organization > Custom Fields > Employee.
UserName	Employee's username. (*Entered in Username/ID in Employees* > *Settings* > *Personal window.*)
BillableHoursTotal	Sum of hours on time entries for Billable tasks, not including errors.
BusinessCount	Count of distinct locations.
EntryCount	Count of time entries.
HoursTotal	Sum of all time entry hours, including errors.
LeaveHoursTotal	Sum of hours on time entries for Leave tasks, not including errors.
NotLeaveHoursTotal	Sum of hours on time entries for non-Leave tasks, not including errors.
PaidHoursTotal	Sum of hours on time entries for Paid tasks, not including errors.
SheetCount	Count of distinct time sheets the time entries are associated with.
TotalBillAmount	Sum of Billable hours times billable rate.

TotalEstimatedPayAmount	Sum of estimated Pay Amount.
TotalPayAmount	Sum of Pay Amount.
UnBillableHoursTotal	Sum of hours on time entries for non-Billable tasks, not including errors.
UnPaidHoursTotal	Sum of hours on time entries for non-Paid tasks, not including errors.
ValidHoursTotal	Sum of hours on non-Error time entries.

15.14 Report Examples

The following examples show how you can use tally function and statistical fields to display the same data in different ways. Example I shows the difference in results when you select tally fields versus calculated fields. Example II shows the difference in results when you select tally fields versus calculated fields and use group / sort to categorize results.

15.14.1 Example I Tally vs. Calculated Field

The following shows the difference between using reporting fields that tally data and calculated fields.

<table>
<tr><th>Reporting Field Design
Tally Function</th><th>Calculated Field Design
Statistical Function</th></tr>
<tr><td>Locations Report for Name, City, and State</td><td>Locations Report for Counting Locations in a State</td></tr>
<tr><td>
<table>
<tr><th>Name</th><th>City</th><th>State</th></tr>
<tr><td>L1</td><td>Denver</td><td>CO</td></tr>
<tr><td>L2</td><td>Boulder</td><td>CO</td></tr>
<tr><td>L3</td><td>Evergreen</td><td>CO</td></tr>
<tr><td>L4</td><td>Wichita</td><td>KS</td></tr>
<tr><td>L5</td><td>New York</td><td>NY</td></tr>
</table>
</td><td>
<table>
<tr><th>State</th><th>Count</th></tr>
<tr><td>CO</td><td>3</td></tr>
<tr><td>KS</td><td>1</td></tr>
<tr><td>NY</td><td>1</td></tr>
</table>
</td></tr>
</table>

Example II Tally vs. Calculated Field and Sort/Group

The following shows the difference between using tally fields and a calculated field that counts locations and groups results by city.

Reporting Field Design **List Functions**	**Calculated Field Design** **SQL Query and Grouping Functions**
Locations Report for Location and City	Locations Report for City with Count Grouped by City

HOW TO DESIGN A SIMPLE REPORT WITHOUT CALCULATED FIELDS

Extensive instructions on using Reports are provided in the Reports section. Here is an overview of two report types.

To design a simple report to display locations and their city:

1. Select Reports from the main menu.
2. Select Designs and select Add.
   Add >> Design window displays.
3. Select the Source: Organization : Location.
4. Type Name: Location and select Type:. List.
5. Select Save.
6. Under Columns, add BusinessName (Location) and City.
7. Select Save and View.
   Results list each location and city. Refer to the following example.
   Example:

Location	City
After Hours	Denver
Coffee Shop	Denver
Faculty Lounge	Denver
Ice Cream Shop	Denver
Registration	Denver
Student Union	Denver
Burrito shop	Golden
Catering Services B	Golden
Coffee Shop B	Golden
Residence Hall A	Golden
Sport Concessions	Golden
Catering Services	Westminster
Dining Services	Westminster
Residence Hall B	Westminster

HOW TO DESIGN A REPORT TO COUNT LOCATIONS IN EACH CITY

To design a report to count the number of locations in each city:

1. Use the same design from above. Under Columns, select Location (Business Name) and on the Properties window, make sure the Display check box is selected for Visible.
2. Clear the check box for City.
3. Add the summary field Count. Select the field and on the Properties window, specify Tally Functions as Group: Count and Report: Sum.
4. Select the Display check box for Visible.
5. Under Sort/Group, add City. Select the field and on the Properties window, select the Display check box for City so it is Visible (Group by).
6. Select Save and View.
   Results list each location, grouped by the city it resides in, with a count of the locations.
   Example:

Location	Count
Denver	
After Hours	1
Coffee Shop	1
Faculty Lounge	1
Ice Cream Shop	1
Registration	1
Student Union	1
	6
Golden	
Burrito shop	1
Catering Services B	1
Coffee Shop B	1
Residence Hall A	1
Sport Concessions	1
	5
Westminster	
Catering Services	1
Dining Services	1
Residence Hall B	1
	3
	14