IRIS | Practice Engine

Scheduling –
Job Management

End-User Guide

CONTENTS

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

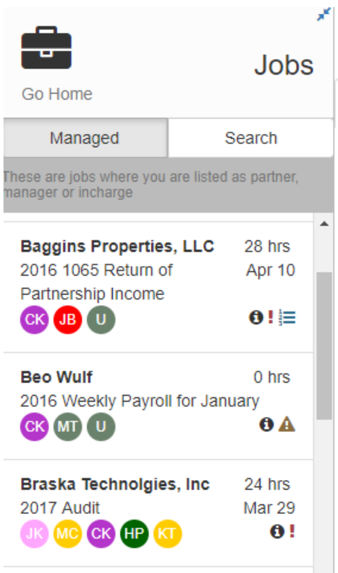
The calendar on the left allows the user to select a date. A summary of jobs scheduled on the selected date will appear to the right. These are jobs that the user is scheduled on as well as any scheduled jobs that the user manages.

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



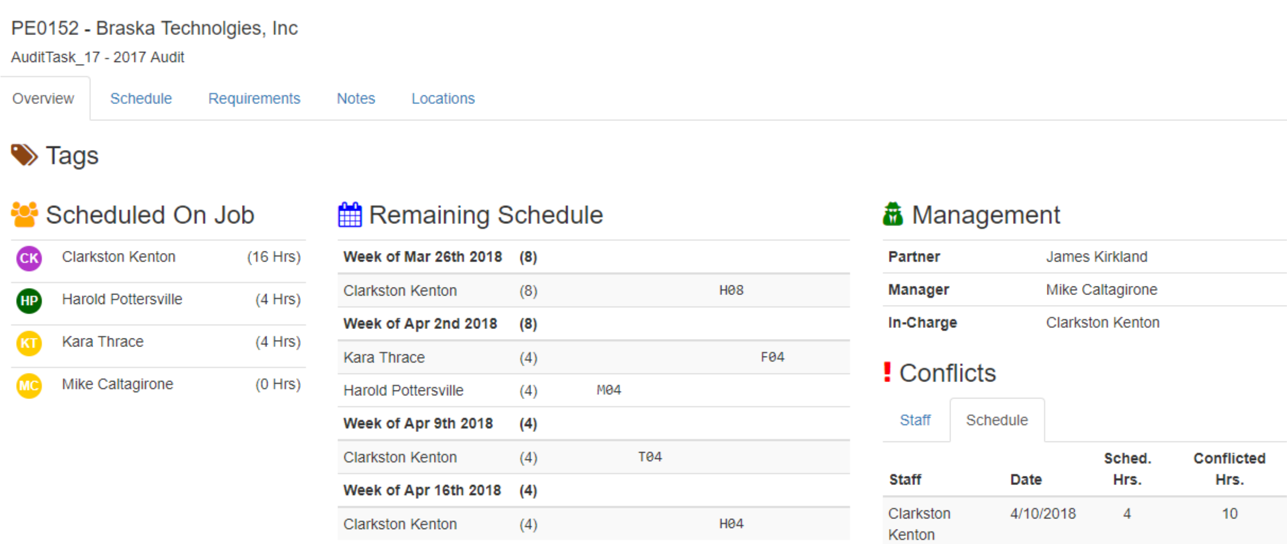
On the Jobs page, a list of Managed Jobs appears on the left. These are all the Jobs where the user is listed as the Partner, Manager or In-Charge. The Jobs are listed alphabetically by Client Name. To search for Jobs not on the list, click the Search tab at the top of the screen and enter the Client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



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.

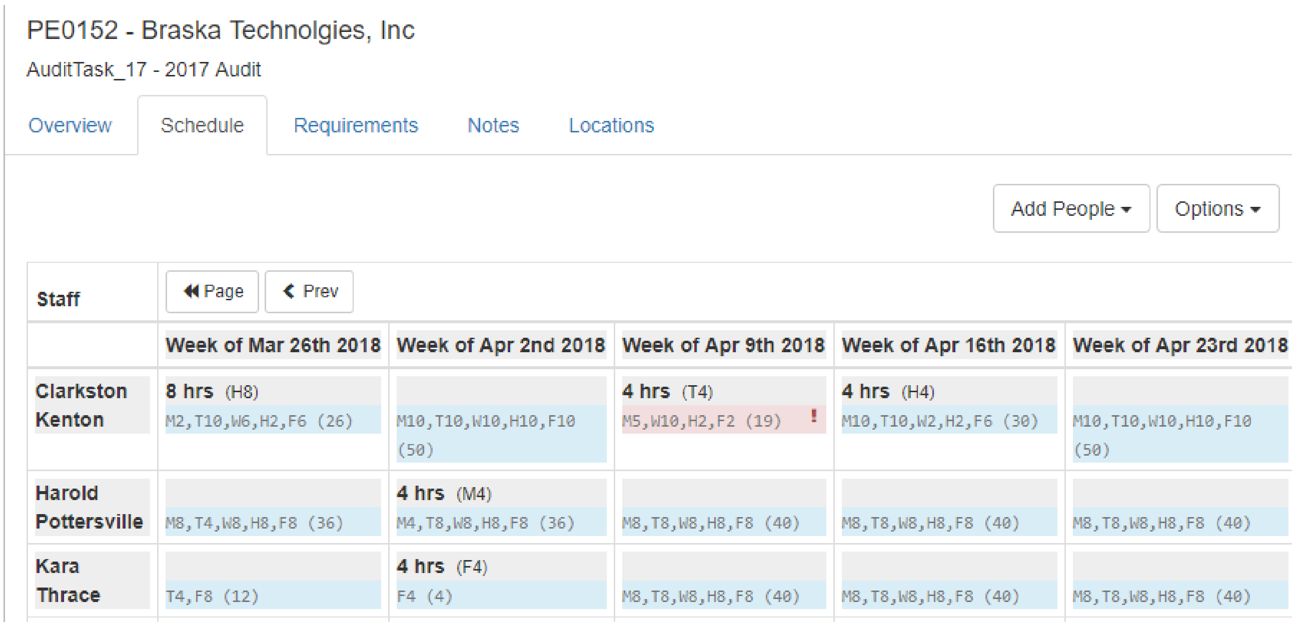
The Overview tab indicates who is scheduled on the Job as well as the number of hours. It also displays the Remaining Schedule of the Staff assigned, the outstanding hours and the days scheduled.

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.



PE0152 - Braska Technolgies, Inc

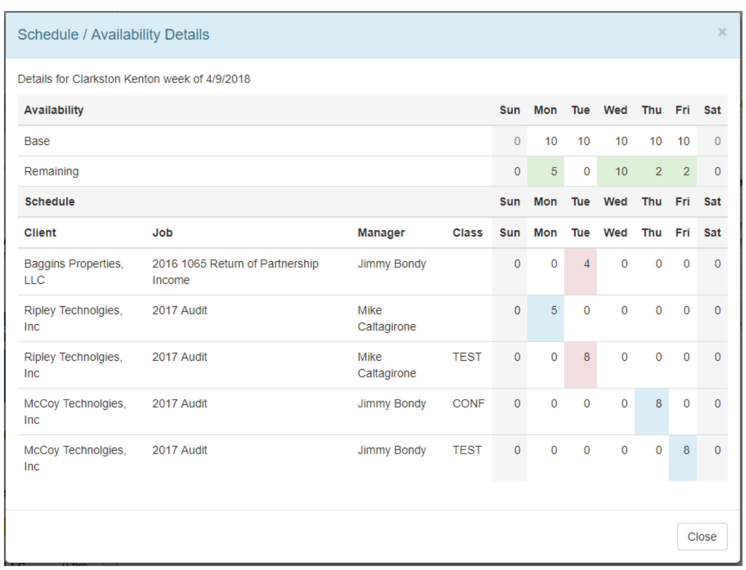
AuditTask_17 - 2017 Audit

Overview | Schedule | Requirements | Notes | Locations

Add People ▾ | Options ▾

Staff	Page / Prev				
	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:



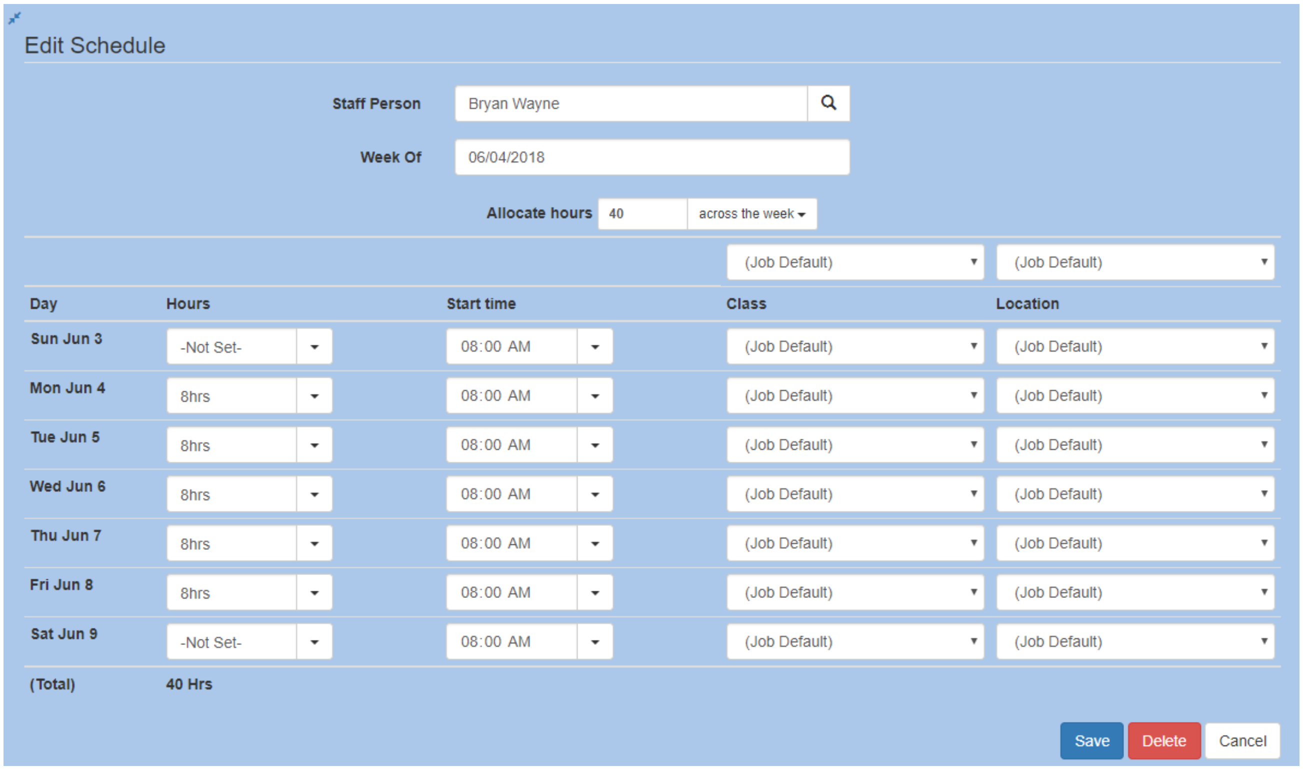
Schedule / Availability Details ×

Details for Clarkston Kenton week of 4/9/2018

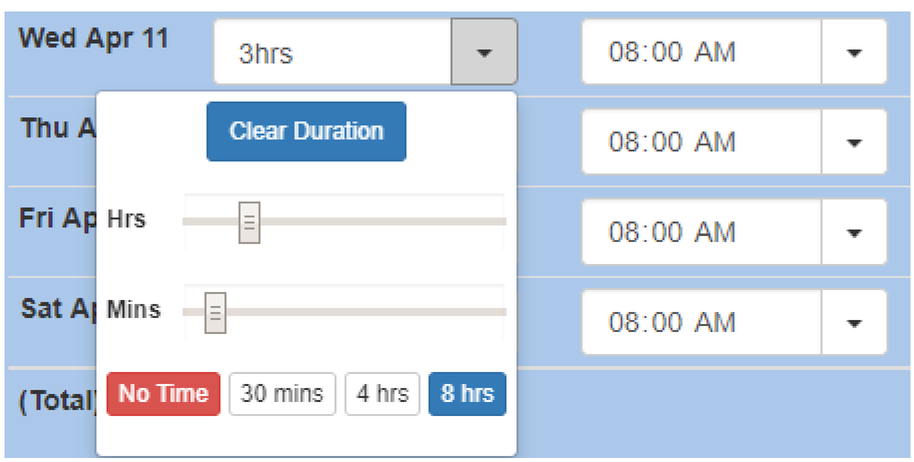
Availability				Sun	Mon	Tue	Wed	Thu	Fri	Sat
Base				0	10	10	10	10	10	0
Remaining				0	5	0	10	2	2	0
Schedule				Sun	Mon	Tue	Wed	Thu	Fri	Sat
Client	**Job**	**Manager**	**Class**	**Sun**	**Mon**	**Tue**	**Wed**	**Thu**	**Fri**	**Sat**
Baggins Properties, LLC	2016 1065 Return of Partnership Income	Jimmy Bondy		0	0	4	0	0	0	0
Ripley Technolgies, Inc	2017 Audit	Mike Caltagirone		0	5	0	0	0	0	0
Ripley Technolgies, Inc	2017 Audit	Mike Caltagirone	TEST	0	0	8	0	0	0	0
McCoy Technolgies, Inc	2017 Audit	Jimmy Bondy	CONF	0	0	0	0	8	0	0
McCoy Technolgies, Inc	2017 Audit	Jimmy Bondy	TEST	0	0	0	0	0	8	0

Close

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:



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.

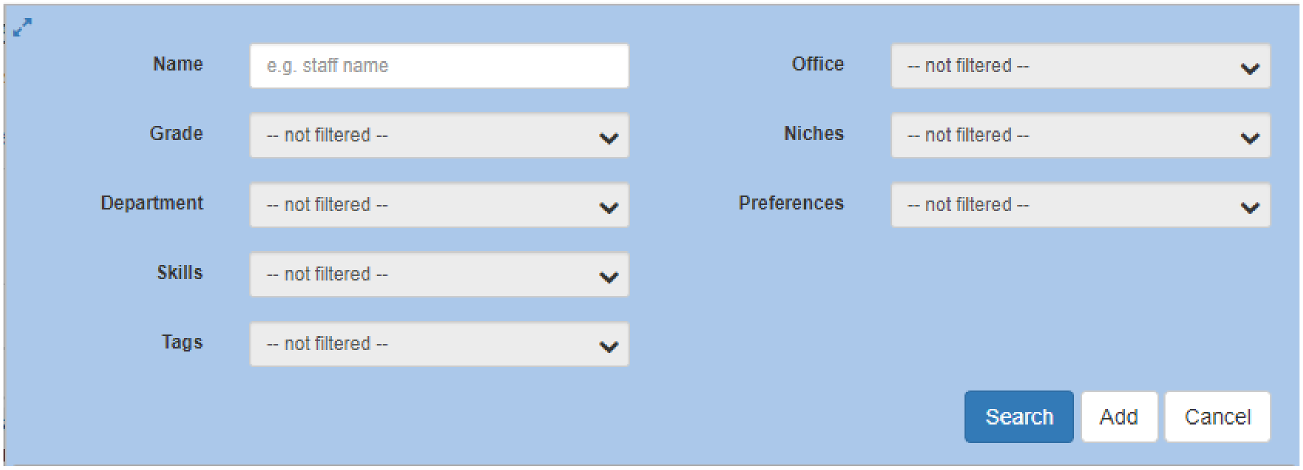


Once the number of hours is set, select the Start Time as needed. Use the Set Full Week button to schedule the Staff the entire week (based on 40-hour week).

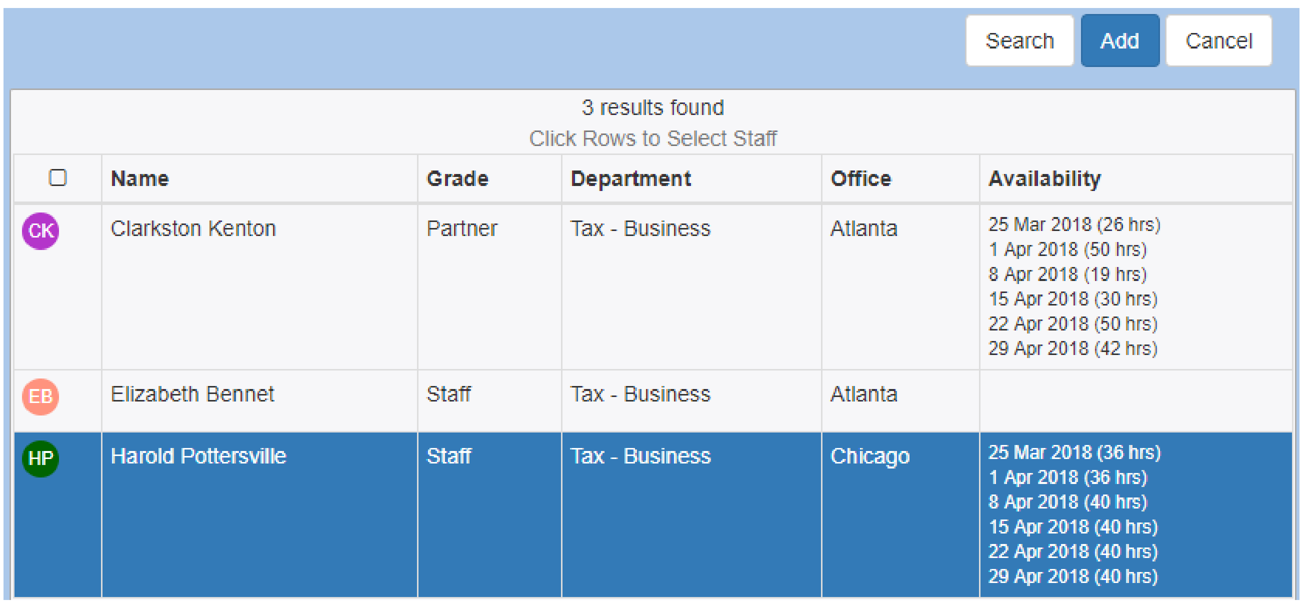
The Class and Location fields will have options depending on the Job.

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

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:



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:

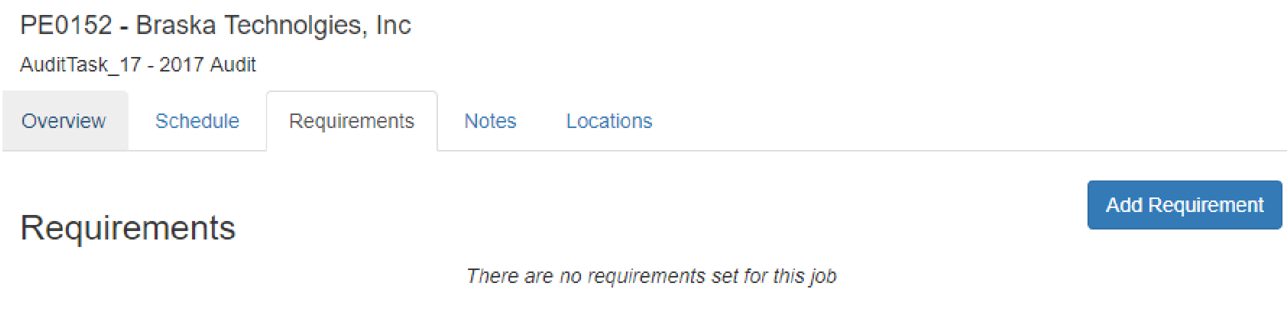
Undo – This will preview and revert changes to a point in the last 30 days.

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

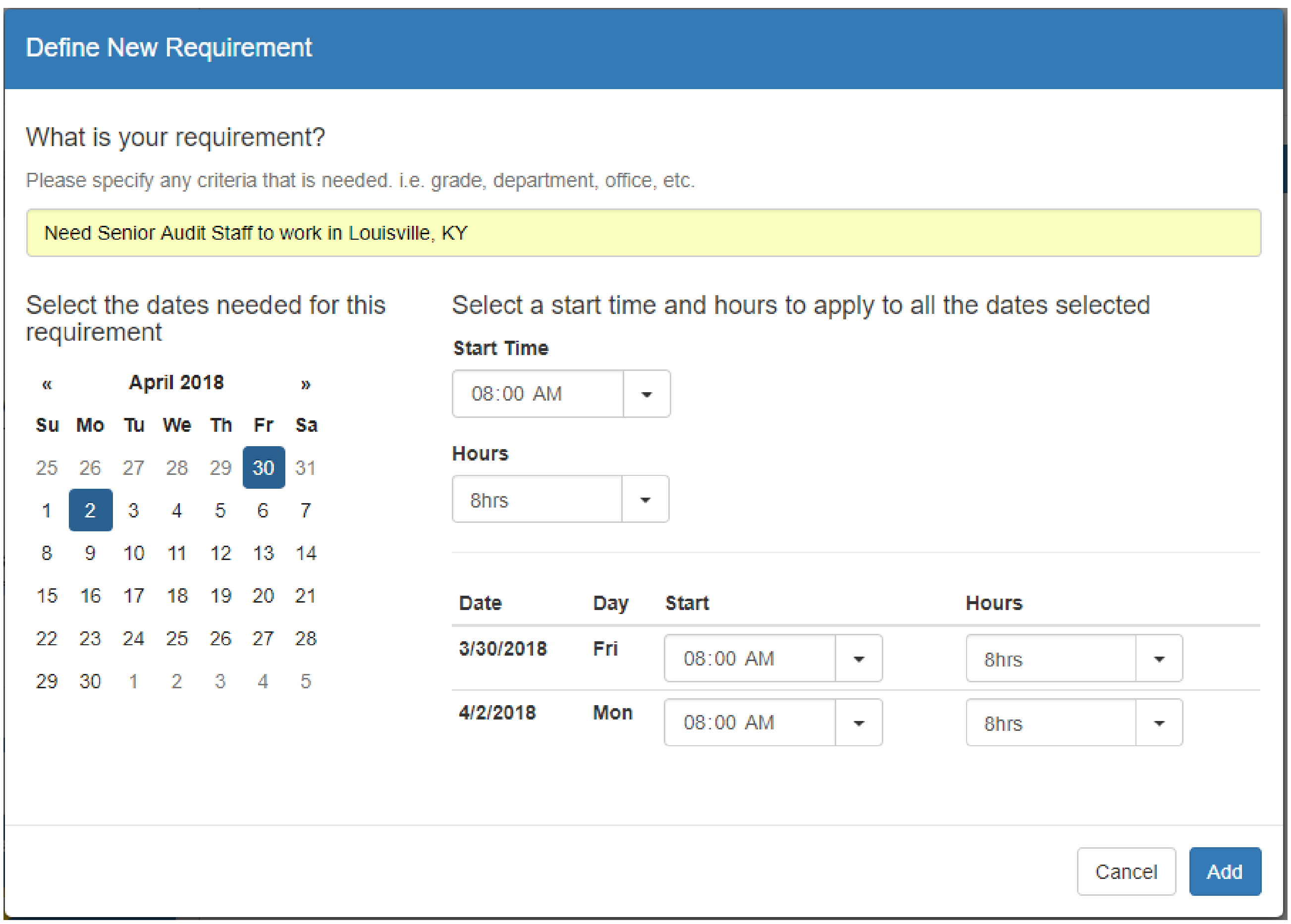
Swap Staff – This will replace one Staff member with another one.

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:



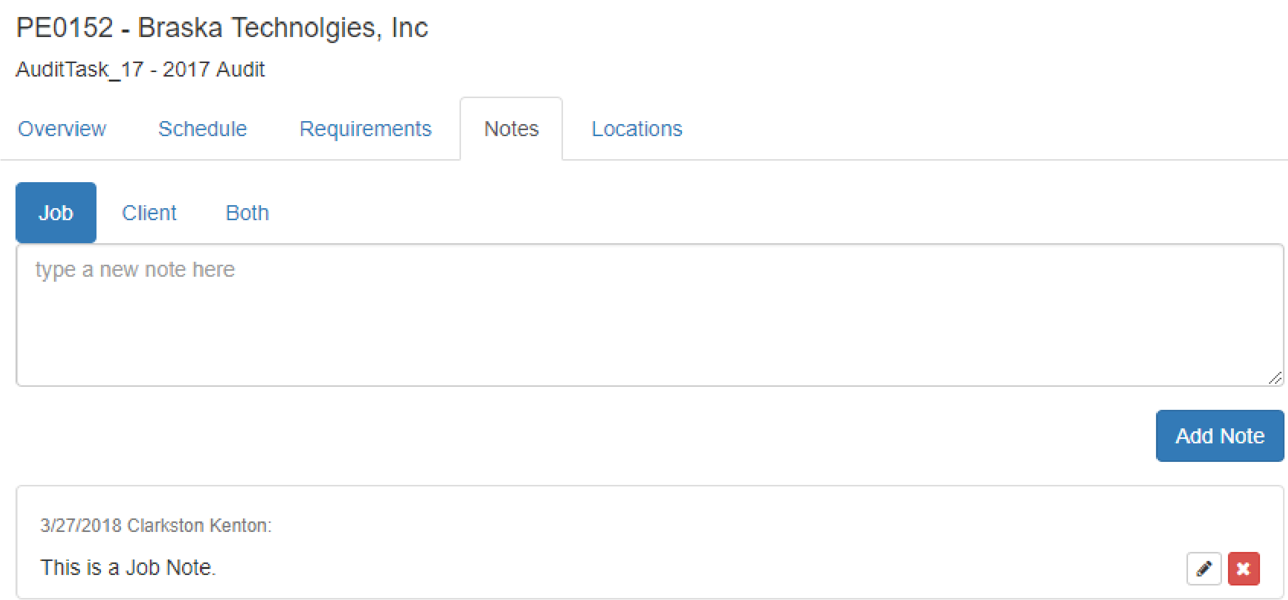
A dialog box will open where the Requirement can be defined. Enter a description, then select the date(s), time(s) and hours before clicking the Add button to set the Requirement. Clicking on a date on the calendar will add it to the list. Click the date again to remove it.



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.



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.