

# Scheduling – Staff Management

## ***End-User Guide***

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## CHANGE HISTORY

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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.

**My Schedule**

Next Week	
Ripley Technologies, Inc 2017 Audit	20 Hrs
2 Weeks Out	
Baggins Properties, LLC 2016 1065 Return of Partnership Income	4 Hrs
McCoy Technologies, Inc 2017 Audit	16 Hrs
Ripley Technologies, Inc 2017 Audit	5 Hrs

**Managed Staff 4**

Next Week		
Harold Pottersville	12 Hrs	☺
Kara Thrace	52 Hrs	! ☺
Peter Parker	12 Hrs	☺
2 Weeks Out		
Kara Thrace	36 Hrs	

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

The screenshot shows a 'Staff' page with a 'Managed' tab selected. Below the tab is a search bar and a note: 'These are staff under your management tree'. A list of staff members is displayed, each with a profile icon, name, role, total hours, and next scheduled date.

Staff Member	Role	Total Hours	Next Scheduled Date
Clarkston Kenton	Tax - Business   Partner	77 hrs	Apr 16
Harold Pottersville	Tax - Business   Staff	12 hrs	Apr 16
Kara Thrace	Accounting, Audit & Assurance   Staff	88 hrs	Apr 16
Peter Parker	Tax - Individual   Senior	12 hrs	Apr 18

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:

The screenshot shows the 'Overview' tab for Kara Thrace. It includes sections for 'Tags', 'Team', 'Upcoming Jobs', and 'Conflicts'.

**Team**

Role	Name
Partner	Clarkston Kenton
Manager	Clarkston Kenton
Admin	- n/a -
Supervisor	- n/a -

**Upcoming Jobs**

Week of	Total Jobs	Hours Remaining
Week of Apr 16th 2018	(52)	8 Hrs Remaining
Williams Holdings, LLC 2017 Audit	(28)	M08 T04 W08 H08
XYZ Co. 2018 Audit	(24)	M08 T08 W08
Week of Apr 23rd 2018	(36)	4 Hrs Remaining
Morgan Technologies, Inc 2017 Audit	(32)	M08 T08 W08 H08
Braska Technologies, Inc 2017 Audit	(4)	F04

**Conflicts**

Client	Job	Date	Sched. Hrs.	Conflicted Hrs.
Williams Holdings, LLC	2017 Audit	4/16/2018	8	8
XYZ Co.	2018 Audit	4/16/2018	8	8
Williams Holdings, LLC	2017 Audit	4/17/2018	4	4
XYZ Co.	2018 Audit	4/17/2018	8	4
Williams Holdings, LLC	2017 Audit	4/18/2018	8	8
XYZ Co.	2018 Audit	4/18/2018	8	8

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

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## SCHEDULE TAB

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

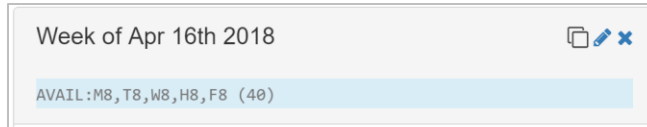
The screenshot displays the 'Current Schedule' for Clarkston Kenton, a Tax - Business Partner in Atlanta. The interface includes tabs for Overview, Schedule, and Notes. The main content area shows a grid of weekly job assignments and availability. Each week's card includes a title bar with the week number, total hours, and availability (e.g., 'Week of Apr 9th 2018', '20 hrs (M8,T8,W4)', 'AVAIL:M10,T10,W10,H10,F10 (50)'). Below the title bar, a list of jobs is shown with their dates, times, and durations. Conflicts are indicated by a red exclamation mark icon and red text. For example, the week of May 7th 2018 shows a conflict for 'Baggins Properties, LLC - 2016 1065 Return of Partnership Income @' on Monday, 7th, at 8:00 am for 08:00 hrs. The availability bar for this week is also highlighted in red. An 'Options' dropdown menu is visible in the top right corner of the schedule area.

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:

Schedule / Availability Details										
Details for Clarkston Kenton week of 4/23/2018										
Availability		Sun	Mon	Tue	Wed	Thu	Fri	Sat		
Base		0	10	10	10	10	10	0		
Remaining		0	5	6	10	2	2	0		
Schedule		Sun	Mon	Tue	Wed	Thu	Fri	Sat		
Client	Job	Manager	Class	Sun	Mon	Tue	Wed	Thu	Fri	Sat
Baggins Properties, LLC	2016 1065 Return of Partnership Income	Jimmy Bondy		0	0	4	0	0	0	0
Ripley Technologies, Inc	2017 Audit	Mike Caltagirone		0	5	0	0	0	0	0
McCoy Technologies, Inc	2017 Audit	Jimmy Bondy	CONF	0	0	0	0	8	0	0
McCoy Technologies, Inc	2017 Audit	Jimmy Bondy	TEST	0	0	0	0	0	8	0

**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.

Clarkston Kenton week of Apr 30th 2018										
Edit	Client	Job	Sun	Mon	Tue	Wed	Thu	Fri	Sat	
<input checked="" type="checkbox"/>	Ripley Technologies, Inc	2017 Audit		05:00						
<input checked="" type="checkbox"/>	Roslin Investments, LLC	Tax Notice		05:00		08:00				
<input checked="" type="checkbox"/>	Baggins Properties, LLC	2016 1065 Return of Partnership Income			04:00					
<input checked="" type="checkbox"/>	McCoy Technologies, Inc	2017 Audit					08:00	08:00		
+ Schedule New Job										

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

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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.



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**NOTES TAB**

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

**Add Staff Note**

**Staff Note**

type your note here

**Access Level** Public (all users) ▼

- Public (all users)
- Private (only specified users)

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