

# Employee Guide



**Workforce TeleStaff**

Version 6.2.2

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# Contents

<b>Chapter: 1</b>	<b>Access . . . . .</b>	<b>1</b>
	Logging In . . . . .	1
	Logging Out . . . . .	1
	Forced to Change Password . . . . .	2
	Forgot Password . . . . .	2
	Forgot User ID . . . . .	2
	Idle Time Out . . . . .	3
	Login Failed . . . . .	3
	Main Navigation Bar . . . . .	3
<b>Chapter: 2</b>	<b>Contact Log . . . . .</b>	<b>4</b>
	Respond to Contact Log Items . . . . .	4
<b>Chapter: 3</b>	<b>Dashboard Overview . . . . .</b>	<b>5</b>
<b>Chapter: 4</b>	<b>My Info . . . . .</b>	<b>6</b>
	My Info: General Tab . . . . .	6
	My Info: Setting Your Primary Language . . . . .	6
	My Info: Password . . . . .	7
	My Info: Profiles Tab . . . . .	8
	Editing My Info . . . . .	8
	My Info: Assignments . . . . .	9
	My Info: Messages . . . . .	9
	My Info: Paybacks . . . . .	9
	My Info: Penalty . . . . .	9

---

	My Info: Setting Your Primary Language . . . . .	9
	My Info: Logged . . . . .	10
	My Info: Institution . . . . .	10
	My Info: Preference Tab . . . . .	10
	Setting My Preferences . . . . .	11
	My Info: Reports Tab . . . . .	13
<b>Chapter: 5</b>	<b>About the Personal Calendar . . . . .</b>	<b>14</b>
	How to Select Calendar Days . . . . .	15
	Viewing the Calendar in List Format . . . . .	16
	Viewing Other Shifts on the Personal Calendar . . . . .	16
	About the Picklist . . . . .	17
	Accessing the Picklist . . . . .	17
	Calendar Shortcut Key List . . . . .	18
<b>Chapter: 6</b>	<b>About Work Codes . . . . .</b>	<b>19</b>
	Work Code Statuses . . . . .	19
	Requesting Time-Off (Sick, Vacation...) . . . . .	20
	Requesting Time-Off Using a Detail Code . . . . .	20
	Requesting Time-Earned (Overtime, Comp Time...) . . . . .	21
	Requesting a Shift Trade . . . . .	21
	Acknowledge a Shift Trade . . . . .	22
	Request to Cancel a Trade . . . . .	22
	Acknowledge a Shift Trade Cancellation . . . . .	23
	Entering Time Outside of Shift Times . . . . .	24
	Sign-up for Additional Work . . . . .	25
	Sign-up for Specific Working Opportunities . . . . .	25
	Work Code: Edit Vs. Edit Without Rules . . . . .	26
	Editing Work Codes . . . . .	27
	Removing Time (Work Code) . . . . .	27
<b>Chapter: 7</b>	<b>About the Roster . . . . .</b>	<b>28</b>
	Roster Symbols . . . . .	28
	Roster Header Overview . . . . .	29
<b>Chapter: 8</b>	<b>Reports . . . . .</b>	<b>30</b>
	Access Reports . . . . .	31
	Accruals Report . . . . .	31
	Accrual Report Field Descriptions . . . . .	31
	Audit Report . . . . .	32
	Audit Report Field Descriptions . . . . .	33
	Contact Log Report . . . . .	33
	Contact Log Report Field Descriptions . . . . .	34
	Costs Report . . . . .	34

---

Costs Report Field Descriptions . . . . .	.35
Exceptions Report . . . . .	.36
Exceptions Report Field Descriptions . . . . .	.36
Expirations Report . . . . .	.37
Expirations Report Field Descriptions . . . . .	.37
Login Report . . . . .	.38
Login Report Field Descriptions . . . . .	.38
Payback Report . . . . .	.39
Payback Report Field Descriptions . . . . .	.40
Payroll Report . . . . .	.41
Payroll Report Field Descriptions . . . . .	.41
Personal History Report . . . . .	.42
Personal History Report Field Descriptions . . . . .	.42
Roster Report . . . . .	.43
Roster Report Field Descriptions . . . . .	.44
Summary Report . . . . .	.45
Summary Report Field Descriptions . . . . .	.45

<b>Chapter: 9</b>	<b>System Phone Options . . . . . 47</b>
-------------------	------------------------------------------

# Access

Access to the application is granted by your organization's system administrator(s). You will need the URL defined by your organization, a valid user name, and password to log into the system.

Security settings assigned to each user apply upon login. Should the User Guide or the Help file refer to an area that you do not see or is grayed out then access to that area or object has been prohibited by your System Administrator.

## Logging In

The application allows organizations to define a distinct URL. Please contact your system administrator to obtain your organization's URL.

The Login screen is the web application's way of applying customer defined security access levels upon log in. For this reason, each user must have a unique user ID and keep passwords private.

To obtain your ID contact your System Administrator.

To sign in:

---

### TASK

1. Enter your user ID and password in the corresponding fields.



2. OPTIONAL - if your organization has turned language preferences on, you will see the Language Preference menu box which contains only the languages set by your organization. In Language Preference, select the desired language from the menu box.
  3. Click **Sign In**.
- 

## Logging Out

To exit the system:

---

### TASK

1. To exit the system from any screen go to the top-right corner.
  2. Click **Sign Out**.
-

## Forced to Change Password

To increase system security, user login policies can be configured to force users to change the default password upon log in.

Users can manage their password at any time by going to: *My Info > Password*.

IMPORTANT - These restricted special characters are not supported.
Do not use: <ul style="list-style-type: none"><li>• Apostrophe ‘</li><li>• Quotation Marks “</li><li>• Carat ^</li><li>• Ampersand &amp;</li></ul>
Special characters supported: ! @ # \$ % * ( ) < > / ? : ; [ ] { } , .   \ = + - _ / <space>
Do not use a <space> at the end of a password doing so will prevent the user from logging in.

To update your password:

---

### TASK

1. Enter your new password in the corresponding fields:
  - New Password
  - Confirm Password

*ADDITIONAL INFORMATION:* Passwords are alphanumeric and limited to ten characters.

2. Click **Save**.
- 

## Forgot Password

Passwords cannot be reset by base users due to system security and database content. Users must contact their system administrators to reset passwords.

System Administrators can reset user passwords to the default password by using the Change Password setting in the person's General tab.

## Forgot User ID

To obtain your User ID contact your web application's Administrator.

User IDs are typically Employee IDs, Badge IDs, or network IDs when using Active Directory.

## Idle Time Out

The number of idle minutes before the web application logs users out is defined by your Administrator and part of the security features offered when setting login policies.

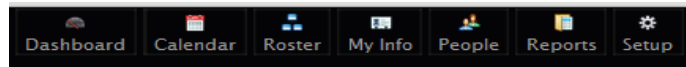
## Login Failed

Login Failed displays when users enter invalid credentials in either the User ID or Password fields.

If the issue persists after several attempts, contact your system administrator.

## Main Navigation Bar

The Main Navigation bar provides users a quick way to access areas within the web application.



Depending on your level of system security from here you can go to:

- Dashboard - contains a high-level overview of pending tasks, work opportunities, request statuses, quick links and more.
- Calendar - defaults to your Calendar and provides access to the List Calendar view and Advance Calendar.
- Roster - users can view and manage work code activity for themselves. Some users can manage work code activity for others, schedule, send notifications, and more.
- My Info - contains personal information for the logged in user.
- People - use to manage personnel profiles, assignments, and more.
- Reports - use to run reports for self, and some users can run reports for others.
- Setup - contains system configuration settings.



# Contact Log

The Contact Log tracks and displays all contact attempts upon login when outstanding work opportunities, messages, or notifications exist for the user to review and respond to.

Contact Log																
	Type	For	Contact	Status	Description	Date	On	Shift	List	Work Code	Start	End	Hours	By	Initi	
Accept	Message	Fernberg, Eileen P.		Skip	Training cancelled 7/31/2013.	07/29/2013	07/29/2013 16:17							Fernberg, Eileen P.	07/16/2013	
Accept	Notify	Fernberg, Eileen P.		Skip	/.../Engine 2 (PAU)/Firefighter #1	08/07/2013	07/29/2013 16:17	A		EW	08/07/2013 07:30	08/08/2013 07:30	24	Fernberg, Eileen P.	07/16/2013	
Accept Reject	Fill Vacancy	Fernberg, Eileen P.	*864-0736	Skip	/.../SAM 1/Firefighter #2 (PM)	07/31/2013	07/29/2013 16:21	A	offduty	+500	07/31/2013 07:30	08/01/2013 07:30	24	Salazar, Jeffrey A.	07/16/2013	

Showing 1 to 3 of 3 entries (filtered from 9 total entries)

The Contact Log displays the following:

- **Fill Vacancy** - is an opportunity for work along with the option to Accept or Reject.
- **Messages** - the message text displays in the Contact log along with the option to Accept. The message remains in the Contact Log until the recipient clicks Accept.
- **Notifications** - provide detail Assignment information. The notification remains in the Contact Log until the recipient clicks Accept.

## Respond to Contact Log Items

The Contact Log displays upon login when outstanding items in the contact log require your response. The Contact Log can also be accessed from the Dashboard.

To respond to contact log items:

### TASK

1. Review the items.
  - **Fill Vacancy:** If you have a work offer, use the scroll bar to review the details and click either **Accept** or **Reject**. **NOTE:** Work Offers typically carry varying expiration times, be sure to review the reserve and expire columns to determine how much time you have before the offer expires.
  - **Message:** If you have a message, review the message and click **Accept**. When the message is accepted the status column updates to Accepted; allowing the sender to see your confirmation.
  - **Notification:** If you have a notification, review the assignment details. This is not a work offer, this is a reminder of your assignment. Click **Accept** to confirm that you have seen this notification and update the status column for the sender to see your confirmation.
2. Close the Contact Log.

# Dashboard Overview

The Dashboard provides real-time staffing information and quick links for users to easily access or view relevant information at a glance.

The Dashboard displays upon login unless the Contact Log has items that require a response from the user.

The Dashboard includes:

# My Info

The My Info area contains your personal information that identifies who you are, what you can do, where and when you can work, and more.

Depending on the settings configured by your system administrator, most of the field in this area are disabled. Only a few fields may be enabled for users to maintain, for example, most users can only edit contact method fields and view the remaining information.

My Info contains the following tabs:

- **General** - contains your personal identifiers such as: name, contacts, address, IDs, DOB, gender...
- **Profile** - identifies what you can do
- **Assignments** - identifies where and when you can work
- **Messages** - tracks messages sent to you.
- **Paybacks** - tracks your shift trades.
- **Penalty** - tracks the following for you, if applicable: probationary periods or work opportunities extended or refused, or all.
- **Logged** - tracks your work offers or assignments in hours or instances.
- **Preference** - identifies when and where you prefer to work.
- **Institution** - identifies your home institution when configured by your system administrator.

## My Info: General Tab

The General tab identifies who you are and contains standard resource information such as, Name, Payroll ID, Phone, Address Login and so on.

The information contained in the General tab is typically visible to all user levels. Security permission settings in Setup control the ability to view or edit areas in the General tab.

**Best Practice** Most organizations grant users the ability to manage their contact information to prevent missed work opportunities and potential grievances due to invalid contact information.

## My Info: Setting Your Primary Language

### *PREREQUISITE*

- Review About Multiple Languages
- Multiple Languages must be configured in order to view language options supported.

To change your default primary language:

TASK

- 1. Go to My Info > General tab.
- 2. In Primary language, select the desired language.
- 3. Click Save.

My Info: Password

The Password tab permits a user to change their password. Password parameters and complexity are configured by your organization. Additionally, depending on your system configuration you may see only Password settings, or Password and Phone Password settings.

*Password only* settings as shown in the image below are used to change the password to log in via the Web and the phone when unique phone credentials are turned off (disabled). Additionally, when passwords contain characters the system will automatically convert the password to it's phone keypad equivalent. This means a password such as **48!CAT** must be entered as **48228** via the phone. Special characters are stripped and letters covert to the corresponding number on the phone keypad, so C=2, A=2,T=8, that's 228.

The screenshot shows the 'My Info' page with the 'Password' tab selected. On the left, there is a 'Login Issues' table with one row: 'All' with a green checkmark and the description 'No login restrictions.' On the right, under the 'Password' heading, there are three input fields labeled 'Current Password \*', 'New Password \*', and 'Confirm Password \*'. A help icon (?) is visible next to the 'Password' heading.

*Password and Phone Password* settings as displayed below show when Allow Unique Phone Credentials have been turned on (enabled). The Password settings apply to the Web ID. The Phone Password settings apply to the phone, and used to change the phone password.

The screenshot shows the 'My Info' page with the 'Password' tab selected. On the left, there is a 'Login Issues' table with one row: 'All' with a green checkmark and the description 'No login restrictions.' On the right, there are two sections: 'Password' and 'Phone Password'. Each section has three input fields labeled 'Current Password \*', 'New Password \*', and 'Confirm Password \*'. Help icons (?) are visible next to both section headings.

Important Information about Web Passwords
<p>These restricted special characters are <u>not supported</u>. Do not use these when selecting your web password:</p> <ul style="list-style-type: none"> <li>• Apostrophe ‘</li> <li>• Quotation Marks “</li> <li>• Carat ^</li> <li>• Ampersand &amp;</li> </ul>
<p>Special characters supported via the Web Login: ! @ # \$ % * ( ) &lt; &gt; / ? : ; [ ] { } , .   \ = + - _ / &lt;space&gt;</p>
<p>Do not use a &lt;space&gt; at the end of any password, doing so will prevent a user from logging in.</p>

Related links:

## My Info: Profiles Tab

The Profile tab identifies what you can do and contains your attributes such as job title, pay information, skill sets, acting capabilities and so on.

date.Security permission settings in Setup control the ability to view, edit or create new profiles, or both.

## Editing My Info

To edit your personal information:

### TASK

1. Go to the Main Navigation area and click **My Info**.
2. The **General** tab contains personal information. Only the fields you have permission to maintain are enabled.
3. Modify your information as needed. If you are modifying the *Contact Methods* area, click on the arrow next to the contact to display a list of contact methods.
4. Click **Save**.

*ADDITIONAL INFORMATION:* The top contact is the primary contact - be sure all contact information is accurate because the application or staffing administrators may use these contact methods to contact you with work offers, notifications, and messages. The most commonly used contact method for work offers is the *Primary* or *1st Contact* on the list.

## My Info: Assignments

The Assignment tab identifies when and where you work. This area contains the user's shift and location of work.

The application schedules personnel and builds the Roster using the active assignment for the given date. Multiple assignments can exist with no overlapping shifts or no overlapping From and Through dates.

Security permission settings in Setup control the ability to edit or create new assignments, or both.

## My Info: Messages

The Message tab displays messages sent to you.

## My Info: Paybacks

The Paybacks tab tracks and displays your outstanding shift trades.

Paybacks information may be accessed from the Dashboard, My Info, and the Reports area.

- The I Owe tab provides the names of who you owe time to.
- The Owes Me tab provides the names of people who owe you time.

## My Info: Penalty

The Penalty tab captures the outcome of a work opportunity that is extended to a person or any one else that received the same opportunity; how penalties or whether penalties are tracked vary by customer. This area also holds probationary periods.

**NOTE:** Sometimes the Penalty tab is renamed to Probation when refusals are not tracked or probation makes better sense.

## My Info: Setting Your Primary Language

### *PREREQUISITE*

- Review About Multiple Languages
- Multiple Languages must be configured in order to view language options supported.

To change your default primary language:

---

TASK

1. Go to My Info > General tab.
  2. In Primary language, select the desired language.
  3. Click Save.
- 

## My Info: Logged

The Logged tab records work opportunities in hours or instances within a defined period. Rules use this information to fairly distribute work opportunities amongst employees.

Hours are recorded in buckets and totaled for each profile within the configured time period. Each record represents a different bucket and time period.

Your organization's business rules determine whether opportunities are evaluated in hours, instances, or dates or all.

Related links:

[Person Logged Tab](#)

## My Info: Institution

The Institution tab is only visible when institution focus is enabled. The tab is used to set a person's home institution and their Scheduled Into institutions. Setting the home institution in this tab updates the Home Institution field in the General tab and auto selects the same institution in the Scheduled Into menu box.

IMPORTANT
People who do not have a set Home Institution when Institution Focus is active will not be able to log into the application.

Related links:

## My Info: Preference Tab

The person Preference tab is used to identify assignment preferences for employees. The application does not enforce a user to setup their Preference Profile, however the information supplied is used to qualify, disqualify, or sort candidates based on assignment preferences. Preferences are either editable, allow reorder, view only or grant the user a mix level of control depending on the selected preference.

Preference behavior is configured by your organization by authorized users in Setup > Preferences.

For example, the shift preference may be reorder only, this means the user can only reorder the shifts available for reorder, and the Area preference may be editable, meaning the user can edit the Areas available to the user, meaning the user can choose which Areas they prefer to work in and in which order. Multiple preferences may be defined, if a date range is associated with a preference they cannot overlap.

Security permission settings in Setup control the ability to add or edit preferences in Setup > Preferences.

Related links:

[Setting My Preferences](#)

## Setting My Preferences

### *PREREQUISITE*

An employee's Preference Profile is set in the person General tab > Preference Profile field.

Preference Profile settings shown are configured by your organization. This means the display options and behaviors are based on configuration settings supplied by your organization. Preferences are either editable, allow reorder, view only or grant the user a mix level of control depending on the selected "preference" within the "preference profile".

Moreover, the application is designed to always return the person's highest priority that matches the rule's or job allocation's criteria for further processing.

For example, suppose that your number one choice is to work as a Paramedic on Shift 3, Unit 4, reason being Shift 3 gives you overtime pay and your friends work in Unit 4. Your second preference, is to work as a Paramedic, any shift, Unit 4. Your third preference is to work as a Paramedic, any shift, any unit.

Your organization has set the rules to return the number one choice in the first pass, if there are no Paramedic, Shift 3, Unit 4 jobs available then the application will return zero jobs for you. Moreover, suppose the second rule pass is set to return people's greater than or equal to #1 choice, in this pass the application finds, a paramedic job in Unit 4, in this case the application returned the highest priority that matches the rules criteria, your #2 choice.

Simply put, the application returns the highest matching preference, your number #1 choice then it evaluates your number one choice against the rule or job allocation criteria. If the rule or pass is set to  $\geq 2$  and a job matches Preference 1, 2, and 3, the application returns 1 your number 1 choice, which is not  $\geq 2$  so it will fail the criteria, this means qualify the second choice or higher.

A single preference number will be returned from all rule or job allocation checks against preferences. The application will always return the highest matching preference number. If a vacancy matches preference 1, 2, and 3. 1 will be returned for further processing, after the 1 is returned, the result is compared to the WHERE condition (or filter modifier for job allocation). So if the where is  $\geq 2$ , a 1 will fail. If the where is set  $\geq 1$  a 1 will pass.



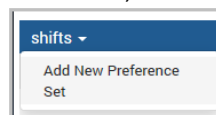
### Important

Preferences shown are configured by your organization. This means the display options and behaviors are based on configuration settings. Preferences are either editable, allow reorder, view only or can grant the user a mix level of control depending on the selected 'preference' within your 'preference profile'. This topic will cover how to set a shift preference with editable controls. Step results are hypothetical examples to illustrate how preferences and rules may affect staffing rules and how they generally work together. It is very important to have knowledge of your organization's staffing rules to widen or limit your job opportunities.

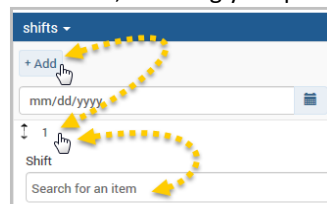
This task will cover how to set a shift preference with editable controls, including how to order a set of preferences. The image below shows a Preference that allows the user to set their shift preferences for a date range. The task steps below shows how we set the Preferences in the image shown, but remember your settings and Preference Profile behavior exhibited by the application is based on your organization's configuration.

### TASK

1. Click the Preference Profile drop-down menu box, and click Add New Preference Set.



2. Click +Add to open the Preference Profile. The screen redraws based on the configuration setting for the selected Preference Profile. The default is 1, meaning your primary choice.



3. Click 1 to show the Preference Profile items configured. In the image, the user can choose any shift. The user's primary preference is to work Shift 1, 2, or 3 equally meaning if any of those shift opportunities come his way. To do this type % symbol in the search box or type the name of the shift to return selectable

shift items. Select each shift, in this case we selected Shift 1, Shift 1, Shift 3. Then supply the date range in From and Through (Date ranges are not required). Click Save to confirm your selections.

*STEP RESULT:* What does this mean to the user? It depends on how your organizations fills vacancies or jobs, because rules can return positions that match the user's #1 choice, in this case the user has more opportunities because number one means, Shift 1, 2, or 3.

4. To indicate another shift preference, click +Add > click 1 > choose a shift. The second preference on the image shows the user has only one choice, Shift 1. to do this, select one shift and supply the date range. The date range cannot overlap the previous preference. Click Save again.

*STEP RESULT:* What does this mean to the user? Depending on how your organization fills vacancies or jobs, rules can return positions that match the user's number #1 choice, this means only Shift 1 positions would apply, or your organization could set a pass that returns #2 and above choices, in this case no positions would return for this user and for this date range.

5. The third preference on the image the user has a shift order, from 05/06/2017 through 05/12/2017 the person prefers jobs on Shift 1, followed by jobs on shift 2, followed by jobs on shift 3. To indicate this pattern do the following:
  - a Click +Add > Click 1 > Select a Shift > Provide a date range > Click Save.
  - b Click 2 > Select a Shift > Click Save.
  - c Click 3 > Select a Shift > Click Save. To reorder your selections use the double-headed arrow.

*STEP RESULT:* What does this mean to the user? Depending on how your organization fills vacancies or jobs, rules can return positions that match the user's number #1 choice first, followed by the #2 choice and so on, or have a more global pass such as return positions that match the user's preference using a matching criteria of greater than or equal to one. This means the user could potentially work jobs in Shift 1, Shift 2, or Shift 3.

Related links:

## My Info: Reports Tab

The person Reports tab contains quick data access to the Personal History and the Accruals Report. These reports are printable without requiring Excel or an Excel viewer to display report data.

The Personal History report provides total hours for each work code record and assignment area.

The Accruals report tracks time earned balances. Use this report to see remaining balances for any work code tied to a bank of hours.

**Important:** Shift breaks are subtracted when the target shift has been configured to deduct time. The shift assigned to the area on the Roster automatically applies and supersede shift break rules assigned to the person.

Security permission settings in Setup control the ability to view Reports for Self and Others.

# About the Personal Calendar

The Personal Calendar displays scheduling activity for each user such as working days, overtime, leave exceptions, sign-ups, and special event work opportunities.



User permission settings control the areas people can affect within the application. Features available on the Personal Calendar enable when you have access to that feature.

Personal Calendar features include:

- Shift assignment visibility. Shift assignments show a time-span bar to quickly identify when the shift is on or off and for how long. For example, a shift crossing midnight displays the time-span bar across two days.
- Work code activity. You can request time-off, time-earned, or sign-up for work. Work codes show a time span bar to identify at a glance the time period and duration of that work code.  
***NOTE:** Should an assignment occur in a different time zone for the target user, the work code will show the icon that looks like a clock. Additionally, the time zone feature requires Institution Focus and timezone setup.*
- Identify pay days and FLSA period. Paydays are identified by the currency icon. The last day of the FLSA cycle is identified by a red dotted vertical bar. ***NOTE:** Fair Labor Standards Act (FLSA).*
- View special event opportunities. The red flag icon means featured vacancies.
- Gear menu box - includes *Show Denied Codes* . Used to return denied work code requests, if any.
- Options Menu Box:

Option	Description
<b>Add</b>	Used to request time-off, time earned, or signup.

Option	Description
<b>Off Roster...</b>	Used to enter records that require advanced data entry. Used seldom to enter time earned balances on the Calendar or force a staffing record.
<b>Approve...</b>	Used to access the Approve screen.
<b>Roster...</b>	Used to access the Roster on the selected date.
<b>Picklist...</b>	Used to access the Pick List and obtain a general idea of where you stand on an opportunity list.
<b>Reports...</b>	Used to access the Reports area.

- Weeks (5-53) - use to control the number of weeks within view and show relevant information for the corresponding number of weeks.

Related links:

[How to View Other Shifts on My Calendar](#)

## How to Select Calendar Days

This topic covers how to select specific days on the calendar to facilitate user data entry.

### Select a Series of Unscheduled Work Days

Selecting a series of unscheduled work days is useful when signing up for extra work, or requesting overtime or time earned, or all.

- 1) Click on the desired unscheduled work day.
- 2) Hold down the mouse key and drag the pointer across the desired number of days.

**Result:** Only unscheduled work days are selected.

### Select a Series of Scheduled Work Days

Selecting a series of scheduled work days is useful when entering time -off or time-on; for example, entering sick leave during scheduled hours or signing up for overtime outside of regular scheduled work hours.

- 1) Click on the desired scheduled work day.
- 2) Hold-down the mouse key and drag the pointer across the desired number of days.

**Result:** Only scheduled work days are selected.

## Select Random Days

Selecting a set of random days is useful when entering random days of either time-off or time-on.

- 1) Click on the desired day and hold the CTRL key
- 2) Select the days in any order

**Result:** Random days are selected.

## Viewing the Calendar in List Format

The List Calendar view displays calendar items in a report format.

### TASK

1. Go to the top-left corner of the calendar and click **List Calendar**.

Show / Hide		TeleStaff Calendar Report (Salazar, Jeffrey A.) 06/29/2013 through 08/17/2013 Showing: [Exception] [My Shift] [All Shifts]	
Wednesday, July 3, 2013			
07:30 - 05:30	10h	OTx	OVERTIME
Friday, July 5, 2013			
07:30 - 05:30	10h	OTx	OVERTIME
07:30 - 07:30	24h	Vacancy	Truck 1
Tuesday, July 9, 2013			
06:30 - 04:30	10h	OTx	OVERTIME
Thursday, July 11, 2013			
07:30 - 07:30	24h	EO	Exchange Off Belles, Christopher(EW)
Friday, July 12, 2013			
06:30 - 04:30	10h	OTx	OVERTIME
Monday, July 29, 2013			
07:30 - 07:30	24h	Vacancy	SAM 1
Tuesday, July 30, 2013			
06:30 - 04:30	10h	Comp Time	Compensatory Overtime Earned
Wednesday, July 31, 2013			
07:30 - 07:30	24h	A	Available
07:30 - 07:30	24h	Vacancy	Truck 1
07:30 - 07:30	24h	Vacancy	Heritage Parade
Close Kraemer Blvd by 7:30 a.m. O's contact Cathy Lynn 709-999-9999 x 8777			
Friday, August 2, 2013			
07:30 - 07:30	24h	EW	Exchange Working
07:30 - 07:30	24h	V	Vacation

2. Use the filters to narrow the data within view by exceptions, shifts, special days, pay days, FLSA days, special event vacancies, or special event notes or all.

## Viewing Other Shifts on the Personal Calendar

The Calendar Shift Group feature shows other shifts on the user's personal calendar for reference purposes. For example, employees may want to know which shift will be working on a specific day to initiate a shift trade with.

To use this feature, you must have Shift Groups configured and have the ability to edit Profiles. To assign a Shift Group and view other shifts on the personal calendar, go to the person’s Profile tab > Calendar Shift Group.

NOTE:
Too many shifts in a shift group may create confusion and clutter the calendar. Calendar Shift Groups are better suited for personnel who have a minimal amount of shifts to reference.

## About the Picklist

The Picklist is used by personnel to obtain a general idea of where they stand on an opportunity list; a candidate at the top of the Picklist can expect to be called in before a candidate at the bottom of the list.

The Picklist displays the most probable staffing order for the selected date. The actual staffing order for a particular vacancy may differ from the Picklist.

The difference between the Picklist and the Fill By Rules feature is that the Picklist represents the probability of being staffed on the target day. The Fill By Rules feature evaluates and applies your staffing criteria to a specific vacancy’s date and time parameters which allows for a more precise staffing order.

Related links:  
[Accessing the Picklist](#)

## Accessing the Picklist

To access the Picklist:

TASK	
1.	Go to the Calendar.
2.	Click on the desired date to enable your options.
3.	Select <b>Picklist</b> .
4.	In the Picklist: <ul style="list-style-type: none"><li>• Use the <b>Filter</b> to narrow your staffing criteria.</li><li>• Use the icon that looks like a gear to limit your list of candidates.</li><li>• Click <b>Audit</b> to review the business rules configured for your organization and determine <i>how</i> and <i>why</i> some people qualify and others do not.</li></ul>
5.	Click <b>Done</b> to show your criteria.

## Calendar Shortcut Key List

The Calendar supports the following shortcuts keys to perform tasks:

Shortcut Key	Task Description
<b>Arrow Keys</b>	Navigates the days on the calendar. To select press the Shift or CTRL key.
<b>Page Up</b>	Moves the calendar to the previous month.
<b>Page Down</b>	Moves the calendar month forward.
<b>Home</b>	Moves the focus to the first day within the calendar view. (Top-left day)
<b>End</b>	Moves the focus to the last day within the calendar view. (Bottom-right day)
<b>Enter</b>	Shows the day or exception in the focus pop-up menu.
<b>Tab</b>	Navigates to the next exception.
<b>Insert</b>	Opens the Add work code pop-up window.
<b>CTRL+A</b>	Opens the Add work code pop-up window.
<b>CTRL+P</b>	Navigates to the Reports area.
<b>CTRL+Q</b>	Opens the Off-Roster pop-up window.
<b>CTRL+V</b>	Opens the Approve pop-up window.
<b>CTRL+L</b>	Navigates to the Pick List area.
<b>A-Z</b>	Characters used to return codes with the matching character criteria in the Add work code pop-up window.
<b>CTRL+Q</b>	Opens the Approve pop-up window.
<b>CTRL+C</b>	Clears all selections.
<b>CTRL+E</b>	Opens the Edit pop-up window.
<b>CTRL+U</b>	Opens the Edit without rules... pop-up window.
<b>DEL</b>	Deletes a work code record.

## About Work Codes

Work codes are used to manage time, staff personnel, and solve payroll needs.

Each work code is configured by the web application's System Administrator. Work code behavior on the Calendar and Roster are unique to each code and based on your business policies and preferences. For this reason, you may find that some codes require approval and others do not, and sometimes a work code is automatically approved and sometimes that same code may require approval; these are Dynamic issues and Static issues in place. Dynamic and Static issues are used to prevent codes from being entered into the system when a work code fails a business rule or system rule.

IMPORTANT:
Each work code is configured to meet scheduling requirements. Not all fields enable or require data entry. The system will prompt you when data is required.
If the request is in violation of any business rule, a Dynamic or Static Issue will either prevent you from entering the work code, or convert the work code into a Request, or allow you to override that issue.
A work code request is prefaced with an asterisk. Personnel requesting time-off show twice on the Roster; the regular assignment is removed when the request is approved.

Related links:

[Configuring Organizations for Extended Exceptions \(FMLA, Military...\)](#)

[Manage Extended Exceptions](#)

## Work Code Statuses

A work code has two statuses either pending approval or approved. Pending approval shows an asterisk \* next to the work code name. Once the work code has been approved the asterisk is removed. Work codes are either approved by another user or system approved. A system approved code means the work code passed your business rules and therefore automatically approved by the system and does not require another user to approve it. The table below shows two work code examples:

Work Code	Description
*Sick	This work code is not approved or pending approval.
Sick	This work code was either automatically or manually approved.



## Requesting Time-Off (Sick, Vacation...)

To request time-off:

---

### TASK

1. Go to the Calendar to select and process one or more days at a time, or go to the Roster to process one day at a time.
  2. From the Calendar, click on the desired date or dates to enable your Calendar options and select **Add**. From the Roster click on the work code column and select **Add**.
  3. In **Work Code\***, select the desired exception code from the drop-down list.
  4. The **From** and **Through** fields populate with your shift assignment. Use these fields to change the start or end time.
    - To change the times use format: HH:MM (ex: 2:30p.m. = 14:30)
    - Use the **Hours** field to change the number of hours and have the system auto populate the **Through** field for you.
  5. In **Add?**, verify your dates and then select the check box next to the desired dates. If a Detail Code, an Account Code, or a Note is required the system will prompt you to enter the information.
  6. Click **Save**. The *Save* button enables if no issues intervene or you have the permission to override the issue.
- 

## Requesting Time-Off Using a Detail Code

To request time-off or time-on along with a Detail Code:

---

### TASK

1. Go to the Calendar to select and process one or more days at a time, or go to the Roster to process one day at a time.
2. Click on the desired date or dates to enable your Calendar options and select **Add**.
3. In **Work Code\***, select the desired exception code from the drop-down list.
4. In **Detail Code**, select a detail code from the drop-down list or type the detail requirement in the menu box; max length 10 characters. See the *Add* section for additional information, if any.
5. The **From** and **Through** fields populate with the start and end time of your shift assignment. Use these fields to change the start or end time.
  - To change the times use format: HH:MM (ex: 2:30p.m. = 14:30)
  - Use the **Hours** field to change the number of hours and have the system auto populate the **Through** field for you.
6. In **Add**, verify your dates and then select the desired dates.
7. Click **Save**.

*ADDITIONAL INFORMATION:* Dynamic issues may trigger in the *Add* section and prevent you from completing your transaction for a specific date or specific dates when your request violates a business policy. The *Save* button enables if no issues intervene or you have the authority to override that issue.

## Requesting Time-Earned (Overtime, Comp Time...)

To request time earned:

---

### TASK

1. Go to the Calendar to select and process one or more days at a time, or go to the Roster to process one day at a time.
  2. From the Calendar, click on the desired date or dates to enable your Calendar options and select **Add**. From the Roster click on the work code column and select **Add**.
  3. In **Work Code\***, select the desired exception code from the drop-down list.
  4. The **From** and **Through** fields populate with predefined system settings. Use these fields to change the start or end time.
    - To change the times use format: HH:MM (ex: 2:30p.m. = 14:30)
    - Use the **Hours** field to change the number of hours and have the system auto populate the **Through** field for you.
  5. In **Add**, verify your dates and then select the desired dates. If a *Detail Code*, *Account Code*, or *Note* is required the system will prompt you to enter the information.
  6. Click **Save**. The *Save* button enables if no issues intervene or you have the permission to override the issue.
- 

## Requesting a Shift Trade

To request a shift trade:

---

### TASK

1. Go to the Calendar or the Roster.
2. From the Calendar, click on the desired date to enable your Calendar options and select **Add**. From the Roster click on the work code column and select **Add**.
3. In **Work Code\***, select your shift trade type work code from the drop-down list. *Typically labeled: Shift Trade or Exchange*.
4. The **From** and **Through** fields populate with your shift assignment. Use these fields to change the start or end time.
  - To change the times use format: HH:MM (ex: 2:30p.m. = 14:30)
  - Use the **Hours** field to change the number of hours and have the system auto populate the **Through** field for you.
5. In **Cover Person**, select a person from the list to cover your shift.
6. In **Work Code**, select the cover work code in the Cover section will apply to the cover person. If a detail code, or a note is required the system will prompt you to enter the information.

7. In **Add**, verify your dates and then select the desired dates.
  8. Click **Save**. The *Save* button enables if no issues intervene or you have the permission to override that issue.
- 

## Acknowledge a Shift Trade

### *PREREQUISITE*

Advanced Business Workflows and Notifications must be activated in Setup to use the Trade Acknowledgment feature.

To acknowledge a shift trade:

---

#### TASK

1. Go to the Calendar or the Roster.
  2. Locate and click the shift trade to open the options menu.
    - Click **Accept Trade** to confirm the trade.
    - Click **Deny Trade** to reject the trade and remove that trade from your Calendar.
- 

### *AFTER COMPLETING THIS TASK:*

If the trade code requires another user to approve, the work code will remain in a pending approval state and a notification will be sent to all applicable Notification Groups of people.

If the work code does not require another user to approve it then the work code status will show Approved, meaning system approved.

Related links:

[Work Code Statuses](#)

## Request to Cancel a Trade

### *PREREQUISITE*

Advanced Business Workflows and Notifications must be activated in Setup to use the Trade Cancellation feature.

To cancel a shift trade:

---

#### TASK

1. Go to the Calendar or the Roster.

2. Locate and click the shift trade to open the options menu.
  3. Click **Cancel Trade** to send a trade cancellation request.
- 

*AFTER COMPLETING THIS TASK:*

A cancellation request notification will be sent to the cover person. The cover person will see the hourglass icon next to the shift trade denoting a pending acknowledgment state and the user will have the option to Accept or Reject the cancellation. Cancellation scenarios include:

- If the user accepts the cancellation and no further approvals are needed then both cover work codes withdraw from both the users' calendar.
- If the trade code was initially approved by another user, the hourglass icon next to the work code converts to an asterisk to denote a pending approval state. Additionally, a notification will be sent to all applicable Notification Groups of people to approve the cancellation. Only one approval is needed to complete the transaction.
- If the work code does not require another user to approve the cancellation and the cover rejects the cancellation then both work codes remain on the calendar.

## Acknowledge a Shift Trade Cancellation

*PREREQUISITE*

Advanced Business Workflows and Notifications must be activated in Setup to use the Trade Cancellation Acknowledgment feature.

To acknowledge a shift trade cancellation:

---

**TASK**

1. Go to the Calendar or the Roster.
  2. Locate and click the shift trade work code and open the options menu.
    - Click **Accept Cancel** to confirm the trade cancellation.
    - Click **Reject Cancel** to refuse the trade cancellation.
- 

*AFTER COMPLETING THIS TASK:*

If the trade code was initially approved by another user, the work code will change to a pending approval state and a notification will be sent to all applicable Notification Groups of people.

If the work code does not require another user to approve the cancellation and the cover person accepts the cancellation then the work code will withdraw from both calendars, meaning the cover person and the person who initiated the trade.

If the work code does not require another user to approve the cancellation and the cover rejects the cancellation then both work codes remain on the calendar.

Related links:

Work Code Statuses

## Entering Time Outside of Shift Times

### PREREQUISITE

Review Requesting Time-Off (Sick, Vacation...) topic to review the basic steps for adding a work code. Skip this prerequisite if you know how to submit basic time requests.

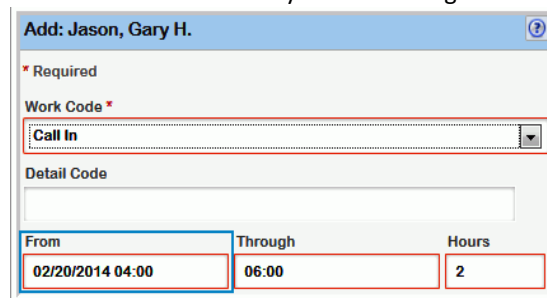
Time may be entered before or after the start or end of a shift for various reasons, such as a meeting, a late call, an administrative task, a holdover. To enter time requests before or after the shift start:

### TASK

1. Go to the Roster and locate yourself.

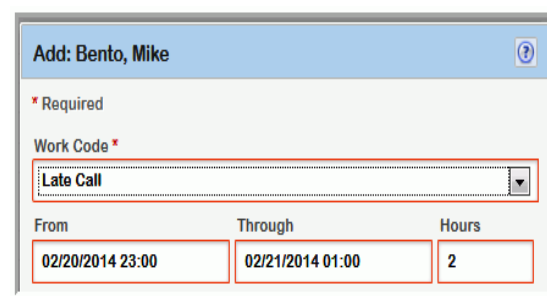
*ADDITIONAL INFORMATION:* The same steps can be performed on the Personal Calendar.

2. To add a work code **before** the start of the shift:
  - In the *Add* panel, enter the desired time in the **From** field using format **HH:MM**, when done either tab or click out of the field to automatically insert the target date.



The screenshot shows a form titled "Add: Jason, Gary H." with a blue header bar. Below the header, there is a "Required" section. The "Work Code" field is a dropdown menu with "Call In" selected. Below this is a "Detail Code" field, which is currently empty. At the bottom of the form, there are three input fields: "From" (containing "02/20/2014 04:00"), "Through" (containing "06:00"), and "Hours" (containing "2").

- In hours, enter the number of hours using format **HH:MM** and either tab or click out of the field to automatically populate the Through field with either the time, or the target date and time when crossing midnight.



The screenshot shows a form titled "Add: Bento, Mike" with a blue header bar. Below the header, there is a "Required" section. The "Work Code" field is a dropdown menu with "Late Call" selected. Below this is a "Detail Code" field, which is currently empty. At the bottom of the form, there are three input fields: "From" (containing "02/20/2014 23:00"), "Through" (containing "02/21/2014 01:00"), and "Hours" (containing "2").

3. If a Detail Code, an Account Code, or a Note is required the system will prompt you to enter the information.
4. Click **Save**. The *Save* button enables if no issues intervene or you have the permission to override the issue.

## Sign-up for Additional Work

The sign-up feature is a way for users to indicate their availability and volunteer for extra work. *Signup* type work codes are typically labeled: *Signup*, *Available*, *Available AM*, *Available PM*...

To sign up for additional work:

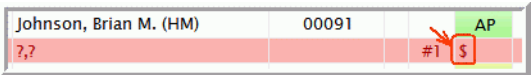
---

TASK

1. Go to the Calendar to select one or more days at a time.
  2. From the Calendar, click on the desired date or dates to enable your Calendar options and select **Add**.
  3. In **Work Code\***, select your *sign-up* type work code from the drop-down list.
  4. The **From** and **Through** fields populate with your shift assignment. Use these fields to change the start or end time.
    - To change the times use format: HH:MM (ex: 2:30p.m. = 14:30)
    - Use the **Hours** field to change the number of hours and have the system auto populate the **Through** field for you.
  5. In **Add**, verify your dates and then select the desired dates. If an event location is either required or optional the system enables the *Where* field.
  6. Click **Save**. The *Save* button enables if no issues intervene or you have the permission to override the issue.
- 

## Sign-up for Specific Working Opportunities

The signup feature is used to allow employees the ability to volunteer their time using a work code of type Signup. Event vacancies can be configured to allow sign-ups at that specific event location and for specific positions. When special events have been set to allow personnel to sign up for specific working opportunities the icon that looks like a dollar sign displays next to the vacancy on the Roster.



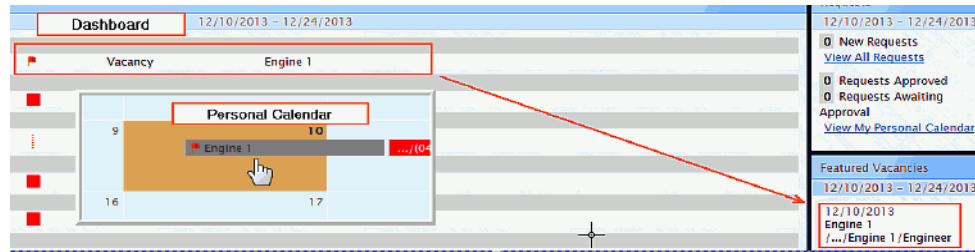
Johnson, Brian M. (HM)	00091		AP
?,?		#1	\$

To sign up for specific working opportunities:

---

TASK

1. Go to the Calendar, Dashboard, or Calendar List view and locate event flags.  
*ADDITIONAL INFORMATION:* Event flags are typically used with the *Signup* and *Where* feature for employees to quickly identify special event working opportunities.



2. Click on the desired date to enable your Calendar options and select **Add**.
3. In **Work Code\***, select your Signup type work code from the drop-down list.
4. In **Where**, select the desired event location.

A screenshot of a 'Add' form for 'Salazar, Jeffrey A.'. The form has several fields: 'Work Code' (a dropdown menu with 'Available' selected), 'From' (07:30), 'Through' (07:30), 'Hours' (24), 'Account' (a dropdown menu with '<none>' selected), and 'Where' (a dropdown menu with '<none>' selected). There are 'Cancel' and 'Save' buttons at the bottom right. A red arrow points from the 'Where' dropdown to the 'Save' button.

5. Click **Save**. The Save button enables if no issues intervene or you have the permission to override that issue.

## Work Code: Edit Vs. Edit Without Rules

Security permission settings control whether a person can edit a work code and to what extent that person can edit work codes.

*Edit* grants users the ability to modify basic work code and time parameter fields with Dynamic and Static Issues enabled. *Edit Without Rules* disables Dynamic and Static issues AND allows either basic OR advance editing capabilities.

*Edit* enables Dynamic and Static issues which allows users to see issues if editing that work code triggers an issue. If the request is in violation of any business rules that issue may prevent the user from entering this code, or convert the work code into a Request, or allow the user to override that issue.

*Edit Without Rules* disables Dynamic and Static issues; users do not see issues and may not know if editing that work code causes any violations. Additionally, this feature allows basic OR advance editing capabilities. Basic editing capabilities allows users to change work code and time parameter field entries. Advance editing capabilities allows the user full control to change that work code's entire system behavior which includes configuration settings.

**NOTE:** Each work code is configurable to allow editing capabilities. For this reason, you may find that some codes can be edited and other codes can not.

## Editing Work Codes

### *PREREQUISITE*

Review Edit Vs. Edit Without Rules... topic

To edit a work code:

---

#### TASK

1. Find the work code to edit on either the Calendar or the Roster.
  2. Click the work code to enable your options.
  3. Click **Edit** to edit with rules and run Issues check, or click **Edit Without Rules...** to edit with no Issues check.
  4. Click **Save**. The *Save* button enables if no issues intervene or you have the permission to override the issue.
- 

Related links:

[About Editing Work Codes](#)

## Removing Time (Work Code)

Work Codes may be removed from the Calendar or Roster at any time before another user either approves, opens, or edits the code.

To remove a work code:

---

#### TASK

1. Find the work code to remove on either the Calendar or the Roster.
  2. Click on the work code to enable your options.
  3. Click **Remove**.
  4. Click **Save**. The *Save* button enables if no issues intervene or you have the permission to override the issue.
-











# About the Roster







The Roster displays the daily staffing activity for the organization and contains scheduling features to simplify staffing tasks.

The roster may be accessed in the main navigation bar (top center). Roster information is organized by Institution, Agency, Region, and Shift. People display by Station, Unit, and Position.

Work exceptions such as vacation, sick, and overtime are also displayed on the roster. Some exceptions will create vacancies on the roster. These vacancies may be filled using organizational staffing rules or staffing preferences. The roster may be customized using Roster View settings to make the roster look more familiar to end-users or to simply enhance or target specific organizational areas, add color, darken lines, focus banding, and more.

## Roster Symbols

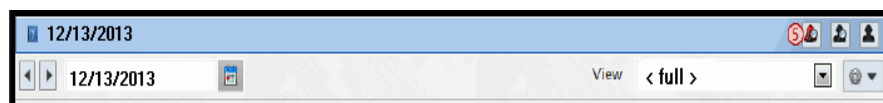
Icon	Roster Icon Description
	Color boxes with text in the center are work codes with their abbreviation, respectively. To emphasize the exceptions on the Roster, sometimes, the regular duty work code is configured with the color white and the abbreviation is a blank space which makes the work code blend with the back ground.
	A black check mark indicates a <i>Finalized</i> roster record.
	A gray check mark indicates a modified roster record which includes <i>Fixed</i> records that have been modified after finalizing the Roster. The gray check mark replaces the backward check mark in previous system versions.
	A white check mark indicates a work code record that has been modified after applying <i>Fix</i> or <i>Finalize</i> on the Roster. The white check mark replaces the backward check mark in previous system versions.
	A crossed record occurs when adding another record on top of a fixed (checked) record.
	The paper clip indicates an attachment. Attachments are notes that can be placed on a person, or the Roster for a day, a date range, or be infinite.
	Red bells indicate a roster alarm. Roster alarms in general are configured to alert staffers or Auto-Hire when a vacancy requires backfilling.
	The sticky note with a pencil indicates a note placed in the work code. Security settings may prevent you from seeing note contents.

Icon	Roster Icon Description
	The yellow triangle with an exclamation point indicates that the person filling the position fails to meet that position's qualifications.
	Desktop icon indicates an Outbound call attempt to either fill a vacancy, send a message, or send a notification.
	Red question marks indicate a vacancy that requires backfilling for Auto-Hire or Auto-Assign jobs.
	Red numbers next to a vacancy indicate a fill priority order when using Auto-Hire or Auto-Assign.
	A hyphen-comma-hyphen indicates a suppressed vacancy that may be used to assign personnel into as needed. Auto-Hire and Auto-Assign jobs ignore suppressed vacancies.
	A balloon with a slashed circle indicates outbound activity and the person has not been notified. When the person confirms the notification the icon withdraws from the Roster.

## Roster Header Overview

The Roster contains many features to manage schedules and personnel.

Use the following features to navigate throughout the roster.



- 1) **Date Selector Arrows** - The arrows next to the date move the date one day at a time.
- 2) **Date Selector** - The date field builds the roster for the date or dates selected.
- 3) **Calendar** - The Calendar icon lists the months and years.
- 4) **Red Alarm** - The red alarm shows vacancies. The number of vacancies for the roster in view display in a red circle if any.
- 5) **Locate People** - The locate people icon contains data filters and a smart search engine to quickly locate and select people on the Roster.
- 6) **People Filter** - The people filter contains advanced data filters and settings to search for specific personnel. For example, *who is* on-duty and can speak Spanish, or *who is* off-duty and assigned to Shift 1 and on Team 3, and so on.
- 7) **View** - The View menu lists default and custom roster views. The default views are enclosed in angle brackets; for example, <full>. Views that are shared across your organization are enclosed in square brackets; for example, [North Region].
- 8) **Gear menu-box** - The gear icon contains settings to add, edit, or remove Roster Views.

# Reports

The following Excel (.xlsx) reports with advanced querying capabilities are default reports within the application. Additional reporting capabilities include the standard payroll export and a custom report builder.

The standard payroll export is part of the software offering and available as a task type in the Task Manager. The Custom Report module is an add-on feature used to create custom reports using fully integrated Excel functionality.

The table below shows the standard reports available:

Report Name	Description
<b>Accrual</b>	Shows remaining accrual balances.
<b>Assignment</b>	Shows personnel Assignment information.
<b>Audit</b>	Shows record changes.
<b>Contact Log</b>	Shows a detailed list of outbound call activity.
<b>Costs</b>	Shows an itemized list of scheduling costs.
<b>Exceptions</b>	Shows an itemized list of record types working and non-working.
<b>Expirations</b>	Shows expiration dates for specialties and licenses.
<b>Login</b>	Shows user login activity and login source.
Multiday Report	Shows who's working and who's not for a date range on a cross tab report.
<b>Payback</b>	Shows outstanding shift trades amongst employees.
<b>Payroll</b>	Shows an itemized list of total hours by work code and employee; if needed, this same report calculates hours above the FLSA threshold.
<b>Personal History</b>	Shows total hours for each record, employee, and assignment area.
<b>Roster</b>	Shows a capture of the daily Roster.
<b>Summary Report</b>	Shows work code record activity in graphical format and subtotals each work code by percent, count, and total hours.

**NOTE:** Standard reports are password protected and cannot be unlocked.

## Access Reports

Reports default to self when accessed from the Dashboard and the Personal Calendar. If you have the ability to run reports for others, use the Reports area in the Main Navigation Bar or from the Roster using the Reports link.

Security permission settings control report visibility levels.

To access the Reports area:

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### TASK

1. Go to the *Main Navigation* area and click **Reports**.
  2. Click on the desired report.
  3. Click **Calendar Dates** to enable the From and Through fields.
  4. Use the **Limit By** section to limit the information on your report.
  5. Click **Run Report** to run the report in Excel (.xlsx).
- 

### RESULT:

The report displays in .xlsx format.

**NOTE:** You may see the *Enable Editing* button upon running the report, like in Excel 2010. The records cannot be altered on any of the WFTS standard reports. The Excel sheet is protected with a randomly generated password created when the report is run to preserve the integrity of each record. The Global Support Team does not have the ability to unprotect the Excel report sheet.

## Accruals Report

The Accruals report tracks time earned balances. Use this report to see remaining balances for any work code tied to a bank of hours.

**Important:** Shift breaks are subtracted when the target shift has been configured to deduct time. The shift assigned to the area on the Roster automatically applies and supersede shift break rules assigned to the person.

Data filter options include date range, single institution, and individual employee.

## Accrual Report Field Descriptions

This report displays the accrual balances for all Accrual Group numbers. The report allows the tracking of the remaining balances for each accrual group, such as vacation, sick, and comp time.

**Important:** Shift breaks are subtracted when the target shift has been configured to deduct time. The shift assigned to the area on the Roster supersedes shift break rules assigned to the person.

- The left column contains the person's name.
- To the right of the person's name is the work code within the Accrual Group.

- The Remaining column shows the balance of the non-working work codes available now.
- The In Period column supplies the amount of hours deposited into the Accrual Group for the working type work codes. The total is within the specified date range in FROM and THROUGH fields.

Field Name	Description
<b>Date Selection</b>	Whether to use calendar dates or dynamically calculated dates.
<b>From</b>	The start date of a range to gather accrual balances.
<b>Through</b>	The end date of a range to bring back accrual balances.
<b>Effective Date</b>	The date on which the accrual balance is totaled during the period specified between the From & Through dates.
<b>Accrual Group</b>	List of accrual groups as configured in Setup Codes. Select an accrual group from the menu list to return this accrual group only. To return all accrual groups in the report select <none>.
<b>Having At Most</b>	Enter an accrual balance in this field to include in the report results only accruals less than or equal to the given number.
<b>Having At Least</b>	Enter an accrual balance in this field to include in the report results only accrual balances greater than or equal to the given number.
<b>Institution</b>	All Institution records are displayed in the drop-down list that you are allowed to limit by. Select one to limit the report results to the selected Institution only.
<b>Person</b>	All active People records are displayed in the drop-down list. Select one to limit the report results to the selected person only.
<b>Run Report</b>	Press this button to view the Accruals report.

## Audit Report

The Audit report provides an audit trail of record changes made by the person who modified the record.

For example, Tom modified Sally's record; this change displays in Tom's audit because he modified Sally's record.

Limit by filter options include date range, area, and individual employee.

## Audit Report Field Descriptions

This report displays the accrual balances for all Accrual Group numbers. The report allows the tracking of the remaining balances for each accrual group (i.e. vacation, sick, comp time, etc...)

- The Who column displays the name of the person who made the changes.
- The When column displays when the changes took place.
- The Target column displays what area was modified/affected.
- The Type column displays what kind of changes were made.
- The Description column displays a summary of the changes.

Field Name	Description
<b>Date Selection</b>	Whether to use calendar dates or dynamically calculated dates.
<b>From</b>	The start date of a range to gather Audit data.
<b>Through</b>	The end date of a range to bring back Audit data.
<b>Institution</b>	A list of Institution(s) as configured in Setup Institution. Select none, one, some, or all to limit the report results to the selected Institutions only.
<b>Audit Target</b>	A list of organizational levels, windows, staffing tasks and more that can be tracked. Select none, one, some, or all to limit the report results to the selected Audit Targets only.
<b>Audit Type</b>	A list of all the different actions that can be tracked: Delete, Disabled, Insert, Order, Record, Rename, Terminology, Update. Select none, one, some, or all to limit the report results to the selected Audit Types only.
<b>Person</b>	All active People records are displayed in the drop-down list. Select none, one, some, or all to limit the report results to the selected People only.
<b>View Report</b>	Press this button to view the Audit report.

## Contact Log Report

The Contact Log provides outbound call activity for work opportunities, notifications, messages, and alarms. Use this report to see who was contacted, when, why, and the outcome of the call.

Limit By... filter options include date range, area, rank, shift, and individual employee.

## Contact Log Report Field Descriptions

This window details any contact log information over a specified date range. This is an exhaustive list of who was contacted and why and the outcome of that contact. All four forms of contact will appear on this window: Opportunity, Notification, Message and Alarm.

Field Name	Description
<b>Date Selection</b>	Whether to use calendar dates or dynamically calculated dates.
<b>Institution</b>	A list of Institution(s) as configured in Setup Institution. Select none, one, some, or all to limit the report results to the selected Institutions only.
<b>Region</b>	A list of Region(s) as configured in Setup Institution. Select none, one, some, or all Regions to limit the report results to the selected Regions only.
<b>From</b>	The start date of a range to gather Contact Log data.
<b>Through</b>	The end date of a range to bring back Contact Log data.
<b>Person</b>	All active People records are displayed in the drop-down list. Select none, one, some, or all to limit the report results to the selected People only.
<b>Rank</b>	A list of Rank(s) as configured in Setup Institution. Select none, one, some, or all to limit the report results to the selected Ranks only.
<b>Shift</b>	A list of Shift(s) as configured in Setup Shifts. Select none, one, some, or all to limit the report results to the selected Shifts only.
<b>View Report</b>	Click to view the Contact Log report.

## Costs Report

The Cost report provides an itemized list of staffing activity and cost. Use this report to view the financial impact of any code.

The Costs report enhances budget preparation and forecasts organizational costs based on historical patterns.

Employee wages must be in place to generate this report. Estimated costs are calculated by:

**Work Code Rate \*(Number of Hours Worked x Employee Wage)**

Limit By... filter options include date range, area, rank, shift, work code, work code type and individual employee.

**Important:** The Costs report represents an approximate cost associated with work codes and not intended for use in payroll reporting.

## Costs Report Field Descriptions

If you associate a wage factor with each Work Code and provide a wage in the person's Profile, this report will detail the total costs associated with each Work Code over a specified date range. This report may not provide accurate information for agencies summing overtime costs using an FLSA period.

Lunch is subtracted if target Shift indicates that it is appropriate.

Field Name	Description
<b>Date Selection</b>	Whether to use calendar dates or dynamically calculated dates.
<b>From</b>	The start date of a range to gather Costs data.
<b>Through</b>	The end date of a range to bring back Costs data.
<b>Detail</b>	Select this check box along with the defined detail code(s) to query records with a detail code. Multiple detail codes must be separated with a comma (,).
<b>Institution</b>	A list of Institution(s) as configured in Setup Institution. Select none, one, some, or all to limit the report results to the selected Institutions only.
<b>Region</b>	A list of Region(s) as configured in Setup Institution. Select none, one, some, or all Regions to limit the report results to the selected Regions only.
<b>Person</b>	All active People records are displayed in the drop-down list. Select none, one, some, or all to limit the report results to the selected People only.
<b>Physical Unit</b>	A list of Units as configured in Setup Institution. Select none, one, some, or all to limit the report results to the selected Units only.
<b>Position</b>	A list of Positions as configured in Setup Institution. Select none, one, some, or all to limit the report results to the selected Positions only.
<b>Rank</b>	A list of Ranks as configured in Setup General. Select none, one, some, or all to limit the report results to the selected Ranks only.
<b>Shift</b>	A list of Shifts as configured in Setup Shifts. Select none, one, some, or all to limit the report results to the selected Shifts only.
<b>Work Code</b>	A list of work codes as configured in Setup Codes. Select none, one, some, or all to limit the report results to the selected Work Codes only.
<b>Work Code Type</b>	A list of Work Code Types. Select none, one, some, or all to limit the report results to the selected Types only.
<b>View Report</b>	Click to view the Costs report.



## Exceptions Report

The Exceptions report provides an itemized list of working and non-working code records. Includes detail codes and excludes regular type work code records.

Records are grouped by day followed by working and then non-working type records. When configured, this report shows who created the vacancy for working type records, for example; Tom received overtime as a result of Sally's sick leave.

Limit By... filter options include, date range, area, rank, shift, work code, work code type and individual employee.

## Exceptions Report Field Descriptions

This report provides a day by day account of all staffing activity. For each day all working and then non-working codes are displayed followed by an alphabetical listing of the people working each of these codes. It includes exceptions only (no full Shift-Regular Duty Work Codes).

Lunch is subtracted if target Shift indicates that it is appropriate.

- Date and Shift
- Payroll Code abbreviation of work code, work code name and abbreviation, and total hours.

Field Name	Description
<b>Date Selection</b>	Whether to use calendar dates or dynamically calculated dates.
<b>From</b>	The start date of a range to gather data for work exceptions.
<b>Through</b>	The end date of a range to bring back data for work exceptions.
<b>Payroll only</b>	If checked, only information that affects payroll is displayed on the report. Staffing only codes (e.g., move-up) do not appear.
<b>Detail</b>	Select this check box along with the defined detail code(s) to query records with a detail code. Multiple detail codes must be separated with a comma (,).
<b>Institution</b>	A list of Institution(s) as configured in Setup Institution. Select none, one, some, or all to limit the report results to the selected Institutions only.
<b>Region</b>	A list of Region(s) as configured in Setup Institution. Select none, one, some, or all Regions to limit the report results to the selected Regions only.
<b>Person</b>	All active People records are displayed in the drop-down list. Select none, one, some, or all to limit the report results to the selected People only.

Field Name	Description
<b>Physical Unit</b>	A list of Units as configured in Setup Institution. Select none, one, some, or all to limit the report results to the selected Units only.
<b>Position</b>	A list of Positions as configured in Setup Institution. Select none, one, some, or all to limit the report results to the selected Positions only.
<b>Rank</b>	A list of Ranks as configured in Setup General. Select none, one, some, or all to limit the report results to the selected Ranks only.
<b>Shift</b>	A list of Shifts as configured in Setup Shifts. Select none, one, some, or all to limit the report results to the selected Shifts only.
<b>Work Code</b>	A list of work codes as configured in Setup Codes. Select none, one, some, or all to limit the report results to the selected Work Codes only.
<b>Work Code Type</b>	A list of Work Code Types. Select none, one, some, or all to limit the report results to the selected Types only.
<b>View Report</b>	Click to view the Exceptions report.

## Expirations Report

The Expirations report provides a list of personnel with specialties and licenses that expire within a user defined date range.

The Expirations report is typically used to manage employees approaching expiration dates on time constrained specialties or licenses.

Limit By... filter options include date range, area, and individual employee.

## Expirations Report Field Descriptions

Specialties are certifications or qualifications that are tracked in the application. Specialties may affect staffing and can be used to include or exclude a Person from a working opportunity. and License Expirations can be tracked using this report. A Person may have multiple specialties, each with its own expiration date. Select a future date range to see People whose specialties or licenses are due to expire during this time period. Contact these people via a recorded message to inform them of their expiration date.

Lunch is subtracted if target Shift indicates that it is appropriate.

- The **What** column displays the specialty or type of document that is expiring
- The **Who** column displays the staff member's name who has the specialty or document that is expiring along with their Employee ID.
- The **When** column displays the expiration date.

Field Name	Description
<b>Date Selection</b>	Whether to use calendar dates or dynamically calculated dates.
<b>From</b>	The start date of a range to gather Specialty Expirations.
<b>Through</b>	The end date of a range to bring back Specialty Expirations.
<b>Institution</b>	A list of Institution(s) as configured in Setup Institution. Select none, one, some, or all to limit the report results to the selected Institutions only.
<b>Region</b>	A list of Region(s) as configured in Setup Institution. Select none, one, some, or all Regions to limit the report results to the selected Regions only.
<b>Person</b>	All active People records are displayed in the drop-down list. Select none, one, some, or all to limit the report results to the selected People only.
<b>Rank</b>	A list of Ranks as configured in Setup General. Select none, one, some, or all to limit the report results to the selected Ranks only.
<b>View Report</b>	Press this button to view the Expiration report.

## Login Report

The Login report provides user login activity and details who, when, and how users logged in.

The Login report is used to monitor or review system activity by person or group.

Filtering options include date range, area, login source, authority, rank, and individual employee.

## Login Report Field Descriptions

Displays who logged in, When and How they logged into the application. This report allows management to track access into the application for a date range.

- The **Who** column displays the name of the staff member that logged onto the application
- The **What** displays the rank of the staff member at the time they logged onto the application
- The **Authority** column indicates the authority level of the user who logged in as well as if they specified they wanted the ability to access the setup area (S).
- The **In** column displays the date and time they logged into the application.
- The **Out** column displays the date and time they logged out of the application.

- The **How** column describes the way staff members accessed the application: by Telephone, Web Access, or Workstation.

Field Name	Description
<b>Date Selection</b>	Whether to use calendar dates or dynamically calculated dates.
<b>From</b>	The start date of a range to gather login data.
<b>Through</b>	The end date of a range to bring back login data.
<b>Institution</b>	A list of Institution(s) as configured in Setup Institution. Select none, one, some, or all to limit the report results to the selected Institutions only.
<b>Region</b>	A list of Region(s) as configured in Setup Institution. Select none, one, some, or all Regions to limit the report results to the selected Regions only.
<b>Authority</b>	A list of Authorities as configured in Setup Security. Select none, one, some, or all to limit the report results to the selected Authorities only.
<b>Login Source</b>	All possible sources are displayed in the list. Select none, one, some, or all to limit the report results to the selected People only. Choices are: <ul style="list-style-type: none"><li>• Inbound</li><li>• Online</li><li>• Workstation</li><li>• Web</li></ul>
<b>Person</b>	All active People records are displayed in the drop-down list. Select none, one, some, or all to limit the report results to the selected People only.
<b>Rank</b>	A list of Ranks as configured in Setup General. Select none, one, some, or all to limit the report results to the selected Ranks only.
<b>View Report</b>	Click to view the Login report.

## Payback Report

The Payback report provides aging information for outstanding shift trade balances in either hours or instances.

The Payback report provides a list of people who owe shift trades and to whom the hours are owed.

Limit By... filter options include date range, area, work code and individual employee.

## Payback Report Field Descriptions

This report tracks payback balances (shift trades). It displays each code which is tracked followed by an alphabetical listing of people who owe for that type of code.

- The **Who** column displays the staff member who owes the hours.
- The **Owes** column displays the staff member to whom the hours are owed.
- The **Hours** column displays the number of hours owed.
- The **Since** column displays the date the trade took place; NOT when it was worked.
- The **Age** column displays the number of days since the trade took place.

Field Name	Description
<b>Date Selection</b>	Whether to use calendar dates or dynamically calculated dates.
<b>From</b>	The start date of a range to gather Payback data.
<b>Through</b>	The end date of a range to bring back Payback data.
<b>Institution</b>	A list of Institution(s) as configured in Setup Institution. Select none, one, some, or all to limit the report results to the selected Institutions only.
<b>Person</b>	All active People records are displayed in the drop-down list. Select none, one, some, or all to limit the report results to the selected People only.
<b>Physical Unit</b>	A list of Units as configured in Setup Institution. Select none, one, some, or all to limit the report results to the selected Units only.
<b>Position</b>	A list of Positions as configured in Setup Institution. Select none, one, some, or all to limit the report results to the selected Positions only.
<b>Rank</b>	A list of Ranks as configured in Setup General. Select none, one, some, or all to limit the report results to the selected Ranks only.
<b>Shift</b>	A list of Shifts as configured in Setup Shifts. Select none, one, some, or all to limit the report results to the selected Shifts only.
<b>Work Code</b>	A list of work codes as configured in Setup Codes. Select none, one, some, or all to limit the report results to the selected Work Codes only.
<b>Work Code Type</b>	A list of Work Code Types. Select none, one, some, or all to limit the report results to the selected Types only.
<b>View Report</b>	Click to view the Payback report.

Related links:

## Payroll Report

The Payroll report provides an itemized list of total hours for work code records including detail codes for each employee. Includes FLSA Style option.

Use the FLSA Style check box to display total hours above the FLSA threshold.

Limit By...filtering options include date range, organizational area in the application, rank, shift, work code, work code type, and individual employee.

**Important:** Shift breaks are subtracted when the target shift has been configured to deduct time. The shift assigned to the area on the Roster automatically applies and supersedes shift break rules assigned to the person. System authorization is required to change shift rules.

## Payroll Report Field Descriptions

The Payroll report displays total Payroll hours per person for the selected payroll period. In addition, it displays work codes and total hours worked over the specified date range. The Payroll report is ordered by Payroll ID followed by the person's name. Under each Person is a list of their staffing activity for the specified date range. This is a sum of hours for each payroll code for the specified date range. First half and second half Shift hours are totaled to the left of the TOTAL hours for those who are interested in which half of the Shift most hours occur. The information contained within this window can be exported in many different formats. FLSA totals, if relevant, appear to the left of the Person's name. If the Person's wage is supplied, then the overtime pay is displayed as well. This report becomes the FLSA report if accessed by right-clicking an FLSA icon (|) on the Calendar.

Lunch is subtracted if target Shift indicates that it is appropriate.

Field Name	Description
<b>Date Selection</b>	Whether to use calendar dates or dynamically calculated dates.
<b>From</b>	The start date of a range to gather Payroll Data.
<b>Through</b>	The end date of a range to bring back Payroll Data.
<b>Payroll only</b>	Select to return work codes that contain a payroll code association.
<b>FLSA Style</b>	If checked, includes FLSA hours and costs.
<b>Detail</b>	Select this check box along with the defined detail code(s) to query records with a detail code. Multiple detail codes must be separated with a comma (,).
<b>Institution</b>	A list of Institution(s) as configured in Setup Institution. Select none, one, some, or all to limit the report results to the selected Institutions only.

Field Name	Description
<b>Region</b>	A list of Region(s) as configured in Setup Institution. Select none, one, some, or all Regions to limit the report results to the selected Regions only.
<b>Pay Information</b>	A list of Pay Information as configured in Setup General. Select none, one, some, or all to limit the report results to the selected Pay Information definitions only.
<b>Person</b>	All active People records are displayed in the drop-down list. Select none, one, some, or all to limit the report results to the selected People only.
<b>Physical Unit</b>	A list of Units as configured in Setup Institution. Select none, one, some, or all to limit the report results to the selected Units only.
<b>Position</b>	A list of Positions as configured in Setup Institution. Select none, one, some, or all to limit the report results to the selected Positions only.
<b>Rank</b>	A list of Ranks as configured in Setup General. Select none, one, some, or all to limit the report results to the selected Ranks only.
<b>Shift</b>	A list of Shifts as configured in Setup Shifts. Select none, one, some, or all to limit the report results to the selected Shifts only.
<b>Work Code</b>	A list of work codes as configured in Setup Codes. Select none, one, some, or all to limit the report results to the selected Work Codes only.
<b>Work Code Type</b>	A list of Work Code Types. Select none, one, some, or all to limit the report results to the selected Types only.
<b>View Report</b>	Click to view the Payroll report.

## Personal History Report

The Personal History report provides total hours for each work code record including detail codes, time earned, person, shift, payroll splits, and assignment area.

Limit By... filter options include date range, Roster location, rank, shift, work code, work code type and individual employee.

## Personal History Report Field Descriptions

The Personal History report displays the date, shift, assignment, and hours (work history) subtotaled by work code.

Field Name	Description
<b>Date Selection</b>	Whether to use calendar dates or dynamically calculated dates.
<b>From</b>	The start date of a range to gather data for work exceptions.
<b>Through</b>	The end date of a range to bring back data for work exceptions.
<b>Payroll only</b>	Select to return work codes that contain a payroll code association.
<b>Detail</b>	Select this check box along with the defined detail code(s) to query records with a detail code. Multiple detail codes must be separated with a comma (,).
<b>Institution</b>	A list of Institution(s) as configured in Setup Institution. Select none, one, some, or all to limit the report results to the selected Institutions only.
<b>Region</b>	A list of Region(s) as configured in Setup Institution. Select none, one, some, or all Regions to limit the report results to the selected Regions only.
<b>Person</b>	All active People records are displayed in the drop-down list. Select none, one, some, or all to limit the report results to the selected People only.
<b>Physical Unit</b>	A list of Units as configured in Setup Institution. Select none, one, some, or all to limit the report results to the selected Units only.
<b>Position</b>	A list of Positions as configured in Setup Institution. Select none, one, some, or all to limit the report results to the selected Positions only.
<b>Rank</b>	A list of Ranks as configured in Setup General. Select none, one, some, or all to limit the report results to the selected Ranks only.
<b>Shift</b>	A list of Shifts as configured in Setup Shifts. Select none, one, some, or all to limit the report results to the selected Shifts only.
<b>Work Code</b>	A list of work codes as configured in Setup Codes. Select none, one, some, or all to limit the report results to the selected Work Codes only.
<b>Work Code Type</b>	A list of Work Code Types. Select none, one, some, or all to limit the report results to the selected Types only.
<b>View Report</b>	Click to view the Personal History report.

## Roster Report

The Roster report provides a capture of the daily Roster. Excludes ID Overrides and Position Overriding Name.



Limit By... filtering options include date range, rank, shift, work code, work code type, and person.

## Roster Report Field Descriptions

This report provides a capture of the roster for any particular day. The roster is sorted by date, roster area, and position. The report displays the date, shift, assignment, and hours and is sub-totaled by work code.

Field Name	Description
<b>Date Selection</b>	Whether to use calendar dates or dynamically calculated dates.
<b>From</b>	The start date of a range to gather data for the report.
<b>Through</b>	The end date of a range to bring back data for the report.
<b>Payroll only</b>	Select to return work codes that contain a payroll code association.
<b>Detail</b>	Select this check box along with the defined detail code(s) to query records with a detail code. Multiple detail codes must be separated with a comma (,).
<b>Institution</b>	A list of Institution(s) as configured in Setup Institution. Select none, one, some, or all to limit the report results to the selected Institutions only.
<b>Region</b>	A list of Region(s) as configured in Setup Institution. Select none, one, some, or all Regions to limit the report results to the selected Regions only.
<b>Person</b>	All active People records are displayed in the drop-down list. Select none, one, some, or all to limit the report results to the selected People only.
<b>Position</b>	A list of Positions as configured in Setup Institution. Select none, one, some, or all to limit the report results to the selected Positions only.
<b>Rank</b>	A list of Ranks as configured in Setup General. Select none, one, some, or all to limit the report results to the selected Ranks only.
<b>Shift</b>	A list of Shifts as configured in Setup Shifts. Select none, one, some, or all to limit the report results to the selected Shifts only.
<b>Work Code</b>	A list of work codes as configured in Setup Codes. Select none, one, some, or all to limit the report results to the selected Work Codes only.
<b>Work Code Type</b>	A list of Work Code Types. Select none, one, some, or all to limit the report results to the selected Types only.
<b>View Report</b>	Click to view the Roster report.

## Summary Report

The Summary report provides work code record activity in graphical format and subtotals each work code including detail codes by percent, count, and totals hours.

Limit By... filtering options include date range, organizational area, rank, shift, work code, work code type and individual employee.

## Summary Report Field Descriptions

This window provides a management overview of the staffing activity for Work Codes over a specified date range. This report shows a breakdown for each code by percentage within the date range selected. Graphics are used to display the information. You decide which work codes to include in the report. The codes are broken down into four categories: working, non-working, regular duty, sign-up.

Field Name	Description
<b>Date Selection</b>	Whether to use calendar dates or dynamically calculated dates.
<b>From</b>	The start date of a range to gather data for work exceptions.
<b>Through</b>	The end date of a range to bring back data for work exceptions.
<b>Payroll only</b>	If checked, only information that affects payroll is displayed on the report. Staffing only codes (e.g., move-up) do not appear.
<b>Detail</b>	Run the report based on a comma separated list of detail codes. Place a check-mark in this check box along with the defined detail code(s) to query records base. Multiple detail codes must be separated with a comma (,).
<b>Institution</b>	A list of Institution(s) as configured in Setup Institution. Select none, one, some, or all to limit the report results to the selected Institutions only.
<b>Region</b>	A list of Region(s) as configured in Setup Institution. Select none, one, some, or all Regions to limit the report results to the selected Regions only.
<b>Person</b>	All active People records are displayed in the drop-down list. Select none, one, some, or all to limit the report results to the selected People only.
<b>Physical Unit</b>	A list of Units as configured in Setup Institution. Select none, one, some, or all to limit the report results to the selected Units only.
<b>Position</b>	A list of Positions as configured in Setup Institution. Select none, one, some, or all to limit the report results to the selected Positions only.

Field Name	Description
<b>Rank</b>	A list of Ranks as configured in Setup General. Select none, one, some, or all to limit the report results to the selected Ranks only.
<b>Shift</b>	A list of Shifts as configured in Setup Shifts. Select none, one, some, or all to limit the report results to the selected Shifts only.
<b>Work Code</b>	A list of work codes as configured in Setup Codes. Select none, one, some, or all to limit the report results to the selected Work Codes only.
<b>Work Code Type</b>	A list of Work Code Types. Select none, one, some, or all to limit the report results to the selected Types only.
<b>View Report</b>	Click to view the Summary report.

Related links:

# System Phone Options

Dialing In
<ul style="list-style-type: none"><li>• Enter your ID, then <b>press #</b></li><li>• Enter your password, then <b>press #</b><ul style="list-style-type: none"><li>– You have X messages</li></ul></li></ul> <p>If there are messages</p> <ul style="list-style-type: none"><li>– <b>Press 1</b> to hear messages</li><li>– <b>Press 2</b> to hear old messages</li><li>– <b>Press 3</b> for inbound options</li></ul>

Inbound Options
<ul style="list-style-type: none"><li>• Add work code, <b>press 1</b></li><li>• Remove work code, <b>press 2</b></li><li>• Personal calendar, <b>press 3</b></li><li>• Picklist position, <b>press 4</b></li><li>• Working opportunities, <b>press 5</b></li><li>• Personal menu, <b>press 6</b></li><li>• Recording menu, <b>press 7</b>. See Advanced Recording Options topic.</li><li>• Return to the previous menu, <b>press #</b></li><li>• Repeat these options, <b>press *</b></li></ul>

Option 1 Add Work Code
<ul style="list-style-type: none"><li>• Enter a date or date range, then <b>press #</b><ul style="list-style-type: none"><li>– Enter code abbreviation, then <b>press #</b></li><li>– <b>Press *</b> to hear a list of codes</li></ul></li><li>• <b>Press 1</b> to confirm</li><li>• To cancel, <b>press #</b></li></ul>

Option 2 Remove Work Code
<ul style="list-style-type: none"><li>• Enter date or date range, then <b>press #</b><ul style="list-style-type: none"><li>– <b>Press 1</b> to confirm</li><li>– To cancel, <b>press #</b></li></ul></li></ul>



Option 3 Personal Calendar
<ul style="list-style-type: none"><li>• Enter date range, then <b>press #</b><ul style="list-style-type: none"><li>– Wait to hear your schedule</li></ul></li></ul>



Option 4 Picklist Position
<ul style="list-style-type: none"><li>• Enter date then press #</li><li>• The system reports Picklist information for the logged in user's default region and shift for the given date.</li></ul>



Option 5 Working Opportunities
<ul style="list-style-type: none"><li>• Enter date, then <b>press #</b><ul style="list-style-type: none"><li>– Wait to hear a list of working opportunities</li></ul></li></ul>

Option 6 Personal Menu
<ul style="list-style-type: none"> <li>• To record your name, <b>press 1</b> <ul style="list-style-type: none"> <li>– Speak after the tone, then <b>press #</b></li> <li>– <b>Press 1</b> to confirm</li> <li>– <b>Press #</b> to cancel</li> <li>– To review your name, <b>press 2</b></li> </ul> </li> <li>• To change the password, <b>press 2.</b> <ul style="list-style-type: none"> <li>– Enter the new password, then <b>press #</b></li> </ul> </li> <li>• To change the phone number, <b>press 3</b> <ul style="list-style-type: none"> <li>– To change the primary phone number, <b>press 1</b></li> <li>– To change the secondary phone number, <b>press 2</b></li> <li>– Enter the new phone number, <b>then press #</b></li> <li>– To confirm, <b>press 1</b></li> <li>– To cancel, <b>press #</b></li> </ul> </li> </ul>

Date and Date Range Format
<ul style="list-style-type: none"> <li>• Use two digits when specifying month or day</li> <li>• Date and Date Range are for today and future only</li> <li>• Use military time</li> </ul>
<ul style="list-style-type: none"> <li>• January 3rd, press: 0 1 0 3 #</li> <li>• January 1st thru January 29, press: 0 1 0 1 0 1 2 9 #</li> <li>• March 6th, 7 AM - 2 PM, press: 0 3 0 6 0 7 0 0 0 0 2 0 0 0 #</li> </ul>
<p><b>Quick keys:</b></p> <ul style="list-style-type: none"> <li>• Today, press: 0 0 0</li> <li>• Tomorrow, press: 0 0 1</li> <li>• Entire month (October), press: 1 0 0 0</li> <li>• Next 'x' days (5 days), press: 0 0 5</li> </ul>

Related links:  
[Advanced Recording Options for Setup Items](#)