Advanced Tracker Technologies Inc.
Scheduling

Overview
This document explains the various types of scheduling available in Employee Tracker.

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Setup

Employee Specific Scheduling Items

Setup->Employees

Under the menu, highlight an employee and click the [Edit] button. In the upper-left box, scroll down and select “Schedule”. Here we have an opportunity to define some employee specific scheduling items.

The Schedule Post Date is the date which posting of schedule patterns is to begin. Patterns and posting of patterns to an employee are discussed below.

The “Override time calculation rule on scheduled days-off” features are covered in the Scheduling unit.

A specific Scheduling Designation can be assigned to each employee. This designation comes into play during the “Throw-and-Catch” method of schedule substitution. Read more about this below. Available designations are “Full Time Positional”, “Part Time Positional” and “Casual Replacement”.

Substitution Reasons

Setup->Schedule->Substitution Reasons

Substitution Reasons are used to explain why an employee is absent. These codes will be used to track why a substitution took place, and are used later within the schedule itself.

On the first screen we are presented the opportunity to administer the Substitution Reasons. Here we can add, edit or delete substitution reasons.

The elements which make up a Substitution Reason are nothing more than a code and description. These are used later for the purpose of filtering during Substitution reporting.

Schedule Patterns

Setup->Schedule->Schedule Patterns

The fundamental building block for a schedule within Employee Tracker is the Schedule Pattern. The patterns are of user-defined length and consist of either static or dynamic content.

On the first screen we are presented the opportunity to administer the patterns. Here we can add, edit, delete, copy and rename patterns.

Click the [Add] button and we’ll see how to build a schedule pattern. First off, as with any element within Employee Tracker, we need to assign a code and description to the pattern.

Just to the right of the description is a breakdown of the current length of the pattern. Freshly added patterns default to 7-days worth of information. This pattern length can be adjusted by using the [Add Week], [Delete Week], [Add Day] or [Delete Day] buttons found on the bottom of the window. We can observe the pattern counters increase or decrease depending on the buttons used to adjust the pattern.

This entire pattern whether the default number of days has been adjusted or not, is blank. A double-click on a “day” allows us to fill in some information.

There are three types of days we can create: scheduled days, absent days or holidays.

Schedules consist of three elements: a shift, a department and a position. For the shift, we can either select a predefined shift, or we can select to “< Take Employee’s Home Shift >”. This special case option allows for creation of dynamic patterns which, when posted against an employee, will drill-back into their employee profile and take the home shift for that particular employee. Department also allows for either selection of a predefined department, or to “< Take Employee’s Home Department >”. Lastly, position gives us three different possibilities. Again, selection can be a predefined position, to “< Take Employee’s Default Position >” or “< Apply No Position >”.

Absents have three elements as well: the absent code to use, the amount of absent time, and the amount of time to pay. Some absent codes can be setup to not allow for payable time against them. When these absent codes are selected, the “Paid Time” box becomes disabled and forces pay time to zero hours.

Holidays only take two elements to define them: the holiday, and the pay time. Typically, statutory holiday records are input via the Holiday Pay run, which allows for a batch-input of the transactions. Some special case industries, such as healthcare, force employees to take their holidays on various days throughout the year, making certain that the day of the holiday still has staff available. This is probably the only situation where having a holiday in a schedule pattern makes sense.

Once we have some details in our pattern, we have some options available to quickly adjust the contents of the days. Right-clicking on a day will bring up a menu allowing us to Copy, Tag, Paste, Copy/Tag or Clear.

Copy
This places a copy of the days’ details in the internal clipboard.

Tag
This begins or ends tagging of multiple days. Tagging is a method to quickly paste a previously copied day to many days in one step, overwriting any previous content.

Paste
This places the contents of the internal clipboard onto the selected day, overwriting any previous content.

Copy/Tag
This two-in-one option will copy the selected day, and begin a tag for multiple day pasting.

Clear
This will remove any details from the selected day.

Employee Availability Patterns

Setup->Schedule->Employee Availability Patterns

Employee availability will keep an on-going record of who is available to work, and under what circumstances. You create patterns for groups of employees, or individual circumstances, and then post them to the employees. You will use these patterns, when your building schedules or substituting employees that are not showing up for work.

A good majority of your staff are probably available seven days a week, twenty-four hours a day. This would be a good starting point for a pattern. You will post this pattern to your employees. The employees that don't fit this pattern will have to have other availability patterns created for them.

The first screen is where you would add, edit, copy or delete these Availability Patterns.

An Availability Pattern is not as dynamic as the schedule patterns discussed above. These patterns consist of little more than the start and stop time an employee would be available throughout a typical week.

Let's walk through an example. Click the [Add] button. Of course, the first thing we need to do is enter a code and description.

Next we have the chance to decide what the starting day of the week is for this pattern. Click the drop down to select the day on which the week begins.

You might make up a pattern for employees who are available Monday through Friday, from 07:00 to 15:30. To do this, check ON the appropriate days of the week, then enter the times FROM and TO that an employee would be available.

Budget Patterns

Setup->Schedule->Budget Patterns

The scheduling module of Employee Tracker allows for hours budgeting by department only. Essentially, a department is given an amount of hours per day, and certain schedule operations and reports use these budgeted hours for man-power allocation checks.

The maintenance of Budget Patterns occurs on the first screen. From here we can add, edit or delete budget patterns, which we can post to certain departments later.

Click the [Add] button and we can see what constitutes a Budget Pattern. Like all major elements in Employee Tracker, the code and description are mandatory.

Next we have the chance to decide what the starting day of the week is for this pattern. Click the drop down to select the day on which the week begins.

Now you can enter the hours per day that you want built into this pattern.

Post Employee Schedules

Setup->Schedule->Post Employee Schedules

This is where we take an employee, and create a schedule for him/her by posting the schedule patterns we created above.

The top of this window is where we choose the employees we want to post scheduled patterns to. We can see in the list the employee code, name and As Of date. This is the Schedule Post Date we observed earlier under Employee Specific Schedule Items.

The Schedule Patterns discussed above were very vague on the day of the week on which the pattern starts. Here's why: Given a single 7-day schedule pattern, and 5 employees. If each employee had their As Of date different from the employee above them, by exactly one day, we could post the same 7-day pattern to them all at once, but have them all start on different days!

The As Of, or Schedule Post Date can be modified on a one-off basis from the Employee Profile. From the Post Employee Schedules screen, we can adjust the date for multiple employees at one time. To select multiple employees, hold down the Control button on your keyboard as you click on them. Now, with multiple employees selected, click the [Edit As Of Date] button. You will see one of two things: if all the employees selected have the same As Of date, this date will show in the field labeled “Current Date”. If the employees have different As Of date’s, the “Current Date” field will indicate “Varies”. A new date to assign to all the employees selected can now be entered in the “New Date” field. Click [Ok] to commit your changes.

The bottom section of the Post Employee Schedules screen is all the options associated with a particular posting operation.

First, a list of Schedule Patterns is presented in a drop-down box. Click and select the required pattern. Notice just below and to the right of the drop-down box where it indicates the number of days within the Pattern.

The Repeat field allows us to repeat the pattern a number of times. A 28-day pattern, repeated 13 times will post a total of 364 days to a person.

“Allow posting over ABSENT records” will permit the schedule posting operation to replace any existing absent days with a scheduled day.

“Allow posting over HOLIDAY records” will permit the schedule posting operation to replace any existing holiday transactions with a scheduled day.

“Roll Over As Of Date” will set the As Of dates for all the employees selected to one day advanced from the last day posted from the pattern. This will, in effect, get their schedule posting dates ready for the next post operation.

“Prompt if schedule information already exists” will ask the user each time the posting operation is about to overwrite an existing scheduled day. The user will need to indicate Yes to overwrite, or No to ignore.

“Ask for Time Bank once per employee, then use that selected bank for all bankable transactions”. This option takes effect when and if a time bank contains an absent type which could incur a withdrawal from an associated time bank. With this option turned off, each day which may incur time bank withdrawals would require the user to select the bank to use for withdrawals. When this option is on, the user only has to select the bank once per employee. Subsequent bank withdrawal will use this same selected bank.

A last item to discuss here is the [Jump To Schedule Patterns] button in the lower-left. This is a short-cut button to the Schedule Pattern administration section of the software.

Once all the required employees are selected, and the necessary options set, clicking the [Post] button will commence the post operation.

Post Master Schedules

Setup->Schedule->Post Master Schedules

If you allow your staff to pick their schedules, you must first create the master schedules that will be offered to them. The master schedules can then be posted to groups of employees or printed out and posted on a bulletin board for employees to pick (usually based on seniority).

The top portion of the Post Master Schedules screen allows for adding, editing or deleting of Master Schedules. At this point, a Master Schedule is nothing more than a code and a description.

Once we have some Master Schedules created, we can post to them by moving them from the left “Available” side, over to the right “Selected” side of the screen.

The lower section of the screen is the posting options. Here we can select a schedule pattern to use, the number of times to repeat the pattern, and the date we want to start the pattern on.

Note: The schedule patterns used for Master Schedules must contain defined shifts, departments, and positions, not “take employee default” information.

Once the Master Schedules and options are selected, you can click the [Post] button to commence the posting operation.

Post Employee Availability

Setup->Schedule->Post Employee Availability

The screen allows us to take the Availability Patterns we defined above and batch-apply them to a number of employees’ availability calendars.

First, ensure the employees you want to post to are all listed under “Selected Employees”.

Because we defined a specific day of the week start for each independent pattern, the date selection only allows for dates beginning on that day of the week for posting. Key in the year you want, and the drop-down immediately to the right will auto-populate with all the days in the year which occur on that day.

Choose your availability pattern from the drop-down, as well as the number of times you want to repeat the pattern.

Once all these items are set as you want them, click the [Post] button to commence the posting procedure.

Post Budgets

Setup->Schedule->Post Budgets

This screen allows us to take the Budget Patterns we defined above and batch-apply them to a number of departments.

First, ensure the departments you want to post to are all listed under “Selected Departments”.

Because we defined a specific day of the week start for each independent pattern, the date selection only allows for dates beginning on that day of the week for posting. Key in the year you want, and the drop-down immediately to the right will auto-populate with all the days in the year which occur on that day.

Choose your budget pattern from the drop-down, as well as the number of times you want to repeat the pattern.

Once all these items are set as you want them, click the [Post] button to commence the posting procedure.

Operations

Crew Scheduling

Operations->Schedule-> Crew Scheduling

Crew Scheduling is one of the many flavors of scheduling available in Employee Tracker. With Crew Schedules, a pre-defined template is generated by the user, and this template is used on a week-by-week basis to ensure that the facility has full coverage.

The initial setup and configuration of the crewing template can be very tedious, but once this template has been defined, it is re-used on a weekly basis. In essence, the goal of setup is to completely map out every possible department, position and shift relationship. The crewing schedule makes use of “crew shifts” and “crew positions”, which can be used to generate multiple slots in a day which relate back to a master shift or position, respectively. Once defined, scheduling becomes a simple drag-and-drop operation.

Before jumping into the actual Crew Schedule, we need to define two elements: the shift periods, and the crewing template.

Shift Periods

The shift periods are the 'Crew Shifts' that the employees will be assigned to for the week.

From the main Crew Scheduling window, click the menu Setup->Shift Periods. From here we are able to add, edit or delete the shift periods, adjust their sequence via the up and down arrow buttons, or generate a report of the current shift period definitions.

Click the [Add] button to see what defines a shift period. Of course, a code and description are required, as well as the days of the week that the shift period will apply to.

Crewing Templates

The crewing templates define how each department breaks down. A department may contain several ‘Crew Positions’, which in turn will contain shift assignments.

From the main Crew Scheduling window, click the menu Setup->Crewing Templates. Here we can add, edit or delete the crew templates, adjust their priority via the up and down arrow buttons, or generate a report.

The primary element within crewing templates is the department. Within each department, we define numerous “crewing positions”. These crewing positions are used only within crew scheduling. The importance of using crewing positions is that multiple crew positions can relate back to one position as used throughout the rest of the system. For example, I may have an actual position of “COOK” with an applicable pay scale. Given a requirement to have 5 cooks on hand at any time, I would setup a crewing template COOK1, COOK2, COOK3, etc, all relating back to my primary COOK position.

If we click the [Add] button, we are permitted to add one of two things: either a heading, or a crewing position.

A heading is nothing more than a way to break and document the crewing template. Any number of headings can be created. Of course, a code and description is required. Double click the square to the right of the code for selection of a color for the heading.

A crewing position also requires a code and description. Double click the square to the right of the code for selection of a color for the position. Next is to relate this crewing position back to an actual master position. Lastly, association of the various Shift Periods (see above) to master shift codes. These associations are adjustable per crewing template.

With the crew shifts, crew positions and departmental relationships all setup, we're ready to start scheduling. From the main Crew Scheduling window, make sure you have the employees you want to work with selected through the specification buckets, and select a start date. Crew Schedules work in combinations of 7 days, so you will only be able to adjust the "From" date. Once this is all looking good, click the [Ok] button.

The Crew Scheduling window has several parts. The very top contains 3 lists: Absent, Work Area and Available.

Any employee who has an absence within the selected date range will appear under "Absent". These employees should probably not be moved about and scheduled. The determination of whether to be able to drag and drop these people around is governed by the "Lock Absence" switch immediately under the absent list. If this switch is on, the employees listed cannot be moved.

The "Work Area" can be used to hold some employees while getting the details of where everybody should go. You can drag-and-drop anybody into the work area for later use.

The "Available" list is all the employees who are not absent, not scheduled, or not currently in the work area. Yes, these people are available for scheduling!

Just below the Work Area list is a button labeled "Detailed". You'll use this later on, once you get some employees scheduled, to get a detailed view of how the week is shaping up, day by day.

Next, working down, is the department selection. You can use the drop-down to select a particular department. The buttons surrounding the department drop-down can be used to scroll through the department list, which is order by department code. The [<<] button will take you to the top of the list, the [<] will move to the previous item in the list, and subsequently, the [>] will proceed to the next item in the list, and [>>] will move to the bottom.

As you select departments, you'll notice the next section adjust per the setup performed with the crew shifts, crew positions and department relationships. Down the left side will be listed any headings and crew positions defined, with the appropriate crew shifts across horizontally. Any cross-section of a crew position and crew shift in the grid is a place where you can drag-and-drop employees. If the spot is empty, the employee currently being dragged will appear in that location. If the spot is already taken by an employee, you'll get a message box asking if you wish to replace the employee. If you answer yes, the new employee will take the spot, and the old employee will follow your mouse, allowing you to drop him or her somewhere else. This is a situation where the work area may come into play.

In the lower left of the Crew Scheduling window is our current date range. This will always cover 7 days. The user is permitted to adjust the "From" date, and the "To" date will automatically change to cover 7 days. The [<<] button to the left of the "From" date allows you to jump to the previous week. The date selection button can be used to change the "From" date as well. Finally, the [>>] button will increment the "From" date to the next week region.

The lower right section of the screen contains a series of buttons.

Calendar
This button is a short-cut to the monthly schedule calendar.

T & A
Shortcut to Edit Time and Attendance Transactions

Copy
Places the entire 7-day schedule for all departments to an internal clipboard. These contents can then be pasted (see below) into another week.

Paste
Places the contents of the internal clipboard to the current week.

Clear
Removes any schedule information. Clicking this button will bring up a question to clear the current department only, or all departments, for the entire 7-day selection.

Refresh
At times, as with many applications, information you are working on may need to be manually refreshed. This button accomplishes that feat.

Post
Schedule information on the Crew Schedule is not immediately considered live. You can work with multiple departments, making any changes necessary, then post these schedule adjustments to the "live" schedule using this button.

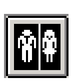
Print
Will produce a hard-copy of the current Crew Scheduling date range for the selected departments. The options for printing are very specific layouts geared towards Crew Schedules. Once the crew schedules are posted, the generic schedule reports (see below) can be used.

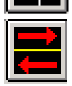
Ok
This will save the current Crew Schedule assignments. Use this to save your work in progress if you need to get out of Employee Tracker. You can continue your work later, then post live when ready.

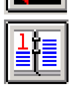
Exit
Leave Crew Scheduling.

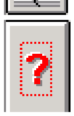
Schedule Calendars

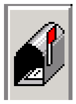
There are buttons which appear on the different monthly schedule calendars, and these will be discussed now.

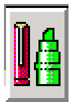
 Show drop-down to select new employee or master

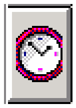
 Return to previous date, employee or master

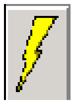
 Show date selection

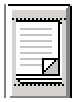
 Calendar legend

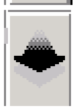
 Shortcut to posting procedure

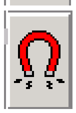
 Toggle between bright or light colors

 Toggle shift information display as shift code or shift times

 Shortcuts to other schedule displays

 Schedule Inquiry

 Schedule moving operations

 Catch any thrown shifts

Master Schedule Calendar

Operations->Schedule-> Master Schedule Calendar

The Master Schedule Calendar is where you go to view and fine-tune the master schedules. The first screen you are presented with shows a current list of master schedules, and allows for selection of a date to view. The date selection here only requires the month and year, since the Master Schedule Calendar displays one month at a time.

Clicking the [Ok] button will bring up the master schedule details.

Here we see a calendar representation of the current master schedule. On the top we can see which master schedule we're looking at. Below that is the current month and year we're viewing.

Down the right side of the screen are various buttons, which are discussed above.

The calendar can be double-clicked to edit the details. The details of a day within the master schedule calendar are made up of one of three record types: absent, holiday or schedule records.

> Absent
> Absent transactions contain an absent code, an amount of absent time, and an amount of paid time.
>
> Holiday
> Holiday transactions contains a specific holiday and an amount of holiday pay time.
>
> Schedule
> Schedule transactions contain a department and a shift

There's also some functionality present within the Master Schedule Calendar which makes maintenance of the schedules a bit more flexible. These are available by double-clicking on a day. These extra functions are:

Copy
This places a copy of the days' details in the internal clipboard.

Tag
This begins or ends tagging of multiple days. Tagging is a method to quickly paste a previously copied day to many days in one step, overwriting any previous content.

Paste
This places the contents of the internal clipboard onto the selected day, overwriting any previous content.

Clear
This will remove any details from the selected day.

Assign Master Schedule

Operations->Schedule-> Assign Master Schedule

This is where employees are assigned to previously defined Master Schedules. Once all the employees have picked their schedule, you can review all their selections; make any adjustments necessary to fill all the required shifts etc. It is then assigned to the employee or group of employees.

The top of the screen allows for selection of employees who we want to work with. Two options appear just to the left of the employee list: "Show All" and "No Absence". When an employee gets assigned to a master schedule, they get removed from the list. This process aids in ensuring that each employee gets assigned to one master schedule only. You can temporarily view any employees who have already been assigned using the "Show All" option. The "No Absence" option will not list any employees who have absent transactions within the selected date range (see below).

Immediately below the employee list is some options for ordering of the employee list.

Next, working our way down, is the list of master schedules. Much like the employees, when a master gets assigned, it is removed from the list. The option to the left of the master schedule list labeled "Show All" allows for overriding this behavior and view all master schedules regardless of assignment. This option is used if several employees are expected to be assigned to the same master schedule.

The lower left corner of the screen contains a button [Clear Assignments] which is used to clear all assignment flags and display all employees and master schedules.

Lastly is the date range which will be used to populate the employee schedule from the master schedule. Intelligent use of the date ranges also allows for portions of master schedules to be assigned to different employees.

All that out of the way, assignment is simple: select an employee from the employee list, select a master from the master schedule list, ensure your date range is set as expected and click the [Assign] button.

Employee Availability Calendar

Operations->Schedule-> Employee Availability Calendar

The Employee Availability Calendar displays a summary of the selected employee's times that he/she is available to work. This operation is used to fine-tune the availability schedules for any one-off circumstances which could not be handled via the Employee Availability Patterns and Posting steps described earlier.

The first screen allows for selection of the employees whom you want to have a look at, as well as the month and year to view. Click [Ok] once these items are set.

The Availability Calendar is pretty simple. Any day with data will appear green with two lines. The top line being the start time of availability for the day; the bottom line being the end time of availability for the day.

Double-click on any day to either set or adjust the availability.

There’s also some functionality present within the Employee Availability Schedule Calendar which makes maintenance of the schedules a bit more flexible. These are available by double-clicking on a day. These extra functions are:

Copy
This places a copy of the days’ details in the internal clipboard.

Tag
This begins or ends tagging of multiple days. Tagging is a method to quickly paste a previously copied day to many days in one step, overwriting any previous content.

Paste
This places the contents of the internal clipboard onto the selected day, overwriting any previous content.

Clear
This will remove any details from the selected day.

Budget Calendar

Operations->Schedule-> Budget Calendar

The Budget Calendar a visual display of what has been budgeted for a Department versus what has actually been scheduled. You can make changes here to adjust the number of budgeted hours to accommodate the amount of scheduled hours.

The first screen allows for selection of the departments you want to have a look at, as well as the month and year to view. Click [Ok] once these items are set.

The Budget Calendar is pretty simple. Any day with data will appear in one of four possible colors: Green for on budget, yellow is under budget, red if over budget and blue if incomplete.

Double-click on any day to either set or adjust the amount of hours budgeted for the selected department for that one day.

There’s also some functionality present within the Employee Availability Schedule Calendar which makes maintenance of the schedules a bit more flexible. These are available by double-clicking on a day. These extra functions are:

Copy
This places a copy of the days’ details in the internal clipboard.

Tag
This begins or ends tagging of multiple days. Tagging is a method to quickly paste a previously copied day to many days in one step, overwriting any previous content.

Paste
This places the contents of the internal clipboard onto the selected day, overwriting any previous content.

Clear
This will remove any details from the selected day.

Daily Schedules

Operations->Schedule-> Daily Schedules

The Daily Schedule is designed to assist with day-to-day scheduling activities. It's not going to be the best solution to deal with multiple days, for as the name implies, this operation allows for scheduling on a daily basis.

The first screen allows for selection of employees and a date to work with. There are some special setup steps necessary before delving in. In the upper left corner, observe the menu "Setup". There are two things to perform here.

Department Association
Daily schedules are viewed by department. Within each department, a list of all the possible positions which could be worked are listed. It is here that we define these department/position relationships.

The Department Position Association screen contains a drop down box at the top, which will contain all the departments' setup within the system. For each department, click the [Add/Remove] button in the lower left. This will display a checked list of all the positions. Check the positions which are to be associated with this department. When you are finished, click the [Done] button to commit your changes.

Repeat for all departments.

Position Color Scheme
To make things a little easier to read, it's possible to assign colors to the positions per department. The Associated Position Color Scheme screen contains a drop down box at the top, which will be populated with all the departments setup within the system. As you select the different departments, the positions we associated with the departments (see above) will be listed. A double-click in the "Colour" column will bring up a color selection dialog box, which can be used to select the colors.

Repeat for all positions per all departments.

With these setup pieces in place, some employee selected and a date entered, click the [Ok] button to get to the main screen for Daily Scheduling.

This screen has several sections. The top-left is a date selection space, which indicates the current date we are viewing scheduled information for. To the right is the list of available employees. To the right of the available employee list, we have another method to iterate through the dates, using the [<] and [>] buttons. Below this some options. "Edit New Time On Drop" will bring up a detail screen when we drag-and-drop an employee into the scheduling grid. We can also choose to display the times of day as "12 Hour" or "24 Hour". The "Full List" option toggles between a filter on the available employees based on the selected department. If this option is not on, only employees who are set to the home shift we have selected will be visible. When this option is set, all employees selected on the first screen are displayed. The last three options detail what we want to see on the daily schedule. “Sched” being schedule records, “Absent” to display absent transactions, and “Holiday” to show any holiday time.

The department drop down allows us to choose the department we want to view and possibly adjust schedule information for. Use the [<<] button to quickly move to the top of the list, the [<] button to move to the previous department, the [>] button to move to the next department, and the [>>] button to move to the bottom of the list.

Just to the right of the department controls are some informational counters. The first one, “Budgeted” reflects the number of hours that have been budgeted for the current department for the current day. Budgeting has been covered earlier. The “Scheduled” counter shows how many hours have been scheduled so far in the current department. The “Left” counter is the number of hours left to schedule to achieve the expected budget. These are for your information only, and the use of Daily Schedules does not hinge on budget information. The only drawback to using Daily Schedules without the budgeting information would be your “Left” value would be in the negative all the time.

Monthly Schedules

Operations->Schedule-> Monthly Schedules

The Monthly Schedule presents the schedule information in a one employee, one month calendar view. The first screen presents a list of employees, a date or range and some options. Let’s go over these options now:

The first two options are mutually exclusive: selecting one unselects the other. “Open Employee Schedules” requires a date entry of where to start viewing. Once viewing the schedule information, the user can move to any date they want, unrestricted. “Closed with To/From Date” is more restrictive. With this option, the user must enter a From and To date combination, and viewing of months is limited to this range. This option may present a bit more responsiveness from the scheduling system, as the amount of information loaded is reduced.

“Inter-Department Substitution Check First” tunes the substitution engine (which we’ll discuss very shortly) to check for substitutes within the department from which the original employee belongs. If the search within the department does not bear fruit, Employee Tracker will query the user if they wish to continue searching outside the department.

“Treat absent and holiday records similar to standard scheduled days in regards to copy/paste operations”. Logically, an employee cannot be absent without first being scheduled to work. By default, Employee Tracker does not allow for pasting of absent or holiday transactions on non-scheduled days. This switch can override that behavior and allow for pasting of absent or holiday records on non-scheduled days.

Once you have your employees and dates set, click [Ok] to view the Monthly Schedule Calendar.

There are four basic record types available within the Monthly Schedule Calendar: schedule, absent, holiday and substitution.

> Schedule records are colored green, and are comprised of a shift, a department and a position. Advanced users can override the defined shift start and stop times to make things more flexible.

Absent records are colored red, and are comprised of an absent code, a position, an amount of absent time and an amount of paid time.

Holiday records are colored blue, and are comprised of a holiday and an amount of paid time.

Substitution records are not adjustable, and mark an instance of substitution. These transactions are colored purple.

One of the most powerful features of a scheduling system is it's ability to substitute scheduled shifts. Employee Tracker has two major methods for accomplishing this, on top of doing it manually.

Using Substitution Records
This method of substitution assumes the presence of a scheduled transaction. Double click on the scheduled day, bringing up the details. Now, in the lower-left corner, click the drop-down box and choose "Substitute". This will kick off a search of any potential substitutes for this particular set of scheduled day details.

The searching of potential substitutes has many facets. First, an eligible substitute cannot already be scheduled to work that day, and cannot have any pre-arranged absence input. Further, the employee must have defined within their employee profile the position which is scheduled. This does not have to be their default position, but the position must exist as a possible position the employee could work.

The final element for potential substitutes is availability. This is maintained via the Employee Availability Calendar. In essence, the employee must be available for the times of the shift. For example, an employee available from 7:00 am to 7:00 pm cannot possibly work a 5:00 am – 2:30 pm shift.

Any suitable potential substitutes will be listed in the "Emp" drop down. Clicking on somebody in this list will immediately take you to a screen used to log calls. If the employee has agreed to work the shift, click [Ok] from the call screen, then [Ok] again at the schedule details screen. If the employee declined to work the shift, select another employee from the list until somebody says yes.

Throw and Catch Substitution
The Throw and Catch method of substitution contains several advanced options allowing for fine-tuning of the substitute search engine. It also has the advantage of allowing for throwing of multiple shifts, and dealing with the assignments of these thrown and available shifts later.

As with the Substitution Record method described above, this method starts with a scheduled day already input into the system. Double click on the scheduled day, and in the lower-left corner of the schedule details window, click the drop down and choose "Absent". What we're about to do is make our original employee absent, throw the shift and catch it later on. When the details for the absent record come up, select an absent code, and enter an amount of absent time and paid time (if a payable absence). Notice a new switch available: "Throw". Turning this on will throw the underlying schedule day prior to adding the absence. Click the [Ok] button and the absence will appear.

Now, assume we've thrown all the shifts we need to, and we're ready to have some employee catch them. On the toolbar down the right side of the Monthly Schedule Calendar, click on the catch any thrown shifts button.

The top half of the Thrown Shifts screen lists all the currently thrown shifts. Details per thrown shift include: date, shift code, position, department, start time, stop time and original employee. To the right of this list is an option “Show All”. As shifts get caught by employees, they will be removed from the list. This option allows for viewing of all thrown shifts. The [Dismiss] button can be used to remove a shift thrown in error. Highlight the shift in question and click the dismiss button to remove it. As with previously assigned shifts, any dismissed shift can be brought back into the list via the “Show All” option.

The bottom half of the window contains a list of employees. As you click on available thrown shifts, the list of available employees will adjust to display any potential substitutes for the selected shift. The details listed for the employees include employee code and name, hire date, phone number, designation and default position.

With employees listed after clicking an available thrown shift, we can call the employee by highlighting him or her, and clicking the [Call] button. The window which appears from this button contains all the phone numbers for the employee, as well as a place to key in some notes about the call. At the conclusion of the call, the employee will either have accepted or declined to work the shift. If the employee accepted, make sure he/she is still highlighted and click [Pass]. If the employee has declined to work, again make sure he or she is still highlighted and click the [Decline] button.

Certain situations may require the throwing of a shift which has not at first been scheduled to an employee. This is done via the [Throw…] button in the lower-left of the Thrown Shifts screen. A new thrown shift requires a date, a shift, potentially an override of the start and stop times, a department and a position. Once this information is entered and the [Ok] button clicked, this new shift will appear in the list of available thrown shifts.

Now that we understand the principles of throwing and catching shifts, we can fine tune how Employee Tracker determines which employees could be potential substitutes. In the top left corned of the thrown shift window is a menu labeled “Options”. Click on this menu and select the sub-menu “Filters”.

Here we determine how the substitute search will work.

“Ignore availability and show any employee who fits the shift” will not use the availability calendar details to determine a suitable substitute.

“Allow employees who could incur overtime” allows the search engine to take into account employees who are already scheduled to work on the day. For example, if an employee is scheduled to work from 6:00 am to 2:30 pm, and we have a thrown shift running from 5:00 pm to 11:00 pm, having this switch on will show this employee in the list.

“Omit employees who have declined to work” will remove employees from the list of available employees when they decline to work a particular shift. This setting is thrown-shift dependant. Declining work on one available thrown shift does not assume declination on any other thrown shifts.

“Allow partial day coverage” will analyze any currently scheduled shift and the thrown shift. If any portion of the thrown shift can be covered, the employee is a potential for substitution. For example, if an employee is scheduled from 6:00 am to 2:30 pm, they would not be available for partial coverage on another 6:00 am to 2:30 pm shift. But, in the same scenario, the employee would be available for partial coverage of a 11:00 am to 7:00 pm shift. There are two sub-options for this one: “Ignore days with absent records” will omit any employee from partial coverage if they have an absent record on that day.

Similarly, “Ignore days with Holiday records” will omit any employee from partial coverage if they have a holiday record that day.

“Allow substitutes from other positions”. Standard substitution checks verify that any potential substitutes are trained in a particular position. This option will remove that restriction and list substitutes irregardless of the positions trained.

Below these advanced options is the ability to limit who appears as potential substitutes via the Schedule Designation we saw earlier under Employee Specific Scheduling Items.

As well, to the right, we can limit the potential substitutes via status designation. Using the status limits, we can avoid having any terminated employees appear.

Once you’re satisfied with the options, click the [Exit <<] button to see how the available employees are affected by these options.

The Schedule Move button along the right side toolbar has several features for dealing with employee schedules. Here we must choose both a source and destination employee. The actions permitted are Copy, Move, Replace and Swap. All of these operations can be performed on a range of dates.

Copy will replicate the source employees’ schedule information on the destination employee.

Move will replicate the source employees’ schedule information on the destination employee, then clear out the schedule for the source employee.

Replace will replicate the source employees’ schedule information on the destination employee, then add the selected absent code for any scheduled days in the range.

Swap will replicate the source employees’ schedule information on the destination employee, and replicate the destination employees’ information on the source employee.

Once you have the options as you want them, click the [Go] button to commence.

Once we have some details on our schedule, we have some options available to quickly adjust the contents of the days. Right-clicking on a day will bring up a menu allowing us to Copy, Tag, Paste, Copy/Tag or Clear.

Copy
This places a copy of the days’ details in the internal clipboard.

Tag
This begins or ends tagging of multiple days. Tagging is a method to quickly paste a previously copied day to many days in one step, overwriting any previous content.

Paste
This places the contents of the internal clipboard onto the selected day, overwriting any previous content.

Copy/Tag
This two-in-one option will copy the selected day, and begin a tag for multiple day pasting.

Clear
This will remove any details from the selected day.

Post Time History From Schedules

Operations->Schedule-> Post Time History From Schedules

The Post Time History From Schedules operation allows for generation of time-type transactions from a schedule. This batch process can be used to record times for salary employees, or generate completed records for employees in the event of some catastrophic event which has caused massive data loss.

The options for posting of schedule information into time history are straight forward: select the employees you want to post to, and a date range.

A couple of advanced options are available as well. “Overwrite existing records posted from schedule” allows you to perform a post, go back into the schedule and make some adjustments, then re-post the same employees and dates. The old time records will be removed prior to the new ones being added. “Do not create a TIME record if a day contains an ABSENT record” disregards any days with absent transactions for generation of a time record from schedule information.

Once you’re happy with the employees and dates, as well as any advanced options, click the [Post] button.

Once these transactions are posted, they are sitting there uncalculated. You will be asked after the post completes if you’d like to perform a recalculation on these transactions immediately. You may choose to do the calculation at a later time.

Schedule Inquiry

Operations->Schedule-> Schedule Inquiry

The Schedule Inquiry allows you to view what has been scheduled for a particular day. You simply specify the month and day, then choose to view the schedule by Department, Position or Shift. A list of the employees scheduled will appear in the grid. This is a useful feature for making sure all departments, positions and shifts are covered for a particular day.

The first options we have available is whether to view the Schedule Inquiry by Department, Position or Shift. This is changed via the three options in the upper-left corner of the window. Depending on the selected value, the drop down box to the right of the options will change and populate. Whichever item is populated in the drop down box, the [Previous] and [Next] buttons directly under the drop down box can be used to cycle through.

The upper right corner contains two fine-tuning options: “Show Absent Employees” which toggles between display of any employees who have an absent transaction on the date selected; and “Show Dollar Totals” will output a projected total amount of pay for the shift times based on the employees’ rate.

Under these options are the guts of the Schedule Inquiry. The left contains a calendar which can be used to select the current view date.

The grid contains the scheduled details for the particularly selected item.

There is also the ability to [Print] the Schedule Inquiry.

Reports

Schedule Patterns
Reports->Schedule Reports->Schedule Patterns

This report will output the layout of the various Schedule Patterns within the system. These are the patterns used to post to Employee Schedules.

Employee Availability Patterns
Reports->Schedule Reports ->Employee Availability Patterns

This report will output the layout of the various Employee Availability Patterns within the system.

Budget Patterns
Reports->Schedule Reports ->Budget Patterns

This report will output the layout of the various Budget Patterns within the system.

Employee Schedules
Reports->Schedule Reports ->Employee Schedules

This report will output the posted Employee Schedules using a number of different layouts. No matter which layout you choose, all of the Employee Schedule Reports will require the selection of the employees to include, as well as a date range to report on.

Calendar
The calendar layout puts a month of schedule information for one employee per page. You can further choose to include substitutions, absenteeism and holidays on the report.

Spreadsheet
The spreadsheet layout has several sub-layouts available.

- 1 week per page using legal paper
- 2 weeks per page using letter paper
- 1 month per page using legal paper
- 1 year per page using legal paper

*****Note***** Make sure you load your printer with legal (8.5” x 14”) paper if you select one of the reports which requires it!

We also have several options available as to what details should be included in each spreadsheet “cell”. The options are

- Position/Start/Stop – Displays the position code, and scheduled shift start and stop times
- Shift/Start/Stop – Displays the scheduled shift code, and scheduled shift start and stop times
- Department/Start/Stop – Displays the scheduled department, and scheduled shift start and stop times
- Position/Department/Shift – Displays the scheduled position, department and shift codes

- Start/Stop/Time – Displays the scheduled shift start and stop times, and the adjusted expected scheduled worked time
- Shift/Department/Time – Displays the scheduled shift and department codes, and the adjusted expected scheduled worked time.

There is also an option to include the expected total dollar amount in place of any scheduled worked time.

Crewing
The Crewing report requires the use of the Crew Schedule (see above) for proper schedule representation. The only option available is a Revision Number which is printed on the Crew Schedule Report to denote new versions of the schedule.

Summary
The Schedule Summary will break down the date range and employees' specified into their scheduled departments and display the total number of hours scheduled for that department. Depending on the security settings, total dollars can also be shown.

Positional Weekly Schedule

Reports->Schedule Reports ->Positional Weekly Schedule

The Positional Weekly schedule takes the relationship between scheduled shift, department and positions and generates a view of schedule information based on these relationships.

Master Schedules

Reports->Schedule Reports ->Master Schedules

Employee Availability

Reports->Schedule Reports ->Employee Availability

Scheduled/Non Scheduled Employee List

Reports->Schedule Reports ->Scheduled/Non Scheduled Employee List

Schedule Substitution

Reports->Schedule Reports ->Schedule Substitution

Schedule vs. Actual

Reports->Schedule Reports ->Schedule vs. Actual

Advanced Features

Scheduled Days Off

It is possible to setup Employee Tracker to automatically alter the time calculation rule if an employee was to come into work on a day off. This requires strict use of the scheduling system in order to let Employee Tracker know what days are scheduled for work, and what days are scheduled for no work.

Three levels of tuning are available for setting up Scheduled Days Off: System default, per status code and per employee.

System default settings are the default for everybody, and are found under the menu Utilities->Customize Software. Select the "Schedule" tab and observe the state of the "Override time calculation rule on scheduled days-off" option. If this is on, the rules specified for First, Second and Third day off will be assigned to employees who work on an unscheduled day.

The global settings can be further refined per status code. Under the menu Setup->Employee Status. Highlight a status entry and click [Edit]. Here we also have an "Override time calculation rule on scheduled days-off" option which is applicable to all employees in the defined status. These settings will override the global settings.

Now we can tune an individual employee. Under the menu Setup->Employees, highlight an employee and click the [Edit] button. Select the "Scheduled" category in the top-left list and again we have the "Override time calculation rule on scheduled days-off" option. These settings are specific to this employee and override both the system wide and status settings.

Advanced Throw And Catch Substitution

Activation

The advanced Throw And Catch substitution interface is not activated by default. To activate the advanced interface, log into Employee Tracker as MASTER. Under the menu Utilities->Policies, select the 'Schedule' category and double click on the 'Advanced Throw And Catch Substitution' policy. When active, a checkmark will appear beside the policy title.

Access

The Throw and Catch interface is accessible via the Monthly Schedule only. You can get to the Monthly Schedule via the menu Operations->Schedule->Monthly Schedule. Once viewing an employees' schedule for the month, observe the button on the right hand side with the horse-shoe magnet. This button will bring you to the Throw And Catch Substitution interface for both standard and advanced.

Layout

The Advanced Throw And Catch Substitution window is divided into two parts. The top section lists the thrown shifts and the bottom section populates with possible employees when the user clicks on an un-assigned, un-corrupt, un-dismissed thrown shift.

Conditions

Options->Conditions

The conditions govern the selection of possibly employees for the thrown shift. From this screen the user can tighten or relax the canvassing rules.

> **Minimum Accepted Coverage**
> This setting allows for selection of the amount of the thrown shift which a possible

employee is able to cover. If set at 100, any possible employees must be available and free to work 100% of the scheduled shift time. Reducing this to 80% would include any employees who can cover down to 80% of the scheduled shift.

Omit employees who decline to work
Each thrown shift maintains it's own list of employees who have declined to work. Turning this option on will remove those employees who decline from the list, thereby leaving only employees who have yet to be asked.

Show employees who are already scheduled
By default, an employee can only be scheduled for one shift per day. Turning on this option allows for listing any potential substitutes who already have a scheduled shift on the day of the thrown shift.

Throw scheduled shift if employee takes a new schedule
This option is only available when 'Show employees who are already scheduled' is on. This option will automatically throw a previously scheduled shift if an employee accepts to be substituted for a listed, thrown shift.

Ignore Availability
The Employee Availability Schedule is another mechanism for marking when an employee is available to work extra shifts. If the availability is not setup, no employees will be listed as potential substitutes. Turning this option on will force the canvassing routine to ignore employee specific availability.

Limit To Scheduled Department
This option will limit the list of possible employees to those who are set within their employee profile to the department which the thrown shift is assigned.

Allow All Departments within *n* days of the shift
This is a sub-option of 'Limit to scheduled department' which allows for the previous condition to be ignored if the current system date is within the defined number of days from the thrown shifts' date.

Limit To Scheduled Position
This option will limit the list of possible employees to those who are set within their employee profile to the position which the thrown shift is assigned.

Allow All Positions within *n* days of the shift
This is a sub-option of 'Limit to scheduled position which allows for the previous condition to be ignored if the current system date is within the defined number of days from the thrown shifts' date.

Designation
The designation is intended to allow for grouping of potential substitutes. Each employees' profile allows for setting of an individuals scheduling designation. This checked list will allow the user to include or exclude certain employees based on this setting.

Display
Options->Display

The display menu controls the columns of information shown for each employee who is found to be a suitable substitute for the thrown shift based on the 'Conditions' settings. For the most part, the available columns are very self explanatory. Simply check the columns you would like to have shown for the employees and adjust their position using the Up and Down arrow buttons to the right of the list.

Totaling Periods

In addition to these simple information columns, users can also define Totaling Periods. The [Add], [Edit] and [Delete] buttons in the lower-left corner are used to administer the user-defined totaling periods.

The first element of a totaling period is the description, which will be used in the Display list for selection and placement, and will also appear as the column header if used in the list of available substitutes.

The next part is the type of hours to accumulate and is selected on the left side of the setup window. You can select any combination of the available hour sources.

There are two types of totaling periods supported: Anchored or Rolling.

Anchored

Anchored periods have a specific date in time that they begin at. For example, you could set a certain totaling period to the start of each pay period to possibly display scheduled hours for the pay period. Using this column and a reverse sort order, you will be given a list of potential substitutes ordered from least scheduled time to most.

Rolling

Rolling periods are dependant on the date of the thrown shift. You can, for example, setup a totaling period to show the number of hours worked for the 2 weeks prior to the thrown shift, and use this information during determinations of potential substitutes.

Whichever type of totaling period selected, both further require a number of days for the specific period.

Throw New Shift

Options->Throw New Shift

The Throw New Shift option allows for generation of a thrown shift which was never previously held by an individual. This can be useful for canvassing potential substitutes in a situation where work load is extremely high. By using the Throw New Shift option, the user will also generate the applicable record of employees who decline to accept the shift.

Right-Click Menus

Both the thrown shift list and the potential substitute list use right-click popup menus for performing actions.

Thrown Shifts

Edit

The Edit popup menu allows for adjusting a previously thrown shift. This is essential for ‘corrupt’ thrown shifts, and is a handy feature if you want to adjust the associated items on an existing thrown shift.

Show All

When Show All is not checked, only un-accepted thrown shifts and corrupt shifts are listed. When Show All is checked, all existing thrown shifts are listed including passed and dismissed.

Dismiss
Sometimes it may not be necessary to have somebody take on a thrown shift. These shifts can then be dismissed to remove them from the main list.

Clear
This is the opposite action to Dismissing. If a shift becomes dismissed but some time in the future it is determined that the shift does need filling, this option will bring it back into the fold for canvassing and assignment.

Substitutes

Call
The call menu brings up an interface allowing for the recording of a call to a potential substitute. The Call window will show the employee who is being called and their applicable phone numbers. Time and Date of the call are recorded along with a Substitution reason, the original employee and an area for free-type notes. The substitution reason will remember the selection from the last call and automatically populate the dropdown with the last selection.

The Call window has four buttons.

Decline
Will mark that the employee being called rejected taking the extra shift.

Pass
Will mark that the employee accepted the shift.

Save
Stores the call information but does not imply an acceptance or declination. This would be used in situations where an employee was not available for affirmative action.

Exit
Will cancel the call and not log it.

Decline
Will mark that the selected employee rejected taking the extra shift. No call log will be made.

Pass
Will mark that the employee accepted the thrown shift. No call log will be made.

Resize Columns
This will forcibly resize all the columns to ensure the width shows all information.