IRIS | Practice Engine

Scheduling –

Staff Profile

End-User Guide

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CHANGE HISTORY

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DEE LOWREY	APRIL 2018	CREATED
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STAFF USER PROFILE

This document is aimed at Practice Engine Scheduling Administrators, Support and Admin staff; Partners and Managers. It provides information regarding the user settings of the scheduling application.

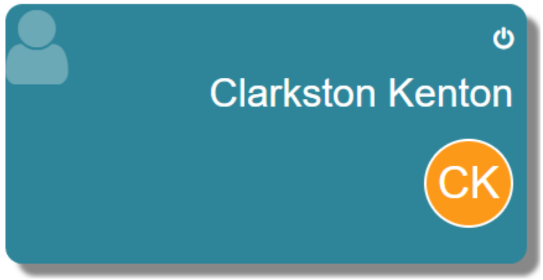
LOGGING IN

Scheduling is a separate application that integrates with Practice Engine. It has a different web site address however end users will continue to use their network username and password.

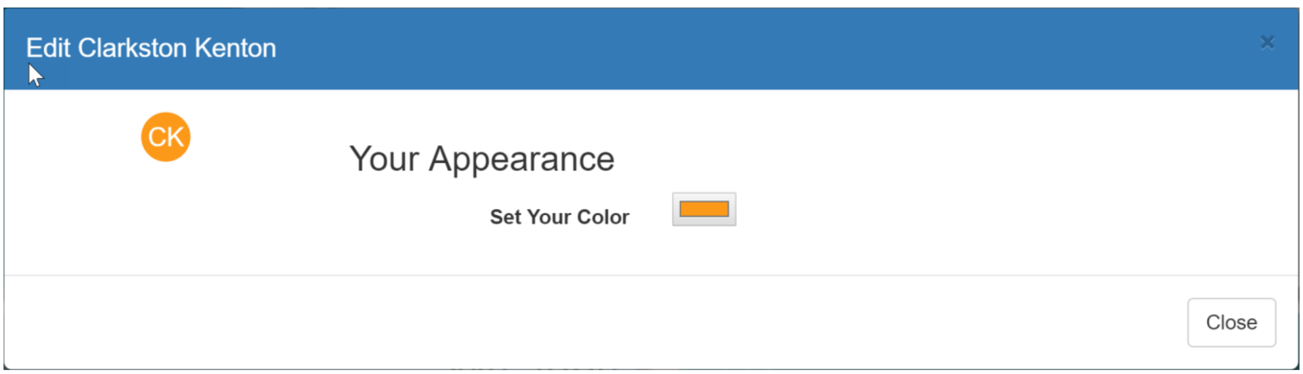
Once logged in, the users dashboard displays. This guide covers the User Name and Profile dashboard widgets.

USER NAME DASHBOARD WIDGET

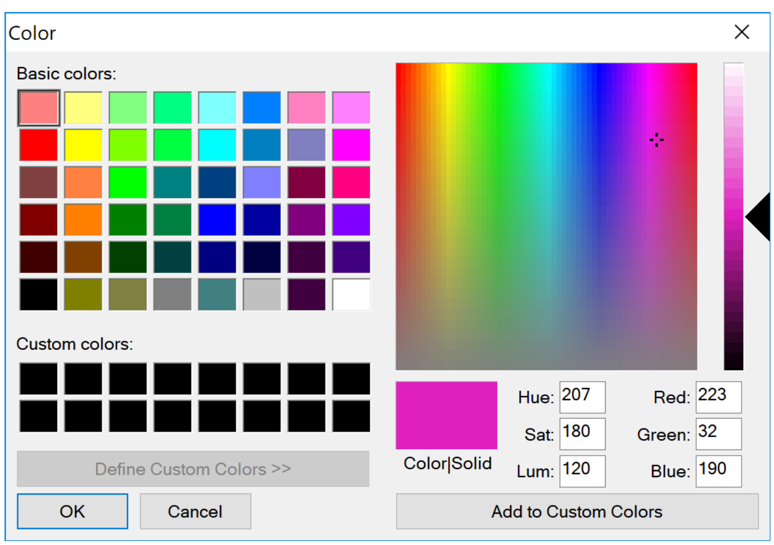
The upper left widget displays the users name. The circle icon that contains the user's initials is a hyperlink that allows the user to set their icon color. The Power icon is used to log out of the scheduling application.



Click the circle icon to choose the icon color preference. Click the Set Your Color button to open the color selection box.

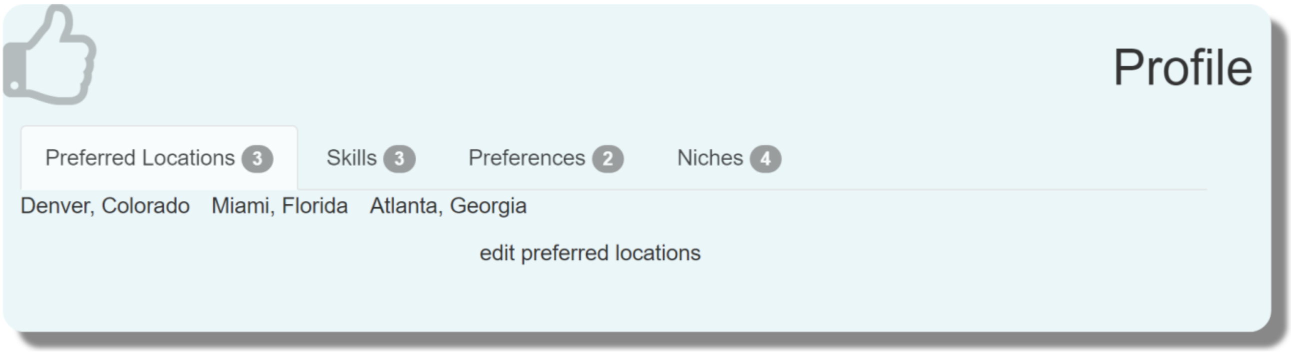


Choose the color and click OK, then click the Close button on the edit box to return to the dashboard.



PROFILE DASHBOARD WIDGET

The Profile widget is used to manage each user's scheduling settings.



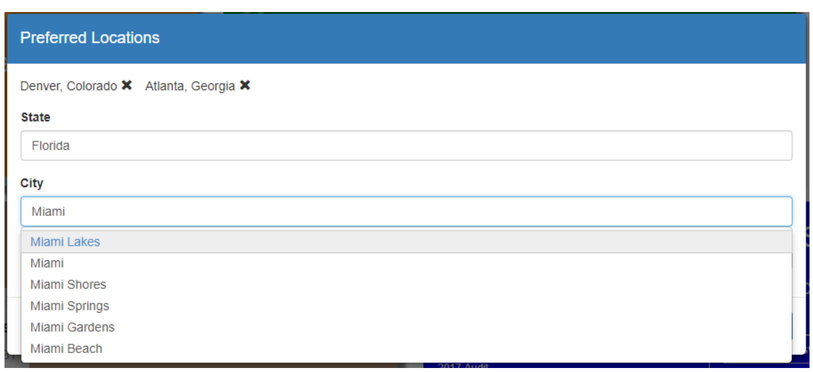
Users may add their choices for the following options:

- Preferred Locations
- Skills
- Preferences
- Niches

Each option is a tab. Click the tab to see the current selections. Click the Edit hyperlink to change the settings.

PREFERRED LOCATIONS TAB

Click Preferred Locations and then click the edit preferred locations hyperlink for the options box to display.

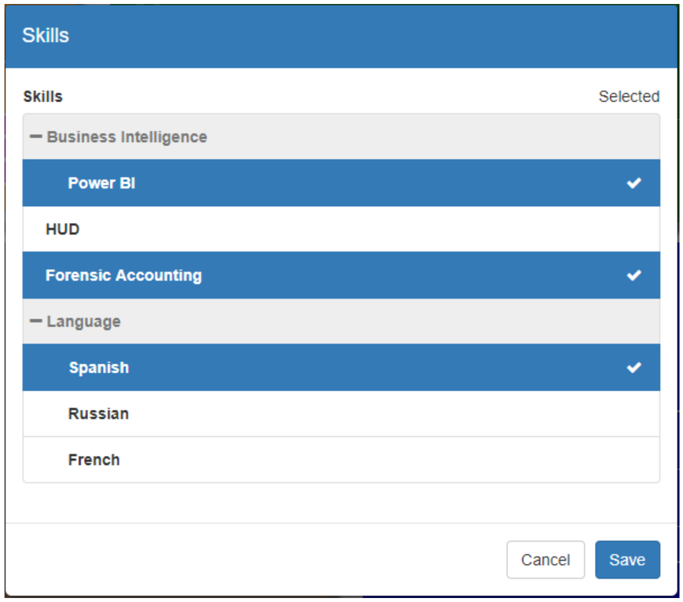


Begin typing in the State box and choose the desired state from the list. Begin typing in the City box and choose the desired city from the list. If the city is not available, choose the closest major city.

Once the State and City have been selected, click the Add button. All selections display at the top of the box. Continue adding preferred locations or click the Close button to return to the dashboard.

SKILLS TAB

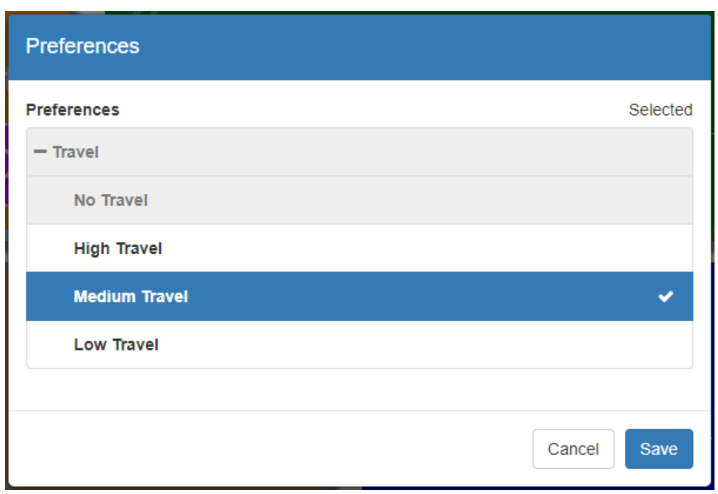
Click the Skills tab and then click the edit skills hyperlink for the options box to display. Skills are custom to each organization and configured by the PE Scheduling Administrator. They may be different from those displayed here.



Click the skills that apply and click the Save button.

PREFERENCES TAB

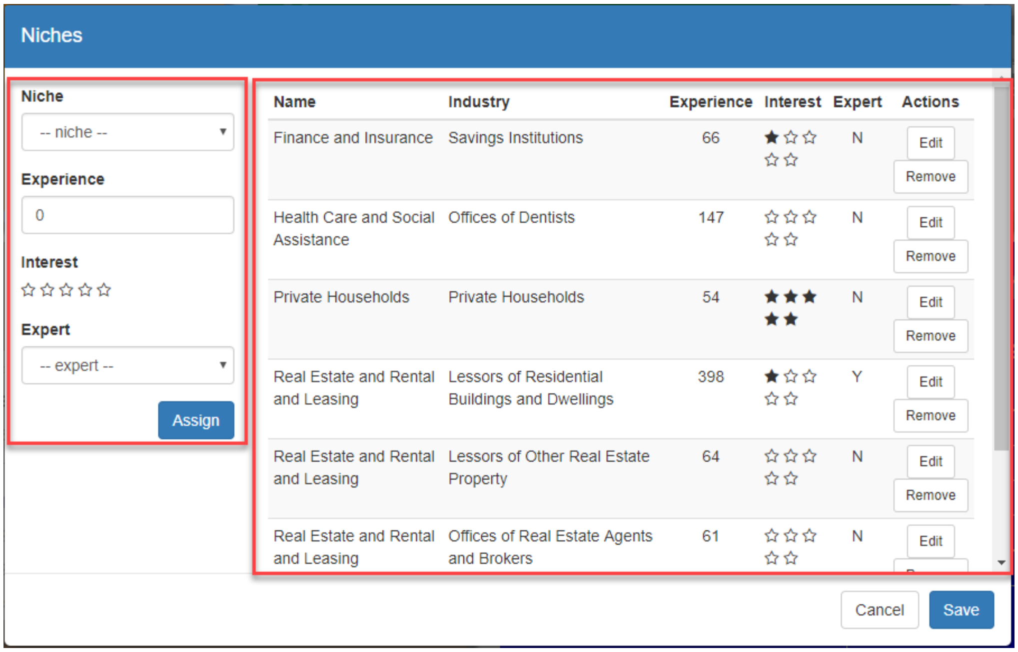
Click the Preferences tab and then click the edit preferences hyperlink for the options box to display. Preferences are custom to each organization and configured by the PE Scheduling Administrator. They may be different from those displayed here.



Click the preferences that apply and click the Save button.

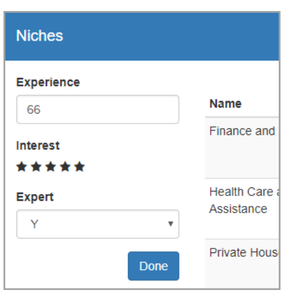
NICHES TAB

Click the Niches tab and then click the edit preferences hyperlink for the options box to display. Niches are pulled from Practice Engine Jobs. The Niches screen has two sections.



The right side lists the niches/industries where the user has previous experience. The experience is calculated from hours logged in existing timesheets.

For each Niche/Industry displayed, users may modify their preferences. Click the Edit button in the Actions column and the left side of the screen displays the edit menu.



- Experience (hours) – may be manually increased/decreased
- Interest – indicate the interest level by selecting stars
- Expert - choose Y/N (yes/no) to indicate expertise

Click the Done button to save changes.

If users do not want their experience in a Niche/Industry to display, click the Remove button in the Action column. The selected row is deleted.

When users want to add an additional Niche/Industry to their list, use the left side of the screen. Choose the Niche, Experience, Interest level and Expert options then click the Assign button. A new row is added to their list.

Once all selections have been updated, click the Save button.

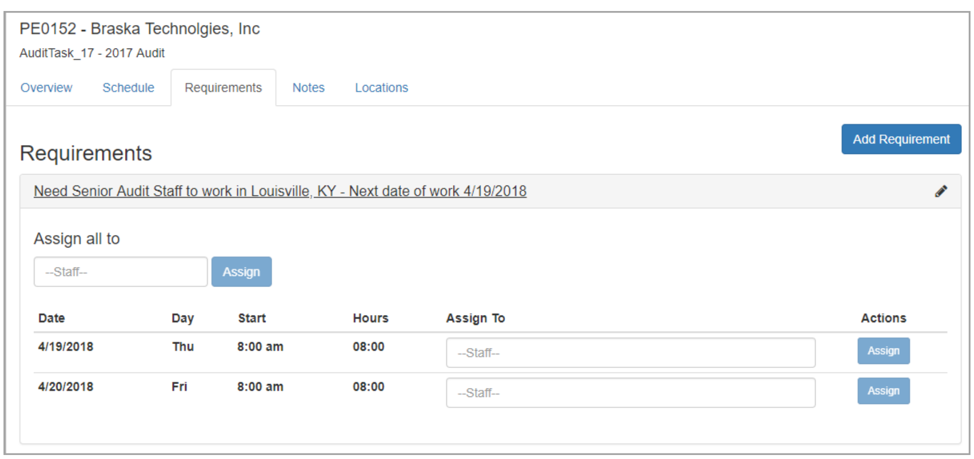
URGENT REQUIREMENTS DASHBOARD WIDGET

The Urgent Requirements widget displays all unassigned special requirements to consider before assigning staff to a job. Job Managers add the requirements on the Job details screen.

On the widget, the total number of unassigned requirements display under the Urgent Requirements title. Each line displays the start date of the request, the client, job and requirement details.

Users may filter requirements by Department or by time Range.   Clicking on the Job name goes the Job/Overview tab. Clicking on the Requirement details goes to the Job/Requirements tab.

Once you are on the Job/Requirements tab, click the requirement name to open the details.



For each job, choose a staff member and click Assign. This will add the job to the staff members schedule and also remove the entry from the Urgent Requests list.