IRIS | Practice Engine

Scheduling – Staff Management

End-User Guide

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CHANGE HISTORY

ORIGINAL DOCUMENT AUTHOR: BRAD PODZIUS

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AUTHOR	DATE	CHANGE
BRAD PODZIUS	APRIL 2018	CREATED
DEE LOWREY	4/20/2018	UPDATE SCREENSHOTS

OVERVIEW: STAFF MANAGEMENT

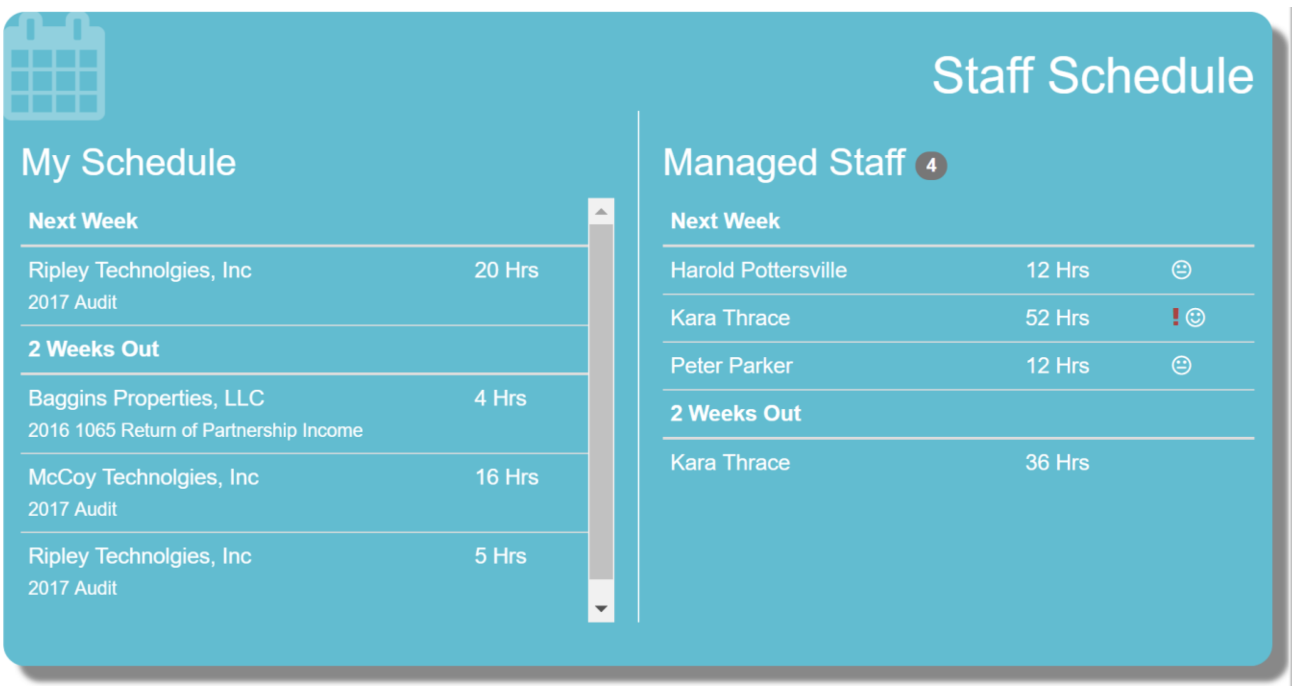
This document is aimed at Practice Engine Scheduling Administrators, Support and Admin staff; Partners and Managers. It provides information regarding the maintenance of scheduled staff as well as the use of key features to help manage the staff's schedule.

SEARCHING FOR STAFF

The Staff will sync from Practice Engine automatically based on the timeframe set by the firm. For stand-alone systems, Staff can be added in the Admin area (see the **Scheduling-Administrators Guide** for more details). Throughout the system, where Staff are listed, the Staff Name is typically a hyperlink to the Staff Details area. The Job Name is typically a hyperlink to the Job Details area.

STAFF SCHEDULE DASHBOARD WIDGET

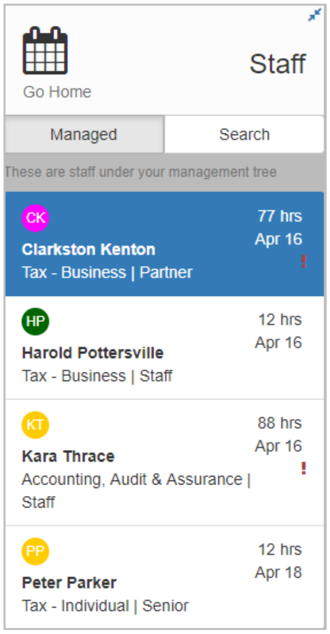
The left side of the widget itemizes the upcoming Clients/Jobs in which the User is scheduled. A summary of total scheduled hours for each week is shown, grouped by week. The right side of the widget provides a summary of the total number of hours each Managed Staff are scheduled by week. Icon indicators announce if the staff has a low schedule, full schedule or any conflicts.



The My Schedule and Managed Staff titles are hyperlinks to the Staff Management screen.

The number icon displays the total number of Staff you are managing. Clicking the number displays a list of each Staff you are managing.

STAFF DETAILS



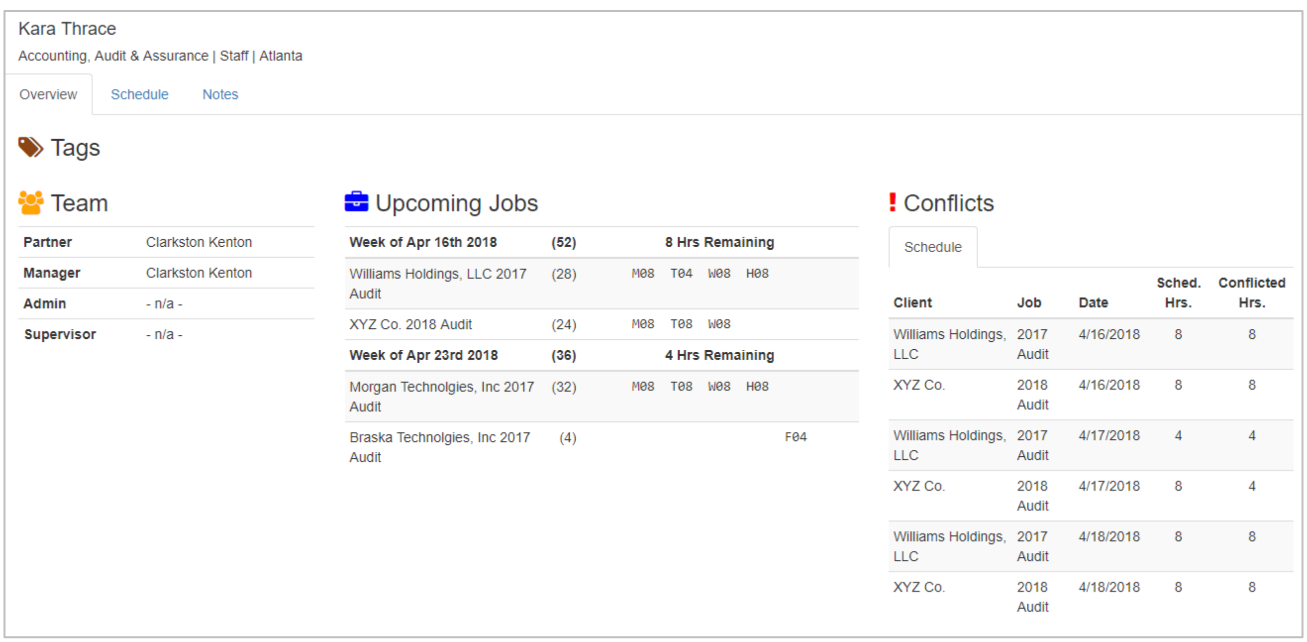
On the Staff page, a list of Managed Staff appears on the left (all users are self-managed by default). These are all the Staff where the user is listed as the Partner, Manager, Admin or Supervisor. The Staff are listed alphabetically by name. Total scheduled hours, next scheduled date and a conflict indicator are listed for each Staff. To search for Staff not on the list, click the Search tab at the top of the screen and enter the Staff Name. The Advanced Search returns a list of Staff based on any of the criteria selected in the various fields.

The Custom option allows the user to create a unique set of conditional criteria that can be used later. Once a Custom Search is named, a dialog box appears where you can set your fields and values.

Once a Staff is selected, the Details are shown as follows:

OVERVIEW TAB

The Overview tab summarizes the details of the Job:



Tags are custom items that can be used to classify the Staff in various ways. Tags are free-form and each new Tag that gets added to the system is available for future use. Tags can be reported on via custom reports.

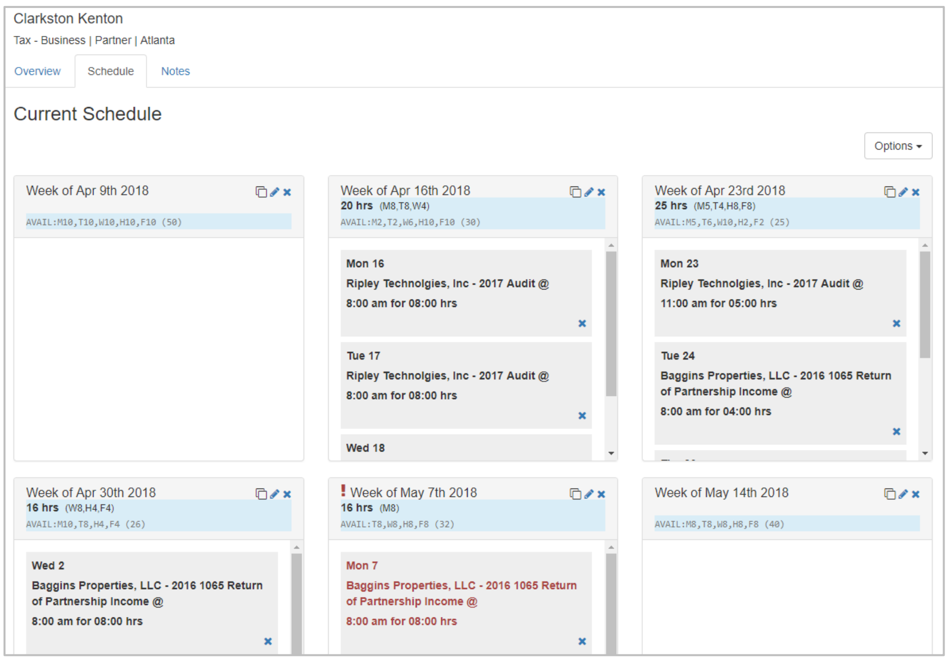
The Team list displays the Partner, Manager, Admin & Supervisor for the Staff. This data comes from Practice Engine in a connected system.

The Upcoming Jobs indicate what the Staff is scheduled on as well as the number of hours by week. It also displays the Remaining availability of the Staff based on the Work Profile.

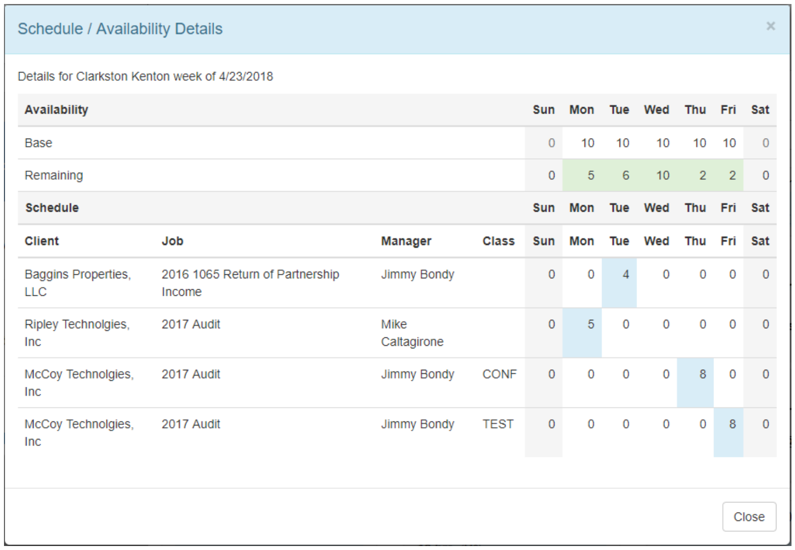
Any scheduling Conflicts are listed by Staff and/or by Schedule, click either tab to reveal the details. Click any Staff Name to go to the Staff current schedule, conflicts are displayed in red

SCHEDULE TAB

The Schedule tab is a weekly overview of the Jobs assigned to the Staff.



For each week, the light blue bar indicates scheduled time and availability (hours per day) for the week. The gray boxes indicate scheduled Jobs. Where there are Conflicts, the Job lettering is red with an exclamation indicator icon at the title bar for the week. Click on the availability bar to see the details for that staff:

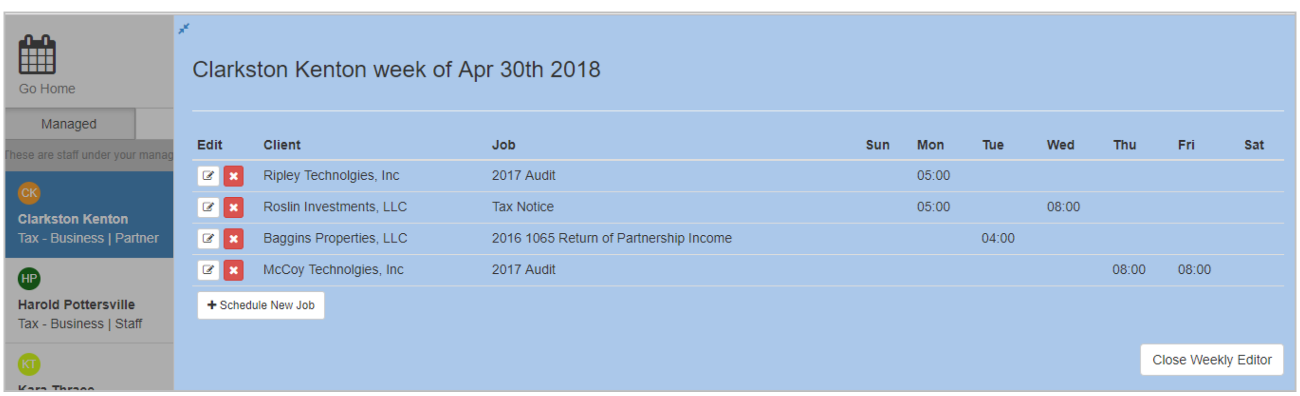


MOVE, COPY, EDIT OR DELETE WEEK

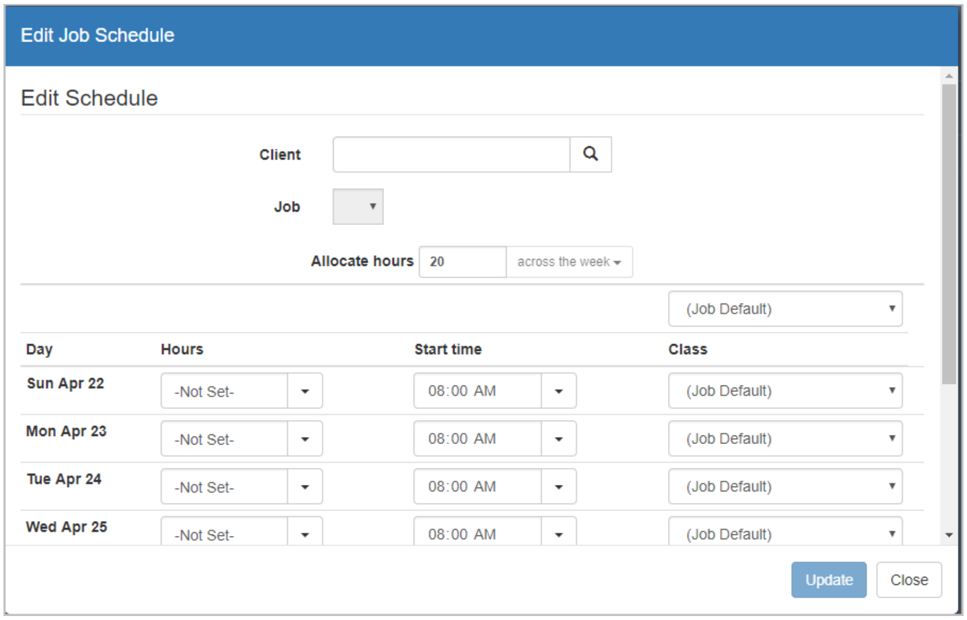
The Title bar of each week holds various functions. Clicking and dragging any part of the Date will Move all items in that week to the target week. Clicking and dragging the Copy boxes will duplicate the scheduled items to the target week. Clicking the pencil icon will allow the user to Edit the schedule. Clicking the “x” will Delete all scheduled items for the week.

SCHEDULE A NEW JOB

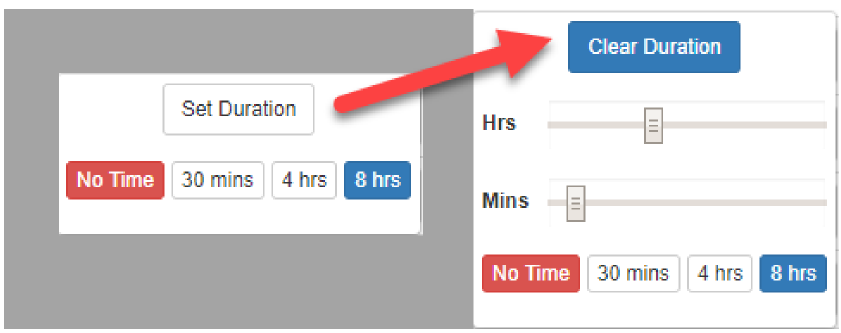
To edit the scheduled time for a Staff person, click on the pencil on the title bar for the applicable week. The Edit Schedule screen opens to the right side.



This screen will display any existing schedules and a summary of the time allocated for the week per client. Add a new entry by clicking the Schedule New Job button. Users can also edit or delete any existing schedule. The same screen opens when adding or editing.



Set or modify the schedule by typing in the Client, selecting the Job, setting the number of hours and then the start time. Click the drop-down in the Hours column and use the quick buttons or the sliders to set the number of hours. You can also type in the number of hours manually.



Once the number of hours is set, select the Start Time as needed. Use the Set Full Week button to schedule the Staff the entire week (based on 40-hour week).

The Class and Location fields will have options depending on the Job.

Once the times and dates are set, click Save to commit the schedule.

To return to the Staff Detail screen, click the Close Weekly Editor button.

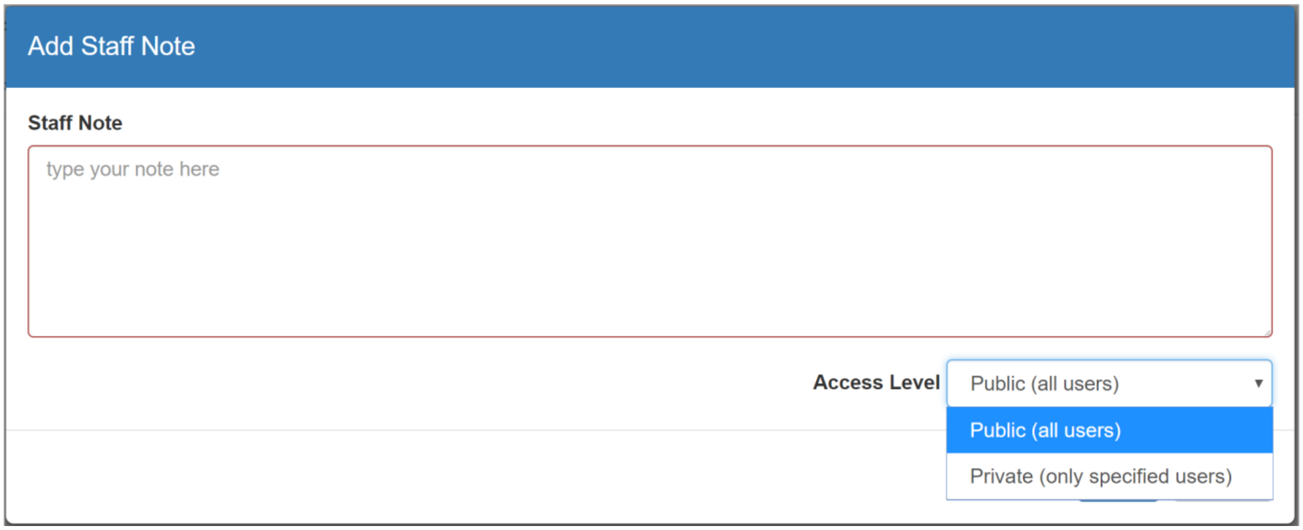
MORE OPTIONS

The Options button allows the user to perform the following actions:

Undo – This will preview and revert changes to a point in the last 30 days.

NOTES TAB

The Notes tab for a Staff holds additional information as needed. Notes can be public or restricted to a set of users.



Type the Note in the text box and click Add Note to save.