

Scheduling – Staff Profile

End-User Guide

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CHANGE HISTORY

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DEE LOWREY	APRIL 2018	CREATED
DEE LOWREY	4/20/2018	UPDATED SCREEN SHOTS

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.

The dashboard is divided into several sections:

- User Profile:** Displays the user's name (Clarkston Kenton), initials (CK), and a thumbs-up icon. It includes tabs for Profile, Admin, and a gear icon for settings. The Profile tab shows preferred locations (Denver, Colorado; Miami, Florida; Atlanta, Georgia) and counts for Skills (3), Preferences (2), and Niches (4).
- My Jobs (45):** A calendar view for April 2018 showing job assignments.

Staff	Client	Job	Date	Sched. Hrs.	Conflicted Hrs.
Kara Thrace	Williams Holdings, LLC	2017 Audit	4/23/2018	8	8
Clarkston Kenton	Ripley Technologies, Inc	2017 Audit	5/14/2018	8	8
Harold Pottersville	Braska Technologies, Inc	2017 Audit	5/14/2018	4	8
- My Schedule:** Shows job assignments for the next week and two weeks out.

Client	Job	Duration
Ripley Technologies, Inc	2017 Audit	20 Hrs
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
- Staff Schedule (Managed Staff 4):** Shows the schedule for managed staff.

Staff	Duration
Harold Pottersville	12 Hrs
Kara Thrace	52 Hrs
Peter Parker	12 Hrs
Kara Thrace	36 Hrs
- Conflicts (18):** A table showing conflicts between jobs.

Staff	Client	Job	Date	Sched. Hrs.	Conflicted Hrs.
Clarkston Kenton	Baggins Properties, LLC	2016 1065 Return of Partnership Income	5/14/2018	8	8
Clarkston Kenton	Strange Technologies, Inc	2017 Audit	5/14/2018	8	8
Kara Thrace	Williams Holdings, LLC	2017 Audit	4/23/2018	8	8
Kara Thrace	XYZ Co.	2018 Audit	4/23/2018	8	8
- Urgent Requirements (1):** A table showing urgent requirements.

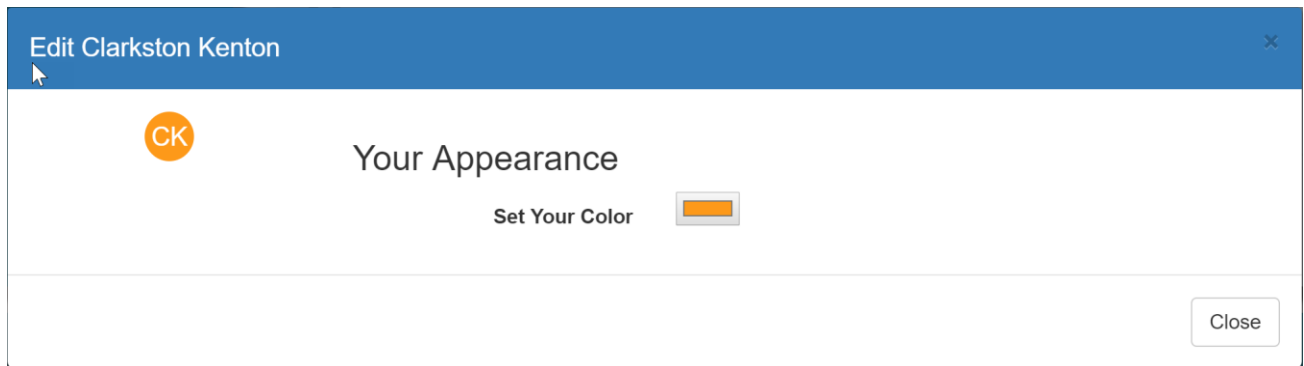
Date	Client	Job	Requirement	Duration
4/23/2018	Braska Technologies, Inc	2017 Audit	Need Senior Audit Staff to work in Louisville, KY	16 Hrs
- Reports (10):** A list of report categories: Availability, Staff Schedule, Staff Schedule Conflicts, Staff To Staff Conflicts, Staff To Client Conflicts, User Activity Audit, Staff Conflicts Of Interest, and Client Conflicts Of Interest.

USER NAME DASHBOARD WIDGET

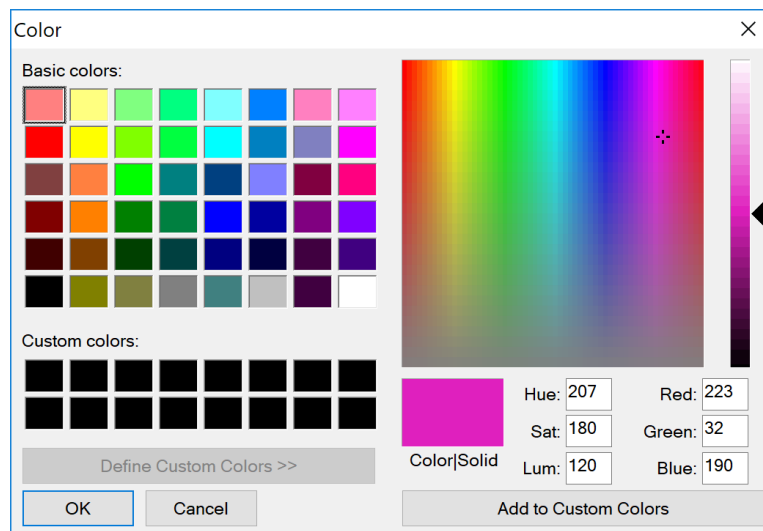
The upper left widget displays the users name. The circle icon that contains the user's initials is a hyperlink that allows the user to set their icon color. The Power icon is used to log out of the scheduling application.



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

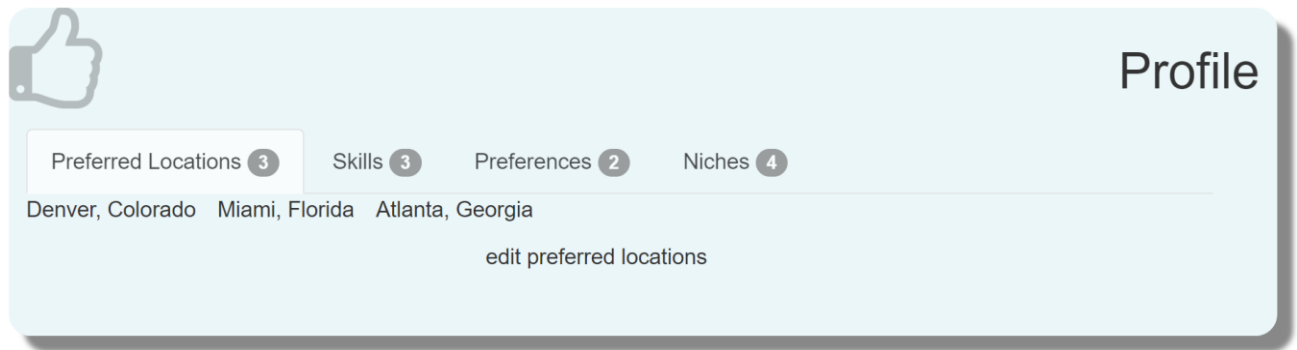


Choose the color and click OK, then click the Close button on the edit box to return to the dashboard.



PROFILE DASHBOARD WIDGET

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



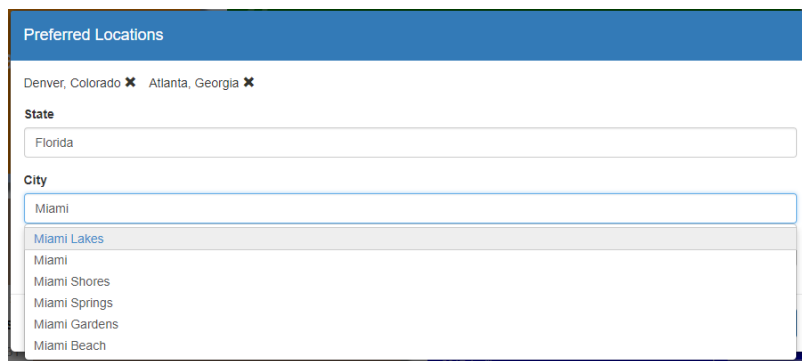
Users may add their choices for the following options:

- 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.

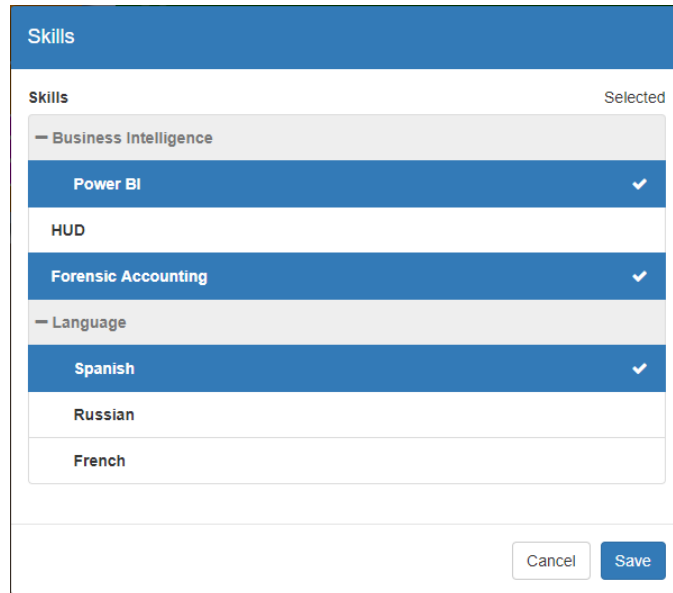
The image shows a screenshot of the "Preferred Locations" tab. At the top, it says "Preferred Locations" in a blue header. Below that, it displays "Denver, Colorado ✕ Atlanta, Georgia ✕". There are two dropdown menus: "State" with "Florida" selected, and "City" with "Miami" selected. A list of city options is visible below the City dropdown, including "Miami Lakes", "Miami", "Miami Shores", "Miami Springs", "Miami Gardens", and "Miami Beach".

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.

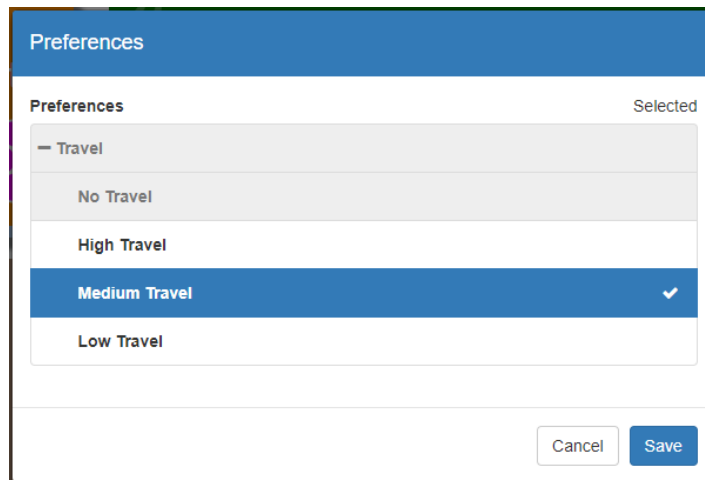


The screenshot shows a dialog box titled "Skills" with a blue header. Below the header, there are two columns: "Skills" and "Selected". The "Skills" column is expanded to show three categories: "Business Intelligence", "Language", and "French". Under "Business Intelligence", "Power BI" is selected with a checkmark. Under "Language", "Spanish" is selected with a checkmark. The "French" category is currently collapsed. At the bottom right of the dialog, there are "Cancel" and "Save" buttons.

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.



The screenshot shows a dialog box titled "Preferences" with a blue header. Below the header, there are two columns: "Preferences" and "Selected". The "Preferences" column is expanded to show four options: "No Travel", "High Travel", "Medium Travel", and "Low Travel". "Medium Travel" is selected with a checkmark. At the bottom right of the dialog, there are "Cancel" and "Save" buttons.

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 screenshot shows the 'Niches' interface. On the left, there is a form with the following fields: 'Niche' (a dropdown menu), 'Experience' (a text input field with '0'), 'Interest' (a star rating system with five stars), and 'Expert' (a dropdown menu). An 'Assign' button is located below these fields. On the right, there is a table with the following columns: 'Name', 'Industry', 'Experience', 'Interest', 'Expert', and 'Actions'. The table contains several rows of data, each with an 'Edit' and 'Remove' button in the 'Actions' column.

Name	Industry	Experience	Interest	Expert	Actions
Finance and Insurance	Savings Institutions	66	★☆☆ ☆☆	N	Edit Remove
Health Care and Social Assistance	Offices of Dentists	147	☆☆☆ ☆☆	N	Edit Remove
Private Households	Private Households	54	★★★ ★★	N	Edit Remove
Real Estate and Rental and Leasing	Lessors of Residential Buildings and Dwellings	398	★☆☆ ☆☆	Y	Edit Remove
Real Estate and Rental and Leasing	Lessors of Other Real Estate Property	64	☆☆☆ ☆☆	N	Edit Remove
Real Estate and Rental and Leasing	Offices of Real Estate Agents and Brokers	61	☆☆☆ ☆☆	N	Edit

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.

The screenshot shows the 'Niches' edit menu. It has the following fields: 'Experience' (a text input field with '66'), 'Interest' (a star rating system with five stars), and 'Expert' (a dropdown menu with 'Y'). A 'Done' button is located at the bottom.

- 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.

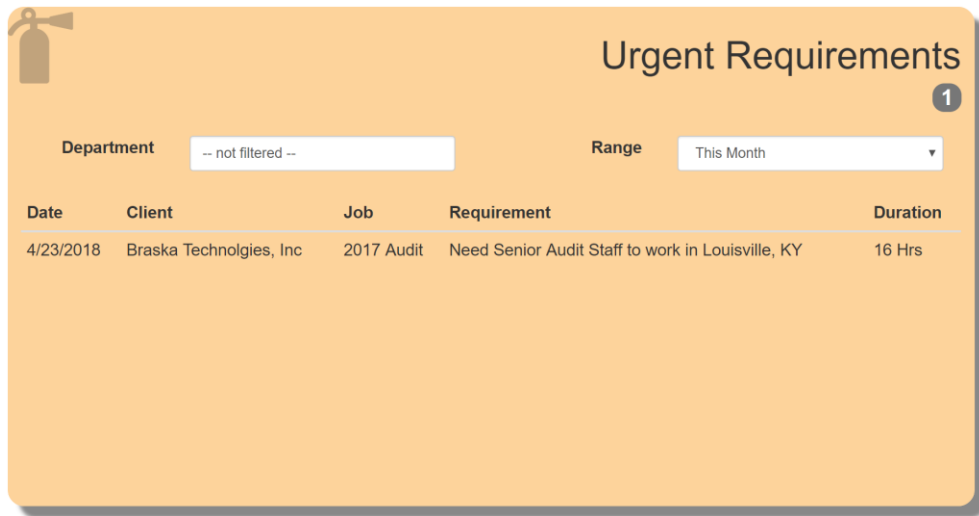
If users do not want their experience in a Niche/Industry to display, click the Remove button in the Action column. The selected row is deleted.

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

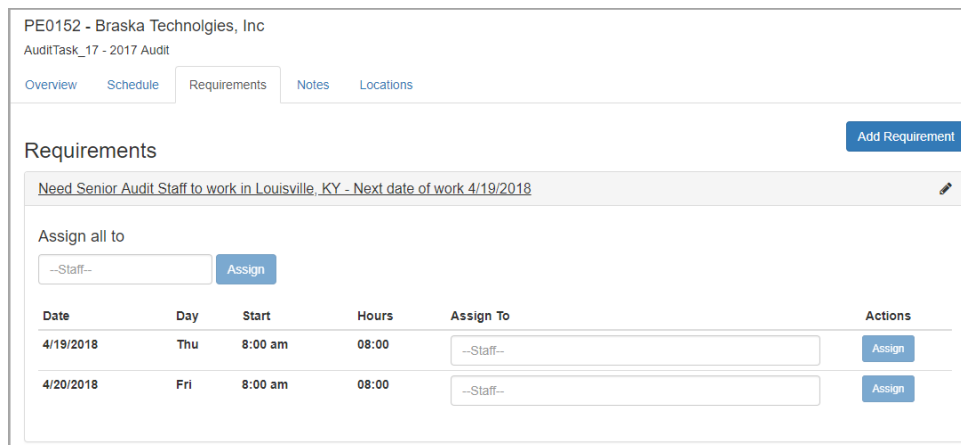
The Urgent Requirements widget displays all unassigned special requirements to consider before assigning staff to a job. Job Managers add the requirements on the Job details screen.



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.