



# Scheduling – Administration Guide

## *End-User Guide*

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## CHANGE HISTORY

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DATE: MAY 2018

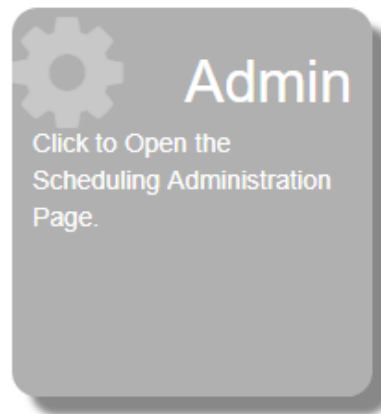
AUTHOR	DATE	CHANGE
DEE LOWREY	MAY 2018	CREATED
DEE LOWREY	APRIL 27, 2018	COMPLETED DRAFT

# OVERVIEW: ADMINISTRATION

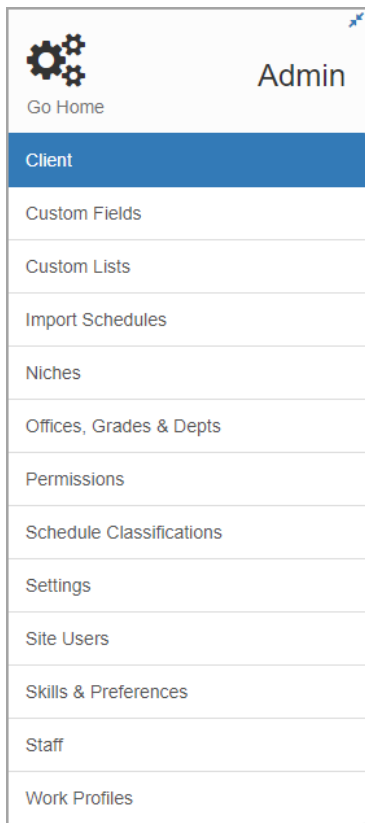
This document is aimed at Practice Engine Scheduling Administrators, Support and Admin staff; Partners and Managers. It provides information regarding the setup and maintenance of the Scheduling application.

## ADMIN DASHBOARD WIDGET

Many components used in Scheduling sync from Practice Engine automatically based on the timeframe set by the firm. These components include Clients, Staff, Jobs and Niches. If using Scheduling as a stand-alone application these components will need to be created manually.



From the dashboard, the Admin widget appears in the upper right corner for users with appropriate security. Click the hyperlink to open the Scheduling Administration Page.

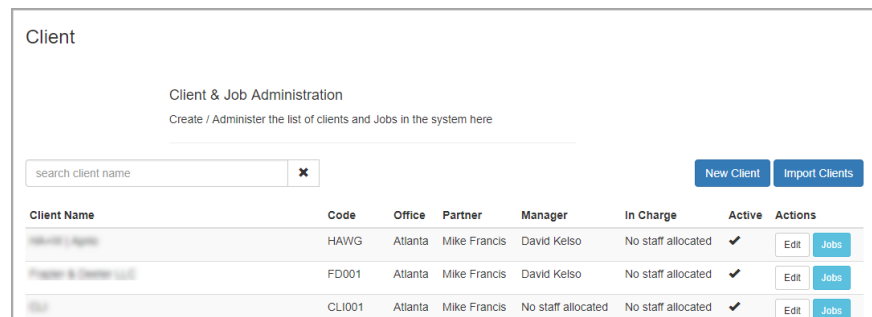


The screen loads with a left menu and right-side details. The first section, Client is the default.

Click the Go Home link to return to the dashboard.

### CLIENT

Clients will sync from Practice Engine automatically and display in a grid. Search for clients by entering text in the search box above the details grid. From the grid users can click the Edit button to edit a client's details, click the Jobs button to go to the client's jobs and manually enter new clients.



## MANUALLY ADDING CLIENTS

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Users may also add Clients manually by Importing or adding Manually.

### ADDING A NEW CLIENT

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Manually add a new client by clicking the New Client button and completing the following information. Click Save to add the client.

Create New Client

**Client Name**

**Client Code**   
Must uniquely identify the client

**Client Active**  Check if the Client can be scheduled

**Year End**  /  Fiscal Year End

**Partner**

**Manager**

**In Charge**

**Office**  Office the client's work is primarily done at

**TEST**

**TEST2**

### IMPORTING CLIENTS

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Bulk import of clients is available using a .csv file. The fields available to import include:

- Client Name
- Client ID
- Office
- Active
- Partner's Code
- Manager's Code
- In-Charge's Code
- Year End Month
- Year End Day

Save the .csv file with the available data and click the Import Clients button. The Client import pop-up opens to choose the file.

**Client Import**

**Pick an Import File** Choose File No file chosen

Cancel
Upload File

PE will read the column headers and try to match to the available fields. If it cannot be matched, choose the column from your spreadsheet. Leave the selection “--Not Included--” to ignore the column. Click the Process Data button to add the clients.

**Client Import**

Code and Name are required. All other fields are optional. Unmapped fields will not update existing values.

Expected Column	Import From
Name	<span style="border: 1px solid #ccc; padding: 2px 5px;">--Not Included--</span> ▼
Code	<span style="border: 1px solid #ccc; padding: 2px 5px;">Code</span> ▼
Office	<span style="border: 1px solid #ccc; padding: 2px 5px;">Office</span> ▼
Active	<span style="border: 1px solid #ccc; padding: 2px 5px;">--Not Included--</span> ▼
Partner's Code	<span style="border: 1px solid #ccc; padding: 2px 5px;">--Not Included--</span> ▼
Manager's Code	<span style="border: 1px solid #ccc; padding: 2px 5px;">--Not Included--</span> ▼
In-Charge's Code	<span style="border: 1px solid #ccc; padding: 2px 5px;">--Not Included--</span> ▼
Year End Month	<span style="border: 1px solid #ccc; padding: 2px 5px;">--Not Included--</span> ▼
Year End Day	<span style="border: 1px solid #ccc; padding: 2px 5px;">--Not Included--</span> ▼

Cancel
Process Data

## CUSTOM FIELDS

Administrators may add up to 10 custom fields for Clients, Jobs or Staff. Enter the field names in the box and click Save. If you want the values in a List you must create the list in the next tab.

Field	Label	List
Field 1	TEST	New List
Field 2	TEST2	New List
Field 3	Budget	Services
Field 4		--Custom List--
Field 5		--Custom List--
Field 6		--Custom List--
Field 7		--Custom List--
Field 8		--Custom List--
Field 9		--Custom List--
Field 10		--Custom List--

## CUSTOM LISTS

Administrators may add custom lists. Click the Add New List box. Additional fields will display on the right. Add the List Description and any List Items by clicking the Add New Item box. When complete, click the Save List button. Lists may also be deleted.

Code	Description
LIST-1	New List
LIST-2	Services

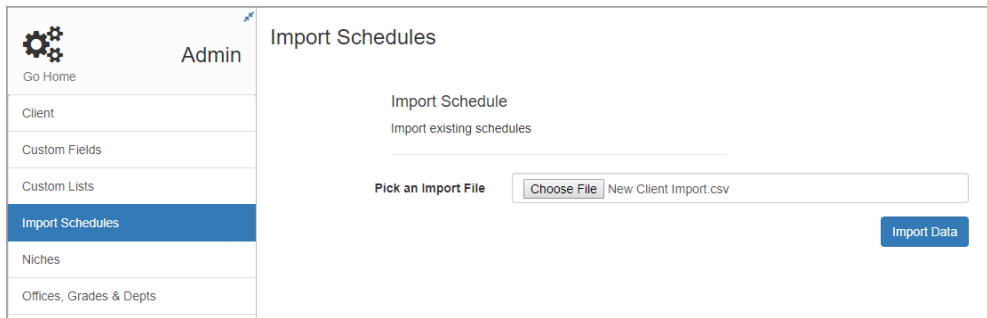
List Code	List Description
LIST-2	Services

List Items	Code	Description	Action
	SRV001	Tax Planning	x

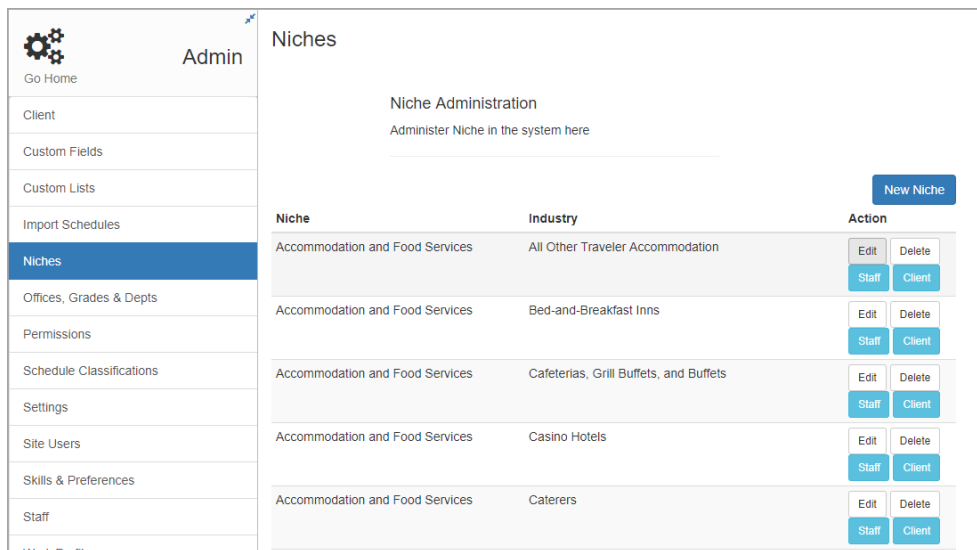
## IMPORT SCHEDULES

Administrators may import existing schedules from a csv file by choosing the file and clicking the Import Data button. This is now available.



## NICHES

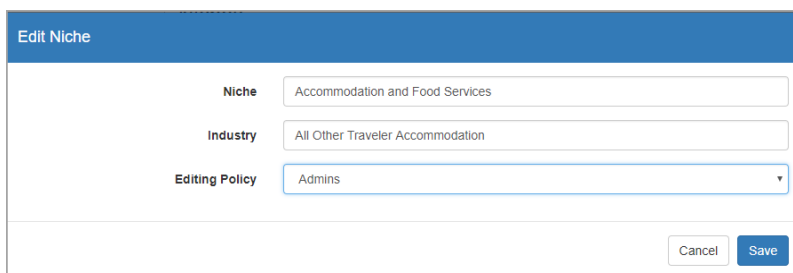
Niches will pull through from Practice Engine. Administrators can add, edit, set editing rights and Delete. Staff and Clients may also be associated with a Niche by clicking the corresponding button.



Niche	Industry	Action	
Accommodation and Food Services	All Other Traveler Accommodation	Edit	Delete
		Staff	Client
Accommodation and Food Services	Bed-and-Breakfast Inns	Edit	Delete
		Staff	Client
Accommodation and Food Services	Cafeterias, Grill Buffets, and Buffets	Edit	Delete
		Staff	Client
Accommodation and Food Services	Casino Hotels	Edit	Delete
		Staff	Client
Accommodation and Food Services	Caterers	Edit	Delete
		Staff	Client

## ADD NEW/EDIT

Click the New Niche button or click the Edit button for an existing Niche to add or modify.





## ASSOCIATE STAFF

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From the Staff Assignment page, Administrators may choose the staff, set their experience in hours, choose a star level to indicate interest and designate if an Expert in that Niche. When selections are complete, click the Assign button and then click Close Staff Assignment button.



## ASSOCIATE CLIENTS

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The Client Assignment page allows Administrators to Select a Client and assign a ranking.



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## OFFICES, GRADES & DEPTS

This will be used differently in Version 2 and will no longer display.

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## PERMISSIONS

Administrators may set who is allowed access to various areas of Scheduling. Click Edit to change a setting then click Save.

**Admin**

Go Home

Client

Custom Fields

Custom Lists

Import Schedules

Niches

Offices, Grades & Depts

**Permissions**

Schedule Classifications

Settings

Site Users

Skills & Preferences

Staff

Work Profiles

### Permissions

Site Permissions  
Set who is allowed access to various things here

Policy	Permissions (Who has access)	Action
Schedulers	Scheduling_Scheduler Group	<input type="button" value="Edit"/>
Site Administration	Scheduling_Admin Group	<input type="button" value="Edit"/>
Users	Scheduling_User Group ✖	<input type="button" value="Save"/> <input type="button" value="Cancel"/>

-- Select Permission to Add --

-- Select Permission to Add --

Scheduling\_Scheduler Group

Scheduling\_User Group

Scheduling\_Admin Group

## SCHEDULE CLASSIFICATIONS

Administrators may add, edit and delete classification codes. Click the Add New Classification button to display the entry area on the right. Give the classification a code and description, then Save. To delete existing classifications, click the row to display on the right and then click the Delete Classification button.

**Admin**

Go Home

Client

Custom Fields

Custom Lists

Import Schedules

Niches

Offices, Grades & Depts

Permissions

**Schedule Classifications**

Settings

### Schedule Classifications

Add or Edit Schedule Classifications


Code	Description
PREP	Prepare
REV	Review
CONF	Configuration
TEST	Testing/Training
LIVE	Go Live

**Code**

**Description**

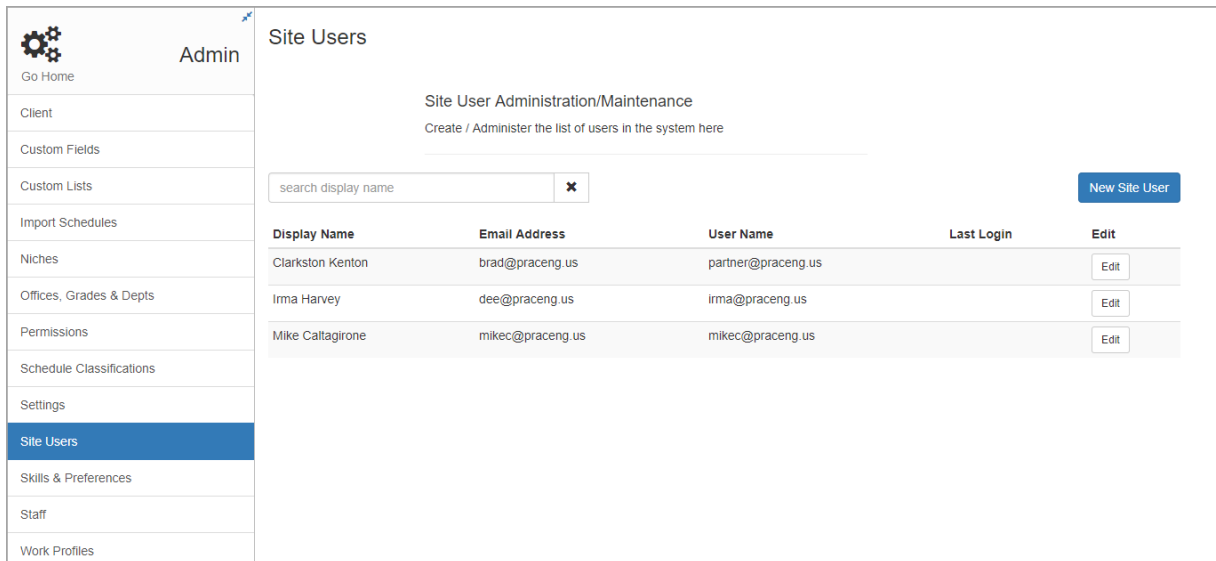
## SETTINGS

This is a placeholder and will have more information in Version 2.

 Go Home Client Custom Fields Custom Lists Import Schedules Niches Offices, Grades & Depts Permissions Schedule Classifications <b>Settings</b> Site Users	<h3>Settings</h3> <p>Settings Application Settings</p> <hr/> <p><i>No setting currently exist</i></p>
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## SITE USERS

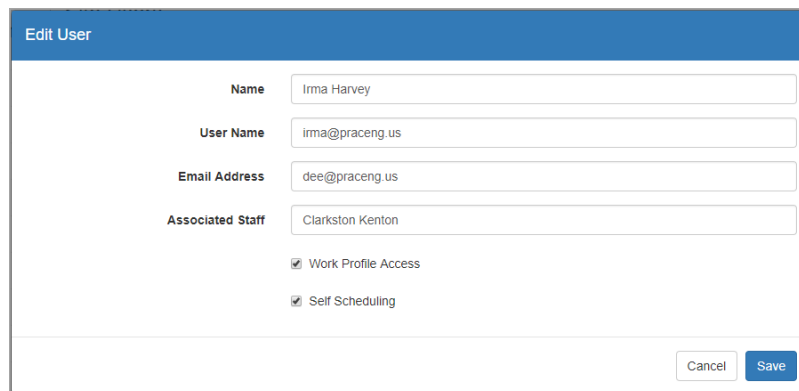
Manage User Logins from the Site User Administration/Maintenance page. All users with logins to scheduling will be listed here.



Display Name	Email Address	User Name	Last Login	Edit
Clarkston Kenton	brad@praceng.us	partner@praceng.us		<input type="button" value="Edit"/>
Irma Harvey	dee@praceng.us	irma@praceng.us		<input type="button" value="Edit"/>
Mike Caltagirone	mikec@praceng.us	mikec@praceng.us		<input type="button" value="Edit"/>

Add new users by clicking the New Site User button or modify a user by clicking the Edit button. Add or update the following information and then click Save.

- Name – Enter the name
- User Name – This the network user name
- Email Address – Enter the email address
- Associated Staff – This is the staff record that ties to the username above.
- Work Profile Access – Checking allows the user to update their Profile preferences
- Self Scheduling – Checking allows the user to schedule their own time.



**Edit User**

Name: Irma Harvey

User Name: irma@praceng.us

Email Address: dee@praceng.us

Associated Staff: Clarkston Kenton

Work Profile Access

Self Scheduling

## SKILLS & PREFERENES

Click the Add button to enter the skill name and description. Choose the desired group to have editing rights. Repeat the same process for the Preferences tab.

Skills & Preferences

Skills are set by skill administrators who have validated these items.

Add new

Name: e.g. Accounts

Description: e.g. General accountancy knowledge

Editing Policy: NoRights

Save

## STAFF

Manage staff profiles from the Staff Administration page. Staff may be imported using the Import from .csv button or manually added via the New Staff button.

Staff Administration

Create / Administer the list of staff in the system here

search name [x]

New Staff Import from .csv

Name	Code	Email	Department	Grade	Office	Active	Action
Unallocated	XXX	Unallocated@thepractice.com	Administration	Unknown	Atlanta	✓	Edit Conflicts
System Administrator	SA	sysadm@thepractice.com	Valuation & Transaction	Unknown	Nashville	✓	Edit Conflicts
Sys Admin	SYSADM		Valuation & Transaction	Unknown	Nashville	✓	Edit Conflicts
Bryan Wayne	2	Manager@praceng.us	Tax - Individual	Manager	Nashville	✓	Edit Conflicts
Clarkston Kenton	3	xxx@xxx.com	Tax - Business	Partner	Atlanta	✓	Edit Conflicts
James Kirkland	4		Accounting, Audit & Assurance	Partner	Atlanta	✓	Edit Conflicts
Jimmy Bondy	5	Bond@praceng.us	Tax - Individual	Manager	Atlanta	✓	Edit Conflicts
Harold Pottersville	6	Staff@praceng.us	Tax - Business	Staff	Chicago	✓	Edit Conflicts
Kara Thrace	7	Thrace@praceng.us	Accounting, Audit & Assurance	Staff	Atlanta	✓	Edit Conflicts

Click the Edit button to view the Staff Details screen. Staff fields include:

- Staff Name
- Staff Code – this must be a unique code.
- Staff Email

- Staff Active – check the box if the staff can be scheduled to jobs
- Department – choose the department the staff works in
- Office – choose a primary office for the staff
- Grade/Level – options include Staff, Senior, Manager, Partner, Administrative and Unknown

The following fields determine who can schedule the staff member. The staff member will appear in the selected user’s Staff Schedule>Managed Staff dashboard widget and in their Jobs widget as Managed Jobs.

- Partner – enter the staff’s primary Partner
- Manager – enter the staff’s Manager
- Admin – enter the staff’s Admin
- Supervisor – enter the staff’s Supervisor
- Calendar ID – this must identify the user’s mailbox, so the schedule can be synced to the users Outlook calendar. It is typically their email address.
- Skills – This will display any skills selected in the user’s profile.

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## WORK PROFILES

Administrators manage the users work schedule/availability in the Work Profile Administration page.

- Delete Profile – Removes the profile
- Select All – Used to select all individuals and update the defaults.
- Clear All – Removes any selections.
- Edit – Click the Edit button for the name to update individuals.

Name	Code	Email	Department	Grade	Office	Select	Action
Unallocated	XXX	Unallocated@thepractice.com	Administration	Unknown	Atlanta	<input type="checkbox"/>	Edit
System Administrator	SA	sysadm@thepractice.com	Valuation & Transaction	Unknown	Nashville	<input type="checkbox"/>	Edit
Sys Admin	SYSADM		Valuation & Transaction	Unknown	Nashville	<input type="checkbox"/>	Edit
Bryan Wayne	2	Manager@praceng.us	Tax - Individual	Manager	Nashville	<input type="checkbox"/>	Edit
Clarkston Kenton	3	xxx@xxx.com	Tax - Business	Partner	Atlanta	<input type="checkbox"/>	Edit
James Kirkland	4		Accounting, Audit & Assurance	Partner	Atlanta	<input type="checkbox"/>	Edit
Jimmy Bondy	5	Bond@praceng.us	Tax - Individual	Manager	Atlanta	<input type="checkbox"/>	Edit
Harold Pottersville	6	Staff@praceng.us	Tax - Business	Staff	Chicago	<input type="checkbox"/>	Edit

A default profile is created to establish the firms weekly work days and weekly hours.

**Default Work Profile**

Schedule: Weekly

Monday  Tuesday  Wednesday  Thursday  Friday  Saturday  Sunday

Hours: 00:00

Cancel Save

Each user can be edited to adjust the default values or setup multiple profiles. Profiles can have a start and end date when a user's availability varies throughout the year.

**James Kirkland Work Profile**

Schedule: Weekly

Monday  Tuesday  Wednesday  Thursday  Friday  Saturday  Sunday

Start Date: 04/27/2018

End Date: mm/dd/yyyy

Hours: 08:00

Add

Start Date	End Date	Hours	Action
8/14/2017		08:00	Edit Delete

Cancel Save