practice engine

V9 End User Guide to Standard Jobs

DOCUMENTATION

Phone: 01981 590410

Fax: 01981 590411

E-mail: information@praceng.com

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V9 END USER GUIDE TO JOBS

This document is aimed at the end user to provide information on the use of Jobs in V9. It will also provide information relating to related functionality such as timesheet entry. More detailed information relating to setting up Jobs and the administration of jobs can be found in the Administrators Guide for Jobs and Workflow.

Dashlet, Menu, Batch, Most Recently Used and Grid settings are retained in temporary internet data in each browser and on each device. If Cookie and Website data is cleared from temporary internet files/ browsing history, user selections will be lost.

ACCESSING JOBS

Staff can access jobs from numerous launch points, and with different focuses. This section details the various access points that are available.

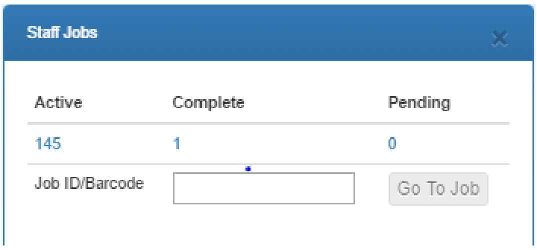
DASHLETS

There are dashlets available from both the Staff Dashboard and the Client dashboard that allow the user to drill down and view jobs for themselves or jobs for the client. Each of these dashlets is explained in more detail.

STAFF JOBS

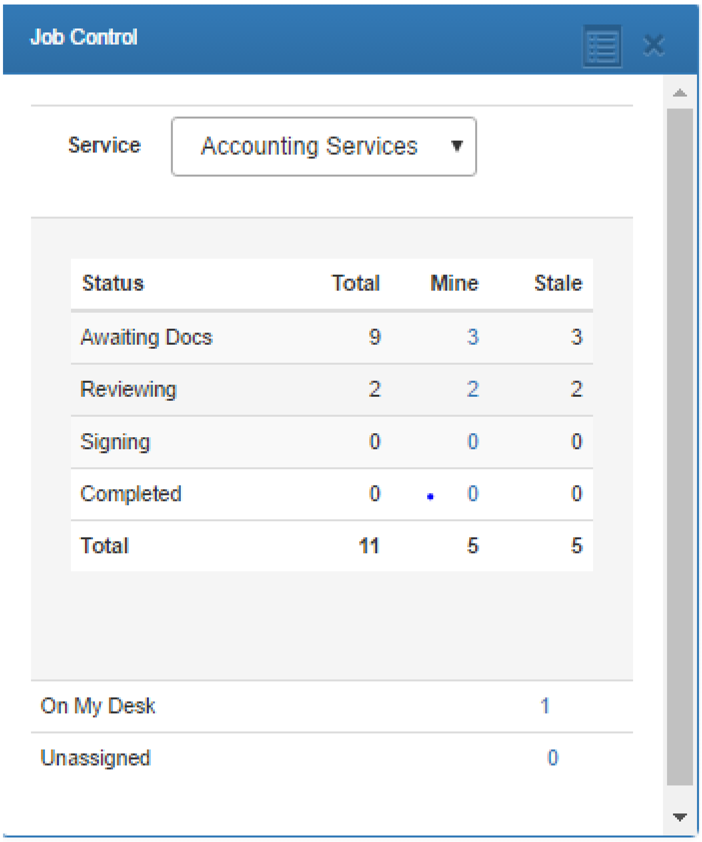
The Staff Jobs dashlet shows the total number of jobs for the staff member, grouped by whether the job is 'Active', 'Complete' or 'Pending'. A Job Search field allows for jobs to be searched for by barcode or job index. This dashlet works based on jobs where the staff member is named as the Job Partner, Job Manager or Job In Charge within the Job Details.

Clicking onto a total will navigate through to the Staff Job Control page where the jobs will be listed.



JOB CONTROLS

The Job Controls dashlet provides an alternative view of information regarding the number of Jobs that the staff member is either the Job Partner, Job Manager, Job In Charge on or where the job has been assigned to them.



The jobs are shown based on the service selected and the workflow statuses that have been set up within Practice Engine. Clicking onto the number on any of the lines will navigate through to the staff member's job control page, from which the details of any job the staff member is connected to can be viewed.

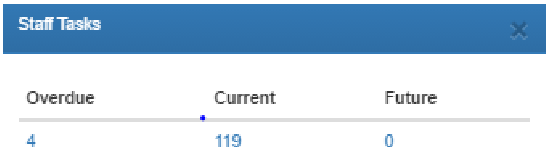
Clicking onto the number displayed next to **On My Desk** will show all jobs where the staff member is the current staff.

There is also an indicator to show any Unassigned Jobs. If any jobs have been assigned to a rack that works on a First available status, the number of unassigned jobs will be displayed. Clicking onto the figure will open the Staff Job Pickup page where the staff member can take assignment of a job.

If the staff member has been assigned to a job, but not yet accepted the staff member will receive a dialog to action whether they will be accepting the assigned job(s) or rejecting them.

TASKS

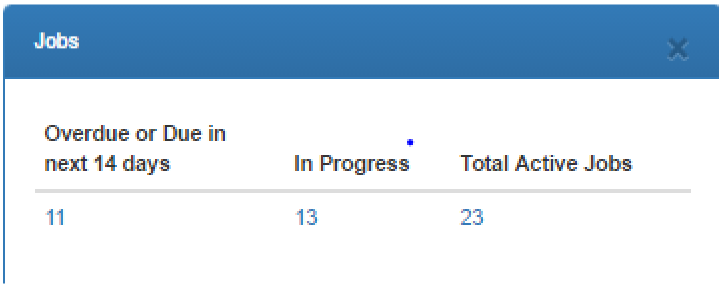
This dashlet displays the total of tasks, grouped by whether the task is 'Overdue', 'Current' or 'Future' dated. Clicking each total gives a breakdown of the tasks within the selection. Tasks within the other ranges can be viewed by selecting the appropriate tab from the Staff Tasks page. These figures are generated where the staff member is the named staff member on the task.



Right clicking on a task from the Staff Tasks page gives access to the Client Dashboard, Job Details, Task Details and also gives the option of entering time against the task.

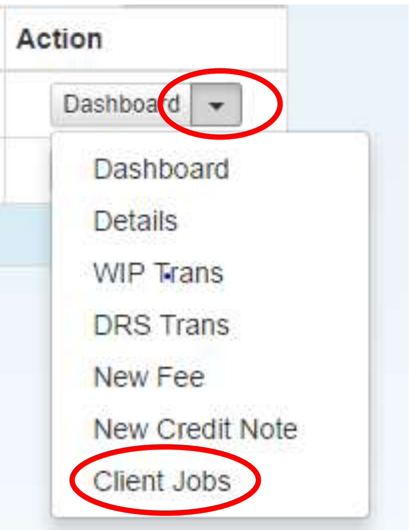
CLIENT JOBS

This dashlet is available on the Client Dashboard and displays the number of Overdue, In Progress and Active jobs for the client. Clicking onto any of the displayed **figures** will navigate through to the Job List page for the client.



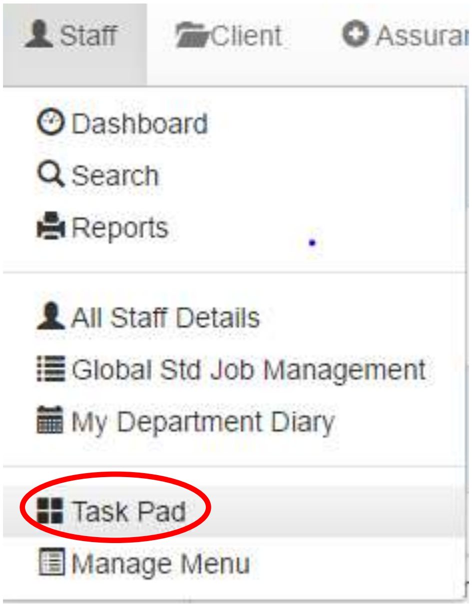
CLIENT SEARCH

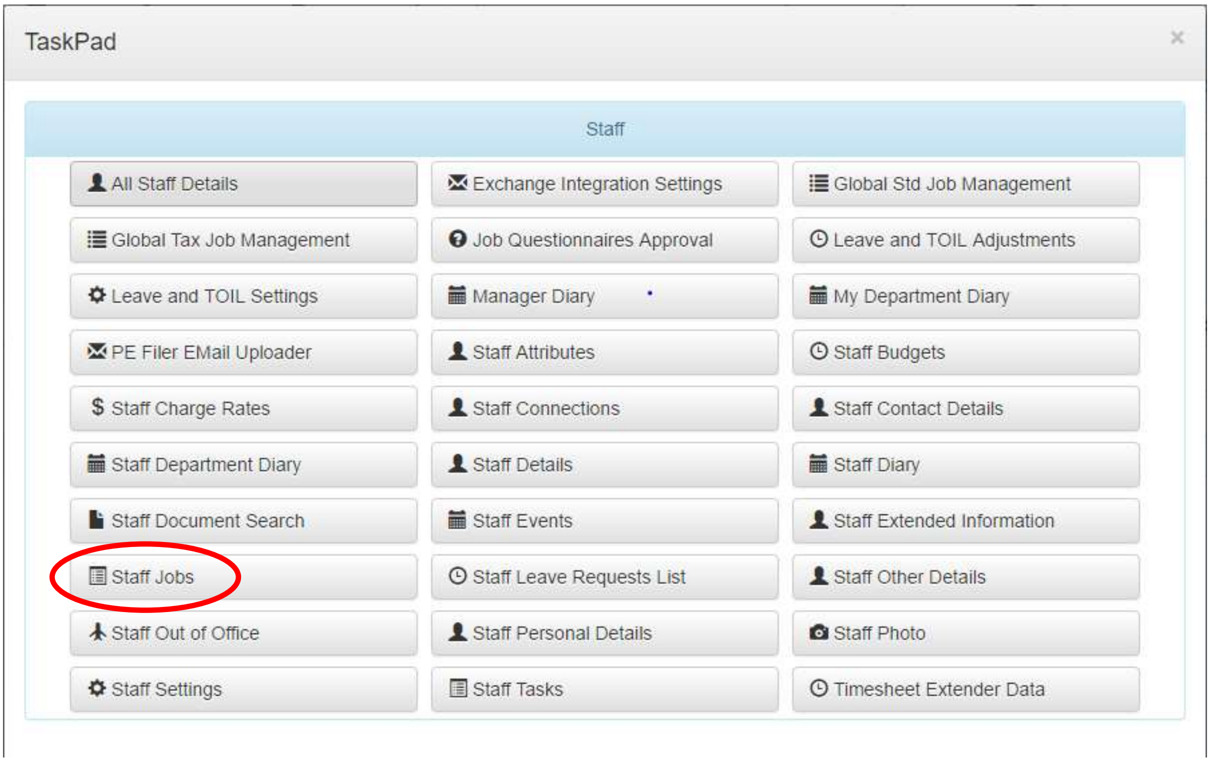
The Client Search can be used to navigate through to the Client Jobs page using the Client Jobs option on the Action menu.



STAFF MENU

Staff Jobs can also be accessed from the Staff Menu by selecting Staff Jobs from the Task Pad:

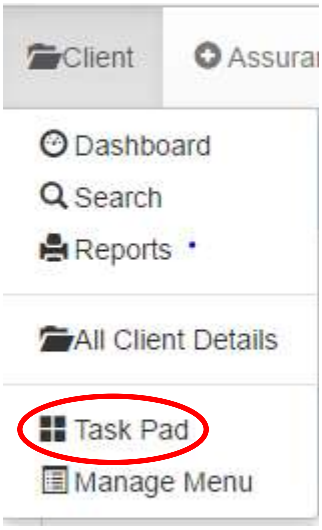


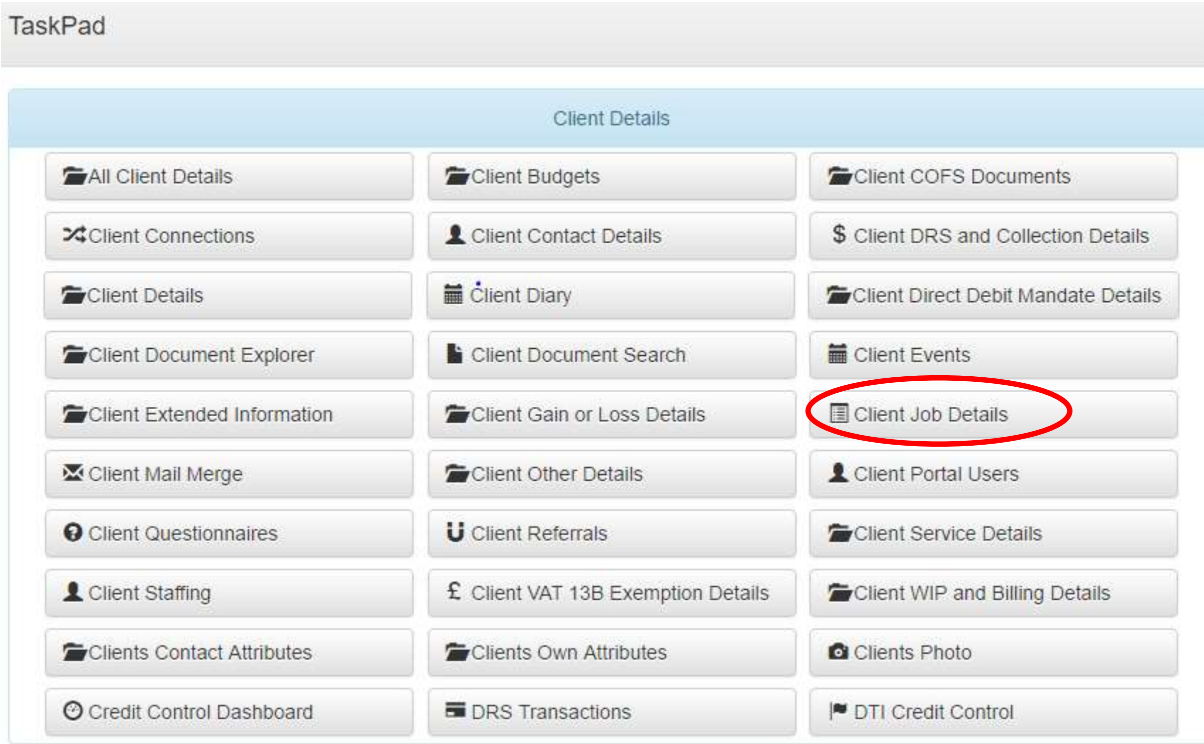


This will open the Staff Jobs page which is described in more detail in a later section.

CLIENT MENU

Client Jobs can also be accessed from the Client Menu by selecting Client Job Details from the Task Pad:



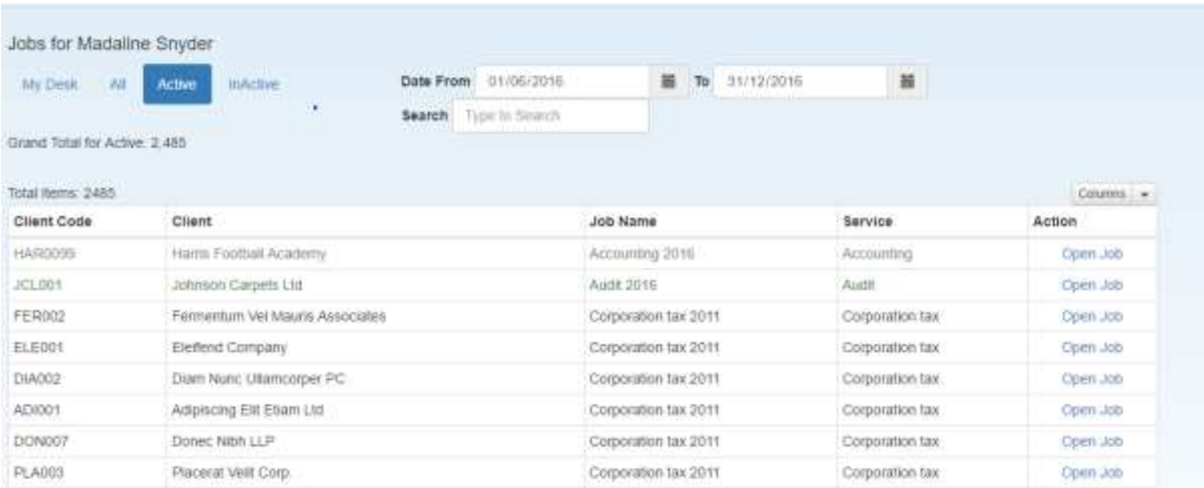


THE JOB LISTS

There are three jobs lists that will display all jobs for the staff member – Staff Jobs, the client – Client Job Details or the firm – Global Std Job Management. They are all reached using the access points described in the section above. This section will detail how the Job Lists can be used and configured.

THE STAFF JOBS LIST

The Staff Jobs page provides the staff member with a list of all of the jobs that they are either the Job Partner, Job Manager or Job In Charge on or assigned to and have accepted (My Desk).



Client Code	Client	Job Name	Service	Action
HAR0095	Harris Football Academy	Accounting 2016	Accounting	Open Job
JCL001	Johnson Carpets Ltd	Audit 2016	Audit	Open Job
FER002	Fermentum Vel Mauris Associates	Corporation tax 2011	Corporation tax	Open Job
ELE001	Eleifend Company	Corporation tax 2011	Corporation tax	Open Job
DIA002	Diam Nunc Ullamcorper PC	Corporation tax 2011	Corporation tax	Open Job
ADI001	Adipiscing Elit Etiam Ltd	Corporation tax 2011	Corporation tax	Open Job
DON007	Donec Nibh LLP	Corporation tax 2011	Corporation tax	Open Job
PLA003	Placerat Velit Corp.	Corporation tax 2011	Corporation tax	Open Job

The page displays four refiners for the Jobs – My Desk, All, Active and Inactive.

Jobs that the staff member has been assigned to, and accepted will be displayed on the 'My Desk' refiner. Jobs can be assigned through the use of the Forward button within the job details. The staff member will get a notification dialog allowing them to accept or reject the assigned job. This process is tracked through the Job History section within the Job pages.

The 'All' refiner will display all jobs regardless of their status.

'Active' will only display jobs with a status of Not Started, In Progress or Pending.

'Inactive' displays jobs with a status of Complete or Closed.

A date filter allows the jobs list to be refined and by default will show the current year. Changes to the date range will be persisted until the user clears their browser cache. The date range works against the Job Finish Target (for standard jobs) which is held in the Other date field within Job Dates or the Current Due Date (for tax jobs).

Columns can be added to the view to allow the user to manage their jobs effectively.

The available columns are:

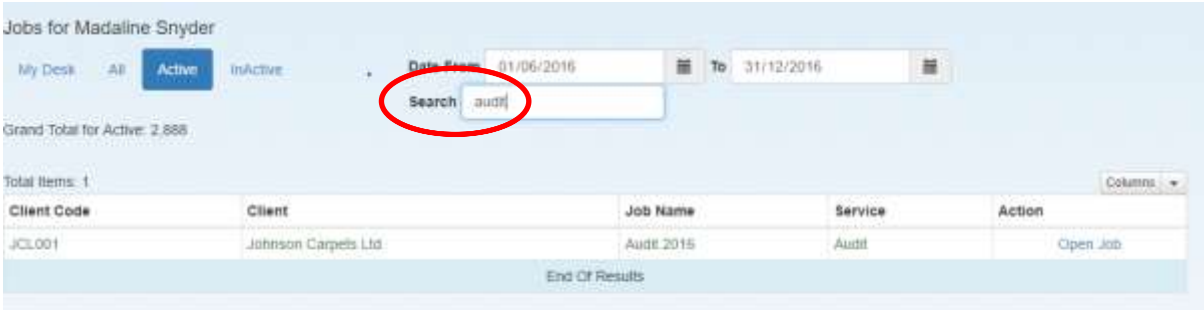
Column	**Description**
Job Id	The job's unique identifier within the database.
Client Code	The Client code that the client that the job is assigned to.
Client	The Client that the job is attached to.
Short Code	The Client's short code.
Group	The group that the client belongs to.

Service	The Service that the job is attached to.
Job Type	The Job type as specified in the Job Header table. This field is hidden within the job details.
Job Name	The name of the job against the client.
Partner	The partner responsible for the job.
Manager	The manager responsible for the job.
In-Charge	The Staff member In Charge of the job.
Is Job recurring?	Indicates whether the job is recurring or not.
Job Status	This column shows the main job status of Not Started, In Progress etc.
Job Work Status	Displays the associated Workflow Status if the job status is set to In Progress.
Job Complexity	Displays the complexity of the job if being used.
Date Created	This field will show the date that the job was first created.
Period Start	The Job's Period Start date as set on the Dates panel of the job.
Period End	The Job's Period End date as set on the Dates panel of the job.
Finish Target	The date entered into Other End within the dates panel of the job.
Current Due Date	The date entered into the Deadline End date.
Date Assigned	The date that the job was forwarded onto a staff member.
Date Accepted	The date that the job was accepted by the staff member.
Next Action Date	The next due date which is based on Task dates, Deadline and Other dates.
Job Code	The job code assigned to the job. This is an alpha numeric identifier that must be unique to the client.
Job Species	This field indicates whether the job is a Standard job, a Standard Tax Job or a Complex Tax Job.
Current Staff	The staff member that the job has been assigned to. This will only be updated if the staff member has accepted the job.
Tax Form	The Tax Form that the job is based upon.
Tax Year	The Tax year for the job.
Job Office Code	The office that the job belongs to.
Estimated Fee	The Estimated Fee for the job.
Budget Hours	The total of the budget hours for the job. This is always provided as a total figure regardless of the budget type selected.
Budget Value	The total of the budget value for the job.
Actual Hours	The number of actual hours that have been worked on the job.
Actual Value	The WIP value of the actual hours that have been worked on the job.
Billed WIP	The amount of WIP that has been billed from the job.
Written Off WIP	The amount of WIP from the job that has been written off.

Rollover Status	Indicates whether the job has been rolled over or whether it can be rolled over. N/A indicates a job that has not been set as recurring.
Rack Description	Indicates which Rack the job has been assigned to, if racks have been set up. (Tax Jobs)

The columns can be sorted into ascending or descending order by clicking into the column header.

The Search field will search against any text column that has been added to the grid.



Jobs can be displayed with differing colours based on the Workflow status of the job.

THE CLIENT JOBS LIST

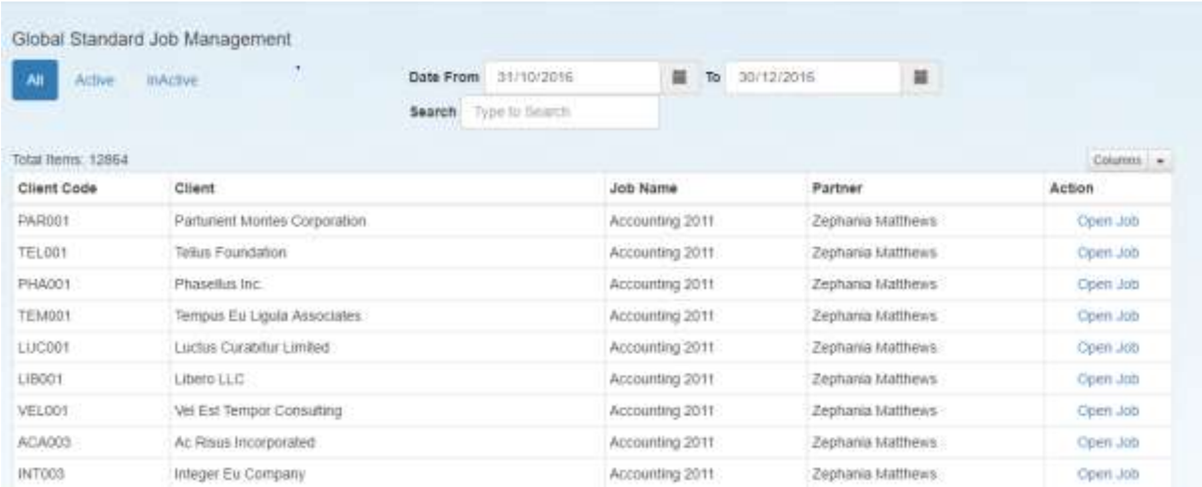
The **Client Job Details** page works in the same way as the Staff Jobs list but provides a grid view of the jobs associated with the client. The default view is of all Active jobs, but this can be changed by selecting either **All** or **Inactive** refiner at the top of the page. Specific jobs can also be searched for using the **Search** field. The search facility will search on text data within any columns that are displayed within the grid view.

The columns can be sorted into ascending or descending order by clicking into the column header.

There is also the ability for each user to select the columns that they would like displayed in the grid view. Additional columns can be selected by clicking onto the **Columns** button and selecting the required columns.

THE GLOBAL STANDARD JOB MANAGEMENT PAGE

The Global Standard Job Management page can be found from the Taskpad on the Staff menu.



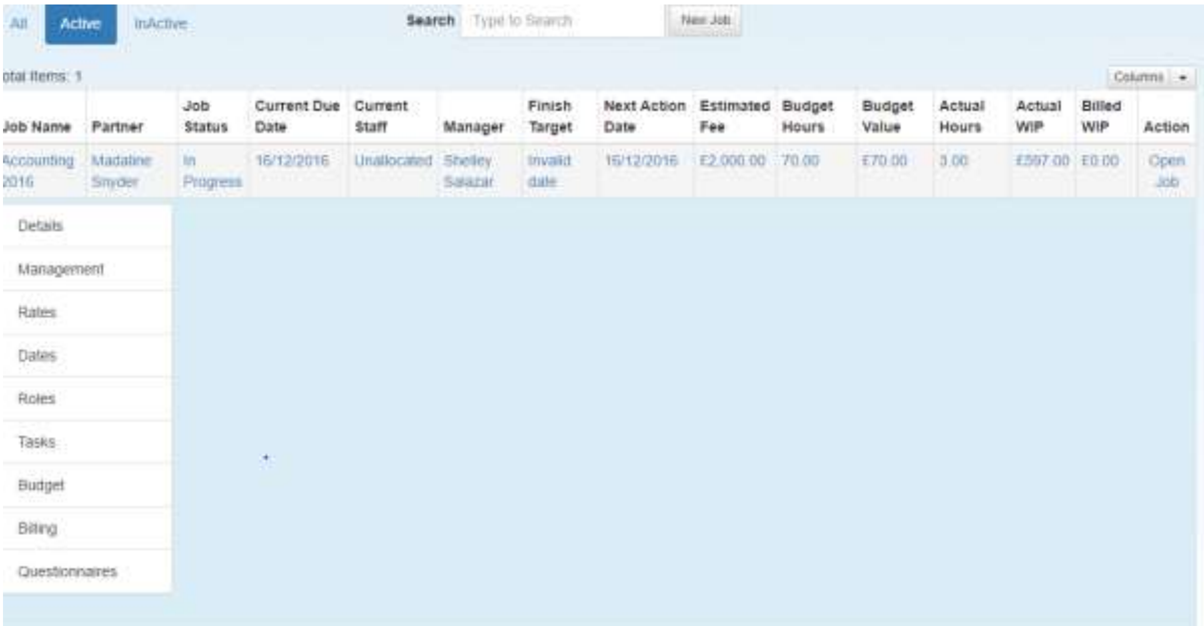
It provides an administrator a global view of all standard jobs within the system. It works in the same way as the Staff Jobs list, but does not have the My Desk refiner. There is a Global Tax Job Management page that will display all tax jobs.

OPENING THE JOB DETAILS

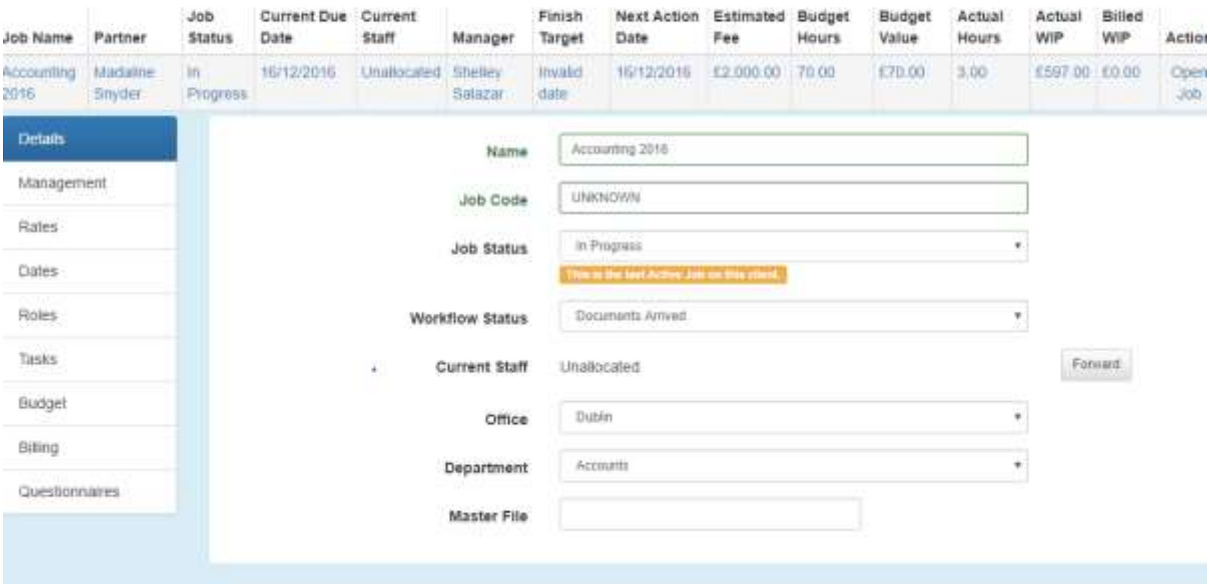
Job Details can be opened and viewed either as an In Line View or as full job pages. Both methods allow the editing of the job if the user has the correct permissions.

THE IN LINE VIEW

The In Line view is a quick way of viewing and updating job information. This view can be seen by clicking onto the job name within a job list.



The Job will expand within the grid to display the job menu as panel selections. Selecting a panel option will display the information for that section within the grid.



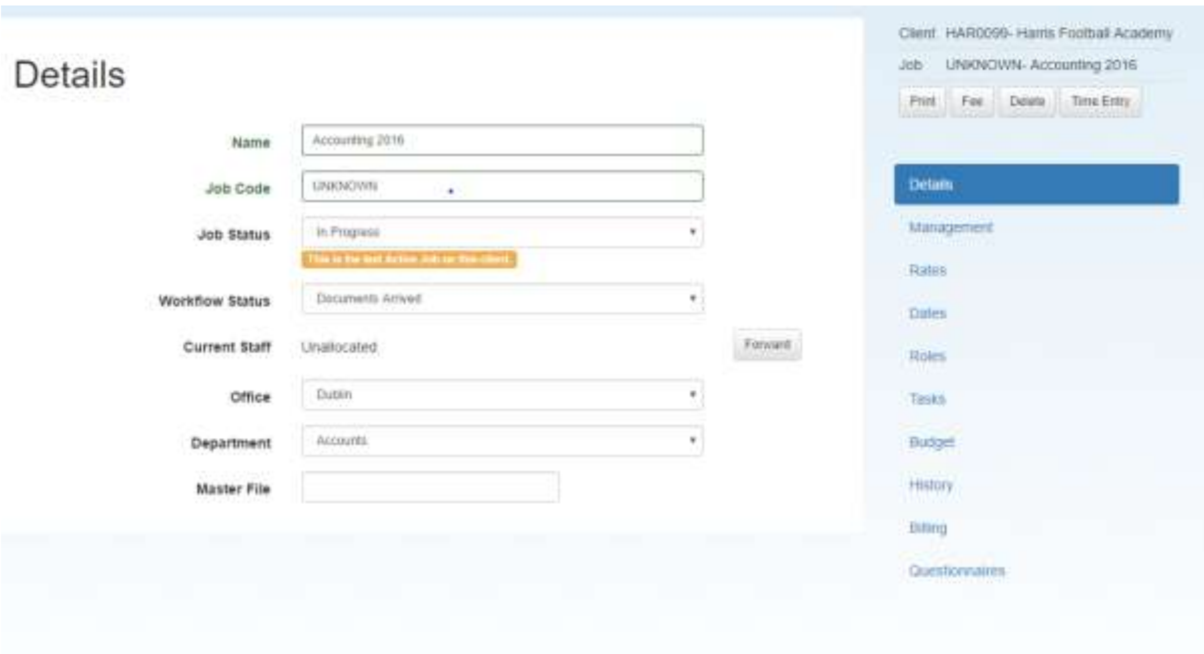
Job details can be viewed and updated from here.

This view allows the user to expand the job details and make updates quickly. Clicking onto the next job in the list will open that job with the same panel expanded.

FULL JOB VIEW

Alternatively the full Job Details page can be opened using the 'Open Job' link in the Job Grid.

The Job Details page will be displayed with the same information as the In Line View. It also includes some additional features and the History panel.



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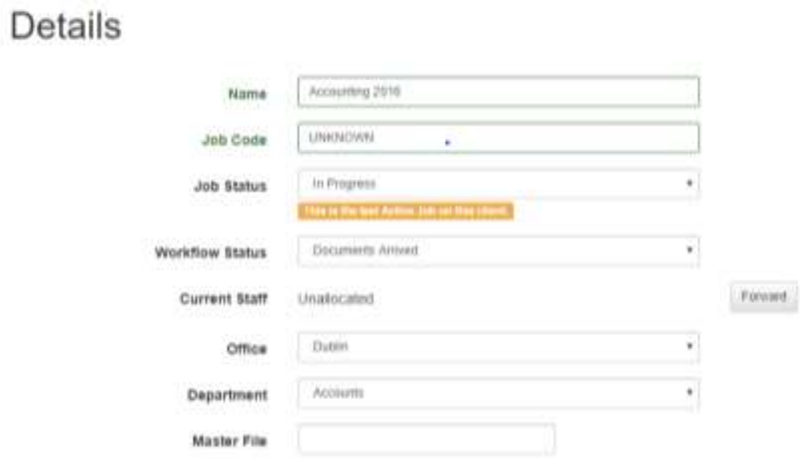
THE JOB DETAILS

The job details are displayed as sections within the page. If opening using the Open Job link rather than the Inline View, a menu of the section headings is displayed on the right hand side of the page and can be used to quickly jump to the section that requires editing. The Inline View will display the menu on the left hand side.

DETAILS PANEL

The details section comprises of the basic job information such as the Job Name and Status. The following information is available in this section:



<u>Field</u> — **<u>Description</u>**

Name: The title of the Job. Must be unique on the client.

Job Code: A unique identifier for the job.

Job Status: The jobs current status. The available statuses are:

- Not Started – indicates that the job has not been started. This status will change automatically when time is entered to the job.
- In Progress – indicates that the job is In Progress
- Complete – marks the job as having been completed. No further Time or Expense entries can be made against the job but the job can still be billed or written off.
- Closed – indicates that the job is finished and there is no longer a WIP balance against the job. The job will not be shown in any job lists.
- Pending – indicates that the job has a questionnaire that requires submission and/ or approval.

Workflow Status: This refers to the progress of the job. This will only appear once the Job Status has been changed to In Progress.

Current Staff Displays the staff member that the job is currently assigned to. This is updated based on the forwarding of the job.

Forward: This button allows the job to be forwarded onto another staff member. The default drop down will display any staff associated with a role on the job. This can be changed to a staff search field by clicking onto the edit icon next to the staff field. The notes field can be used to put a brief note for the staff member it is being forwarded to.

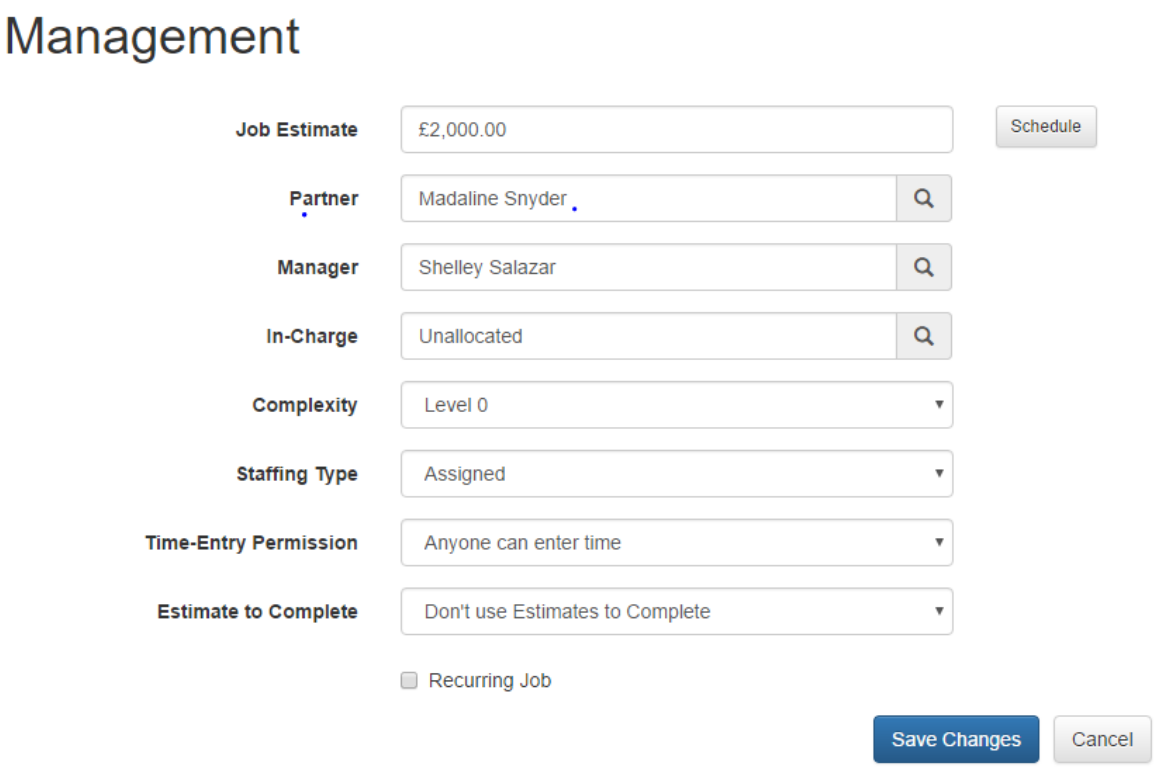
Office: The Office that the job belongs to. This can be used to restrict staff viewing the job.

Department: The Department the job belongs to. This can be used to restrict staff viewing the job.

Master File: This is text field that can be used to record the location of the master file for the job. This field is for information purposes only.

JOB MANAGEMENT

The Management panel displays information relating to the ownership of the job and key preferences for the job:



Field	**Description**
Job Estimate:	This field displays the expected value of the fee for the job.
Partner:	This displays the Job Partner assigned to the job. If the job partner is to be changed, remove the existing partner and start typing the name of the partner to be added. An autocomplete list will be displayed with possible partners. Select the partner who is to be added.
Manager:	As for the Job Partner.

In Charge:	As for the Job Partner. The In charge can be any staff member who is to have responsibility for the job.
Complexity:	This can then be used to determine the level of staff that should be allocated to the job.
Staffing Type:	This field is for use with the Tax Return Tracking system and indicates whether the tax return should be allocated to the First Available person or Assigned to a designated staff member.
Time Entry Permission:	This provides the ability to restrict who can enter time against the job – either 'Anyone can enter time' or 'Only people in roles can enter time'.
Estimate to Complete:	Indicates whether an Estimate To Complete (ETC) is allowed. If Estimates To Complete are allowed then entering time to the selected task will display the budgeted time (the original ETC), the actual time to date and allow entry of the estimate of the remaining time. An ETC icon will then be shown on the user's timesheet where they are able to update the ETC information. This information will also be displayed and is editable from the ETC portfolio.
Recurring Job:	A checkbox to indicate whether the job is to be recurring. If this is checked an additional Frequency option will be displayed.
Frequency:	The frequency of the recurring job. The options that are available are – Manual, Annually, Semi-annually, Quarterly, Monthly, Biweekly and Weekly.
Roll button:	This button will display the Roll Job forward dialog. Options on this dialog allow:

- Keep Current Staffing On Roles – this will create the new jobs with the same staffing as the current job.
- Automatic Budget – this will create a budget for the new job based on the previous jobs actuals.
- Task Scheduling – this provides options to create a task schedule based on the current job's schedule. Options here include – Don't Schedule, Replicate Schedule, Schedule to Staff and Schedule to Grade.

JOB RATES

The Rates panel provides information regarding the charge rates that will be used for the job.

The available options are:

Field	**Description**
Rates for this job	Also called Rate Types. This is a feature at the Client, Service and Job level that will calculate WIP values based upon the set Rate Type. There are four possible rate types that can be applied to jobs: • Standard (default) – this will apply the staff members default charge rate to any WIP on the Client, Service or Job. • % of Standard – this will apply a percentage value to any WIP on the Client, Service or Job. This allows for the WIP to be either discounted or charged at a premium without being dependent upon the staff member having an appropriate charge rate. • Flat Rate – this will apply a flat charge rate to any WIP regardless of the staff member's charge rate. • Custom rates by grade or staff – this will apply a rate based on either the staff member attached to the rate or the grade associated with the rate. This Special Rate is only available at the Job level. Note: If a rate type is applied at all three levels the Job level rate type will take precedence followed by the Service rate type and finally the Client rate type.

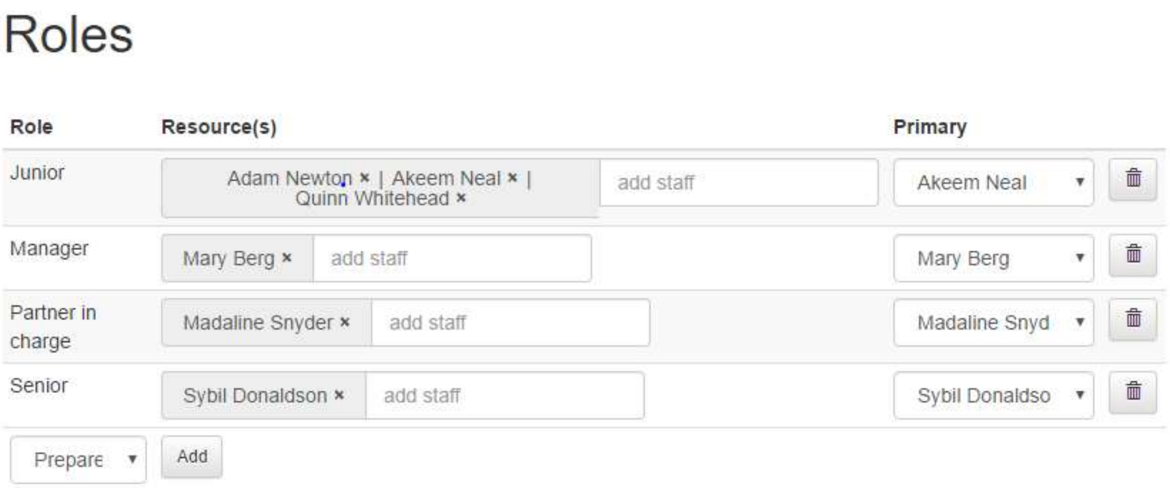
JOB DATES

The Dates panel displays the key dates for the job:

Field	**Description**
Job Period	The start and end dates for the job period will be populated based on the client's **Year End** date (on the **Client Details** page under the **Client** menu). If no **Year End** date is populated against the client this date can be manually entered.
Deadline	Dates to indicate when the job must be started and finished by. This will be reflected in the Current Due Date field on the Jobs List pages.
Other	Other dates, such as Target start and end dates that are important for the job. This will update the Finish Target date on the Jobs List pages.
Actual	These dates will be auto populated when the job is started and marked as complete.

JOB ROLES

Job roles allow a list of staff to be defined who will be working on a specific job. This can be used in conjunction with the 'Time Entry Permission' to restrict who can enter time to the job. Roles can also be used when budgeting against the job.



Any roles that have already been set against the template will be displayed here. Additional roles can be added if required for a specific job.

Type the name of the staff member to allocate staff to a role. Repeat for all staff that are required against a specific role.

It is also possible to set who the Primary Staff member is against a role. This is for information purposes only.

JOB TASKS

The Job Tasks section will not be available for Standard Tax Jobs. The job tasks section displays any tasks that have been added against the job. These tasks can be edited, deleted and new tasks added.

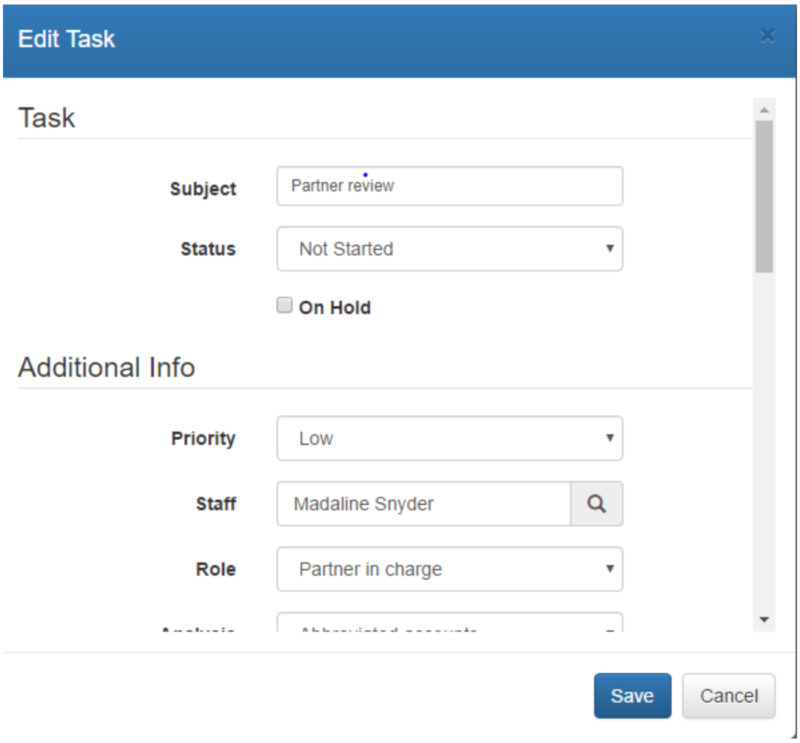
Tasks

	Subject	Due Date	Budget	Actual	Staff	Date Completed
	Request books and records	Invalid date	0.00	0.00	Unallocated	
	books and records received	Invalid date	0.00	0.00	Unallocated	
	Fieldwork	Invalid date	0.00	0.00	Unallocated	
	Manager review	Invalid date	0.00	0.00	Unallocated	
	Partner review	Invalid date	0.00	0.00	Madaline Snyder	
	Sign off	Invalid date	0.00	0.00	Unallocated	
	Enter a Task Subject	Add Task				
TOTALS			0	0		

Any budget information and actual WIP information allocated against each task will also be shown. Budget figures will be displayed against the task, but can only be edited from the Budgets panel.

New tasks can be added to the job by entering a task subject and clicking onto the **Add Task** button. Alternatively a detailed task or master task can be added using the drop down of the **Add Task** button.

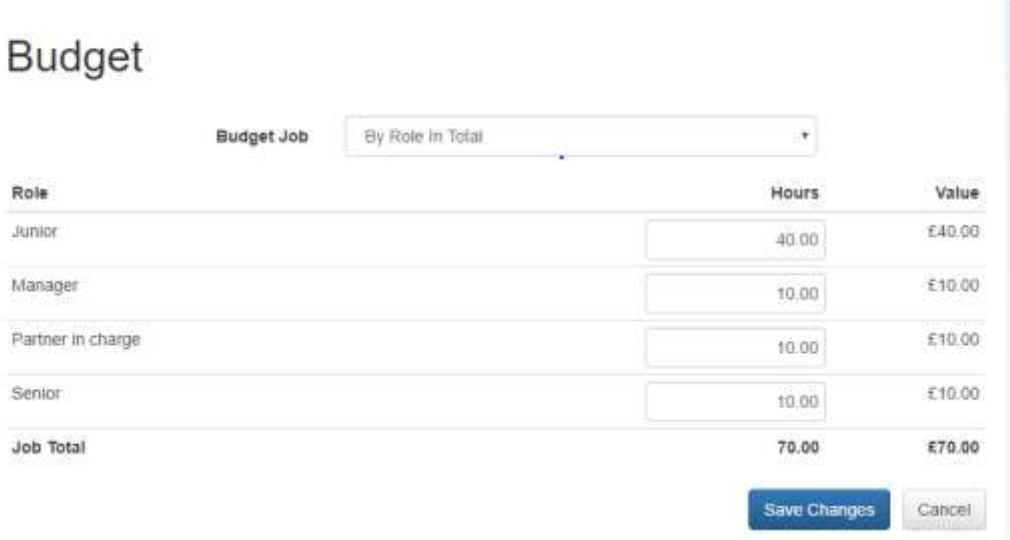
Tasks can be edited by clicking onto the edit ( ) icon, which can be found next to the Actual value. This will display the **Task Details** page where any task details can be added/ amended. Remember to click onto the **Save** button to save any changes.



Tasks can be deleted by clicking onto the **Delete (** **)** button next to each task.

JOB BUDGETS

The Job Budget section will display any budgets that have been set against the Job, Role, Staff Member or Task – depending the on budget type that has been selected.



Values can be changed by clicking into the Hours and Value fields. The Value will be calculated automatically for the Role In Total budget type and the Staff budget types.

The various budget options are described below:

- *By Job In Total* - Total figures for the number of hours and the value for the job can be entered.
- *By Role In Total* – The total number of hours for each role is entered. The Value is calculated based on the default charge rate that is set against the grade attached to the role. An 'Estimate to Complete' field will also be displayed if the job is set to use Estimates to Complete. The initial budget figure will create the initial 'Estimate to Complete' figure.
- *By Task In Total* – Allows total figures for hours and value to be entered against each task on the job. An 'Estimate to Complete' field will also be displayed if the job is set to use Estimates to Complete. The initial budget figure will create the initial 'Estimate to Complete' figure.
- *By Task By Role* – Allows a budget figure to be entered for each role on each task of the job.
- *By Staff By Date* – A budgeted number of hours can be set against each staff member who will work on the job. The date is used to add the budget into the schedule if the **Sync Budget with Schedule** is checked.
- *By Task By Staff By Date* – A budgeted number of hours can be set against each task and a staff member assigned to that task. The date is used to add the budget into the schedule if the **Sync Budget with Schedule** is checked.

It is also possible to Import a budget from a prior recurring job using the **Import** button. An Import Budget dialog will be displayed, if the job has been rolled from a previous job, providing a choice to import the budget based on Actual Time or the prior year's budget. It also provides the facility to adjust the budget by a percentage.

JOB HISTORY

The History section provides an area where information pertaining to status updates or any other important information can be recorded

New notes can be created and existing notes can be edited from here. System created notes (due to status update etc) cannot be edited. To add a new note, select the **Add Note** button.

JOB BILLING

This section provides a place to assign a particular billing address and Attention Of for the job. The billing address itself is set up on the Other page of the main client details.

A default fee narrative can also be entered here. This narrative will then be used when billing the job and the Build Fee By Job option is selected on the Fee Narrative tab of the fee wizard.

JOB QUESTIONNAIRES

This page will display any associated questionnaires with the job.

Selecting the required questionnaire will display the questionnaire details for completion. Once the questionnaire has been completed it can be submitted or closed.

Any job where the questionnaire has not been completed or approved in the case of mandatory questionnaires will appear under the Pending status on the main Jobs page for the client.

Questionnaires can be Viewed and Approved from the **Questionnaires** page on the **Client** menu. Click onto the Job tab and expand the Job to display the questionnaire and its status.

Expand the line and then right click onto the questionnaire to access a context menu with options to View the questionnaire, Approve or Delete the questionnaire.

> Note: Mandatory questionnaires MUST be approved before time and expenses can be entered against them.

PRINT

This button will generate a job cover sheet.

FEE

The **Fee** button provides a facility to create a single job draft fee. A Job Billing dialog is displayed providing options to select the type of bill that is to be created:

Option	**Description**
Manual Draft	This is the default setting that will display the standard fee wizard, but with the Single Job Fee selected for the job.
Interim Bill	This option will create an interim fee for the amount entered into the value box on the dialog window. The value of the fee will be created as an On Account entry. The draft fee can then be accessed from the client dashboard or the Fee Portfolio.
Progress Bill	This option will create a progress fee for the amount entered into the value box on the dialog window. The fee will use WIP to the value of the amount entered and carry forward any remaining WIP. The draft fee can then be accessed from the client dashboard or the Fee Portfolio.
Final Bill	This will create a single job draft fee that can be accessed from either the client dashboard or the Fee Portfolio.

The actual fee process is the same as elsewhere within Practice Engine.

DELETE

The **Delete** button allows the job to be deleted.

TIMESHEET ENTRY

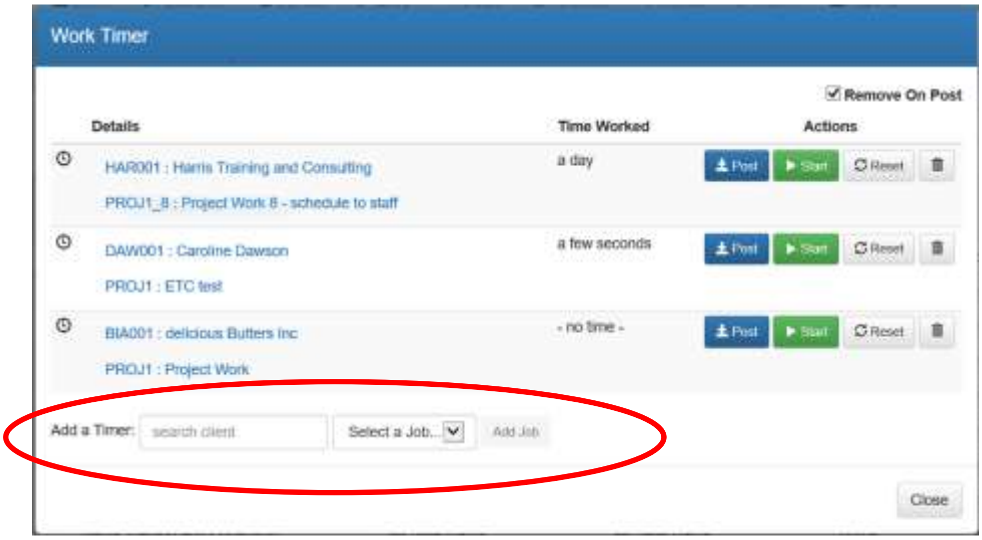
Time can be entered against a job as a normal timesheet entry, but additional options relating to timesheet entry include the Work Timer and adding Scheduled Entries.

THE WORK TIMER

The work timer can be found from the Home menu and from within the full job details. Its purpose is to record the time spent on a job and allocate the time to the timesheet.

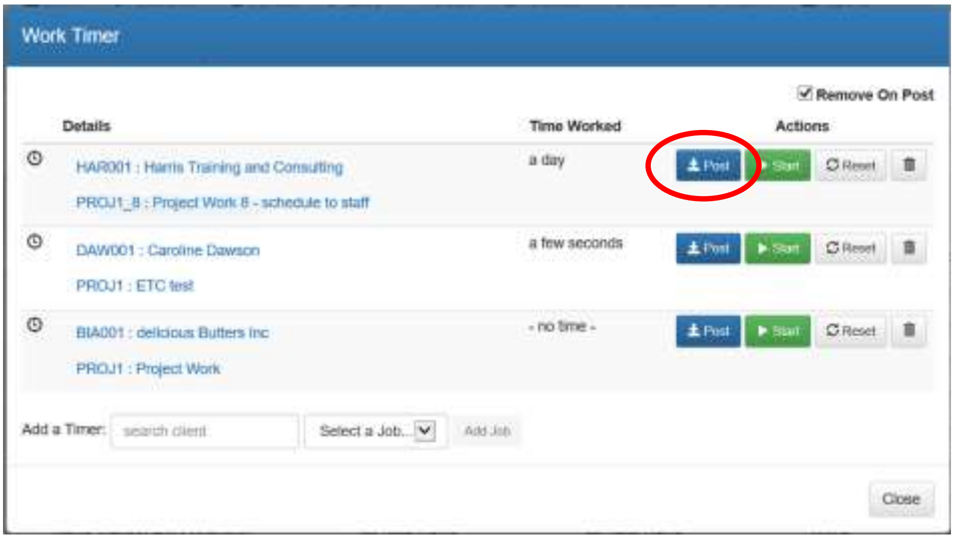
The work timer can be set running from either the Home menu or from the job details pages – the Time Entry button. It can then be left running and the work timer window closed.

Jobs can be added to the timer by either using the Time Entry option from within the Job pages or from within the work timer itself.

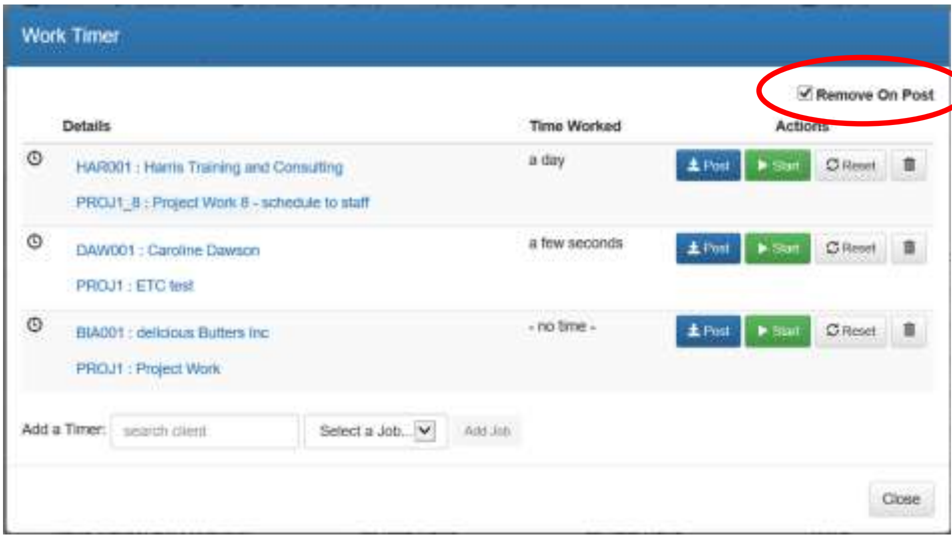


New jobs are added via the line at the bottom – Add a Timer. Once added the timer can be started and stopped against any of the listed jobs, but can only be run against one job at a time. The timer will continue to run when the Work Timer Dialog has been closed and also when Practice Engine has been closed. If the time exceeds 24 hours, the work timer will display a message indicating a maximum of 24 hours can be posted in a single entry.

The time can be posted to the timesheet using the Post button, and once on the timesheet further information such as additional narrative can be added.

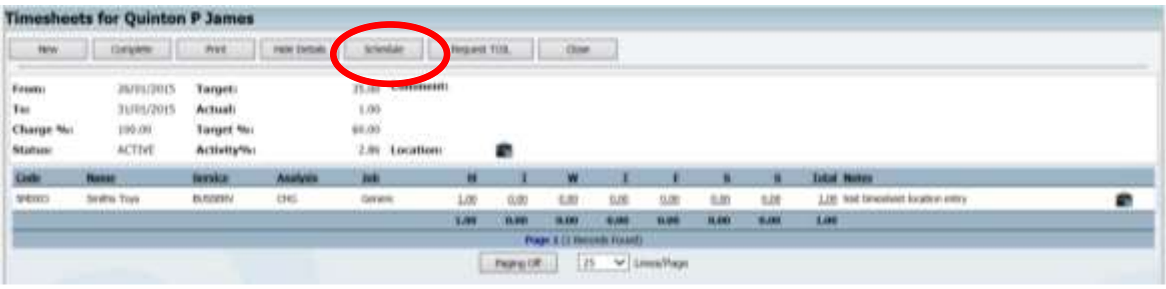


By default the job will be removed from the work timer when it has been posted. This can be changed by unchecking the Remove On Post checkbox at the top of the timer.



SCHEDULED ENTRIES

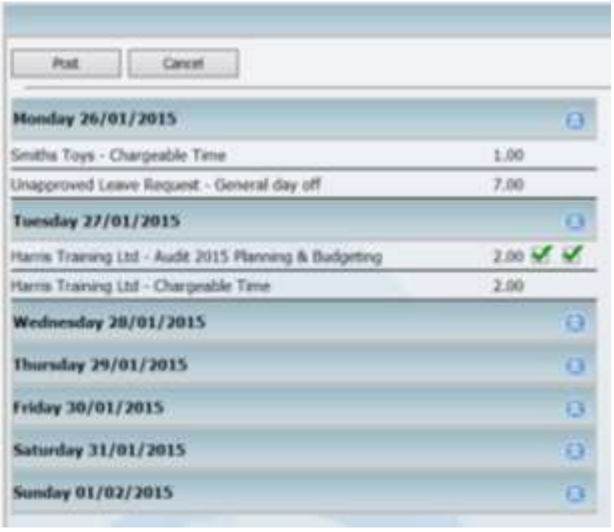
If a staff member has been scheduled against a job or a task they can use the schedule button to add the scheduled entries to their timesheet. The Schedule Button shows on the weekly timesheet header:



Clicking onto the Schedule button will display a list of items that the staff member has been scheduled to for the week along with any entries that have already been put onto the timesheet.

Select the entries that are to be posted to the timesheet and click onto the **Post** button. These entries will be entered onto the timesheet, but can be edited as required.

They will be displayed on the Diary Entries page (clicking onto the Schedule button again) as below to indicate that they have been entered onto the timesheet:

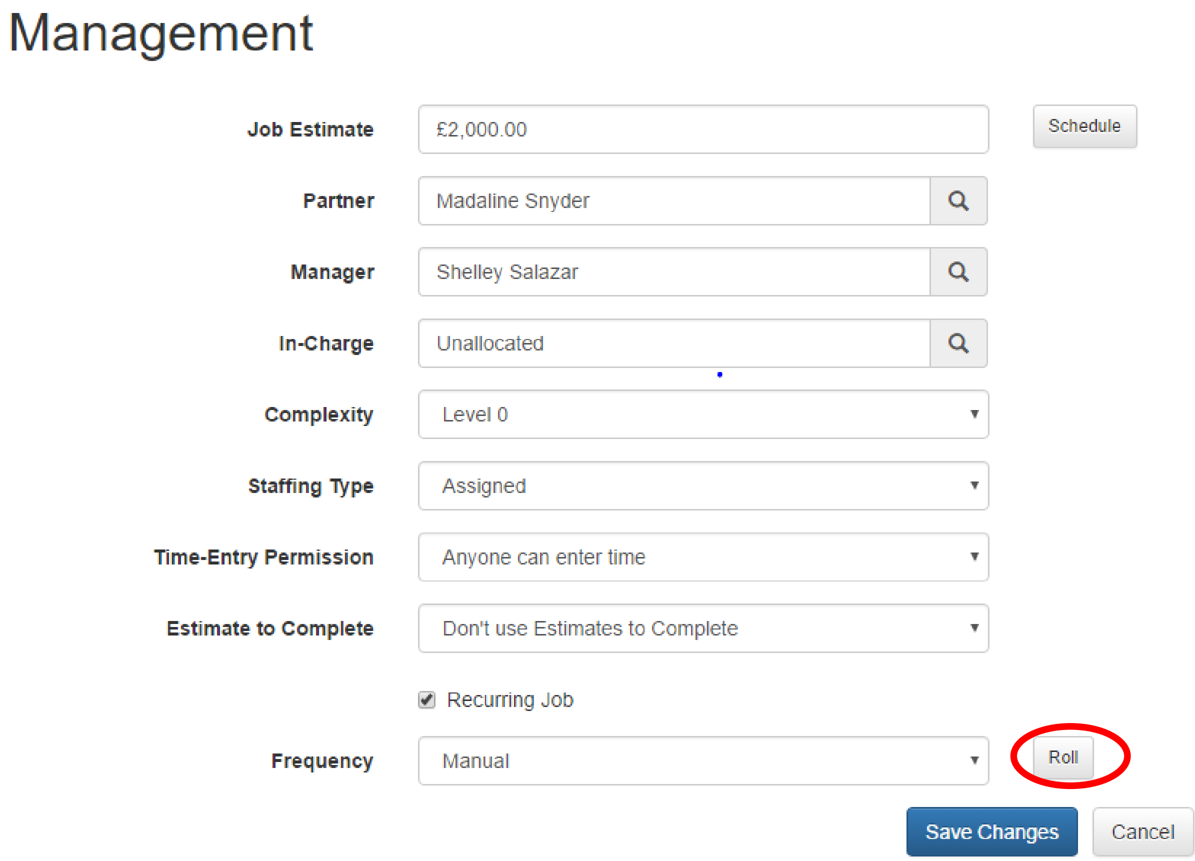


JOB MANAGEMENT

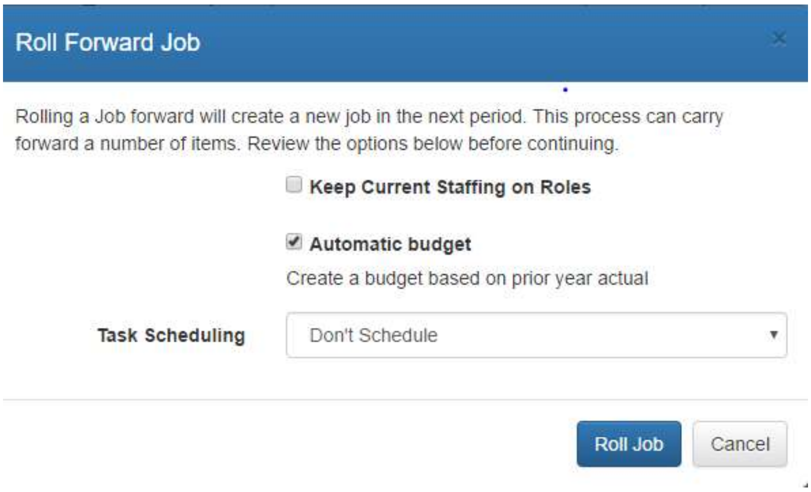
There are multiple ways of managing jobs, from the Staff Jobs list and the Client Jobs list through to specific portfolios that can be used. For detailed explanations of these please refer to the Jobs and Workflow Administrators Guide.

ROLLING JOBS OVER

Recurring Jobs can be rolled over using the **Roll** button on the Management panel of the Job.



Clicking onto the Roll button will display a dialog of options:



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Option	Description
Keep Current Staffing on Roles:	This option will take the current staffing and apply it to the rolled over job.
Automatic Budget:	Selecting this will create a budget for the new job based on the actual timesheet entries of the current job.
Task Scheduling:	This provides ways of scheduling staff against any tasks in the job. The available options are: • Don't Schedule • Replicate Schedule – this will copy the current schedule and create a new schedule based on the recurring frequency of the job. • Schedule to Staff – this will create a schedule based on the actual staff who worked on the job. • Schedule to Grade – this will create a schedule based on the grades of staff who worked on the job.

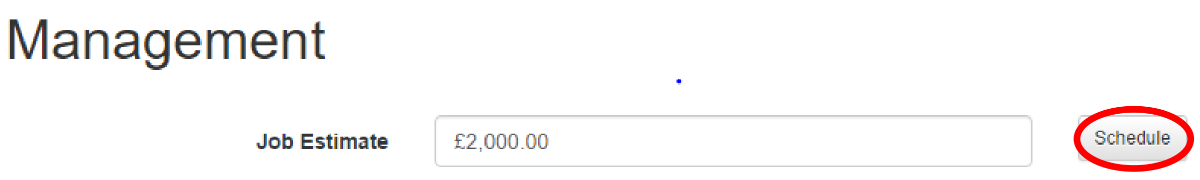
Click onto the Roll Job button to create the new job. The new job will be opened so that details can be amended as necessary.

SCHEDULING JOBS

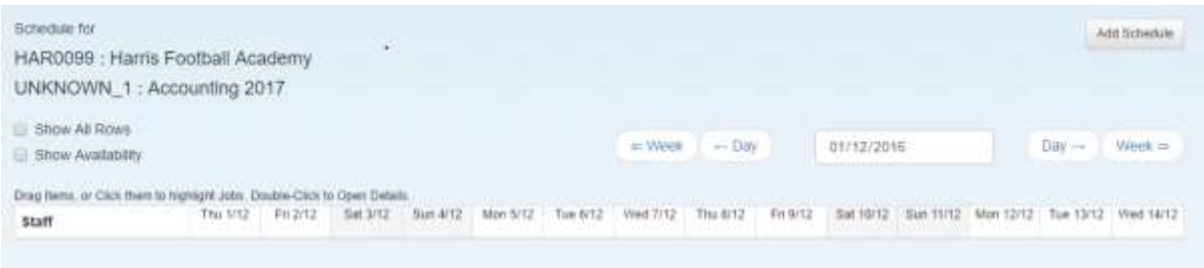
Jobs can be scheduled to staff from within the job itself using the Schedule button on the Management panel and also through the Scheduling Portfolios – Department Schedule and My portfolio schedule.

SCHEDULE BUTTON

The Schedule button in the **Job Management** section opens the Schedule page for the selected client.



The view displays 2 weeks, and the view can be scrolled to earlier or later dates using the Day and Week buttons.

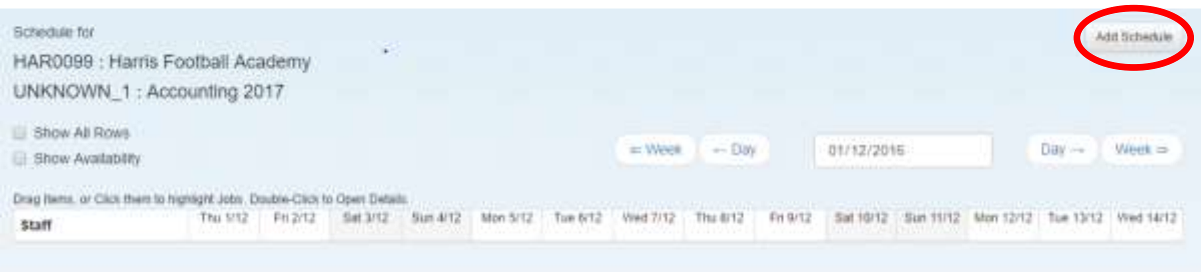


By default, the view will only display rows for scheduled staff. However, the check box '**Show All Rows'** will display a row for each staff member attached to the job – either as Partner, Manager, In Charge or against a role.

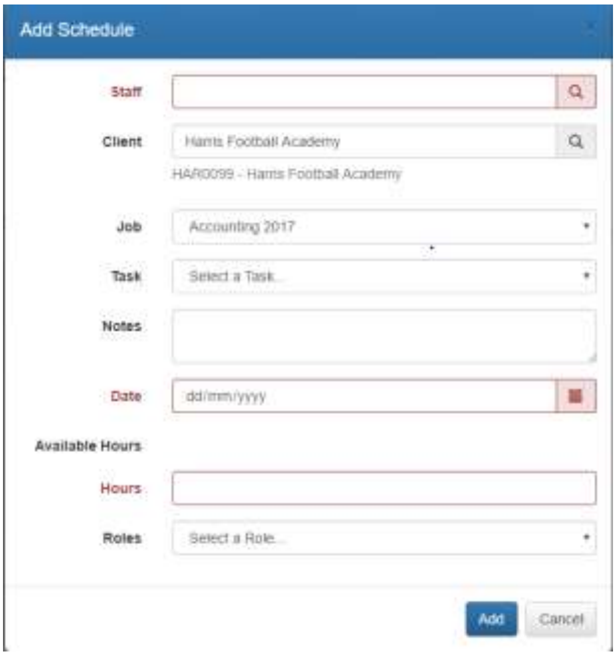
The **'Show Availability'** check box displays an Availability view at the bottom of the screen. This view allows for available staff to be searched for, with filters against Office, Department and Grade. For a detailed explanation please refer to the section within Department Schedule.

Existing schedule items can be edited or deleted by double clicking onto the item. Existing items can also be moved to different days or staff by dragging to the new day or staff member. Items can be copied by selecting the item and using the **Clipboard** option that will appear in the top right hand corner, with the instruction to 'Drag to copy'.

New schedule items can be added using the **Add Schedule** button.



This will display the Schedule Editor.



Type the staff member's name to be added to the schedule. Select the associated **Task** if being used. Enter any **Notes** – these may be used to prompt the staff member about the work involved, or can be used as the narrative on the timesheet.

Set the **Date** that the schedule is to apply to. Enter the corresponding **Hours** and allocate the staff member to a **Role**.

Remember to save the changes that have been made using the **Add** button.

DEPARTMENT SCHEDULE

The department schedule provides a departmental summary of job and task allocation, as well as providing the ability to create and amend schedules.

Options are available to filter by Office, Department and Grade. By default only scheduled staff will be shown, however all staff can be displayed by selecting **Show All Rows**. It is highly recommended to have filters set before clicking onto Show All Rows, particularly in large organisations.

An overview of scheduled jobs and tasks can be seen by hovering the mouse over the relevant entry.

New entries can be added by clicking onto **Add Schedule** button. This will open the **Schedule Editor** where the Staff member, Client Name, Job, Task, Notes, Date, Hours and Roles can be added.

Entries can be copied by clicking onto the entry. This will copy the entry to the clipboard at the top of the page, where it can then be dragged to other days/ staff members. Double clicking onto an existing entry will allow for editing of the schedule details.

Entries can also be dragged and dropped to different days or staff members.

The **Show Availability** checkbox will display an additional section at the bottom of the screen. In this section it is possible to view staff availability filtered by Office, Department, Grade and then a selection of the returned staff.

Each returned row displays the staff members scheduled hours/ standard hours and then the remaining available hours in brackets.

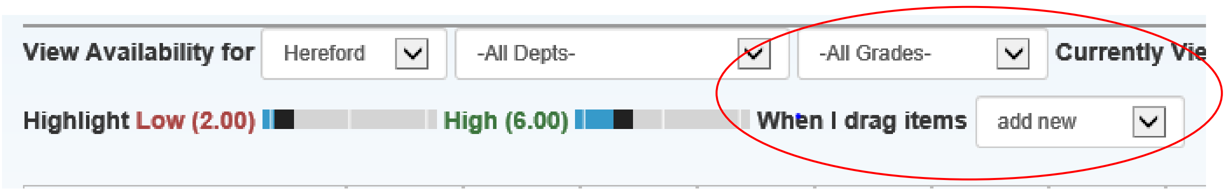
Available staff members can be swapped with existing staff on all instances of a job using the **Swap** button. The job that requires the staff swap must be highlighted in the top schedule before the Swap button becomes available. Clicking onto a job will highlight all instances of that job in the scheduler.

Click onto the Swap button against the staff member who will replace the original staff member. A Replace Staff on Job dialog will be displayed where the user can select which original staff member to replace.

Click onto the **Close** button to activate the swap.

Scheduled items can also be moved to available staff without changing the staff member on all scheduled items on the job. E.G. when only one out of 3 scheduled items for staff member A is to be changed to Staff member B. In this case the Swap would not be appropriate.

This option is achieved using the **When I Drag Items** drop down:



The options available are Add New or Move the Item.

- **Add New** will create a new schedule item when an existing schedule item is dragged onto an available staff member. The job details will be created from the dragged item and a line item will be created in the schedule view for the staff member.
- **Move the Item** will change the staff member allocated to the job for that scheduled item. Drag the scheduled item onto an available day for the staff member required.

MY PORTFOLIO SCHEDULE

My Portfolio Schedule provides a schedule view of all jobs that the logged in staff member is scheduled on or is responsible for by being the Job partner, Job Manager or Job In Charge and has scheduled items against it. This portfolio can be located under the **Portfolio** menu **– Task Pad – My Portfolio Schedule**.

An overview of scheduled jobs and tasks can be seen by hovering the mouse over the relevant entry.

The '**Show All Rows**' check box will hide/ display any jobs that do not have scheduled items against them.

New entries can be added by clicking onto **Add Schedule** button. This will open the **Schedule Editor** where the Staff member, Client Name, Job, Task, Notes, Date, Hours and the Role can be added.

Entries can be copied by clicking onto the entry. This will copy the entry to the clipboard in the top right corner of the page, where it can then be dragged to other days. Clicking onto an existing entry will allow for editing of the schedule details.