

Scheduling – Job Management

End-User Guide

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CHANGE HISTORY

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AUTHOR	DATE	CHANGE
BRAD PODZIUS	MARCH 2018	CREATED

OVERVIEW: JOB 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 jobs as well as the use of key features to help manage the scheduled jobs.

SEARCHING FOR JOBS

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

MY JOBS DASHBOARD WIDGET

The calendar on the left allows the user to select a date. A summary of jobs scheduled on the selected date will appear to the right. These are jobs that the user is scheduled on as well as any scheduled jobs that the user manages.

My Jobs 36

« June 2018 »

Su	Mo	Tu	We	Th	Fr	Sa
27	28	29	30	31	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
1	2	3	4	5	6	7

ARA Test Company Inc.
2017 1065 Partnership Return - Seasonal Budget
BW Bryan Wayne 8 Hrs

Braska Technologies, Inc
2017 Audit
CK Clarkston Kenton 4 Hrs
Requirement... 8 Hrs

Morgan Technologies, Inc
2017 Audit
KT Kara Thrace 8 Hrs

The My Jobs title is a hyperlink to the Job Management screen.

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

On the Calendar, click a day to see the details of the Jobs you are managing. The calendar details will list Client Name, Job Name –click to go to the Job schedule and Color-coded Staff name with the number of hours they are scheduled – click to go to the Staff member’s current schedule.

JOB DETAILS

On the Jobs page, a list of Managed Jobs appears on the left. These are all the Jobs where the user is listed as the Partner, Manager or In-Charge. The Jobs are listed alphabetically by Client Name. To search for Jobs not on the list, click the Search tab at the top of the screen and enter the Client Name, Client Code or Job Name to narrow your results.

Each Job tile indicates the Staff assigned, number of hours, first scheduled date, presence of any Conflicts and/or Requirements. Hover-over the icons for descriptions.

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

OVERVIEW TAB

The Overview tab summarizes the details of the Job:

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Overview | Schedule | Requirements | Notes | Locations

Tags

Scheduled On Job

CK	Clarkston Kenton	(16 Hrs)
HP	Harold Pottersville	(4 Hrs)
KT	Kara Thrace	(4 Hrs)
MC	Mike Caittagirone	(0 Hrs)

Remaining Schedule

Week of Mar 26th 2018 (8)		
Clarkston Kenton	(8)	H08
Week of Apr 2nd 2018 (8)		
Kara Thrace	(4)	F04
Harold Pottersville	(4)	M04
Week of Apr 9th 2018 (4)		
Clarkston Kenton	(4)	T04
Week of Apr 16th 2018 (4)		
Clarkston Kenton	(4)	H04

Management

Partner	James Kirkland
Manager	Mike Caittagirone
In-Charge	Clarkston Kenton

Conflicts

Staff | Schedule

Staff	Date	Sched. Hrs.	Conflicted Hrs.
Clarkston Kenton	4/10/2018	4	10

Tags are custom items that can be used to classify the Jobs 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 Overview tab indicates who is scheduled on the Job as well as the number of hours. It also displays the Remaining Schedule of the Staff assigned, the outstanding hours and the days scheduled.

The Management list displays the Partner, Manager & In-Charge on the Job.

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 Staff assigned to the Job.

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Overview Schedule Requirements Notes Locations

Add People Options

Staff	Week of Mar 26th 2018	Week of Apr 2nd 2018	Week of Apr 9th 2018	Week of Apr 16th 2018	Week of Apr 23rd 2018
Clarkston Kenton	8 hrs (H8) M2, T10, W6, H2, F6 (26)	M10, T10, W10, H10, F10 (50)	4 hrs (T4) M5, W10, H2, F2 (19) !	4 hrs (H4) M10, T10, W2, H2, F6 (30)	M10, T10, W10, H10, F10 (50)
Harold Pottersville	M8, T4, W8, H8, F8 (36)	4 hrs (M4) M4, T8, W8, H8, F8 (36)	M8, T8, W8, H8, F8 (40)	M8, T8, W8, H8, F8 (40)	M8, T8, W8, H8, F8 (40)
Kara Thrace	T4, F8 (12)	4 hrs (F4) F4 (4)	M8, T8, W8, H8, F8 (40)	M8, T8, W8, H8, F8 (40)	M8, T8, W8, H8, F8 (40)

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

Schedule / Availability Details

Details for Clarkston Kenton week of 4/9/2018

Availability	Sun	Mon	Tue	Wed	Thu	Fri	Sat			
Base	0	10	10	10	10	10	0			
Remaining	0	5	0	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 Callagirone		0	5	0	0	0	0	0
Ripley Technologies, Inc	2017 Audit	Mike Callagirone	TEST	0	0	8	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

Close

ADD SCHEDULE ITEM

To schedule time for a Staff person or to view/edit an existing schedule on a Job, click on the gray bar under the applicable week. The Edit Schedule window will open:

Edit Schedule

Staff Person: Bryan Wayne

Week Of: 06/04/2018

Allocate hours: 40 across the week

Day	Hours	Start time	Class	Location
Sun Jun 3	-Not Set-	08:00 AM	(Job Default)	(Job Default)
Mon Jun 4	8hrs	08:00 AM	(Job Default)	(Job Default)
Tue Jun 5	8hrs	08:00 AM	(Job Default)	(Job Default)
Wed Jun 6	8hrs	08:00 AM	(Job Default)	(Job Default)
Thu Jun 7	8hrs	08:00 AM	(Job Default)	(Job Default)
Fri Jun 8	8hrs	08:00 AM	(Job Default)	(Job Default)
Sat Jun 9	-Not Set-	08:00 AM	(Job Default)	(Job Default)
(Total)	40 Hrs			

Buttons: Save, Delete, Cancel

Set or modify the schedule by 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.

Wed Apr 11: 3hrs

Start time: 08:00 AM

Modal: Clear Duration, Hrs slider, Mins slider, (Total) No Time, 30 mins, 4 hrs, 8 hrs

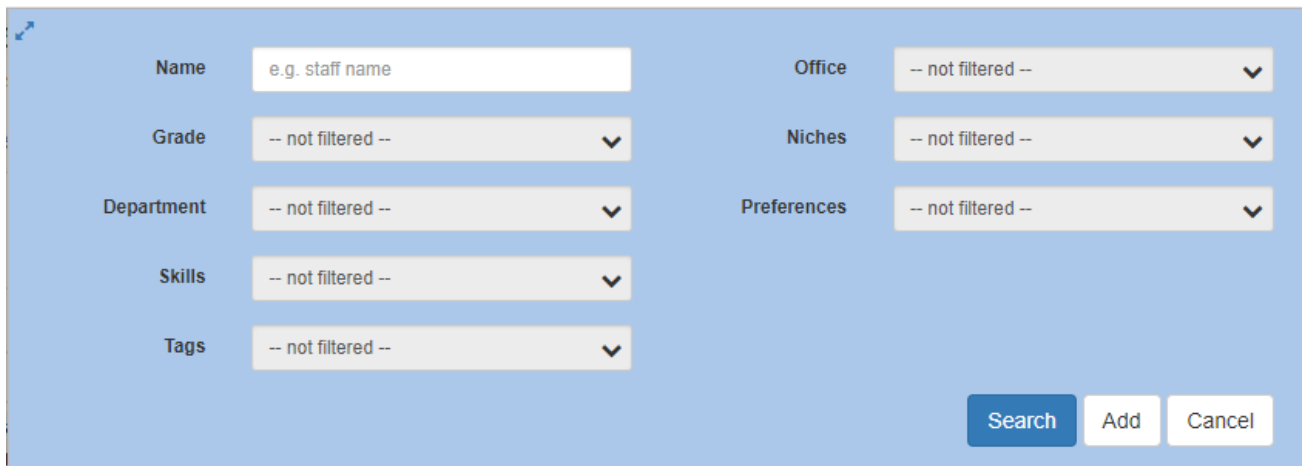
Once the number of hours is set, select the Start Time as needed. Use the Set Full Week button to schedule the Staff the entire week (based on 40-hour week).

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.

ADD STAFF TO JOB

The Add People button opens a search screen to choose criteria to help you find qualified Staff to add to this job.



Enter a Name and/or use one or more filters to narrow your results set. Clicking the Search button will return a list of Staff that meet the criteria:



<input type="checkbox"/>	Name	Grade	Department	Office	Availability
CK	Clarkston Kenton	Partner	Tax - Business	Atlanta	25 Mar 2018 (26 hrs) 1 Apr 2018 (50 hrs) 8 Apr 2018 (19 hrs) 15 Apr 2018 (30 hrs) 22 Apr 2018 (50 hrs) 29 Apr 2018 (42 hrs)
EB	Elizabeth Bennet	Staff	Tax - Business	Atlanta	
HP	Harold Pottersville	Staff	Tax - Business	Chicago	25 Mar 2018 (36 hrs) 1 Apr 2018 (36 hrs) 8 Apr 2018 (40 hrs) 15 Apr 2018 (40 hrs) 22 Apr 2018 (40 hrs) 29 Apr 2018 (40 hrs)

Select one or more Staff by clicking on the row. Click the Add button to add the Staff to the Job.

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.

Push Dates – This will change a Staff's scheduled hours to new dates.

Swap Staff – This will replace one Staff member with another one.

REQUIREMENTS TAB

The system has the ability to create Requirements. These are scheduled items that do not have a resource (Staff) defined. Adding a Requirement allows the Job Manager to specify any criteria that is needed. i.e. grade, department, office, etc. for specific dates and hours. Click the Add Requirement button to start the process:

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Overview

Schedule

Requirements

Notes

Locations

Requirements

Add Requirement

There are no requirements set for this job

A dialog box will open where the Requirement can be defined. Enter a description, then select the date(s), time(s) and hours before clicking the Add button to set the Requirement. Clicking on a date on the calendar will add it to the list. Click the date again to remove it.

Define New Requirement

What is your requirement?
Please specify any criteria that is needed. i.e. grade, department, office, etc.

Need Senior Audit Staff to work in Louisville, KY

Select the dates needed for this requirement

Select a start time and hours to apply to all the dates selected

Start Time
08:00 AM

Hours
8hrs

Date	Day	Start	Hours
3/30/2018	Fri	08:00 AM	8hrs
4/2/2018	Mon	08:00 AM	8hrs

Cancel Add

Requirements will be listed by Client on the Urgent Requirements widget on the main Dashboard.

NOTES TAB

The Notes tab on a Job holds additional information relevant to the Job or the Client.

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Overview Schedule Requirements **Notes** Locations

Job Client Both

type a new note here

Add Note

3/27/2018 Clarkston Kenton:

This is a Job Note.



Type the Note in the text box and click Add Note to save. Any Notes added to the Client tab will appear on ALL Jobs for that Client. The Both tab will show both Job and Client Notes together.

LOCATIONS TAB

The Locations tab allows you to specify the Job Locations (including Addresses) and are used with Outlook Calendar Appointments.

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Overview Schedule Requirements Notes **Locations**

Save Locations

Job Locations

Specify the Job Locations (including Addresses) here. If you use the Outlook integration, addresses will appear on Calendar Appointments. Locations are also useful for searching for resources.

Atlanta, Georgia (Default Location)

Clear Default

Address 1175 Peachtree St. NE
Atlanta, GA 30361

Physical Address (if known)

Denver, Colorado

Set Default

Address

Physical Address (if known)

Add a Location

State