EDP SOFTWARE

SchedulePro

Web Edition

User Manual
For
Managers/Schedulers/System Administrators

By

EDP Software

Table of Contents

Terms of Service

for employee scheduling software service offered through Web Edition of Schedule Pro

These Terms of Service govern the employee scheduling software service offered through web edition of Schedule Pro. PLEASE READ THEM CAREFULLY.

1.0   "Terms of Service" is an agreement between EDP Software, the owner and operator of the employee scheduling software service through web edition of Schedule Pro, and your company. The rules herein apply to all usage of the employee scheduling software service through web edition of Schedule Pro hosted on the domain "ScheduleProWeb.com" or any other domain. By using the Service or any portion of the Service, you are automatically agreeing to these Terms of Service, which can be changed by EDP Software at any time. If the Terms of Service change at any time to your disliking, you may cancel your service by emailing spro@edpsoftware.com , in accordance with the CANCELLATION section of these Terms of Service. However if you continue to use the Service, you are automatically agreeing to any and all changes in these Terms of Service.

2.0   Service - EDP Software provides businesses with employee scheduling software service through web edition of Schedule Pro that allows users to create, and maintain their employee shift schedules online, and provides employees and all other users with access to that information both through the web, through email as well as provides a way to communicate with other users / employees.

3.0   Contract Terms - EDP Software currently offers one standard contract terms for 12 month. You must pay in advance for the full amount of the entire term. The contract will automatically renew at the end of current contract, and you will be invoiced via email up to 90 days before the termination date for another subscription for 12 months. However you can cancel the service by writing to us on spro@edpsoftware.com.

4.0   EDP Software reserves the right to change fees for subscriptions without notice. However the change in fees will not affect the fees for the current Contract Terms and would apply on the next billing cycle.

5.0   NSF Cheque - The fee for a bounced cheque is US$50, plus any charges or fees incurred to us by our bank or in any way connected with your bad cheque. EDP Software reserves the right to immediately terminate an account with no refund in the event of receiving a bad cheque.

6.0   Free 30 day trial - EDP Software offers a limited thirty-day free trial. The thirty-day free trial is covered by these Terms of Service. As a potential customer your business may use a limited version of the Service for thirty days, free of charge. If you do not sign up for the Service within thirty days after accepting the free thirty-day trial, your access will be immediately terminated and you will not be billed. EDP Software is not responsible for contacting you to let you know your thirty-day free trial is over. If your company has already had a free trial in the past with the EDP Software's employee scheduling software service, you are not eligible for another free trial.

7.0   You as a manager/user will receive a company ID, a user ID, and a password to manage the schedules and other users, with special administrative rights. As administrator, you can assign someone else to act as user/manager etc. You can also grant permission to Employees to use the information / functionality that an employee can normally use. YOU ARE FULLY RESPONSIBLE FOR ANY AND ALL ACTIONS OF ANY MANAGERS, USERS AND/OR EMPLOYEES USING THEIR PASSWORDS AS WELL AS ANY ACTIVITY THAT OCCURS UNDER THOSE ACCOUNTS REGARDLESS OF WHO THE ACTUAL INDIVIDUAL IS WHO IS ACTING UNDER THOSE ACCOUNTS. YOU ARE RESPONSIBLE FOR MAKING SURE THAT MANAGERS, USERS AND EMPLOYEES KEEP THEIR PASSWORDS ABSOLUTELY CONFIDENTIAL. Your Employees must keep their passwords confidential. We recommend that all users, managers, employees and

administrator change their password periodically. You agree to notify EDP Software immediately of any unauthorized use of any password. EDP Software will not be liable for any loss or damage arising from your failure to comply with this section or the failure of any of your Employees to comply with this section.

8.0   It is not allowed to copy or use any source code (HTML and scripts) or part of the source code generated by the Service.

9.0   Technical Support by Email - EDP Software provides limited technical support via email. EDP Software will attempt to respond to any request for support by email within three business days, not including holidays, but makes no guarantee of any response time.

10.0   Technical Support via Telephone - EDP Software offers telephone support billable at US$150 per hour or part thereof and paid in advance. However EDP Software may, at its sole discretion, offer a limited amount of free phone support, in order to answer a quick question or handle a quick problem. This is no way obligates EDP Software to continue to offer such free support. You will be notified beforehand when billable time is starting.

11.0   Training and Consulting - EDP Software provides consulting services and training services on an hourly basis in addition to the online service. If you would like for a scheduling specialist to assist you in developing a custom solution for your scheduling situation, the cost is US$150 per hour or part thereof and must be paid in advance.

12.0   On-siteTraining - EDP Software provides on-site consulting services and on-site training services on per diem basis plus expenses. The fee and expenses for this service must be paid advance.

13.0   EDP would fix any problems with our software at no cost to the customer.

14.0   Cancellation of Service – You can cancel the Service anytime by emailing spro@edpsoftware.com with your company ID, Company name, Contact name stating your request. We do not give refunds for any portion of an unused subscription. By canceling before your subscription is over, you are authorizing us to close your account, therefore blocking all access to it, and you are accepting that you will not receive a refund for the remainder of the subscription term not used.

15.0   By not actually using the Service, you are not releasing yourself from your liability to EDP Software for the Service. The fact that you have signed up for the Service regardless of whether or not you choose to actually use it, is enough to constitute your liability to EDP Software for the Service.

16.0   In the event that you do not pay for charges incurred by using the Service within 30 days of the due date, you will be responsible for all costs incurred by EDP Software to collect the money from you, including but not limited to attorney's fees, court costs, other legal costs, and postage.

17.0   You agree to provide true, accurate, current and complete information about your business and maintain and promptly update the company information to keep it true, accurate, current and complete. If you provide any information that is untrue, inaccurate, not current or incomplete, or EDP Software has reasonable grounds to suspect that such information is untrue, inaccurate, not current or incomplete, EDP Software has the right to suspend or terminate your account and refuse any and all current or future use of the Service (or any portion thereof).

18.0   As a condition of your use of the Service, you warrant to EDP Software that you will not use the Service for any purpose that is unlawful or prohibited by these Terms of Service and notices. Any resale of the Service is expressly prohibited. Any type of abuse, including but not limited to attempts to spy or get the passwords or private information of others, spamming, harassment, hacking, reverse engineering of any kind, excessive use with the intention of overworking or overloading the system in any way, or any other behavior which is considered an abuse by modern internet standards will be cause for and serve as reasonable grounds for immediate termination.

19.0   The subscriber of the service will take full responsibility for its contents.

20.0   EDP Software reserves the right to remove data without notice in the following cases:

    a.   We consider a usage to be fraudulent or illegal;
    b.   The trial period for the trial subscription has expired;
    c.   The email address as registered for the service does not exist or does not belong to the subscriber.

21.0   Disclaimer and Limitations of Liability - The information and services included in or available through the Service may include inaccuracies or typographical errors. Changes are periodically added to the information herein. EDP Software may make improvements and/or changes in the Service at any time. EDP Software does not represent or warrant that the Service will be uninterrupted or error-free, that defects will be corrected, or that the Service or the server that makes it available, are free of viruses or other harmful components. EDP Software does not warrant or represent that the use or the results of the use of the Service or the materials made available as part of the Service will be correct, accurate, timely, or otherwise reliable. You specifically agree that EDP Software shall not be responsible for unauthorized access to or alteration of your data.

EDP SOFTWARE MAKES NO REPRESENTATIONS ABOUT THE RELIABILITY, SUITABILITY, TIMELINESS, AVAILABILITY, AND ACCURACY OF THE SERVICE FOR ANY PURPOSE. THE SERVICE IS PROVIDED "AS IS" WITHOUT WARRANTY OF ANY KIND. EDP SOFTWARE HEREBY DISCLAIMS ALL WARRANTIES AND CONDITIONS WITH REGARD TO THE SERVICE, INCLUDING ALL IMPLIED WARRANTIES AND CONDITIONS OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE, TITLE AND NON-INFRINGEMENT. IN NO EVENT SHALL EDP SOFTWARE BE LIABLE FOR ANY INDIRECT, DIRECT, PUNITIVE, SPECIAL, INCIDENTAL, CONSEQUENTIAL DAMAGES OR ANY DAMAGES WHATSOEVER INCLUDING, WITHOUT LIMITATION, DAMAGES FOR LOSS OF USE, DATA OR PROFITS, ARISING OUT OF OR IN ANY WAY CONNECTED WITH THE USE OR PERFORMANCE OF THE SERVICE, WITH THE DELAY OR INABILITY TO USE THE SERVICE, THE PROVISION OF OR FAILURE TO PROVIDE SERVICES, OR FOR ANY INFORMATION, SOFTWARE, PRODUCTS, SERVICES AND RELATED GRAPHICS OBTAINED THROUGH THE SERVICE, OR OTHERWISE ARISING OUT OF THE USE OF THE SERVICE, WHETHER BASED ON CONTRACT, NEGLIGENCE, TORT, STRICT LIABILITY OR OTHERWISE, EVEN IF EDP SOFTWARE HAS BEEN ADVISED OF THE POSSIBILITY OF DAMAGES. IF YOU ARE DISSATISFIED WITH ANY PORTION OF THE SERVICE, OR WITH ANY PART OF THESE TERMS OF SERVICE, YOUR SOLE AND EXCLUSIVE REMEDY IS TO CANCEL (SEE "TERMINATION / CANCELLATION") AND DISCONTINUE USING THE SERVICE.

22.0   The invalidity or unenforceability of any provision of these Terms of Service shall not affect the validity or enforceability of any other provisions of this agreement, which shall remain in full force and effect. If any of the covenants or provisions of these Terms of Service are determined to be unenforceable by reason of their extent, duration, scope, or otherwise, then the parties contemplate that the court making such determination shall reduce such extent, duration, scope or other provision and enforce such term(s) in their reduced form for all purposes contemplated by these Terms of Service.

23.0   These Terms of Service contain the entire agreement between EDP Software and your company with respect to usage of the Service, and supercedes, merges, and replaces all prior written or oral agreements, negotiations, offers, representations, and warranties with respect to the usage of the Service. No course of dealing between the parties, no usage of trade, and no parol or outside evidence of any nature shall be used to modify, interpret or supplement any provision of these Terms of Service.

24.0   You agree to indemnify and hold EDP Software, its affiliates, officers and employees, harmless from any claim, demand, or damage, including reasonable attorneys' fees, asserted by any third party due to or arising out of your use of the Service.

25.0   Changes in Agreement - The terms of this agreement may change at any time without any advance notice. A current version of the Terms of Service will remain at http://www.scheduleProWeb.com. By continuing to use the service, you automatically agree to any and all of these changes.

26.0   Termination and Cancellation - EITHER PARTY CAN CANCEL THIS AGREEMENT AT ANY TIME FOR ANY REASON WITH WRITTEN NOTICE. IF AT ANY TIME YOU ARE DISSATISFIED WITH THE SERVICE FOR ANY REASON, YOU CAN CANCEL BY EMAILING SPRO@EDPSOFTWARE.COM WITH YOUR COMPANY ID, COMPANY NAME, CONTACT NAME SIMPLY STATING THAT YOU WOULD LIKE TO CANCEL THE SERVICE.

27.0   **MISCELLANEOUS PROVISIONS** - These Terms of Service will be governed by and construed in accordance with the substantive laws of the Province of New Brunswick, Canada. This is the entire agreement between EDP Software and the subscriber of the Service, and supersedes any prior communications or representations concerning this service.

1.0   Introduction

Even in the best-run organizations, managing employee shift schedules can be frustrating and time consuming for everyone concerned. Human resource managers spend countless hours scheduling resources while trying to take into account the complexity of employee preferences, organizational needs and union rules. This results in inefficient schedules, higher labour costs and increased fiscal pressure.

A truly effective scheduling solution requires the flexibility to handle the numerous dynamic needs of an entire institution. Full time, part time and casual employee scheduling requirements must be met and optimized using one system. Short term and long term leaves need to be tracked and managed. Managers must have instant access to a wide array of information to deal with everyday tasks and decisions. Employee information, availability of replacement workers, and management reports are all necessary for effective leadership.

Schedule Pro Web Edition is a web based solution that is easy-to-use. It is ideal for institutions with any number of employees. This powerful system saves time and money. Schedule Pro Web Edition can be accessed from any computer with Internet access and a web browser. Employees can view their schedule as well as the schedule of other employees in their location. Employee can trade shift, request time-off, specify unavailability, bid on open shifts etc. from comfort of their home on their PC. Similarly schedulers can manage their workforce schedules from anywhere, anytime using a compatible web browser with internet access. . There is no need for special hardware such as servers or any program installation, program updates etc. EDP Software would update the software as necessary.

2.0   How to Log into Schedule Pro web edition

Open Internet Explorer on your computer and type the following address

https://scheduleproweb.com

The following screen would be displayed

Please enter your *username and password* and click on "Sign In". **If do not remember your password, click on "Forgot Password?"** and enter the username to get your password in your email. Administrators cannot retrieve passwords in this manner. They must call EDP Software to get it reset.

Clicking "Sign in" will display the Dashboard as follows:

SchedulePro   Dashboard   Setup   Schedule   Reports   Messages   Sign Out

Dashboard

⚙ **Setup**
Specify system codes, employees, users, groups and requirements.

✉ **View Messages**
You have no new messages.

📅 **Work on Unpublished Schedules**
Create, edit, publish and post open shifts in unpublished schedules

📅 **Manage Published Schedules**
View, edit and fill open shifts in published schedules

📊 **View Reports**
View, export, and print various reports

💼 **Manage Leave Requests**
Manage employees' leave requests. Add, edit, approve, and decline a leave request.

🔄 **View Employee's Shift Trades**
View employee's shift trades within the organization.

Contact Info

About EDP Software
Tel: (506) 454-7776 (SPRO)

Support

Admin/Manager Manual (PDF)
Employee Manual (PDF)

Settings

Change My Password

Setup

3.0 Setup

Please click on the "Setup" on the Dashboard to display the following screen:

SchedulePro   Dashboard   Setup   Schedule   Reports   Messages   Sign Out

Setup

Organization
General settings for your organization.

Codes
Before creating a schedule, you need to specify all the system codes.

Requirements
Specify the staffing/skills/tasks requirements within your organization.

Grouping of Position/Location
Manage the scheduling of your employees by dividing employee into logical groups.

Template Libraries
Define shift and event patterns to be reused when defining an individual employee's shift pattern.

Employees
Manage employee information, rotating shift template, unavailability, secondary Positions and Dept.

Manage Users
Define which employees will be managers and schedulers for each group.

Employee's Group Assignments
Employees will be able to see the schedule of other employees in their same group.

Send Usernames/Passwords
Batch send username/passwords to employees.

4.0 Organization

Please click on the "Organization" on the Setup to display the following screen:

Please select the first day of the week for your schedules. This is needed to calculate the weekly hours.

You can also rename "Position" and "Location" to suit your needs. The default used throughout Schedule Pro is Position and Location.   Click on "Save" to save your changes.

Position – This will refer to the roles individual employees will perform in your organization. Some examples used by other organizations: Rank, Role, Job, Type, Function, Task, etc.

Location – This refers to the location or organizational unit in which employees will perform their duties. Some examples used by other organizations: Unit, Ward, Base, Team, Line, Branch, Chapter, Precinct, Zone, Division etc.
The individual positions and locations unique to your organization will be defined in the codes section.

NOTE: Going forward, this manual will refer to these fields as Location and Position. If you rename them, remember that the text on your screen will reflect these new names. However the manual still refers them as Location and Position.

5.0   Codes

Codes provide the ability for each organization to custom tailor Schedule Pro for their unique needs. Codes define the building blocks used in creating schedules. For example, by defining shift codes, one organization can specify that they use a 9am to 5pm daytime shift, and a second organization can specify that they use 7am to 7pm. It's completely up to you and how your company does business!

Before creating schedules, you need to specify all the system codes that you wish to use with Schedule Pro. Click on "Codes" to display the following screen.

Shift Codes
Specify/edit various shifts your organization would use in scheduling employees.

Leave Codes
Specify/edit various leave code (time off codes) your organization would use.

Position Codes
Specify/edit various positions for the employees you would be scheduling.

Location Codes
Specify/edit various departments (location of work) for the employees you would be scheduling.

Refusal Codes
Specify/edit reasons for declining shift offered to an employee.

Skill Codes
Specify/edit various skills for your employees.

Break Codes
Specify/edit various breaks such as lunch for your employees if you schedule breaks.

Task Codes
Specify/edit various tasks that your employees would be doing during the shift.

Team Codes
Specify/edit various Teams if your employees work in team environment.

OT Reason Codes
Specify/edit overtime reasons for shifts.

What are Codes?

Before creating schedules, you need to specify all the system codes that you wish to use with SchedulePro.

5.1   Shift Codes

Click on the "Shifts" to open the Shift Codes screen (see below).

Shift codes define the start and end times for shifts that will be assigned to employees.   User can enter as many different shift codes as needed. These shift codes may have overlapping start and end times.

To add a shift code, please click on the "New Shift Code" button. To edit a shift code, click on ✎ "Edit". Now you will see the following screen as shown on the next page.

Please click on ✖ "Delete" to delete a shift code you do not require. However you may not be able to delete a shift code that has been used either in the template and / or in the schedule.

Overnight Shifts – If a single shift spans across midnight, it occurs on 2 different days.   Employee schedules are displayed like calendars with single day boundaries.   The * column is used to indicate whether the shift will show up on the day it starts, or on the day it ends. This can be chosen when defining the shift code.

System Defined Shift Codes – These codes are predefined and cannot be changed.
- **(-)** is used to show that the employee has not been assigned a shift
- **OFF** is used to mark an employee as unavailable to work. If this code is assigned to an employee, they will not be scheduled to work on that day.

Code – Enter a code for a shift. This code can be up to 4 characters long. Please do not use any special characters in the code such as "/","-"etc. We recommend to use A – Z, a – z and 0 – 9.

Description – Please enter a description for the shift code. For example you may enter "Day (0700-1500) " for a "D" shift. If you have large number of shift codes, then it is recommended to put the start and end time of the shift in the description.

Start Time – Enter the time the shift starts.

End Time – Enter the time shift ends.

Hours Paid – Enter the hours that are paid for this shift.

Color – This field will set the color of text used for this shift in the final schedules. Click on the ▼ in ▇ ▼ to select the foreground color for the shift code if so desired. The default color is black. If you choose to have a different color then it is recommended to have a dark color otherwise shift code text may have poor visibility in the final schedule

Defining the color in the shifts is useful to quickly identify different shifts in schedule as well as in the reports.

After you have entered all the information, click on "Save" to save the information.

5.2   Leave Codes

Click on the "Leaves" to open the Leave Codes screen (see below).

Codes							
New Code							
Code	Description	Is Paid	Emp Use	Color	Edit	Delete	
S	Paid Sick Time Off/Sick Leave	✔	✔	▇			
SH	in Lieu of Stat Holidays	✔	✔	▇			
V	Paid Vacation/Annual Leave	✔	✔	▇			
AL	Leave of Absence		✔	▇	✎	✘	
MT	Maternity	✔	✔	▇	✎	✘	
OT	In Liew of Over time	✔	✔		✎	✘	
T1	First Aid Training	✔		▇	✎	✘	

Codes (left menu): Shift, **Leaves**, Position, Location, Refusals, Skills, Breaks, Tasks, Teams, Overtime Reasons

What is a Leave Code?

You can specify various leave codes that your employees may take. In addition you also specify all training codes, and code for any other situation where an employee is not doing his/her regular duties.

User can enter as many different leave codes as needed.   To add a leave code, please click on the "New Leave Code" button. To edit a leave code, click on ✎ "Edit" for the leave code you wish to edit. Now you will see the following screen.

Please click on ✘ "Delete" to delete a leave code you do not require. However you may not be able to delete a leave code that has been used either in the template and / or in the schedule.

Codes

Shift, **Leaves**, Position, Location, Refusals, Skills, Breaks, Tasks, Teams, Overtime Reasons

Leave Codes

Code
_____ (max 4 chars)

Description
_____

☐ Is Paid
☑ Employee Use

Color (backcolor)
☐ ▾

Save   **Cancel**

Code – Enter a code for the leave. This code can be up to 4 characters long. Please do not use any special characters in the code such as "/","-"etc. We recommend to use A – Z, a – z and 0 – 9.

Description – Please enter a description for the leave code. For example you may enter "Vacation" for a "V" leave code.

Is Paid – Check this box if the leave is a paid leave.

Employee Use – Check this box if employee can request time off for this code.

Color – Click on the ▼ in [▪ ▼] to select the background color for the leave code if so desired. It is not required that you select a color as you can leave it to be white. If you choose to have color then it is recommended to have a light color otherwise the black text may not be visible on a dark color.

After you have entered all the information, click on "Save" to save the information.

Note – Please ensure that you have marked each leave code whether it is paid or unpaid as it would affect the hours paid in the report.

5.3   Position Codes

Click on the "Position" to open the Position Codes screen (see below).

Position codes define the different roles or jobs that exist in your organization. This represents "What" an employee will be doing during a shift. Keep the definition limited to the function performed. Do not mix "When" or "Where" these positions occur. That information is defined in the Shift codes and Location codes respectively.

User can enter as many different position codes as needed.   To add a position code, please click on the "New Code" button. To edit a position code, click on 🖉 "Edit" for the code you wish to edit. Now you will see the following screen.

Please click on ✖ "Delete" to delete a position code you do not require. However you may not be able to delete a position code that has been used either in the employee profile and / or in the schedule.

Code – Enter a code for the Position. This code can be up to 4 characters long. Please do not use any special characters in the code such as "/","-"etc. We recommend to use A – Z, a – z and 0 – 9.

Description – Please enter a description for the leave code. For example you may enter "Registered Nurse" for a "RN" Position code or you may enter "Fire Fighter" for "FF" position code.

Print Order – You may enter a number here to specify the sort order for Positions. Some organizations like to print Positions in certain order. For example, healthcare facilities might like to print "RN" before "LPN" and manufacturing facilities might like to print "Manager" before "Supervisor". Lower number prints on the top.

Minimum Time Between Shifts (in hours) – Please enter the minimum amount of time in hours that an employee is required to have OFF between shifts.

After you have entered all the information, click on "Save" to save the information.

5.4   Location Codes

Click on the "Location" to open the Location Codes screen (see below).

Location codes define "Where" an employee will be performing their duties. This is often a separate physical location, such as office branches or separate police stations. This can also be used to define areas or teams within a single physical location. For example, different wards within a hospital, assembly lines within a factory, or teams within an organization.

User can enter as many different Location codes as needed.   To add a Location code, please click on the "New Code" button. To edit a Location code, click on ✎ "Edit" for the code you wish to edit. Now you will see the following screen.

Please click on ✖ "Delete" to delete a code you do not require. However you may not be able to delete a Location code that has been used either in the employee template and / or in the schedule.

Code – Enter a code for the Location. This code can be up to 4 characters long. Please do not use any special characters in the code such as "/","-"etc. We recommend to use A – Z, a – z and 0 – 9.

Description – Please enter a description for the location code. For example you may enter "Allan Building" for a "AL" location code or you may enter "Yarmouth Base" for "YR" location / base / unit / post /ward code or "East Tower" for "ET" location / post code.

After you have entered all the information, click on "Save" to save the information.

5.5 Skill Codes

Click on the "Skills" to open the Skill Codes screen (see below).

Skill codes can define specialized training or skills attributed to an employee. This allows organizations to find employees with the correct skill set for a particular position. For example, a nurse in an ICU ward will require the ICU training skill. Schedulers can ensure that only nurses with that skill are found for that shift.

User can enter as many different Skill codes as needed. To add a Skill code, please click on the "New Code" button. To edit a Skill code, click on ✎ "Edit" for the code you wish to edit. Now you will see the following screen.

Please click on ✖ "Delete" to delete a code you do not require. However you may not be able to delete a Skill code that has been used either in the employee profile and / or anywhere else.

Code – Enter a code for the Skill. This code can be up to 4 characters long. Please do not use any special characters in the code such as "/","-"etc. We recommend to use A – Z, a – z and 0 – 9.

Description – Please enter a description for the Skill code.

After you have entered all the information, click on "Save" to save the information.

5.6   Refusal Codes

Click on the "Refusals" to open the Refusal Codes screen (see below).

Refusal codes are used to track why an open shift was not accepted by an employee when it was offered to them. This tracking is very useful for organizations that have contractual obligations to offer open shifts to senior employees first.

User can enter as many different Refusal codes as needed.   To add a Refusal code, please click on the "New Code" button. To edit a Refusal code, click on ✏ "Edit" for the code you wish to edit. Now you will see the following screen.

Please click on ✖ "Delete" to delete a code you do not require. However you may not be able to delete a Refusal code that has been used either in the employee profile and / or anywhere else.

Code – Enter a code for the Refusal. This code can be up to 4 characters long. Please do not use any special characters in the code such as "/", "-"etc. We recommend to use A – Z, a – z and 0 – 9.

Description – Please enter a description for the Refusal code.

After you have entered all the information, click on "Save" to save the information.

5.7   Break Codes

Click on the "Breaks" to open the Break Codes screen (see below).

User can enter as many different Break codes as needed. Employees are not doing their duties when on BREAK. Three Break codes are pre-defined and cannot be deleted or edited.   To add a Break code, please click on the "New Code" button. To edit a Break code, click on ✏ "Edit" for the code you wish to edit. Now you will see the following screen.

Please click on ❌ "Delete" to delete a code you do not require. However you may not be able to delete a Break code that has been used either in the Templates, schedules and / or anywhere else.

Code – Enter a code for the Break. This code can be up to 4 characters long. Please do not use any special characters in the code such as "/","-"etc. We recommend to use A – Z, a – z and 0 – 9.

Description – Please enter a description for the Break code.

After you have entered all the information, click on "Save" to save the information.

5.8   Task Codes

Click on the "Task Codes" to open the Task Codes screen (see below).

User can enter as many different Task codes as needed. Sometimes employees are given various tasks to do during their shift. These tasks may have to done within certain time or may be for the whole shift.

To add a Task code, please click on the "New Code" button. To edit a Task code, click on ✎ "Edit" for the code you wish to edit. Now you will see the following screen.

Please click on ✖ "Delete" to delete a code you do not require. However you may not be able to delete a Task code that has been used either in the Templates, schedules and / or anywhere else.

Code – Enter a code for the Task. This code can be up to 4 characters long. Please do not use any special characters in the code such as "/","-"etc. We recommend to use A – Z, a – z and 0 – 9.

Description – Please enter a description for the Task code.

After you have entered all the information, click on "Save" to save the information.

5.9   Team Codes

Click on the "Team Codes" to open the Team Codes screen (see below).

User can enter as many different Team codes as needed. Sometimes employees are part of a team.   To add a Team code, please click on the "New Code" button. To edit a Team code, click on ✎ "Edit" for the code you wish to edit. Now you will see the following screen.

Please click on ✖ "Delete" to delete a code you do not require. However you may not be able to delete a Team code that has been used either in the employee profile, schedules and / or anywhere else.

Code – Enter a code for the Team. This code can be up to 4 characters long. Please do not use any special characters in the code such as "/","-"etc. We recommend to use A – Z, a – z and 0 – 9.

Description – Please enter a description for the Team code.

After you have entered all the information, click on "Save" to save the information.

5.10 Overtime Reasons Codes

Click on the "Overtime Reasons Codes" to open the Overtime Reasons Codes screen (see below).

User can enter as many different Overtime Reasons codes as needed. To add an Overtime Reasons code, please click on the "New Code" button. To edit a Overtime Reasons code, click on 🖉 "Edit" for the code you wish to edit. Now you will see the following screen.

Please click on ❌ "Delete" to delete a code you do not require. However you may not be able to delete an Overtime Reasons code that has been used either in the schedules and / or anywhere else.

Code – Enter a code for the Overtime Reason. This code can be up to 4 characters long. Please do not use any special characters in the code such as "/","-"etc. We recommend to use A – Z, a – z and 0 – 9.

Description – Please enter a description for the Overtime Reasons code.

After you have entered all the information, click on "Save" to save the information.

6.0   Groups

Groups are used to split up the scheduling work amongst several schedulers. Groups divide the overall schedule into pieces by assigning particular positions within a location to a scheduler.   For example, there may be 2 nursing schedulers within a hospital. Nursing Group A would be responsible for all RNs, LPNs and CNAs in half of the wards, and Nursing Group B would be responsible for the other half of the wards.   This way the work is divided and each scheduler is only given access to the group to which they are assigned.

To add or modify a group, click on the "Groups" in Setup.

This would display the following screen

User can enter as many different Groups as needed.   To add a Group, please click on the "New Group" button. To edit a Group, click on ✎ "Edit" for the Group you wish to edit. Now you will see the following screen.

Please click on ✖ "Delete" to delete a Group you do not require. However you may not be able to delete a Group that has been assigned to a user and / or employee.

Groups

View All Groups

Add New Group

Group

Save Cancel

Group Name

Description

Position

Selected	Code	Description
☐	MGR	Manager
☐	RN	Registered Nurse

Select All | Unselect All

Location

Selected	Code	Description
☐	A	Location A
☐	B	Location B

Select All | Unselect All

Group Name – Enter a Group Name to identify this group. The Group Name can be up to 16 characters long. There should be a unique name for each group.

Description – Enter a description for this group that may be more descriptive than the group name.

Rank Codes – Select all Rank codes that would be part of this group.

Location Codes – Select a Location codes that would be part of this group.

After you have entered all the information, click on "Save" to save the information.

7.0 Requirements Template

When you click on requirements, the following screen is displayed.
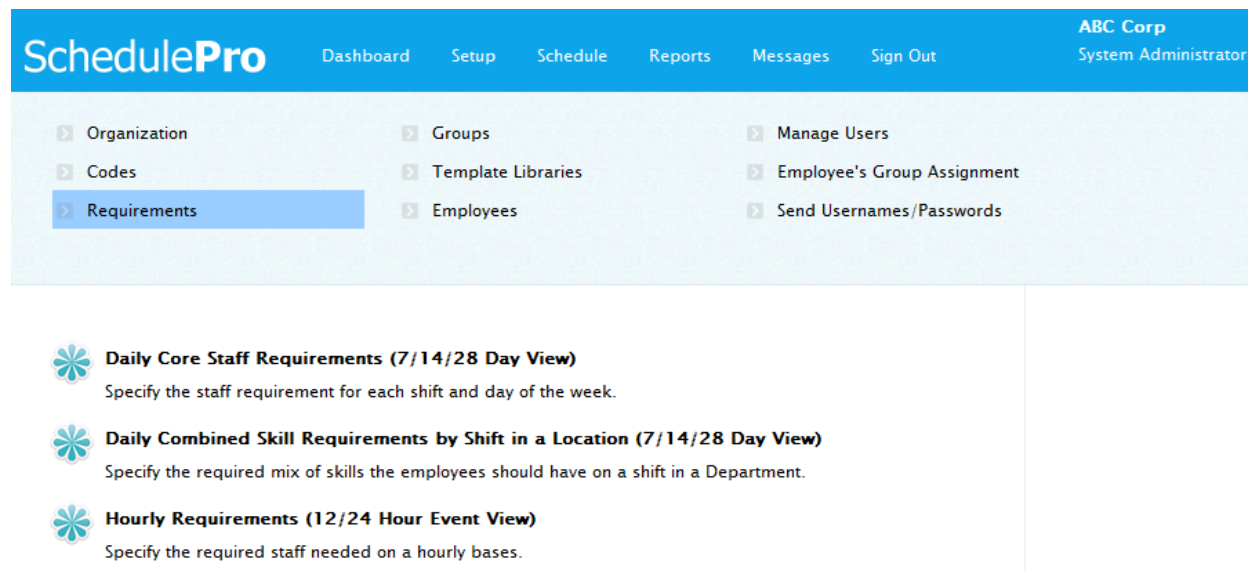
Daily Core Staff Requirements (7/14/28 Day View) – You can specify the core staffing requirements in Schedule Pro for each day of the week for each Position, Location and Shift combination. For example, "How many RNs do you require on Mondays on Day shift in Allan building?"

Daily Combined Skill Requirements by shift in a Location (7/14/28/Day View) – You can specify the minimum number of staff required for each skill in a location as some organizations require certain mix of skills on a particular shift in a location. For example, you may require that there be at least 2 employees that speak French, at least 5 employees that speak English. It is possible that you 7 employees scheduled in this location and all 7 speak English and 4 also speak French. <mark>This is optional. Some organization may not even see this option.</mark> If you need this option and do not see it, please call EDP Software and it would be turned on for your organization.

Hourly Requirements (12/24 Hour Event View) – You can also specify the number of people needed for each hour for a particular position, skill and task. You can omit any of these three and requirements would be for either for all positions, for all skills or for all events. <mark>This is optional. Some organization may not even see this option.</mark> If you need this option and do not see it, please call EDP Software and it would be turned on for your organization.

7.1 Daily Core Staff Requirements (7/14/28 Day View)

To open the **Daily Core Staff Requirements Template**, please click on the "Daily Core Staff Requirements (7/14/28 Day View)".

This will display the following screen.

Requirements \ Daily Core Staffing Requirements

New Requirement Template

#	Loc	Pos	Shift	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Effective	Edit	Delete
	A	MGR	D (Day Shift (7A-3P))	1	1	1	1	1	1	1	1/1/2000	✎	✖
	A	RN	D (Day Shift (7A-3P))	3	3	3	3	3	3	3	1/1/2000	✎	✖
	A	RN	E (Evening Shift)	2	2	2	2	2	2	2	1/1/2000	✎	✖
	A	RN	N (Night)	1	1	1	1	1	1	1	1/1/2000	✎	✖

What is a Staffing Requirement?

You can specify the core staffing requirements in Schedule Pro for each day of the week for each Position, Department and Shift combination. For example, "How many RNs do you require on Mondays on Day shift in Allan building?"

You can add as many different combinations of Position, Location and Shift as required. You can also filter the list by position and/or location and/or shift by selecting or typing appropriate values in the boxes below headings. To add the staffing requirements for a new combination, please click on "New Requirement Template". Now you will see the following screen.

Please click on ✖ "Delete" to delete a particular requirement you do not require or the requirements are zeros for each day of the week.

To edit / modify the number of employees needed on a "Position", "Location" and "Shift" combination, please click on ✎ "edit" for that combination.

Staffing Req

✳ View All Req.
✳ Add New Req.

Daily Staffing Requirements

Location
A (Location A) ▼

Position
MGR (Manager) ▼

Shift
D (Day Shift (7A-3P)) ▼

Effective Date
[   ] 🗓
(M/d/yyyy)

Total Required Staff

Mon	Tue	Wed	Thu	Fri	Sat	Sun

Save   Cancel

Please select "Position", "Location", "Shift" and "effective date" for these requirements in the four drop down boxes. Then enter the employees required for each day for the selected Position, Location and Shift combination.

After you have entered all the information, click on "Save" to save the information. Please repeat this process to add staffing requirements for each combination of Position, Location and Shift.

7.2 Daily Combined Skill Requirements by shift in a Location (7/14/28 Day View) - <mark>Optional</mark>

To open <mark>optional</mark> **Daily Combined Skill Requirements by Shift in a Location**, please click on "Daily Combined Skill Requirements by Shift in a Location (7/14/28 Day View)". This would display the following screen.

You can add as many different skill requirements for combinations of Location and Shift. To add the skill requirements for a new combination, please click on "New Skill Requirement". Now you will see the following screen.

Please click on "Delete" to delete a particular requirement you do not require or you make the requirements for all skills as zeros.

To edit / modify the number of employees needed for each skill on a "Location" and "Shift" combination, please click on "edit" for that combination.

Please select "Location" and "Shift" for these requirements in the two drop down boxes. Then enter the employees required for each skill for the selected Location and Shift combination.

After you have entered all the information, click on "Save" to save the information. Please repeat this process to add skill requirements for each combination of Location and Shift.

7.3   Hourly Requirements (12/24 Hour Event View)

To open <mark>optional</mark> **Hourly Requirements**, please click on "Hourly Requirements (12/24 Hour Event View)". This would display the following screen.

You can add as many different hourly requirements for combinations of Position, skill and Task. To add the hourly requirements for a new combination, please click on "New Requirement". Now you will see the following screen.

Please click on ✖ "Delete" to delete a particular requirement you do not require or you make the requirements for all Hours as zeros.

To edit / modify the number of employees needed for each skill on a "Position", "Skill" and "Event" combination, please click on 🖉 "edit" for that combination.

Hourly Requirements

Save   Cancel

Position	Skill	Task
(Any) ▼	(Any) ▼	(Any) ▼

Total required staff by hour

Time	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
12:00 AM	0	0	0	0	0	0	0
1:00 AM	0	0	0	0	0	0	0
2:00 AM	0	0	0	0	0	0	0
3:00 AM	0	0	0	0	0	0	0
4:00 AM	0	0	0	0	0	0	0
5:00 AM	0	0	0	0	0	0	0
6:00 AM	0	0	0	0	0	0	0
7:00 AM	0	0	0	0	0	0	0
8:00 AM	0	0	0	0	0	0	0
9:00 AM	0	0	0	0	0	0	0
10:00 AM	0	0	0	0	0	0	0
11:00 AM	0	0	0	0	0	0	0
12:00 PM	0	0	0	0	0	0	0
1:00 PM	0	0	0	0	0	0	0
2:00 PM	0	0	0	0	0	0	0

Please select a "Position" or leave it at "(any)", Select a "Skill" or leave it at "(any)", select a "Task" or leave it at "(any)" for these requirements in the three drop down boxes. Then enter the employees required for **each hour of the day** for the selected combination.

After you have entered all the information, click on "Save" to save the information. Please repeat this process to add skill requirements for each combination.

8.0 Employee Management

You can enter information about your employees. To add a new employee or to modify the information about an employee, please click on the "Employees" icon on the Setup.

Following screen would be displayed.

New Employee

Group: (All Position/Location) ▼
Position: ALL
Location: ALL

Employees

Create/edit employee information, rotating shift template, unavailability, skillsets, secondary Positions and Locations.

Current Employees Count: 13   Max. Employees: 10000
☐ Display only active employees.

Legend

SP – Shift Patterns
EV – Events (only apply to shift patterns)
UA – Unavailabilities
SD – Secondary
SK – Skillsets

✔ Assigned
? Unassigned

#	Emp #	First Name	Last Name	Pos	Loc	SP	EV	UA	SD	SK	Edit	Delete
	204	L	Brewer	SP	A	?	?	?	?	?	✏	✖
	104	H	Cormier	SP	A	✔	✔	✔	?	✔	✏	✖
	203	L	Grant	SP	A	✔	?	?	?	?	✏	✖
	106	F	King	SP	A	✔	?	?	?	?	✏	✖
	EDP999	Anand	Kishore	MGR	A	✔	?	?	?	?	✏	✖
	103	A	LeBlanc	SP	A	✔	?	?	?	?	✏	✖
	205	M	Palmer	SP	A	?	?	✔	?	?	✏	✖
	201	G	Robichaud	SP	A	?	?	?	?	?	✏	✖
	101	B	Smith	SP	A	✔	?	✔	?	?	✏	✖
	105	K	Sullivan	SP	A	✔	?	✔	?	?	✏	✖
	202	G	Taylor	SP	A	✔	?	?	?	?	✏	✖
	99123	Jennifer	Todd	MGR	A	?	?	?	?	?	✏	✖
	102	E	White	SP	A	✔	?	✔	?	?	✏	✖

You can add as many employees as required. The number of employees you can enter is limited by licensing. To add a new employee, please click on "New Employee". Now you will see the screen shown on next page.

There are several columns for each employee for Employee number, first name, last name, position (Pos), primary location of work (loc). In addition there are several other columns. In these columns ✔ means data exists and ? means data is missing. The columns are SP (Shift Pattern/rotating work schedule), EV (breaks and tasks), UA (Unavailability), SD (Secondary positions and/or locations) and SK (Skillset).

Please click on ✖ "Delete" to delete an employee you entered by mistake. You cannot delete an employee that has rotating work template or has schedule or is in use anywhere else in the system. In this case you can terminate the employee.

Please click on ✏ "Edit" to edit / modify information for an employee.

✳ View All Employees	
✳ **Employee Info**	
✳ Shift Patterns	
✳ Unavailability	
✳ Secondary	
✳ Skills	

Employees \ New Employee

[Save] [Cancel]

Contact Info

* Employee Number [ ]

* First Name [ ]

* Last Name [ ]

Gender [Female ▾]

* Seniority Order [0] (lower number = higher seniority)

Primary Tel [ ]

Secondary Tel [ ]

E-mail Address [ ]

(required for online access)

Misc Info [ ]

Work Info

* Full/Part/Casual [Full Time ▾]

* Hired Date [ ] 📅
(M/d/yyyy)

* Primary Position [MGR (Manager) ▾]

* Primary Location [A (Location A) ▾]

Team [▾]

* Max work days in a row [5] (0 = unlimited)

* Max hours per week [40] (0 = unlimited)

* Status [Active ▾]

Termination Date [ ] 📅
(M/d/yyyy)

Employee Permission Settings

Group [▾]

Trade Request [Not Allowed ▾]

Leave Request [Not Allowed ▾]

Availability Request [Not Allowed ▾]

Approval Manager [▾]

Employee Number – This can be up to 25 characters long containing numbers and letters.

First Name – Enter the first name of the employee. This can be up to 25 characters long.

Last Name – Enter the last name of the employee. This can be up to 25 characters long.

Gender – Enter the gender of the employee.

Seniority Order – Enter employee seniority order. Employee would be sorted by this order if so desired. Lower number means higher seniority and would print/show on the top. Basically it is a natural order of 1, 2, 3.

Primary Phone – Enter the primary contact phone number for this employee (optional)

Secondary Phone – Enter the secondary contact phone number for this employee (optional)

Email Address – Optional but needed for employee login.

Full Time/Part Time/Casual – Specify if the employee is a full time, part time or casual employee.

Hired Date – Specify the hired date for the employee. Employee cannot be scheduled before the hired date.

Primary Position – Select the Position for this employee e.g. RN from the drop down list. Please click on the ▼ to open the drop down list. This code must be entered in the Position codes first before you can see it in the drop down list.

Primary Location – Select the location for this employee where this employee normally works (home location) e.g. AB for "Alan Building" from the drop down list. Please click on the ▼ to open the drop down list. Code(s) must be entered in the location codes first before you can see it in the drop down list. Employee can be scheduled in any Location even though you specify the home Location for this employee. So select one of the Locations as home Location.

Team – Enter a team code if your employees work in teams. Please click on the ▼ to open the drop down list. Codes must be entered in the team codes before you can see then in the drop down list. You can select the appropriate team code this employee belongs to.

Max Work Days in a Row – Specify the maximum number of consecutive days this person can work at any point. For example, if you specify 7 as "Max Work Days in a Row", then program will warn you if try to assign shift for 8 days in a row. O means there is no limit.

Max hours Per Week – Specify the maximum hours this employee can work without causing overtime. O means there is no limit.

Group – Specify the Group if you would like this employee to see the schedule of other employee of the same position for the group. If no group has been specified, then the employee cannot see the schedule of other employees in the Employee Module.

Group Manager – Specify the Manager/Scheduler for this group for this employee that would approve shift trades and leave requests.

Trade Request – Select "Not Allowed" if employee is not allowed to trade/swap shifts otherwise select "Requires Approval" as approval is required from the manager before the trade/swap is finalized.

Leave Request – Select "Not Allowed" if employee is not allowed to request time off (leave request) otherwise select "Requires Approval" as approval is required from the manager before the leave (time off) is finalized.

Availability Request – Select "Not Allowed" if employee is not allowed to specify his/her unavailability otherwise select "Auto Approve" if an employee can specify his/her unavailability without any approval.

Status – Enter Active if employee is still working with your organization otherwise enter "Terminated" if the employee is no longer working for your organization.

Termination Date – If an employee is no longer working for your organization and the status has been marked as "Terminated", then enter the effective Termination date in this box. The employee cannot be scheduled on the day and beyond.

After you have entered all the information, click on "Save" to save the information.

8.1 Adding/Modifying Rotating Shift Pattern

Does this sound familiar to your employees? "I work Monday, Wednesday, and Friday mornings. Tuesday and Thursday I work in the afternoon." It is likely that your organization has rotating shift pattern. In some organizations, some or all of the employees work a certain rotating shift pattern. The example above was 1 week long, but the pattern may be much longer. For example, a repeating pattern of 4 weeks of day shift and 4 weeks of night shift is an 8 week shift pattern.

If your organization uses rotating shift pattern (rotating schedule), you can specify the rotating shift pattern (rotating schedule) for each employee. Entering a shift pattern speeds up the process of creating a schedule. The shifts will automatically be added to new schedules when they are created. The benefits include a consistent schedule for employees and reduced work to create a schedule.

To enter a **Rotating Shift Pattern** for this employee, click on "Shift Pattern". The following screen will be displayed (shown below).

Click on "New Template" or you can select from the template library by clicking on "New Template from Library". The following screen would be displayed.

Shift Pattern Template

L Brewer

Start Date
| 2/6/2011 | ⊞ |

(M/d/yyyy)

End Date
| 12/31/2100 | ⊞ |

(M/d/yyyy)

Number of Days in Pattern
| 28 |

IMPORTANT: Day 1 of this shift pattern rotation will start on:
Sunday, 2/6/2011

[Ok] [Cancel]

Start Date – Specify the start date for this shift pattern. As schedules are created, they will be counted forward from this date.

End Date – Specify the end date for this shift pattern. This template would not be used on beyond this date.

Number of days in Pattern – Specify the length of pattern in days.

Click "OK" to save and now the following screen would be displayed to enter the shift pattern.

		Shift Info
✳ View All Employees	**Employees \ L Brewer**	**D** (Day Shift (7A–3P))
✳ Employee Info		7:00 AM – 3:00 PM
✳ **Shift Patterns**	[Save] [Cancel] [Insert Events from Library]	**D12** (12 Hour Day Shift)
✳ Unavailability		7:00 AM – 7:00 PM
✳ Secondary	**Effective Date:** 2/6/2011 – 12/31/2100	**E** (Evening Shift)
✳ Skills	IMPORTANT: Day 1 of this shift pattern rotation will start on **Sunday, 2/6/2011**	3:00 PM – 11:00 PM
	Note: Any changes to this shift pattern will not be reflected in existing schedules.	**N** (Night)
		11:00 PM – 7:00 AM

	Day 1	**Day 2**	**Day 3**	**Day 4**	**Day 5**	**Day 6**	**Day 7**	
Shift	- ▾	- ▾	- ▾	- ▾	- ▾	- ▾	- ▾	-
Location	A ▾	A ▾	A ▾	A ▾	A ▾	A ▾	A ▾	A
Events	view	view	view	view	view	view	view	

Enter the shift for each day this employee would be working. For OFF days you can either enter "-" or "Off" depending if the employee is available to work or unavailable to work. Enter the Location/unit for each shift to specify the location of work. The default would be the home Location from the employee profile.

You can also enter/specify the events (Breaks and Tasks) for any shift. To specify events, click on "Show" to display the events screen as follows:

Event – Select the event (Break or Task)
Start Time – Select the start time for this event if any or click on "All Day" if the event is for the whole shift.
End Time – Select the End Time for this event if any or click on "All Day" if the event is for the whole shift.

Click on "Add Event" to add this event. Repeat this process to enter other events for this shift. You can specify as many events as required.

You can also enter events for a shift from the template library by clicking on "Insert Events from Library".

Click on "Save" to save the pattern.

Note: If the same shift pattern is used multiple times, a pattern library can be defined to save time. In the dashboard, click **Setup.** From there, choose **Template Libraries** to define a reusable pattern.

8.2   Adding/Modifying Secondary Positions and Locations

Schedule Pro allows an employee to work in more than one position. You can specify other positions this employee can work. You can also specify all the depsrtments/units this employee is allowed to work. To specify secondary positions(s) and location(s), click on "Secondary (Position/Location)" to open the following screen.

Select the secondary positions you wish to add for this employee by clicking on the check boxes.

Select the secondary Locations you wish to add for this employee by clicking on the check boxes.

Click on "Save" to save these changes.

8.3 Specifying Unavailability of an Employee

Schedule Pro allows you to specify when an employee is not available to work. This unavailability can be for a single day or can be recurring on a weekly, monthly or yearly basis. To specify unavailability, click on "Availability" to display the following screen.

Now select a date and click on "New" to specify unavailability for a single day. The following screen will be displayed.

Date – Specify the date for the unavailability
Subject – Specify the reason for being unavailable. If none has been given, then you may say "Unavailable".
Start Time – Specify start time for the unavailability
End Time – Specify end time for the unavailability.

Click on "Save" to save this single day unavailability.

To specify the recurring unavailability, click on the "New Recurrence" and following screen will be displayed.

Subject – Specify the reason for being unavailable. If none has been given, then you may say "Unavailable".
"Part of the Day" or "All Day" – Select one of these options to specify whether the unavailability is for the whole day or for the part of the day.
Start Time – Specify start time for the unavailability if for the part of the day.
End Time – Specify end time for the unavailability if for the part of the day.
Recurrence Pattern - "Daily", "Weekly", "Monthly" or "Yearly" – Select of these options to specify if the recurrence is daily, weekly, monthly or yearly. If weekly, select the days this employee is unavailable.
Start Date – Specify the start date for this recurrence
End Date – Specify the end date for this recurrence.

Click on "Save" to save the recurrence.

8.4   Assign Skills to Employees

Schedule Pro allows you to specify the skills employees possess. To specify skills, click on "Skills" and the following screen will be displayed.

Please check "Selected" for all the skills this employee possess. Click on "Save" to save the skills for this employee.

9.0 Template Libraries

Users can maintain a library of templates for shift pattern (rotating schedule) as well as for events (Breaks and Tasks). Click on "Template Library" in the menu and the following screen will be displayed.

9.1 Creating Shift Pattern Templates Library

To open Shift Pattern Template Library (employee's rotating work schedule templates' library), click on "Shift Pattern Template Library" and the following screen would be displayed.

This displays all the shift patterns in the library. Click on ✎ in the "Info" column for any shift pattern to see the details as follows:

You can make changes to the three pieces of information if you like. Click on "Save" to save the changes or click on "Cancel" to return to previous screen.

Click on ✖ in the "Delete" column to delete a shift pattern.

Click on ✎ in the column "Shift Patterns" to view the actual shift pattern.

You can make changes to the pattern if you like. Click on "Save" to save the changes. Click on "Cancel" to return to the previous screen.

Click on "New Shift Pattern Library" to create a new Shift Pattern in the library. The following screen would be displayed.

Title – Give a title/name to this pattern
Description – Enter descriptive text to describe the pattern
Number of Days in pattern – Specify the number of days in the pattern

Click on "Save" to save the information. Now the following screen would be displayed.

Enter the pattern by specifying shift and location for each day of the pattern. Then click on "Save" to save the information.

9.2   Creating Events (Breaks and Tasks) Templates Library

To manage the Events (Breaks and Tasks) Template Library, click on "Event Template Library" or "Events" to open the following screen.

This screen lists all Event (Breaks and Tasks) Templates in the library. Event can be Break and/or Task. Any Even Template can have one or more events in the template. If you enter events for any shift in employee's rotating shift pattern, those events can be saved in the template library for late use. These templates would also be shown in the list above.   You can edit the existing library by clicking on ✎ in the "Edit" column. You can also delete an entry from the event library by clicking on the ✖ in ther "Delete" column.

You can add a new template manually by clicking on the "New Events Library". The following screen would be displayed.

Template Name – Enter a name for this template for later retrieval.
For Shift – Enter the shift this template applies to. Even templates are valid for only one shift.
Event – Select an event (Break and Tasks) from the drop-down list.
Start Time – Start time of the event if not for the duration of the shift.
End Time – End time of the event if not for the duration of the shift.
All Day – Click this box if the event for the duration of the shift.

Click on "Add Event" to add the event to group of events for this template. Once all the events have been added, click on "Save" to save the template.

Repeat this process to add additional templates.

10.0 Managing Users

Administrator can assign users (manager/schedulers) for each group. One user can have permission to manage one or more groups. Click on "Manage Users" to add/edit users.

The following screen would be displayed.

You can add as many users as required. To add a new user, please click on "New User". Now you will see the following screen.

You can filter the list by typing few characters of the last name and/or first name and/or position and/or location or employee#. Click on "Select" to select an employee from the list to be added as a user. This would display the following screen.

Select a group and role for this user and click on "Add" to add the Group for this user to manage. You can add more than one group for any user. The roles "Manager" and "Scheduler" are the same except

only manager can approve leave requests, trade shift requests etc.. They are here to define the person rather than the role. Click on "Finished" when done adding groups to this user.

Repeat this process to add as many users as required.

Please click on   "Delete" to delete a user. You cannot delete a user that is being used in the system such as approval manager in Employee Profile(s).

Please click on   "Edit" to edit / modify User.

You can add another group to be managed by this user. You can also delete a group from the list for this user.

11.0 Send Username / Password (Reset/Resend Password)

To send Username / Password for any user or to many users at a time, click on "Send Username/Password".

The following screen would be displayed.

X	Emp #	First Name	Last Name	Pos	Loc	Email Address	Last Sent
☐	104	H	Cormier	SP	A	edpsoft104@gmail.com	3/18/2010
☐	203	L	Grant	SP	A	anand203@schedulepro.ca	12/10/2010
☐	EDP999	Anand	Kishore	MGR	A	akishore@edpsoftware.com	3/18/2010
☐	103	A	LeBlanc	SP	A	edpsoft103@gmail.com	3/18/2010
☐	205	M	Palmer	SP	A	edp205@schedulepro.ca	7/21/2010
☐	201	G	Robichaud	SP	A	anand201@schedulepro.ca	12/10/2010
☐	101	B	Smith	SP	A	edpsoft101@gmail.com	4/13/2010
☐	202	G	Taylor	SP	A	anand202@schedulepro.ca	12/10/2010
☐	102	E	White	SP	A	edpsoft102@gmail.com	3/18/2010

Send

☐ Display only employees who haven't received their login information.

Select All | Unselect All

Send Usernames & Passwords

i Send Username/Password for any user or to many users at a time.

Click on check boxes to select the employees and/or users. You may click on "Select All" to select all employee displayed on this screen. You can also check the box "Display only employees who haven't received their login information" and this will display the list of employee who have not received their login info.

Then click on "Send Login Info to Selected Employees" to send username/password. Same functionality can be used to resend username/password to an employee that forgot his/her password.

12.0 Assign Group and Approval Manager to Employees

You can assign a Group to an employee so that that employee can see the schedule of other employee of the same position from that Group. Similarly you can also assign Approval Manager's name to an Employee so that all requests for Shift Trade and Time Off would be sent to this Manager for approval.

To assign Group and Manager to employees, click on "Employee's Login Assignment".

The following screen would be displayed.

Group: (All Position/Location)
Position: ALL
Location: ALL

#	Emp #	First Name	Last Name	Pos	Loc	Group Assignment	Approval Manager	Edit
	204	L	Brewer	SP	A	Group1	Anand Kishore	
	104	H	Cormier	SP	A	Group1	Anand Kishore	
	203	L	Grant	SP	A	Group1	Anand Kishore	
	106	F	King	SP	A	Group1	Anand Kishore	
	EDP999	Anand	Kishore	MGR	A			
	103	A	LeBlanc	SP	A	Group1	Anand Kishore	
	205	M	Palmer	SP	A	Group1	Anand Kishore	
	201	G	Robichaud	SP	A	Group1	Anand Kishore	
	101	B	Smith	SP	A	Group1	Anand Kishore	
	105	K	Sullivan	SP	A	Group1	Anand Kishore	
	202	G	Taylor	SP	A	Group1	Anand Kishore	
	99123	Jennifer	Todd	MGR	A			
	102	E	White	SP	A	Group1	Anand Kishore	

What is an Employee's Group Assignment?

i You can assign a Group to an employee so that that employee can see the schedule of other employee of the same position from that Group. Similarly you can also assign Approval Manager's name to an Employee so that all requests for Shift Trade and Time Off would be sent to this Manager for approval.

Click on "Edit" to enter or modify the Group and Approval Manager for the employee. The following screen would be displayed.

Select the Group and Manger from the list. You can leave the Group blank if you do not wish this employee to see the schedule of other employees. Click on "Save" to save the information.

Repeat this process for all the employees that need Group and / or Manager's name to be assigned or modified.

General

13.0 Messages

Users can check their messages and take appropriate action if one is required. To manage messages, click on "View Messages" and following screen would be displayed.

	From	Subject	Sent Date	View	Delete
Unread Messages/Pending Actions					
	H Cormier	Leave Request	6/11/2010 11:03:17 AM	🔍	✖
	H Cormier	Leave Request	6/9/2010 11:14:17 AM	🔍	✖

By default the screen shows all the unread messages and pending action messages. To view archived messages, click on "Messages Archived" tab to display a screen similar to the following.

From	Subject	Sent Date	View	Delete
H Cormier	Leave Request	6/9/2010 5:52:54 PM	🔍	✖
H Cormier	Trade Shift Request	6/9/2010 5:52:18 PM	🔍	✖
H Cormier	Trade Shift Request	6/9/2010 11:15:46 AM	🔍	✖
H Cormier	Trade Shift Request	6/8/2010 11:23:37 AM	🔍	✖
H Cormier	Trade Shift Request	5/6/2010 5:20:54 PM	🔍	✖
H Cormier	Leave Request	5/6/2010 5:14:57 PM	🔍	✖
B Smith	Trade Shift Request	4/28/2010 1:56:51 PM	🔍	✖
E White	Leave Request	4/13/2010 2:36:53 PM	🔍	✖
E White	Trade Shift Request	4/13/2010 2:36:11 PM	🔍	✖

Please click on ✏️ "View" to view the message. Following screen would be displayed.

Click on "Accept" to approve the request.
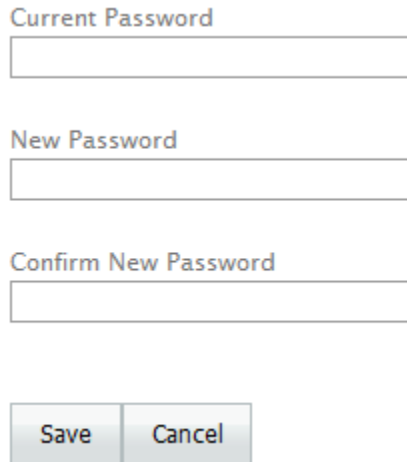
Click on "Reject" to deny the request.

Click on "Decide Later" to take action later.

As you can see we have integrated the messaging with action for approval.

14.0 Changing Password

Users can change their password any time they wish to change. Click on "Change Password" at the bottom of the screen to display the following screen.

Current Password

New Password

Confirm New Password

Save   Cancel

Current Password – Enter your current password.
New Password – Enter the new password you wish to have.
Confirm New Password – Enter the new password again.

Click on "Save" to save the information.

Schedules

15.0 Creating and Managing Schedules

We have two types of schedules, one published and other unpublished. User would create the schedule in unpublished area. After schedules creation is complete, the schedules can be published. Employees can only see the published schedules. Users can only delete unpublished schedules. If a user wishes to delete a published schedule, user has to move the schedule from published area to unpublished area before deleting it.

Currently only the Administrator can create, delete, publish and un-publish schedules. This is being done to avoid gaps in the schedules and to ensure that all schedules are published for the same dates for all groups. However each user can work on the unpublished schedules to complete them. Administrator only creates the initial schedules using employees' rotating work schedules. If an employee does not have rotating work schedule then a blank schedule is created for the employee. Each user can then work on the schedule for his/her Group to complete it. Once the schedules are complete for all groups, then the system administrator can publish them with a click of a button.

The functionality in published and unpublished schedules is the same except there five buttons in unpublished schedules that are not in published schedules. These buttons are "New ", "Copy", "Re-Create", "Delete" and "Publish ". System administrator can only create new schedules as unpublished schedules. Similarly system administrator can delete unpublished schedules. "Publish Schedule" allows the system administrator to publish schedules. These action buttons are only available to the system administrator. All users can **re-create** part of the unpublished schedules from the employees' rotating work schedules. Remember this functionality would delete all the shifts assigned manually, through auto-scheduler and via "Find Employee" functionality. However all the leaves approved through leave management functionality would be kept except leaves assigned directly into schedules. All users can recreate part of the schedules by **copy**ing from other part of the unpublished schedules.

There is one button "UnPublish Schedule" that is not in the unpublished schedules. This button is used to un-publish the published schedules. Again this button is available to the Administrator only for action.

15.1   Unpublished Schedules

Click on the "Work on Unpublished Schedules" icon or "Schedules" on the top of the screen.

Work on Unpublished Schedules
Create, edit, publish, post open shifts etc in unpublished schedules

The following screen would be displayed.

SchedulePro Dashboard   Setup   Schedule   Reports   Messages   Sign Out   **ABC Corp** / System Administrator

| Unpublished Schedule | Published Schedule | Leave Requests | Bid Systems |

➕ New | 📋 Copy | Re-Create | ✖ Delete | Publish | 👤 Find Employee(s) | Auto-Scheduler | Post Open Shifts | Shift Divider

Start Date	View Type	Sort By	Grouping of Pos/Loc	View by Manager	Page Size	Summary
4/17/2011	14 Days	Position/Name	(All Position/Location)	-	50	Bottom

< APRIL 17, 2011 TO APRIL 30, 2011 >   Filters   [+] SHIFT LEGENDS   [+] MAXIMIZE

Multiple Shifts   N/A Part Day   N/A All Day   Overtime   Partial Shift   Events   Comments

Employee (Pos)(Loc)(Type)		Sun 4-17	Mon 4-18	Tue 4-19	Wed 4-20	Thu 4-21	Fri 4-22	Sat 4-23	Sun 4-24	Mon 4-25	Tue 4-26	Wed 4-27	Thu 4-28	Fri 4-29	Sat 4-30
Anand Kishore (MGR)(A)(FT)	Shift	-	D	D	D	D	D	-	-	D	D	D	D	D	-
	Loc		A	A	A	A	A			A	A	A	A	A	
Jennifer Todd (MGR)(A)(FT)	Shift	D	-	-	-	-	-	D	D	-	-	-	-	-	D
	Loc	A						A	A						A
L Brewer (SP)(A)(PT)	Shift	-	-	-	-	-	-	E	N	-	-	-	-	-	-
	Loc							A	A						
H Cormier (SP)(A)(FT)	Shift	E	E	-	E	E	E	-	-	D	D	D	-	D	D
	Loc	A	A		A	A	A			A	A (E)	A		A	A
L Grant (SP)(A)(PT)	Shift	E	-	-	-	-	-	D	D	D	-	-	E	N	-
	Loc	A						A	A	A			A	A	
F King (SP)(A)(FT)	Shift	D	D	D	D	D	-	-	D	D	D	D	-	-	D
	Loc	A	A	A	A	A			A	A	A	A			A
A LeBlanc (SP)(A)(FT)	Shift	N	N	N	-	N	N	N	-	N	N	N	N	-	N
	Loc	A	A	A		A	A	A		A	A	A	A		A
M Palmer (SP)(A)(PT)	Shift	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	Loc														
G Robichaud (SP)(A)(PT)	Shift	-	D	-	D	E	E	E	E	-	-	-	D	D	D
	Loc		A		A	A	A	A	A				A	A	A
B Smith (SP)(A)(FT)	Shift	-	E	E	E	-	D	D	D	-	D	D	D	D	-
	Loc		A	A	A		A	A	A		A	A	A	A	
K Sullivan (SP)(A)(FT)	Shift	D	-	D	D	D	D	-	-	E	E	E	-	E	E
	Loc	A		A	A	A	A			A	A	A		A	A
G Taylor (SP)(A)(PT)	Shift	-	-	E	N	-	-	D	E	-	-	-	D	E	-
	Loc			A	A			A	A				A	A	
E White (SP)(A)(FT)	Shift	D	D	D	-	D	D	-	-	E	E	E	E	-	E
	Loc	A	A	A		A	A			A	A	A	A		A

Coverage Summary — Pos / Loc / Shift	Sun 4-17	Mon 4-18	Tue 4-19	Wed 4-20	Thu 4-21	Fri 4-22	Sat 4-23	Sun 4-24	Mon 4-25	Tue 4-26	Wed 4-27	Thu 4-28	Fri 4-29	Sat 4-30
MGR / A / D (7:00a – 3:00p)	1/1	1/1	1/1	1/1	1/1	1/1	1/1	1/1	1/1	1/1	1/1	1/1	1/1	1/1
SP / A / D (7:00a – 3:00p)	3/3	3/3	3/3	3/3	3/3	3/3	3/3	3/3	3/3	3/3	3/3	3/3	3/3	3/3
SP / A / E (3:00p – 11:00p)	2/2	2/2	2/2	2/2	2/2	2/2	2/2	2/2	2/2	2/2	2/2	2/2	2/2	2/2
SP / A / N (11:00p – 7:00a)	1/1	1/1	1/1	1/1	1/1	1/1	1/1	1/1	1/1	1/1	1/1	1/1	1/1	1/1

Schedules Stats
UnPublished Schedules: Sunday, April 17, 2011 to Saturday, April 30, 2011
Published Schedules: Sunday, April 04, 2010 to Saturday, April 16, 2011

LEGEND: UNDER   OVER

Contact Info
About EDP Software
Tel: (506) 454-7776 (SPRO)

Support
Admin/Manager Manual (PDF)
Employee Manual (PDF)

Settings
Change My Password

© 2011 EDP Software | Terms of Service

This would display unpublished schedules if there are any. If there are no unpublished schedules, then no scheduling data would be displayed.

15.2   Creating / Extending Schedules

Administrator can click on the "New" button and the following screen would be displayed.

Enter the "Start Date" and "End Date" for the new schedule you wish to create when no schedule exists. You can only change the "End Date" when extending the existing schedule beyond the existing "End Date".   Click "Create Schedule" to create/extend the schedule.

You will see the following screen after the schedule is created.

SchedulePro   Dashboard   Setup   Schedule   Reports   Messages   Sign Out

| Unpublished Schedule | Published Schedule | Leave Requests | Bid Systems |

+ New   Copy   Re-Create   ✖ Delete   Publish   Find Employee(s)   Auto-Scheduler   Post Open Shifts   Shift Divider

Start Date	View Type	Sort By	Grouping of Pos/Loc	View by Manager	Page Size	Summary
5/1/2011	14 Days	Position/Name	(All Position/Location)	-	50	Bottom

< **MAY 1, 2011 TO MAY 14, 2011** >   Filters   [+] SHIFT LEGENDS   [+] MAXIMIZE

Multiple Shifts   N/A Part Day   N/A All Day   OT Overtime   P Partial Shift   E Events   Comments

Employee (Pos) (Loc) (Type)		Sun 5-1	Mon 5-2	Tue 5-3	Wed 5-4	Thu 5-5	Fri 5-6	Sat 5-7	Sun 5-8	Mon 5-9	Tue 5-10	Wed 5-11	Thu 5-12	Fri 5-13	Sat 5-14
Anand Kishore (MGR) (A) (FT)	Shift	-	D	D	D	D	D	-	-	D	D	D	D	D	-
	Loc		A	A	A	A	A			A	A	A	A	A	
Jennifer Todd (MGR) (A) (FT)	Shift	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	Loc														
L Brewer (SP) (A) (PT)	Shift	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	Loc														
H Cormier (SP) (A) (FT)	Shift	D	-	D	D	D	D	-	-	D	D	D	-	E	E
	Loc	A	-	A	A	A	A	-	-	A	A	A	-	A	A
L Grant (SP) (A) (PT)	Shift	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	Loc														
F King (SP) (A) (FT)	Shift	D	D	E	E	E	-	-	E	E	E	E	-	-	D
	Loc	A	A	A	A	A	-	-	A	A	A	A	-	-	A
A LeBlanc (SP) (A) (FT)	Shift	N	N	N	-	N	N	N	-	N	N	N	N	-	-
	Loc	A	A	A	-	A	A	A	-	A	A	A	A	-	-
M Palmer (SP) (A) (PT)	Shift	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	Loc														
G Robichaud (SP) (A) (PT)	Shift	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	Loc														
B Smith (SP) (A) (FT)	Shift	-	D	D	D	-	D	D	D	-	E	E	E	E	-
	Loc	-	A	A	A	-	A	A	A	-	A	A	A	A	-
K Sullivan (SP) (A) (FT)	Shift	E	E	-	E	E	E	-	-	D	D	-	D	D	D
	Loc	A	A	-	A	A	A	-	-	A	A	-	A	A	A
A LeBlanc (SP) (A) (FT)	Shift	N	N	N	-	N	N	N	-	N	N	N	N	-	-
	Loc	A	A	A	-	A	A	A	-	A	A	A	A	-	-
M Palmer (SP) (A) (PT)	Shift	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	Loc														
G Robichaud (SP) (A) (PT)	Shift	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	Loc														
B Smith (SP) (A) (FT)	Shift	-	D	D	D	-	D	D	D	-	E	E	E	E	-
	Loc	-	A	A	A	-	A	A	A	-	A	A	A	A	-
K Sullivan (SP) (A) (FT)	Shift	E	E	-	E	E	E	-	-	D	D	-	D	D	D
	Loc	A	A	-	A	A	A	-	-	A	A	-	A	A	A
G Taylor (SP) (A) (PT)	Shift	-	-	-	-	-	D	-	-	-	-	-	-	-	-
	Loc						A								
E White (SP) (A) (FT)	Shift	E	E	E	-	D	D	-	-	D	D	D	D	-	D
	Loc	A	A	A	-	A	A	-	-	A	A	A	A	-	A
A LeBlanc (SP) (A) (FT)	Shift	N	N	N	-	N	N	N	-	N	N	N	N	-	-
	Loc	A	A	A	-	A	A	A	-	A	A	A	A	-	-
M Palmer (SP) (A) (PT)	Shift	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	Loc														
G Robichaud (SP) (A) (PT)	Shift	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	Loc														
B Smith (SP) (A) (FT)	Shift	-	D	D	D	-	D	D	D	-	E	E	E	E	-
	Loc	-	A	A	A	-	A	A	A	-	A	A	A	A	-
K Sullivan (SP) (A) (FT)	Shift	E	E	-	E	E	E	-	-	D	D	-	D	D	D
	Loc	A	A	-	A	A	A	-	-	A	A	-	A	A	A
G Taylor (SP) (A) (PT)	Shift	-	-	-	-	-	D	-	-	-	-	-	-	-	-
	Loc						A								
E White (SP) (A) (FT)	Shift	E	E	E	-	D	D	-	-	D	D	D	D	-	D
	Loc	A	A	A		A	A			A	A	A	A	A	A

Coverage Summary Pos / Loc / Shift	Sun 5-1	Mon 5-2	Tue 5-3	Wed 5-4	Thu 5-5	Fri 5-6	Sat 5-7	Sun 5-8	Mon 5-9	Tue 5-10	Wed 5-11	Thu 5-12	Fri 5-13	Sat 5-14
MGR / A / D (7:00a – 3:00p)	0/1	1/1	1/1	1/1	1/1	1/1	0/1	0/1	1/1	1/1	1/1	1/1	1/1	0/1
SP / A / D (7:00a – 3:00p)	2/3	2/3	2/3	2/3	2/3	4/3	1/3	1/3	3/3	3/3	2/3	2/3	1/3	3/3
SP / A / E (3:00p – 11:00p)	2/2	2/2	2/2	2/2	2/2	1/2	0/2	1/2	1/2	2/2	2/2	1/2	2/2	1/2
SP / A / N (11:00p – 7:00a)	1/1	1/1	1/1	0/1	1/1	1/1	1/1	0/1	1/1	1/1	1/1	1/1	0/1	0/1

Schedules Stats   LEGEND: UNDER OVER

UnPublished Schedules: Sunday, April 17, 2011 to Saturday, May 14, 2011

Published Schedules: Sunday, April 04, 2010 to Saturday, April 16, 2011

Contact Info

About EDP Software
Tel: (506) 454-7776 (SPRO)

Support

Admin/Manager Manual (PDF)
Employee Manual (PDF)

Settings

Change My Password

You can use the following options to customize the way schedules are displayed.

Start Date – This is the first day of the schedule to display. You can choose any start date to display the schedule starting with this date.

View Type – You can choose the following options
- 7 day
- 14 day
- 28 day
- Daily (12 Hours – Shifts) – useful if you have specified the hourly requirements for number of staff required for the group or for each position
- Daily (24 Hours – Shifts) – useful if you have specified the hourly requirements for number of staff required for the group or for each position
- Daily (12 Hours – Events) – useful if you have specified the hourly requirements for events
- Daily (24 Hours – Events) – useful if you have specified the hourly requirements for events

Sort By – You can sort the employee in the schedule that is displayed by the following criteria
- Position / Name
- Position / Seniority
- Name
- Seniority
- Location / Position
- Location / Name
- Team/Position

Grouping of Pos/Loc – System administrator can select a group or all groups for viewing.
View by Manager – System administrator can select a manager for viewing employees for that manager.
Page Size – user can choose to display 10, 25, 50 or 100 employees per page.
Summary – User can choose to display the schedule summary at the top, bottom or hidden.
Filters – You can filter the list of employees by position and/or location to shorten the list.

The schedule summary displays two numbers. The number before the "/" tells you the number of employees scheduled for a given position/location/shift combination while the number after the "/" tells the number of employees required. You change the number of required staff by clicking on the number you wish to change. More details on this functionality later in the manual.

You can also click on any name and it would display employee information that is useful for scheduling.

Click on the **left or right arrow** to navigate schedules. Left arrow displays the schedules for previous period. The period is determined by the number of days in "View Range". Similarly the right arrow displays the schedule for the next period.

Number of legends are displayed with the shift as following:
- Multiple Shifts to indicate if there multiple entries for this day
- N/A Part Day to indicate if the employee is unavailable for part of the day
- N/A All Day to indicate if the employee is unavailable for the whole day
- Overtime to indicate if there are over-time hours for this day
- Partial Shift to indicate if any shift for this day is for less than full hours of the shift

- Events to indicate if there are events specified for this day
- Comments to indicate if there are shift comments for this day

Click on **[+] SHIFT LEGENDS** to display the legends for the shifts as follows:

Multiple Shifts | N/A Part Day | N/A All Day OT Overtime P Partial Shift E Events Comments **D** : Day Shift (7A–3P) (7:00 AM – 3:00 PM) | **D12** : 12 Hour Day Shift (7:00 AM – 7:00 PM) | **E** : Evening Shift (3:00 PM – 11:00 PM) | **N** : Night (11:00 PM – 7:00 AM)

This provides the details about the various shift codes.

Click on **[+] MAXIMIZE** to maximize the schedule window to see more employees as follows;

Employee (Position) (Location)		Sun 5-1	Mon 5-2	Tue 5-3	Wed 5-4	Thu 5-5	Fri 5-6	Sat 5-7	Sun 5-8	Mon 5-9	Tue 5-10	Wed 5-11	Thu 5-12	Fri 5-13	Sat 5-14
Anand Kishore	Shift	-	D	D	D	D	D	-	-	D	D	D	D	D	-
(MGR) (A)	Loc		A	A	A	A	A			A	A	A	A	A	
Jennifer Todd	Shift	-	-	-	-	-	-	-	-	-	-	-	-	-	-
(MGR) (A)	Loc														
L Brewer	Shift	-	-	-	-	-	-	-	-	-	-	-	-	-	-
(SP) (A)	Loc														
H Cormier	Shift	D	-	D	D	D	D	-	-	D	D	D	-	E	E
(SP) (A)	Loc	A		A	A	A	A			A	A	A		A	A
L Grant	Shift	-	-	-	-	-	-	-	-	-	-	-	-	-	-
(SP) (A)	Loc														
F King	Shift	D	D	E	E	E	-	-	E	E	E	E	-	-	D
(SP) (A)	Loc	A	A	A	A	A			A	A	A	A			A
A LeBlanc	Shift	N	N	N	-	N	N	N	-	N	N	N	N	-	-
(SP) (A)	Loc	A	A	A		A	A	A		A	A	A	A		
M Palmer	Shift	-	-	-	-	-	-	-	-	-	-	-	-	-	-
(SP) (A)	Loc														
G Robichaud	Shift	-	-	-	-	-	-	-	-	-	-	-	-	-	-
(SP) (A)	Loc														
B Smith	Shift	-	D	D	D	-	D	D	D	-	E	E	E	E	-
(SP) (A)	Loc		A	A	A		A	A	A		A	A	A	A	
K Sullivan	Shift	E	E	-	E	E	E	-	-	D	D	-	D	D	D
(SP) (A)	Loc	A	A		A	A	A			A	A		A	A	A
G Taylor	Shift	-	-	-	-	-	D	-	-	-	-	-	-	-	-
(SP) (A)	Loc						A								
E White	Shift	E	E	E	-	D	D	-	-	D	D	D	D	-	D
(SP) (A)	Loc	A	A	A		A	A			A	A	A	A		A
Coverage Summary		Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat
Pos / Loc / Shift		5-1	5-2	5-3	5-4	5-5	5-6	5-7	5-8	5-9	5-10	5-11	5-12	5-13	5-14
MGR / A / D (7:00a – 3:00p)		0/1	1/1	1/1	1/1	1/1	1/1	0/1	0/1	1/1	1/1	1/1	1/1	1/1	0/1
SP / A / D (7:00a – 3:00p)		2/3	2/3	2/3	2/3	2/3	4/3	1/3	1/3	3/3	3/3	2/3	2/3	1/3	3/3
SP / A / E (3:00p – 11:00p)		2/2	2/2	2/2	2/2	2/2	1/2	0/2	1/2	1/2	2/2	2/2	1/2	2/2	1/2
SP / A / N (11:00p – 7:00a)		1/1	1/1	1/1	0/1	1/1	1/1	1/1	0/1	1/1	1/1	1/1	1/1	0/1	0/1

[–] Minimize   < Prev 5/1/2011   📅 to May 14, 2011 Next >
View Type 14 Days ▼   **Sort By** Position/Name ▼   **Group** (All Position/Location) ▼ Filters **Manager** - ▼

Click on **[–] Minimize** to go back to the original display.

15.3   Deleting Schedules

Administrator can only delete unpublished schedules. For deletion Administrator can specify the start date. However the end date is the last day of the schedules. Click on the "Delete Schedule" button to display the following screen.

You can see that End Date cannot be changed. We created the schedules up July 3, 2010, that is the date in End Date box. You cannot create a hole in schedules by deleting schedules in the middle. This screen also displays the range for which you have not published the schedules. The Start Date cannot be earlier than the date range for the unpublished schedules.

Click on "Delete" to delete the schedules.

Note – The delete is permanent. Deleted schedules cannot be retrieved.

15.4   Auto-Scheduler

This functionality is available in both, published and unpublished schedules. If you have under-scheduling situation then you can use our auto-scheduler to schedule employees to open shifts. Auto-scheduler takes many rules into account such as time off between shifts; max hours per week for the employee, seniority etc.

Click on "Auto-Scheduler" to display the following screen.

Start Date – This the first date in the range for which you like to auto schedule employees.

End Date – This the last date in the range for which you like to auto schedule employees.

Group – System Administrator can select all groups or one of the groups to auto schedule.

Position – Select the position(s) you wish to auto schedule.

Location – Select the location(s) you wish to auto schedule.

Attemp to assign same shift between breaks for each employee – check this box if you like to give the same shift between breaks (off days) if possible. For example, auto scheduler would assign all days shifts before employee has an off day.

Full/Part/Casual – Select the type of employees you wish to auto schedule.

Secondary

Allow secondary employees to fill remaining empty shifts

Use Secondary Position – This option is not normally used. You should only use this option if you have scheduled employee in all ranks and you would like the employees from other positions fill in the open shifts that could not be filled by employee in that position.

Use Secondary Location – You should use this option if an employee can work in his/her primary location as well as in all secondary locations. In most organizations, employees can work in all locations within an office/building.

Click on "Run Auto-Scheduler" to auto fill all the open shifts.

15.5   Re-Create Schedules

You can re-create part of the schedules using this functionality. This may be necessary if the rotating work schedule (Shift template) has changes for many of the employees. This functionality would delete all the shifts assigned manually, through auto-scheduler and via "Find Employee" functionality for the employee whose schedule is being re-created. However all the leaves approved through leave management functionality would be kept and leaves assigned directly into schedules would be lost. Click on "Re-Create" to open the following screen.

Start Date – This the first date in the range for which you like to re-create schedules.
End Date – This the last date in the range for which you like to re-create schedules.
Group – System Administrator can select all groups or one of the groups to auto schedule. Other users can only work with the group they are logged into.
Position – Select the position(s) you wish to re-create the schedule for.

Click on "Re-create Schedule" to re-create the schedule for selected criteria.

15.6   Copy Schedules

You can copy part of the schedules using this functionality and paste into another part of the unpublished schedules. Click on "Copy" to open the following screen.

Start Date – This the first date in the range for which you like to copy schedules.
End Date – This the last date in the range for which you like to copy schedules.

Paste schedule from – this the date at which you start pasting the copied schedules.
Include Events – If checked, events (Breaks and Tasks) would be copied.
Include Leaves – If checked, leaves would be copied.
Group – System Administrator can select all groups or one of the groups to auto schedule. Other users can only work with the group they are logged into.
Position – Select the position(s) you wish to re-create the schedule for.

Click on "Copy Schedules" to copy and paste schedules for selected criteria.

15.7   Publish Schedules

System Administrator can publish the unpublished schedules using this functionality. Click on "Publish" to open the following screen.

From Date – This the first date in the range for which you like to copy schedules. This date cannot be changed. You publish starting from the first date of the unpublished schedules.
To Date – This the last date in the range for which you like to copy schedules.

Click on "Publish Schedules" to publish schedules for **all** employees within the organization.

15.8   Published Schedules

Click on the "Manage Published Schedules" icon when on dashboard or "Published Schedules" on the top of the screen when working on unpublished schedules.

Manage Published Schedules

View, edit, fill open shifts etc in published schedules

The following screen would be displayed.

SchedulePro   Dashboard   Setup   Schedule   Reports   [1] Messages   Sign Out   **ABC Corp** Anand Kishore

Unpublished Schedule | Published Schedule | Leave Requests | Bid Systems

X UnPublish   Find Employee(s)   Auto-Scheduler   Post Open Shifts   Shift Divider

Start Date: 4/5/2011 | View Type: 14 Days | Sort By: Position/Name | Grouping of Pos/Loc: Group1 | Page Size: 50 | Summary: Bottom

< APRIL 5, 2011 TO APRIL 18, 2011 > | Filters   [+] SHIFT LEGENDS [+] MAXIMIZE

Multiple Shifts | N/A Part Day | N/A All Day | OT Overtime | Partial Shift | E Events | Comments

Employee (Pos) (Loc) (Type)		Tue 4-5	Wed 4-6	Thu 4-7	Fri 4-8	Sat 4-9	Sun 4-10	Mon 4-11	Tue 4-12	Wed 4-13	Thu 4-14	Fri 4-15	Sat 4-16	Sun 4-17	Mon 4-18
L Brewer	Shift	-	-	-	-	E	N	-	-	-	-	-	-	-	-
(PO) (A) (PT)	Loc					A	A								
H Cormier	Shift	D	D	D	D	-	-	V	V	V	-	E	E	E	E
(PO) (A) (FT)	Loc	A	A	A	A							A	A	A	A
L Grant	Shift	-	-	-	E	E	E	E	-	-	E	-	E	-	-
(PO) (A) (PT)	Loc				A	A	A	A			A		A		
F King	Shift	E	E	E	-	-	E	E	E	E	-	-	D	D	D
(PO) (A) (FT)	Loc	A	A	A			A	A	A	A			A	A	A
A LeBlanc	Shift	N	-	N	N	N	-	N	N	N	N	N	-	N	N
(PO) (A) (PT)	Loc	A		A	A	A		A	A	A	A	A		A	A
M Palmer	Shift	-	-	-	-	-	-	-	-	-	-	-	-	-	-
(PO) (A) (PT)	Loc														
G Robichaud	Shift	D	D	D	-	D	D	-	D	D	D	D	-	-	D
(PO) (A) (PT)	Loc	A	A	A		A	A		A	A	A	A			A
B Smith	Shift	D	D	-	D	D	D	-	E	E	E	E	-	-	E
(PO) (A) (FT)	Loc	A	A		A	A	A		A	A	A	A			A
K Sullivan	Shift	-	E	E	E	-	-	D	D	-	D	D	D	D	-
(PO) (A) (FT)	Loc		A	A	A			A	A		A	A	A	A	
G Taylor	Shift	-	N	-	-	D	D	D	-	D	-	D	N	E	-
(PO) (A) (PT)	Loc		A			A	A	A		A		A	A	A	
E White	Shift	E	-	D	D	-	-	D	D	D	D	-	D	D	D
(PO) (A) (FT)	Loc	A		A	A			A	A	A	A		A	A	A

Coverage Summary Pos / Loc / Shift		Tue 4-5	Wed 4-6	Thu 4-7	Fri 4-8	Sat 4-9	Sun 4-10	Mon 4-11	Tue 4-12	Wed 4-13	Thu 4-14	Fri 4-15	Sat 4-16	Sun 4-17	Mon 4-18
PO / A / D (7:00a – 3:00p)		3/3	3/3	3/3	3/3	3/3	3/3	3/3	3/3	3/3	3/3	3/3	3/3	3/3	3/3
PO / A / E (3:00p – 11:00p)		2/2	2/2	2/2	2/2	2/2	2/2	2/2	2/2	2/2	2/2	2/2	2/2	2/2	2/2
PO / A / N (11:00p – 7:00a)		1/1	1/1	1/1	1/1	1/1	1/1	1/1	1/1	1/1	1/1	1/1	1/1	1/1	1/1

Leave Summary		Tue 4-5	Wed 4-6	Thu 4-7	Fri 4-8	Sat 4-9	Sun 4-10	Mon 4-11	Tue 4-12	Wed 4-13	Thu 4-14	Fri 4-15	Sat 4-16	Sun 4-17	Mon 4-18
Paid Vacation/Annual Leave								1	1	1					

Schedules Stats   LEGEND: UNDER OVER
UnPublished Schedules: Sunday, May 01, 2011 to Tuesday, May 31, 2011
Published Schedules: Sunday, April 04, 2010 to Saturday, April 30, 2011

Contact Info   **Support**   **Settings**
About EDP Software   Admin/Manager Manual (PDF)   Change My Password
Tel: (506) 454-7776 (SPRO)   Employee Manual (PDF)

© 2011 EDP Software | Terms of Service

This would display published schedules if there are any. If there are no published schedules, then no scheduling data would be displayed.

15.9   Making Changes to Schedules (Schedules Editing)

This functionality is available in both, published and unpublished schedules. You have complete control over the schedules and can make any change you would like to make. You can assign any shift / leave to any employee. If an employee calls in sick, you can mark the employee on sick leave for the day.

To make a change, click on a shift you wish to change for any employee and the following screen would be displayed.

You can on ☑ to expand Events (Breaks/Tasks) and/or Comments for this shift.

Now you can change the "D" shift to "S" sick day. Click on "Save" to save the change. You can also check the box "Send changes notification to email:" to send the email notification to the employee before you click on Save.

The open shift created by this sick leave can be filled via "Find Employee" functionality.

This functionality can also be used to add another shift or to split a shift by adding a leave for part of the shift. You can also modify the start and end times of the shift to match the actual if needed.

You can also add / modify EVENTS (Breaks and Tasks) to this shift. Similarly you can add comments for this shift if needed.

Click on to hide Events(Breaks/Tasks) and /or Comments.

15.10 Find Employee(s)

This functionality is available in both, published and unpublished schedules. If you have under-scheduling situation, then you may find employees to fill open shifts with this functionality. This feature is very useful to find a replacement employee when an employee calls in sick. This functionality can also be use to manually assign employees to open shifts when creating a new schedule.

Click on the "Assign Employee(s)" button in published/unpublished schedules. The following screen will be displayed.

You can select any date in the date box on the top to display open shifts for that day by clicking on beside "Next" button. You can also navigate by clicking on "Previous" or "Next" buttons.

This screen displays all the open shifts for the day in a list on the top. You can select any shift you wish to fill. Once you select a shift, it would display a list of available employee for the shift. You can customize the list by selecting following options:

Full/Part/Casual – You can select the type of employees you wish to display. You have choice from 5 options
- All
- Part Time and Casual
- Full Time
- Part Time
- Casual

Position – You can select either All or one of the positions in the lust. This would display the open shifts for the selected position or for All positions.

Hide employees working maximum hours or more – You can hide/show employees that are already working their max hours for the week.

Hide employees that are not available – You can also hide/show employees that have specified their unavailability for any part of the shift.

Include Employees who are working on the selected date – You can include/exclude employees that working a shift on that day.

Include Employees from secondary position – You can select to include All employees whose primary position or secondary position is the same as the position for the open shift or only the employees whose primary position is the same as for the open shift being filled/selected.

Include Employees from secondary location – You can choose to include all employees whose primary location or secondary location is the same as for the open shift or only the employees whose primary location is the same as for the open shift being filled/selected.

Order Employees By – You can order the list of employees for this shift by
- Name
- Seniority
- OT List

If you select "OT List", then you have to specify the "OT Since" date. Then the program will calculate the overtime done since this date and order the list from low overtime hours to high overtime hours. This allows the organization to distribute the overtime equally among their employees.

Filter by Skill Code – You can also filter the list of employees by any number of skill codes. In that case it would only show the employees that have that all the skills selected. You can expand on the skills by clicking on ☑

After all the selections are made, click on "Show Employees" to display a list of employees as follows:

!	Employee	FPC	Pos	Loc	Seniority	Shift 4-6	Today Shift	Today Hrs	Shift 4-8	Hrs For Week	Refusal
⚠	B Smith	FT	RN	A	1	D	-	0.00	D	40.00/4	
	G Taylor	PT	RN	A	8	N	-	0.00	-	24.00/40	
	L Grant	PT	RN	A	9	-	-	0.00	E	24.00/40	
	L Brewer	PT	RN	A	10	-	-	0.00	-	8.00/40	
	M Palmer	PT	RN	A	11	-	-	0.00	-	0/40	

You will notice a warning sign on the first employee in the list. This means that this employee would break some rules. This employee is already has 40 hours for the week and his max hours for the week are also 40. This will cause overtime.

Now select an employee and employee's primary and secondary phone numbers would be displayed at the bottom as shown below.

You can now call the employee to see if the employee wished to accept the shift. If the employee declines the shift or you are unable to contact the employee, then you can enter a Refusal for this employee for this shift by clicking "Add Employee Refusal" button. Now the following screen would be displayed.

Please select the "reason" from the drop-down list. Please enter the date and time in "Called on" to reflect your local date and time. You can click on ▦ to select a date and click on ⏰ to select time.

Click "Save" to save the Refusal. Now you will see the Refusal code on the employee line.

Once you find an employee that has accepted the shift offered, click on "Assign Shift to Employee" button to fill the shift. You can also check the box "Send shift assignment notification to email:" to notify the employee by email before assigning the shift to the employee. Repeat this process to fill all open shifts.

15.11 Changing Requirements, Resolving over-staffing and under-staffing

This functionality is available in both, published and unpublished schedules. To change the number of staff required or to un-assign a shift in over-staffing situation or to quickly find an employee to fill under-staffing, click on the numbers in appropriate cell in the Schedule Summary as shown in the schedules below.

+ New   Copy   Re-Create   Delete   Publish   Find Employee(s)   Auto-Scheduler   Post Open Shifts   Shift Divider   + New

Start Date	View Type	Sort By	Grouping of Pos/Loc	Page Size	Summary
5/1/2011	14 Days	Position/Seniorty	Group1	50	Bottom

< MAY 1, 2011 TO MAY 14, 2011 >   Filters   [+] SHIFT LEGENDS   [+] MAXIMIZE

Multiple Shifts   N/A Part Day   N/A All Day   Overtime   Partial Shift   Events   Comments

Employee [Edit]		Sun 5-1	Mon 5-2	Tue 5-3	Wed 5-4	Thu 5-5	Fri 5-6	Sat 5-7	Sun 5-8	Mon 5-9	Tue 5-10	Wed 5-11	Thu 5-12	Fri 5-13	Sat 5-14
(Pos) (Loc) (Type)															
B Smith	Shift	-	D	D	D	-	D	D	D	-	E	E	E	E	-
(RN) (A) (FT)	Loc		A	A	A		A	A	A		A	A	A	A	
E White	Shift	E	E	E	-	D	D	-	-	D	D	D	D	-	D
(RN) (A) (FT)	Loc	A	A	A		A	A			A	A	A	A		A
A LeBlanc	Shift	N	N	N	-	N	N	N	-	N	N	N	N	N	-
(RN) (A) (FT)	Loc	A	A	A		A	A	A		A	A	A	A	A	
H Cormier	Shift	D	-	D	D	D	D	-	-	D	D	D	-	E	E
(RN) (A) (FT)	Loc	A		A	A	A	A			A	A	A		A	A
K Sullivan	Shift	E	E	-	E	E	E	-	-	D	D	-	D	D	D
(RN) (A) (FT)	Loc	A	A		A	A	A			A	A		A	A	A
F King	Shift	D	D	E	E	E	-	-	E	E	E	E	-	-	D
(RN) (A) (FT)	Loc	A	A	A	A	A			A	A	A	A			A
G Robichaud	Shift	-	D	D	D	D	-	D	D	-	-	D	D	D	N
(RN) (A) (PT)	Loc		A	A	A	A		A	A			A	A	A	A
G Taylor	Shift	D	D	-	N	-	-	D	D	-	-	-	-	D	-
(RN) (A) (PT)	Loc	A	A		A			A	A					A	
L Grant	Shift	-	-	-	-	-	E	E	E	E	-	-	E	-	E
(RN) (A) (PT)	Loc						A	A	A	A			A		A
L Brewer	Shift	-	-	-	-	-	-	E	N	-	-	-	-	-	-
(RN) (A) (PT)	Loc							A	A						
M Palmer	Shift	-	-	-	-	-	-	-	-	-	-	-	-	-	-
(RN) (A) (PT)	Loc														
Coverage Summary [New]		Sun 5-1	Mon 5-2	Tue 5-3	Wed 5-4	Thu 5-5	Fri 5-6	Sat 5-7	Sun 5-8	Mon 5-9	Tue 5-10	Wed 5-11	Thu 5-12	Fri 5-13	Sat 5-14
Pos / Loc / Shift															
RN / A / D (7:00a – 3:00p)		3/3	4/3	3/3	3/3	3/3	3/3	3/3	3/3	3/3	3/3	3/3	3/3	3/3	3/3
RN / A / E (3:00p – 11:00p)		2/2	2/2	2/2	2/2	2/2	2/2	2/2	2/2	2/2	2/2	2/2	2/2	2/2	2/2
RN / A / N (11:00p – 7:00a)		1/1	1/1	1/1	1/1	1/1	1/1	1/1	1/1	1/1	1/1	1/1	1/1	1/1	1/1
Schedules Stats													LEGEND:	UNDER	OVER

The cell with green background shows that 4 employees are scheduled while only 3 employees are required on this shift. Clicking on the green cell would display the following screen.

SUMMARY \\ 2011-05-02

X close window

Position	Location	Shift
RN – Police Officer	A – Location A	D – Day Shift (7A–3P) (7:00 AM – 3:00 PM)

Total Scheduled	Total Required
4	3

Employees assigned to this shift

Emp #	Employee	FPC	Seniority	Shift Day Before	Today Hrs	Shift Day After	Total Hrs/Week	Action
106	F King	FT	6	D	8.00	E	40.00/40	Unassign
201	G Robichaud	PT	7	-	8.00	D	40.00/40	Unassign
101	B Smith	FT	1	-	8.00	D	40.00/4	Unassign
202	G Taylor	PT	8	D	8.00	-	32.00/40	Unassign

🔍 ▸ Find Employees for this Shift (Quick Suggest)

Now choose an employee that would not be scheduled for this shift and click on "Unassign" to un-assign the shift for this employee. The shift will be removed for this day from this employee. Suppose we want to un-assign the shift for G Taylor and clicked on "Unassign" for G Taylor, and then we would see the following screen after the shift taken away from this employee.

SUMMARY \\ 2011-05-02

X close window

Position	Location	Shift
RN – Police Officer	A – Location A	D – Day Shift (7A–3P) (7:00 AM – 3:00 PM)

Total Scheduled	Total Required
3	3

Employees assigned to this shift

Emp #	Employee	FPC	Seniority	Shift Day Before	Today Hrs	Shift Day After	Total Hrs/Week	Action
106	F King	FT	6	D	8.00	E	40.00/40	Unassign
201	G Robichaud	PT	7	-	8.00	D	40.00/40	Unassign
101	B Smith	FT	1	-	8.00	D	40.00/4	Unassign

🔍 ▶ Find Employees for this Shift (Quick Suggest)

If you were under-scheduled as in the following screen

SUMMARY \\ 2011-04-07

X close window

Position	Location	Shift
RN – Police Officer	A – Location A	D – Day Shift (7A–3P) (7:00 AM – 3:00 PM)

Total Scheduled	Total Required
2	3

Employees assigned to this shift

Emp #	Employee	FPC	Seniority	Shift Day Before	Today Hrs	Shift Day After	Total Hrs/Week	Action
201	G Robichaud	PT	7	D	8.00	-	40.00/40	Unassign
102	E White	FT	2	-	8.00	D	40.00/40	Unassign

🔍 ▶ Find Employees for this Shift (Quick Suggest)

Then click on 🔍 to provide a list of employees that can fill this shift. If you wish to specify a lot of criteria such as skills etc then use the "Find Employee(s)" functionality. This list only shows the

employees that are not working on this day and whose primary position and location is the same as for the open shift.

SUMMARY \\ 2011-04-07

Position	Location	Shift
RN – Police Officer	A – Location A	D – Day Shift (7A–3P) (7:00 AM – 3:00 PM)

Total Scheduled	Total Required
2	3

Employees assigned to this shift

Find Employees for this Shift (Quick Suggest)

Emp #	Employee	Loc	FPC	Seniority	Shift Day Before	Shift Day After	Total Hrs/Week	Action
204	L Brewer	A	PT	10	-	-	8.00/40	Assign
203	L Grant	A	PT	9	-	E	24.00/40	Assign
205	M Palmer	A	PT	11	-	-	0/40	Assign
202	G Taylor	A	PT	8	N	-	24.00/40	Assign

Now click on the "Assign" to assign this shift to an employee.

You can also change the number of employees required for this position, location and shift by typing the new required number in the box titled "Total Required".

Click on [X close window] to close this window.

15.12 Employee info,

This functionality is available in both, published and unpublished schedules. You can display basic information about any employee by clicking on a name in the schedule. Suppose you click on "H Cormire", then you will see following screen.

There are several tabs in this widow.

"General" tab – displays information such as telephone number, email address, hired date etc about the employee.

"Skills" tab – displays skills this employee has as follows:

This employee has the skill "ICU".

"Leaves" tab – displays upcoming leaves information for this employee as follows:

"Unavailability" tab – displays unavailability information for this employee as follows:

You can scroll months to see unavailability for other months.

"Shift Pattern" tab – displays employee's rotating work schedule as follows:

This employee has a 28 day rotating schedule.

"Re-Create Schedule" tab – You can re-create schedule in un-published schedules only for this employee from his/her rotating work schedule for a range of dates as follows:

Start Date – Start date for the range of date you wish to recreate the schedule for.
End Date – Start date for the range of date you wish to recreate the schedule for.

Click on "Re-create Schedules" button to re-create the schedules for this employee.

Click on "Close Window" to close this window and return to the schedules.

15.13 Post Open Shifts

This functionality is available in both, published and unpublished schedules. If you have under-scheduling situation, you can post the open shifts for employees to bid on. To post open shifts, click on "Post Open Shifts" button. The following screen would be displayed.

POST OPEN SHIFTS FOR BIDDING

Post Open Shifts Starting:

From Date | To Date
(M/d/yyyy) | (M/d/yyyy)

☐ Send notification to employees

Group
Group1 ▾
Group Filters ▼

[Post Open Shifts] [Cancel]

Start Date – Select the start date for the date range you wish to post the open shifts for.
End Date – Select the end date for the date range you wish to post the open shifts for.
Send notification to employees – Please check this box if you wish to send notifications to employees regarding the open shifts you are posting.
To select the positions and locations you wish to post the open shifts for, click on "Group Filters" to display the list of positions and locations to select. Check the positions and locations as appropriate.

Click on "Post Open Shifts" to post the open shifts.

16.0 Leave Requests

Manager/Scheduler/System Administrator can view all leave requests, approve or reject leave requests as well as enter new leave requests as either approved or as pending. Click on the "Manage Leave Requests" on the dashboard as shown below :

Manage Leave Requests

Manage employees' leave requests. Add, edit, approve, and decline a leave request.

Or on "Leave Requests" on the schedule screen as shown below.

This will display the following screen.

There are several tabs to view all requests, pending requests, approved requests and rejected requests.

You can click on edit ✎ to edit the request for approving or rejecting. You can also click on ✖ under Delete column to delete this leave request. If the request is "Pending" then no other action is taken. If the leave has been approved and no schedule has been created/exists for these dates, then no other action is taken. However if the schedule exists for leave dates and leave has been approved, then the leaves would be replaced by the shifts from employee's shift pattern if there is a shift pattern specified otherwise the leaves are replaced by "-".

To enter a new request, click on "New Leave Request" to display the following screen.

Leave Request

Select Employee Requesting Leave

Group

All ▾

Position: ALL

Location: ALL

TIP: To narrow down the list of employees, fill in the filter box below the column names.

#	Select	Employee #	First Name	Last Name	Position ▾	Location ▾
	Select	204	L	Brewer	RN	A
	Select	104	H	Cormier	RN	A
	Select	203	L	Grant	RN	A
	Select	106	F	King	RN	A
	Select	EDP999	Anand	Kishore	MGR	A
	Select	103	A	LeBlanc	RN	A
	Select	205	M	Palmer	RN	A
	Select	201	G	Robichaud	RN	A
	Select	101	B	Smith	RN	A
	Select	105	K	Sullivan	RN	A

Page 1 of 2 (12 items) ‹ **[1]** 2 ›

You can filter the list by typing some characters in boxes below the headings. You can filter by typing few characters for the first name, and/or last name, and/or position, and/or location etc.

Click on "Select" to select an employee for which you wish to enter the leave request for. This would display the following screen.

Leave Request

L Grant (203) [Change]

Start Date

[   ] 🔲

(M/d/yyyy)

End Date

[   ] 🔲

(M/d/yyyy)

Leave Type

[AL - Leave of Absence   ▼]

Status

[Pending (Requested)   ▼]

[Save] [Cancel]

Click on "change" or "Cancel" to go back to the list of employee to select another employee.

Start Date – first day on which the leave would start.
End Date – Last day on which the leave would start.
Leave Type – Select the type of leave being requested.
Status – Select the status of Pending, Approved or Rejected for this leave.

Click on "Save" to save this leave request.

17.0 Bid System

Manager/Scheduler/System Administrator can view all open shifts that have been posted. Click on the "Bid System" as shown below.

This would display the following screen.

This displays all the open shifts that have been posted starting from the date shown in the date box "Display open shifts starting from". You can select any date in this box. Default is the current date.

Click on ✖ under Delete column to delete the posted shift if you no longer want this shift as a posted shift. All data would be deleted including the information about who has bid for this shift as if this shift was never posted.

Click on "View" on the shift line to see the names of the employee(s) that have bid for the shift. The following screen would be displayed.

Close Shift from further Bidding – Click on this button if you wish to close this open shift from further bidding. It will keep all data regarding this open shift.

Keep Shift Open – Click on this button to return to return to previous screen.

Send notification to employees upon accepting/rejecting/closing this open shift – Check this box if you wish to send email notification to employee(s).

This screen displays the shift, position, location for the open shift as well as the number of employees "Currently scheduled", "Total Required" and "Total needed" for this open shift.

If you are under-staffed then you can click on "Yes" under "Accept?" column on the employee line to assign the shift to the employee. This would reduce the "Total Needed" count by 1 and increase the "Currently Scheduled" count by 1.

You can also click on "No" under "Accept?" column to reject an employee's bid for this shift.

Click on "View All Open Shifts" to view the list of open shifts as shown on previous page.

If you click on the edit ✏️, then the following screen would be displayed.

You can change the status from "Open" to "Closed" with this screen. Click on "Save" to save the change.

18.0 View Employee's Shift Trades

You can view all the shift trades starting from a certain date. Click on "View Employee's Shift Trades" on the dashboard to open the following screen.

Shift Trades

Groups
All
Position: ALL
Location: ALL

Display shift trades from
09/01/2010

#	From Emp #	First Name	Last Name	Shift	Start	End	To Emp #	First Name	Last Name	Shift	Start	End	Status
	201	G	Robichaud	E	9/24/2010 3:00:00 PM	9/24/2010 11:00:00 PM	202	G	Taylor	D	9/30/2010 7:00:00 AM	9/30/2010 3:00:00 PM	Approved
	101	B	Smith	D	9/17/2010 7:00:00 AM	9/17/2010 3:00:00 PM	102	E	White	E	9/18/2010 3:00:00 PM	9/18/2010 11:00:00 PM	Approved
	202	G	Taylor	E	8/28/2010 3:00:00 PM	8/28/2010 11:00:00 PM	102	E	White	D	9/2/2010 7:00:00 AM	9/2/2010 3:00:00 PM	Approved
	202	G	Taylor	D	9/4/2010 7:00:00 AM	9/4/2010 3:00:00 PM	201	G	Robichaud	D	9/1/2010 7:00:00 AM	9/1/2010 3:00:00 PM	Approved

You can change the date in the date box to display the list starting from this date. You can filter this list by typing values in the boxes below the headings. You can filter the list by few characters of first name and/or few characters of last name and/or shift and/or employee number.

19.0 Reports

Schedule Pro has many reports that you can preview or print. Reports can be previewed on the screen before printing. Click on the Reports Icon or "View Reports" or "Reports" on the top on the Dashboard.

View Reports
View, export, and print various reports

Schedule**Pro**   Dashboard   Setup   Schedule   Reports   Messages   Sign Out

This will open the Reports menu as shown below.

Schedules

Work Schedule (Duty Roster)

Display schedules for any number of weeks for a group of employees.

Weekly Schedule by Staffing level

Display the weekly schedule for each shift in each department and for each position.

Daily Shift List

Display the daily shift list for each unit.

Individual Employee Schedule

Display the schedule for an employee in calendar format.

Stats

Group Stats (for Shifts\Leaves)

Display all the total hours/OT worked on each shift as well as total hours taken for each leave.

Individual Employee Stats

Display the summary of all hours for an employee for the specified date range for each shift and leave.

Hours Worked

Display all the total hours and total OT hours worked on each shift in each department.

Overtime

Display detail summary of OT hours worked on each department.

Other

Leaves

Display the scheduled leaves in spreadsheet format.

Refusals

Display all shifts that were offered to employees and were not taken/declined with reason for refusal.

Breaks

Display all the breaks for group of employees for time range for a given day.

Shift Trades

Display all the shift trades for group of employees.

Individual Employee Tasks

Display all events (Breaks and Tasks) for an employee for a date range.

Tasks Summary

Display total number of employees assigned to each event (Breaks and Tasks).

Skills Summary

Display total number of employees assigned to each skill.

19.1   Printing Work Schedules (Duty Rosters)

Click on the icon for "Wok Schedule (Duty Roster)". This will display the following screen.

Work Schedule (Duty Roster)

Start Date
04/10/2011   🔲

○ Display in month

◉ Display in number of week(s)
1 Week   ⌄

Sort by
Position/Name   ⌄

Summary in:
No Summary   ⌄

Display in Schedule	Display under employee name:	Display color for:
☐ Location	☐ Employee Number	☐ Shifts (forecolor)
☐ Working Position	☐ Primary Position	☑ Leaves (background color)
☐ Hours Paid	☐ Full/Part/Casual	
☐ Display Events (1 Wk only)	☐ Team	

Group
(All Position/Location)   ▼
Group Filters   ⌄

[View Report]

This prints schedules for any number of weeks for a group of employees. You can also print the schedule for a month if so desired.

Please specify / select the fields.

Start Date – The schedule would print starting this date. Click on 🔲 to open the calendar, and then select a date from the calendar.

Display in Month – Select this option to print the work schedule for a month. In this case the Start Date would change to the first of the month and the schedule would be print for the month in the Start Date.

Display in number of Week(s) –Select this option to print the schedule in number of weeks.   You can select 1, 2 or 4 weeks to print. The schedule would print for 7 days, 14 days or 28 days starting from the Start date.

Sort By – You can select the sort order for the employees in the schedules. Following options are available.
- **Position / Name** – This option would sort the list in Position order and by name within each Position.
- **Position / Seniority** – This option would sort the list in Position order and by seniority within each Position.
- **Name** – The list would be sorted by Name only.
- **Seniority** – The list would be sorted by seniority only.
- **Team/Position/Name** – The list would be sorted by Team, position and name

Summary – You can select to print schedule summary if you wish. Select the appropriate schedule summary option in "Summary in".

Display Color – You can display shift in colored foreground and/or leaves in a colored background. These colors are taken from the color you specified in the shift and leave codes.

Display in Schedule – You can also choose to display other information along with shift in the schedule. You can choose one or more from the following.
- Location
- Working Position
- Hours Paid
- Total Hours Paid
- Display Events (1 Wk only) - This option is valid only if you are printing the schedules for 1 week.

Display Under Employee Name – You can choose to display one or more of the following under the employee name.
- **Employee Number** – This option would print the employee number on the next line below the employee name.
- **Primary Position** – This would print the employee position that is in the employee profile on the line below employee name.
- **Full/Part/casual** – This would print whether the employee is a full time, part time or casual employee.
- **Team**

Group – Only system administrator can select a group otherwise you see the group you logged in.

By default All positions and All locations are selected for the selected group.   Click on "Group Filters" bar to select the positions and locations for printing to expand selection box.

Position – Select the positions for printing

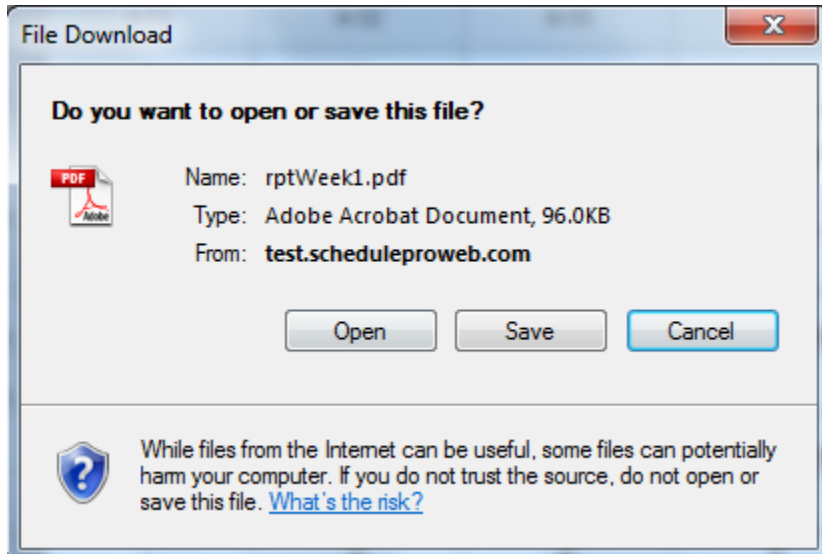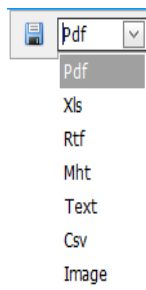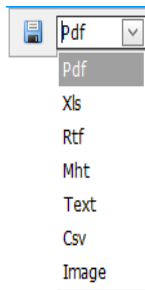**Location** – Select the locations for printing

View Report – Click on this button to preview the report on the screen. The report can be printed or exported from the preview screen.

To print from the preview screen, click on in to display the following

Click on Open to open the report in PDF format. Then the report can be printed. You can also click on Save to save the report in PDF format on your disk.

In the dropdown list in select Xls

to save the file in Excel format.

These options would let you customize the printing of work schedules (duty rosters) to your facility's needs. You can use these reports for payroll if so desired.

19.2   Printing Schedule by Staffing Level

This report prints the weekly schedule for each shift in each location and for each position. It displays the employees scheduled for each combination of position/location/shift. It displays as many while cells as employees required. An empty cell indicates under-scheduling while a name in grey cell indicates over-scheduling. This is a very popular report.

Click on the "Weekly Schedule by Staffing Level" menu. This will display the following screen.

Start Date – The schedule by staffing level would print starting this date for 7 days. Click on 🔲 to open the calendar, and then select a date from the calendar.

Shifts – Click on ✔ to expand the Shifts as follows:

By default, all shifts are selected. You can select any number of shifts for which you wish to print the schedule by staffing level.

Group – Only system administrator can select a group otherwise you see the group you logged in.

By default All positions and All locations are selected for the selected group.   Click on "Group Filters" bar to select the positions and locations for printing to expand selection box.

Position – Select the positions for printing

Location – Select the locations for printing

View Report – Click on this button to preview the report on the screen. The report can be printed or exported from the preview screen.

To print from the preview screen, click on 🖫 in [🖫 Pdf ⌄] to display the following

Click on Open to open the report in PDF format. Then the report can be printed. You can also click on Save to save the report in PDF format on your disk.

In the dropdown list in select Xls

to save the file in Excel format.

19.3 Printing Daily Shift List

This prints the daily shift list for each unit. Click on the icon for "Daily Shift List" and the following screen would be displayed.

Daily Shift List

Start Date
04/11/2011

Display in number of days:

Shifts ▼

Group by:
◉ Location   ○ Team

Display
◉ Events   ○ Comments

Group
(All Position/Location) ▼
Group Filters ▼

[View Report]

You can print the daily shift list for one or more days starting from the Start Date. Each day starts on a new page.

Start Date – The daily shift list would print starting this date. Click on 🔲 to open the calendar, and then select a date from the calendar.

Display in number of days – Specify the number of days for which you wish to print the daily shift list. Normally user prints the daily shift list for one day (next day) except on Friday when the user prints the shift list for three days (Saturday, Sunday and Monday). If you like you can print the shift list for the whole week.

Shifts – Click on ☑ to expand the Shifts as follows:

By default, all shifts are selected. You can select any number of shifts for which you wish to print the Daily Shift List for.

Group – Only system administrator can select a group otherwise you see the group you logged in.

By default All positions and All locations are selected for the selected group. Click on "Group Filters" bar to select the positions and locations for printing to expand selection box.
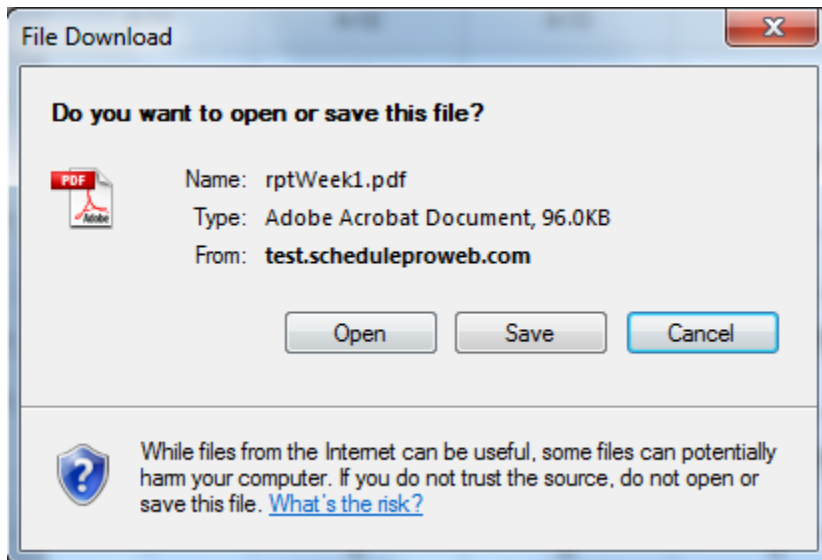

Position – Select the positions for printing

Location – Select the locations for printing

View Report – Click on this button to preview the report on the screen. The report can be printed or exported from the preview screen.

To print from the preview screen, click on in to display the following

Click on Open to open the report in PDF format. Then the report can be printed. You can also click on Save to save the report in PDF format on your disk.

In the dropdown list in select Xls

to save the file in Excel format.

19.4   Printing Individual Employee Schedule

This prints the schedule for an employee in calendar format. Click on the icon for "Individual Employee Schedule". This will display the following screen.

This screen displays the name of the employees, employee's Position, Home Location.

Start Date – The shifts on individual employee schedule would be shown starting this date. Click on ⊞ to open the calendar, and then select a date from the calendar.

End Date – The shifts on individual employee schedule would be shown up to this date. Click on ⊞ to open the calendar, and then select a date from the calendar.

You can also display the following information along with shift code for each day by checking appropriate boxes.

- Display Shift Desc
- Display Location
- Display Events

Display Employees by Group – Only system administrator can select a group.   The list of employees would be displayed for this group.

Display Employees by Manager – You may choose to display the list of employees for a Manager instead of a group.

You can filter the list by typing few letters in the boxes below the headings.

View – Click on the "View" button beside the employee to preview the individual schedule for this employee. The report can be printed or exported to Excel spreadsheet from the preview screen.

To print from the preview screen, click on 🖫 in [🖫 | Pdf ▾] to display the following
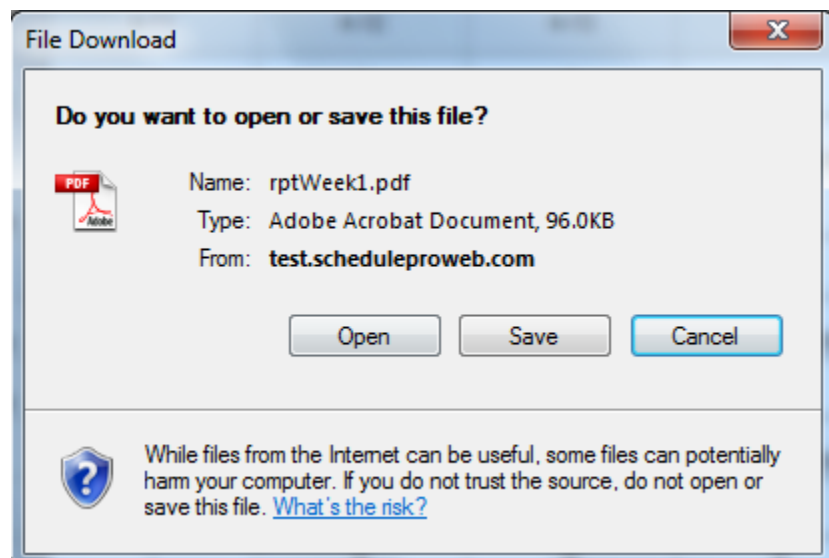
Click on Open to open the report in PDF format. Then the report can be printed. You can also click on Save to save the report in PDF format on your disk.

In the dropdown list in [🖫 | Pdf ▾] select Xls
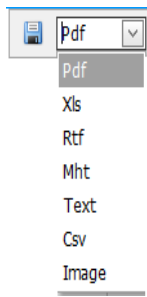
to save the file in Excel format.

19.5   Group Stats (for Leaves\Shifts)

This report prints all the total hours and total OT hours worked on each shift as well as total hours taken for each leave and hours done on each shift.

Click on the icon for "Stats". This will display the following screen.

Start Date – The Stats report is printed for the period from Start Date to End Date inclusive. Click on ▦ to open the calendar, and then select a date from the calendar.

End Date – The Stats report is printed for the period from Start Date to End Date inclusive. Click on ▦ to open the calendar, and then select a date from the calendar.

Group – Only system administrator can select a group otherwise you see the group you logged in.

By default All positions and All locations are selected for the selected group.   Click on "Group Filters" bar to select the positions and locations for printing to expand selection box.

Position – Select the positions for printing

Location – Select the locations for printing

View Report – Click on this button to preview the report on the screen. The report can be printed or exported from the preview screen.

To print from the preview screen, click on ![save icon] in ![save and format selector with Pdf] to display the following

Click on Open to open the report in PDF format. Then the report can be printed. You can also click on Save to save the report in PDF format on your disk.

In the dropdown list in select Xls

to save the file in Excel format.

19.6 Printing Individual Employee Stats

This report prints the summary of all hours for an employee for the specified date range for each shift and leave. Click on the icon for "Individual Employee Stats". This will display the following screen.

Individual Employee Stats

Start Date
04/11/2011

End Date

Group
(All Position/Location)
Position: ALL
Location: ALL

#	Report	Employee #	First Name	Last Name	Position	Location
	View	204	L	Brewer	RN	A
	View	104	H	Cormier	RN	A
	View	203	L	Grant	RN	A
	View	106	F	King	RN	A
	View	EDP999	Anand	Kishore	MGR	A
	View	103	A	LeBlanc	RN	A
	View	99123	J	Lockhart	MGR	A
	View	205	M	Palmer	RN	A
	View	201	G	Robichaud	RN	A
	View	101	B	Smith	RN	A
	View	105	K	Sullivan	RN	A
	View	202	G	Taylor	RN	A
	View	102	E	White	RN	A

This screen displays the name of the employees, employee's Position, Home Location.

Start Date – The employee stats are calculated from Start Date to End Date inclusive. Click on ⊞ to open the calendar, and then select a date from the calendar.

End Date – The employee stats are calculated from Start Date to End Date inclusive. Click on ⊞ to open the calendar, and then select a date from the calendar.

Group – Only system administrator can select a group otherwise you see the group you logged in. List of employees is displayed for the selected group.

You can filter the list by typing few letters in the boxes below the headings.

View Report – Click on the "View" button beside the employee to preview the stats for this employee. The report can be printed or exported from the preview screen.

To print from the preview screen, click on ⊟ in [⊟ Pdf ▾] to display the following
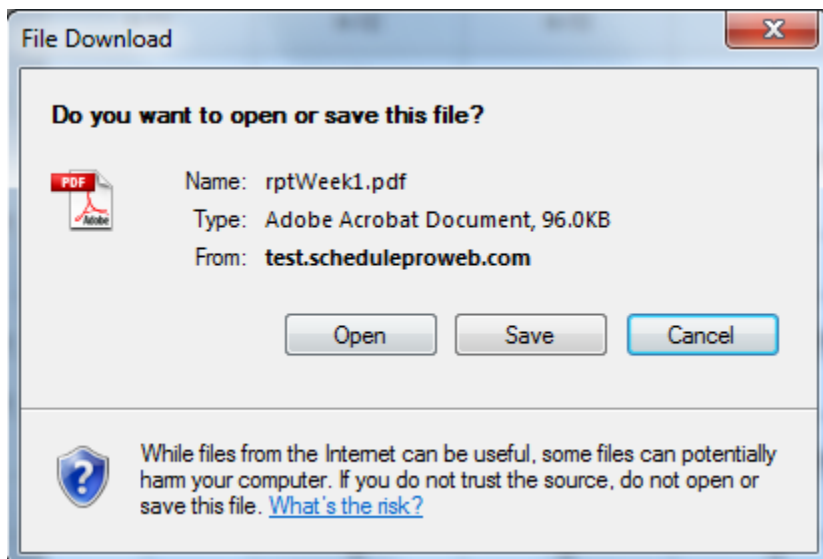
Click on Open to open the report in PDF format. Then the report can be printed. You can also click on Save to save the report in PDF format on your disk.

In the dropdown list in [⊟ Pdf ▾] select Xls
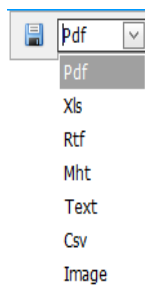
to save the file in Excel format.

19.7   Hours Worked

This report prints all the total hours and total OT hours worked on each shift in each location.

Click on the icon for "Hours Worked". This will display the following screen.

Start Date – The Hours Worked report is printed for the period from Start Date to End Date inclusive. Click on ⊞ to open the calendar, and then select a date from the calendar.

End Date – The Hours Worked report is printed for the period from Start Date to End Date inclusive. Click on ⊞ to open the calendar, and then select a date from the calendar.

Report hours worked on Location/Shift – Select this option if you wish to print the total hours worked and total OT hours worked on each shift in each location.

Report hours worked on Shift – Select this option if you wish to print the total hours worked and total OT hours worked on each shift in all location.

Group – Only system administrator can select a group otherwise you see the group you logged in.

By default All positions and All locations are selected for the selected group.   Click on "Group Filters" bar to select the positions and locations for printing to expand selection box.

Position – Select the positions for printing

Location – Select the locations for printing

View Report – Click on this button to preview the report on the screen. The report can be printed or exported from the preview screen.

To print from the preview screen, click on 🖫 in 🖫 Pdf ☑ to display the following

Click on Open to open the report in PDF format. Then the report can be printed. You can also click on Save to save the report in PDF format on your disk.

In the dropdown list in select Xls

to save the file in Excel format.

19.8   Overtime Report

This report prints overtime done for each day.

Click on the icon for "Overtime". This will display the following screen.

Start Date – The Leaves report is printed for the period from Start Date to End Date inclusive. Click on ▦ to open the calendar, and then select a date from the calendar.

End Date – The Leaves report is printed for the period from Start Date to End Date inclusive. Click on ▦ to open the calendar, and then select a date from the calendar.

OT Reasons – Click on ☑ to expand the OT reasons as follows:

Select the Overtime codes you wish the report for. Check the box "Include OT where no reasons have been specified" if you like the report where no overtime reason has been specified.

Group – Only system administrator can select a group otherwise you see the group you logged in.

By default All positions and All locations are selected for the selected group.   Click on "Group Filters" bar to select the positions and locations for printing to expand selection box.
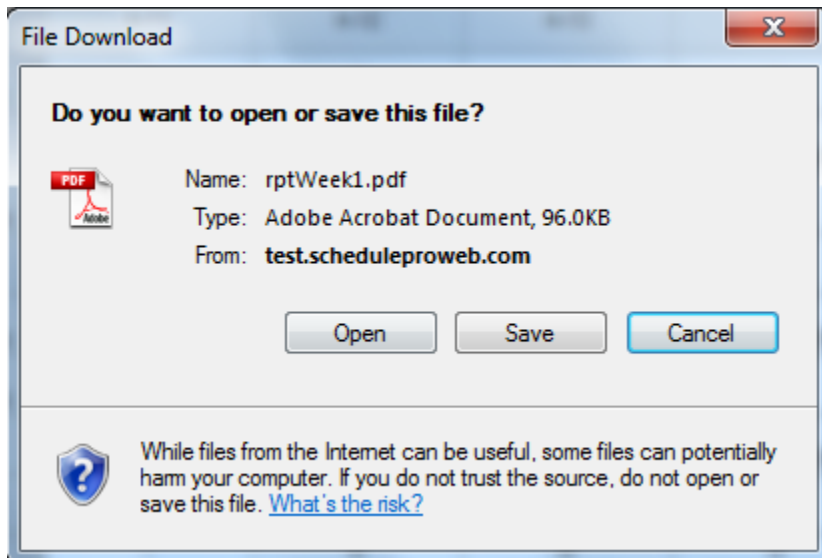

Position – Select the positions for printing

Location – Select the locations for printing

View Report – Click on this button to preview the report on the screen. The report can be printed or exported from the preview screen.

To print from the preview screen, click on 🖫 in [🖫 Pdf ⌄] to display the following

Click on Open to open the report in PDF format. Then the report can be printed. You can also click on Save to save the report in PDF format on your disk.

In the dropdown list in select Xls

to save the file in Excel format.

19.9   Leaves Report

This report prints only the leaves in a spreadsheet format just like schedule. The requested leaves are in orange background while the approved leaves are in white background. This report is very good to see how many requested leaves you wish to approve on a given day.

Click on the icon for "Leaves". This will display the following screen.

Leaves

Start Date	End Date
04/11/2011	

Leave

	Code	Description
☑	AL	Leave of Absence
☑	MT	Maternity
☑	OT	In Liew of Over time
☑	S	Paid Sick Time Off/Sick Leave
☑	SH	in Lieu of Stat Holidays
☑	T1	First Aid Training
☑	V	Paid Vacation/Annual Leave

Select All | Unselect All

◉ Display Leaves Summary   ○ Display Leave Details

◉ Display Employees by Group   ○ Display Employees by Manager

Group

(All Position/Location)   ▼

Group Filters   ▼

View Report

Start Date – The Leaves report is printed for the period from Start Date to End Date inclusive. Click on 🗓 to open the calendar, and then select a date from the calendar.

End Date – The Leaves report is printed for the period from Start Date to End Date inclusive. Click on ⊞ to open the calendar, and then select a date from the calendar.

Display Leave Summary – You can choose display the leave summary. This report is in spreadsheet format and display the leave code for each employee if they have either approved leave or a pending leave within the selected date range. The pending leaves have orange background. This report can be used to see how many employees you can afford on leaves for each day in the selected date range. Approve the pending leaves for the employees you wish to approve based on this report.

Display Leave Details – You can choose to display detailed information about leaves for each employee instead of leave summary.

Display Employees by Group – You may choose to select employees for a Group. In this case only Administrator can choose a group and within the selected group you can select the positions and locations for the report.

Display Employees by Manager – You can select this option if you wish to display employees for a manager. The screen changes as follows for this option.

○ Display Employees by Group   ◉ Display Employees by Manager

Manager

| Anand Kishore | ▼ |

[View Report]

In this case all employees for this manager would be displayed. There is no option to filter/select certain positions and locations. That option is available only when you select a group as follows.

Group – Only system administrator can select a group otherwise you see the group you logged in.

By default All positions and All locations are selected for the selected group. Click on "Group Filters" bar to select the positions and locations for printing to expand selection box.
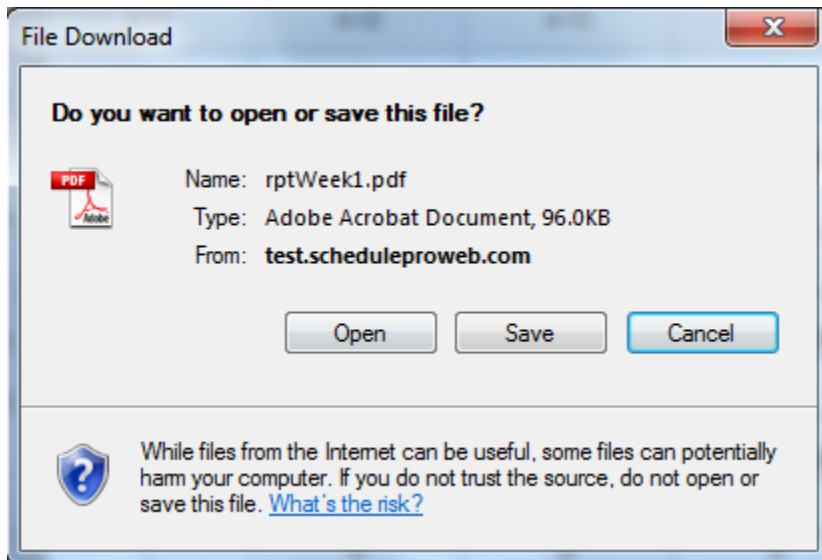
Position – Select the positions for printing

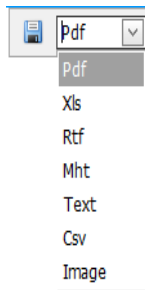**Location** – Select the locations for printing

View Report – Click on this button to preview the report on the screen. The report can be printed or exported from the preview screen.

To print from the preview screen, click on in to display the following

Click on Open to open the report in PDF format. Then the report can be printed. You can also click on Save to save the report in PDF format on your disk.

In the dropdown list in select Xls

to save the file in Excel format.

19.10 Refusal

This report prints all shifts that were offered to employees and were not taken / declined with reason for refusal.

Click on the icon for "Refusal". This will display the following screen.

Start Date – The Refusals report is printed for the period from Start Date to End Date inclusive. Click on ▦ to open the calendar, and then select a date from the calendar.

End Date – The Stats report is printed for the period from Start Date to End Date inclusive. Click on ▦ to open the calendar, and then select a date from the calendar.

Group – Only system administrator can select a group otherwise you see the group you logged in.

By default All positions and All locations are selected for the selected group.   Click on "Group Filters" bar to select the positions and locations for printing to expand selection box.
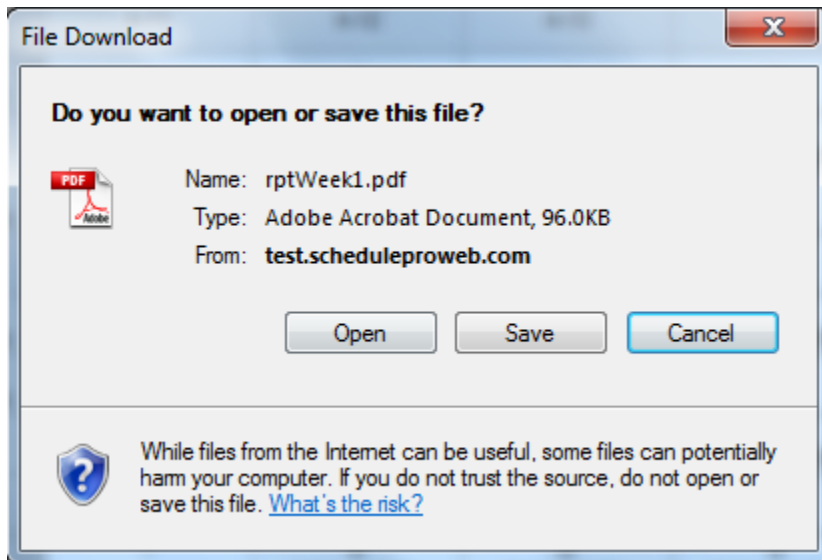
Position – Select the positions for printing

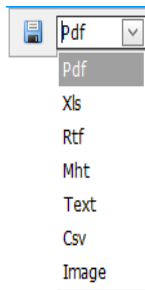**Location** – Select the locations for printing

View Report – Click on this button to preview the report on the screen. The report can be printed or exported from the preview screen.

To print from the preview screen, click on 🖫 in 🖫 Pdf ▾ to display the following

Click on Open to open the report in PDF format. Then the report can be printed. You can also click on Save to save the report in PDF format on your disk.

In the dropdown list in select Xls

to save the file in Excel format.

19.11 Breaks

This report prints all the breaks for group of employees for time range for a given day.

Click on the icon for "Breaks". This will display the following screen.

Shift Date – The Breaks report would print for this date. Click on [icon] to open the calendar, and then select a date from the calendar.

Start Time – The Breaks report is printed for the time period from Start Time to End Time inclusive. Click on [icon] to open time list, and then select a time from the list. If you like you can enter your own time.

End Time – The Breaks report is printed for the time period from Start Time to End Time inclusive. Click on [icon] to open time list, and then select a time from the list. If you like you can enter your own time.

Group – Only system administrator can select a group otherwise you see the group you logged in.

By default All positions and All locations are selected for the selected group.   Click on "Group Filters" bar to select the positions and locations for printing to expand selection box.
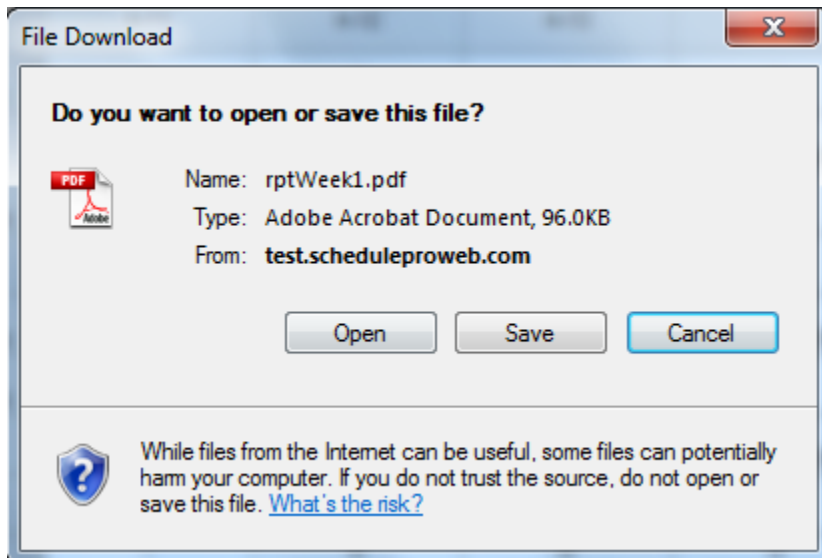
Position – Select the positions for printing

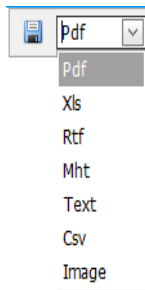**Location** – Select the locations for printing

View Report – Click on this button to preview the report on the screen. The report can be printed or exported from the preview screen.

To print from the preview screen, click on in to display the following

Click on Open to open the report in PDF format. Then the report can be printed. You can also click on Save to save the report in PDF format on your disk.

In the dropdown list in select Xls

to save the file in Excel format.

19.12 Shift Trades

This report prints all the shift trades for a group of employees for a given day.

Click on the icon for "Shift Trades". This will display the following screen.

Start Date – The Breaks report would print for this date. Click on ⊞ to open the calendar, and then select a date from the calendar.

Group – Only system administrator can select a group otherwise you see the group you logged in.

By default All positions and All locations are selected for the selected group.   Click on "Group Filters" bar to select the positions and locations for printing to expand selection box.
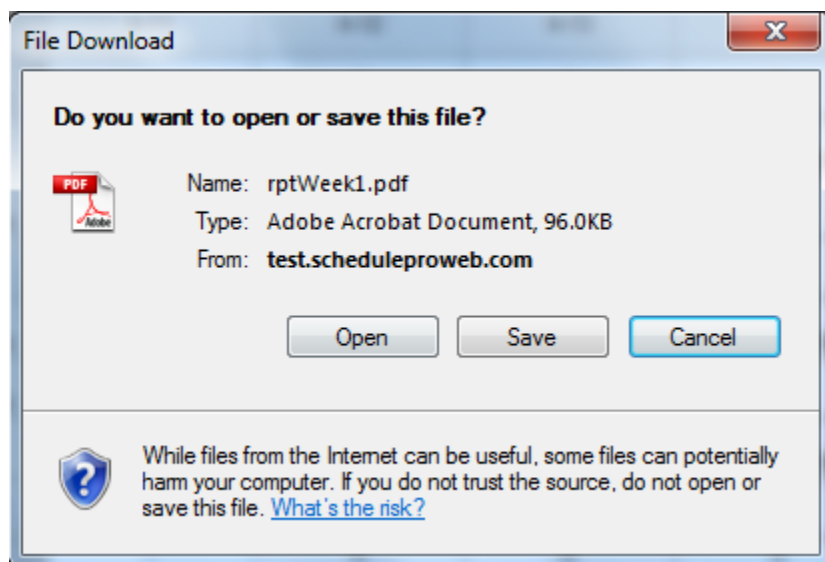
Position – Select the positions for printing

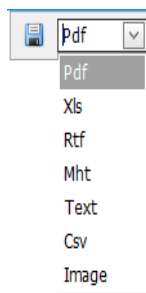**Location** – Select the locations for printing

View Report – Click on this button to preview the report on the screen. The report can be printed or exported from the preview screen.

To print from the preview screen, click on in to display the following

Click on Open to open the report in PDF format. Then the report can be printed. You can also click on Save to save the report in PDF format on your disk.

In the dropdown list in select Xls

to save the file in Excel format.

19.13 Individual Employee Tasks

This report prints all events (Breaks and Tasks) for an employee for a date range.

Click on the icon for "Employee Tasks". This will display the following screen.

Individual Employee Tasks

Start Date
09/27/2010

Number of Days

Group
All

Position: ALL
Location: ALL

#	Report	Employee #	First Name	Last Name	Position	Location
	View	204	L	Brewer	RN	A
	View	104	H	Cormier	RN	A
	View	203	L	Grant	RN	A
	View	106	F	King	RN	A
	View	EDP999	Anand	Kishore	MGR	A
	View	103	A	LeBlanc	RN	A
	View	205	M	Palmer	RN	A
	View	201	G	Robichaud	RN	A
	View	101	B	Smith	RN	A
	View	105	K	Sullivan	RN	A
	View	202	G	Taylor	RN	A
	View	102	E	White	RN	A

You can print the Employee Tasks report for one or more days starting from the Start Date.

Start Date – The Employee Task report would print starting this date. Click on ⊞ to open the calendar, and then select a date from the calendar.
**Number of days** – Specify the number of days for which you wish to print the Employee Tasks Report.

Group – Only system administrator can select a group otherwise you see the group you logged in.

You can filter the list by typing few letters in the boxes below the headings.

View Report – Click on the "View" button beside the employee to preview the report on the screen for the employee. The report can be printed or exported from the preview screen.

To print from the preview screen, click on 🖫 in [🖫 Pdf ⌄] to display the following
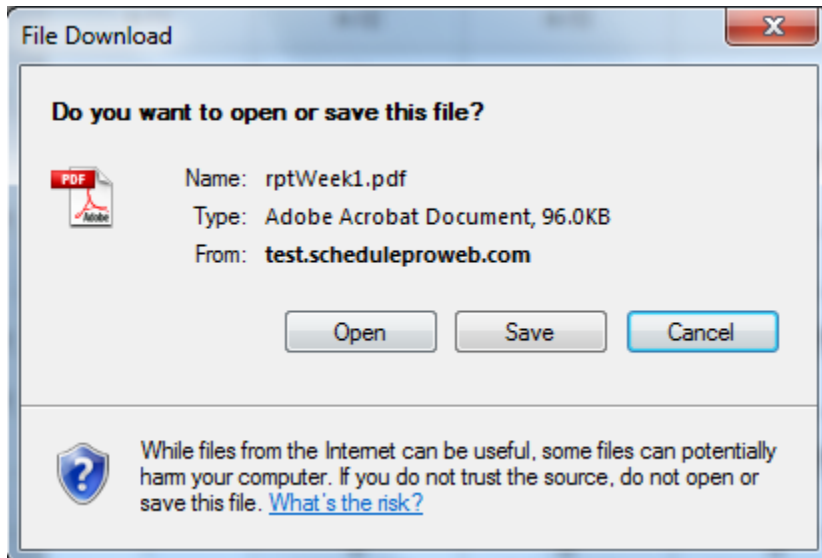
Click on Open to open the report in PDF format. Then the report can be printed. You can also click on Save to save the report in PDF format on your disk.

In the dropdown list in [🖫 Pdf ⌄] select Xls
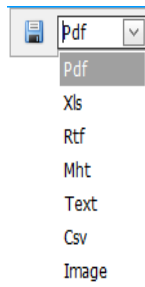
to save the file in Excel format.

19.14 Tasks Summary

This report prints total number of employees assigned to each event (Breaks and Tasks) for each Position/Location/Shift combination.

Click on the icon for "Tasks Summary". This will display the following screen.

Start Date – The Tasks Summary (by number) report would print for this date. Click on ▦ to open the calendar, and then select a date from the calendar.

Summary By – You can either display the number of employees on each task or the names of the employees.

Group – Only system administrator can select a group otherwise you see the group you logged in.

By default All positions and All locations are selected for the selected group.   Click on "Group Filters" bar to select the positions and locations for printing to expand selection box.
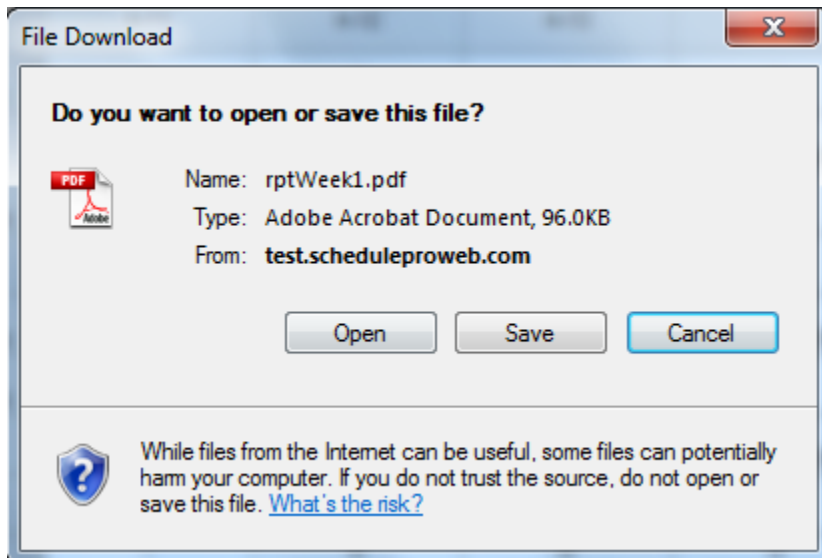
Position – Select the positions for printing

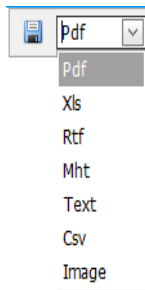**Location** – Select the locations for printing

View Report – Click on this button to preview the report on the screen. The report can be printed or exported from the preview screen.

To print from the preview screen, click on in to display the following

Click on Open to open the report in PDF format. Then the report can be printed. You can also click on Save to save the report in PDF format on your disk.

In the dropdown list in select Xls

to save the file in Excel format.

19.15 Skill Summary

This report prints skill set summary for each Position/Location/Shift combination.

Click on the icon for "Skill Summary". This will display the following screen.

Skills Summary

Start Date

04/11/2011

Shift

D - Day Shift (7A-3P)

Location

A - Location A

Position

MGR - Manager

Summary By

◉ Number   ○ Employee

View Report

Start Date – The Tasks Summary (by employee) report would print for this date. Click on ⊞ to open the calendar, and then select a date from the calendar.
Shift – Select the shift from the list for which you wish to print the skill summary for.
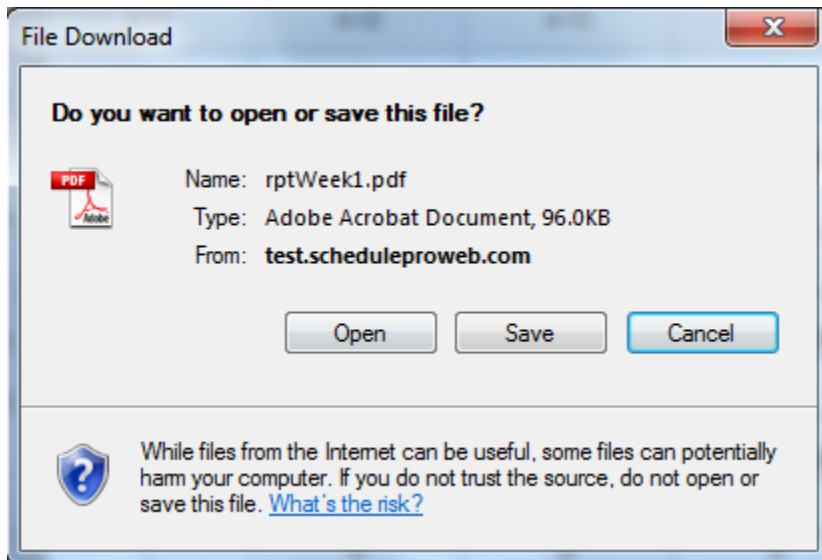**Location** – Select the location from the list for which you wish to print the skill summary for.
Position – Select the position from the list for which you wish to print the skill summary for.
Summary By – You can either display the number of employees on each skill or the names of the employees.
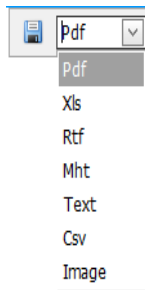
View Report – Click on this button to preview the report on the screen. The report can be printed or exported from the preview screen.

To print from the preview screen, click on 💾 in 💾 Pdf ⌄ to display the following

Click on Open to open the report in PDF format. Then the report can be printed. You can also click on Save to save the report in PDF format on your disk.

In the dropdown list in select Xls

to save the file in Excel format.