SnapSchedule

User Manual

V5.0.4

www.BMScentral.com

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About This Help File

Snap Schedule provides a standard Windows Help Viewer that lets you search the set of help information in various ways. Using the Help Viewer, you can browse through topics listed in the **Contents** tab of the viewer's navigation pane. To display information for a particular topic, simply double-click any book or page icon in the **Contents** tab. If you are a new user, you may want to browse through the topics listed under the Introduction section to learn about **Snap Schedule**'s basic concepts and common tasks. When you want to find the answer to a specific question, you can use the **Search** tab to locate relevant topics. Use the **Index** tab to look up a specific term or task, just like you would use a book index.

To search by contents

To search by index

To search by keywords

While running the program, you can obtain information about windows or dialogs and detailed field-by-field descriptions by clicking the Help button on the toolbar.

To navigate among the topics you have read, use the **Back** and **Forward** button on the toolbar. To return to the contents previously viewed in the right pane, click the **Back** button. Right-clicking the mouse while on the display pane will display additional context sensitive commands.

To exit, click the **Close** button at the upper right corner of the Help screen.

Frequently Asked Questions

Following are answers to some of the most commonly asked questions about **Snap Schedule**. Click on a subject heading below to view questions and answers relating to your selection. Links throughout the answers will guide you to further information in this Help file or from our web site and other sources.

INSTALLATION AND SETUP

- How is Snap Schedule licensed?
- Can I import my employee data into Snap Schedule?
- Can I access Snap Schedule data from multiple computers?
- Can I encrypt or password protect a schedule file?

PRODUCT FEATURES

- Is there any limit on the number of employees or shifts that I can schedule?
- Is there a limit in how far in advance I can schedule?
- Can Snap Schedule create reminders for training or certification expiration?
- Can Snap Schedule display military time (24 hour clock), long and short date formats?
- Can I specify what information to be shown on the schedule views?
- Does Snap Schedule support multiple work locations or sites?
- Can I email schedules to my employees?
- How do I publish schedules and reports to a web site?

OPERATIONS

- How do I provide additional details and explanation notes when making a shift assignment?
- What should I do when an employee is discharged?
- How do I schedule employees' breaks and specific tasks within a shift?
- How do I know if I have enough people, by skill and position, scheduled for each shift ?
- When an employee stays late or is asked to work a longer shift, how do I adjust the shift length?
- Can I copy and paste schedule assignments?
- I pay my employees extra for working on certain shifts. How do I keep track of shift premium pays?
- Can Snap Schedule track vacation and time off requests?
- Will Snap Schedule help me with labor cost estimates?
- How do I print a monthly calendar?

Product Overview

Snap Schedule helps you save scheduling time, track labor costs, manage vacations and leaves, ensure adequate shift coverage, and eliminate scheduling conflicts. With **Snap Schedule**, you can:

- Easily schedule an unlimited number of employees, shifts, positions, and skills.
- Reduce labor costs, avoid scheduling conflicts, and minimize overtime and over/under staffing.
- Spend less time on developing schedules and provide management and payroll departments with complete and accurate manpower and labor cost data.
- Ensure adequate shift coverage and know who are assigned to which shifts.
- Instantaneously access everyone’s schedule and availability so you can respond to changing demands faster.
- Take proactive control of your personnel scheduling through automatic schedule generation, conflict alerts, and detailed reports.
- Track employees' hours by activity/task and schedule break. Monitor training, compensatory, overtime, and time off hours and costs.

Snap Schedule brings you visual scheduling tools, a powerful feature set, comprehensive reports, and the modern Microsoft Office® user interface. Listed below are some of **Snap Schedule**’s unique capabilities.

- **Know instantly where and when your employees are assigned.** All scheduling information is available on screen. No need to flip through pages of paper to see absentees, on-call, training, or overtime situations. And if there’s ever any question about coverage, you can show shift and rotation scheduling for any date and location.

- **Reduce labor costs, foresee and avoid overtime** Snap Schedule lets you accurately track and forecast employee absences and staffing needs. It warns you of scheduling conflicts using color-coded flags and helps you minimize over-staffing, which in turn reduces payroll costs. As you are making shift assignments, Snap Schedule automatically sums up employees’ work hours, calculates overtime, on-call, time off, and shift premium pays, and provides detailed cost reports so you know instantly if your are on budget.

- **Save time and speed up shift rotations with pre-designed schedule plans. Snap Schedule** comes with pre-designed compressed work week, 8, 10, 12, and 24 hour fixed and rotating work schedules that meet scheduling needs for virtually all shift-based businesses. Preview shiftwork schedules and make changes as necessary.

- **Keep scheduling and employee information in one place for easy access.** It’s easy to insert a person’s photo into their employee record as well as contact information, authorized work locations, skills, availability, and work hour constraints. Use the 25 custom fields to store anything you like from employment history such as start dates, review dates, training dates, certification renewal dates to radio call handles.

- **Quickly and efficiently fill a shift or find a substitute.** Find the right employees based on position, skills, availability, labor cost, work hour limits, seniority, and other criteria. This is ideal for scheduling events where a large number of employees must be contacted and confirmed.

- **View, create, and print schedules that are visually understandable.** With **Snap Schedule**, you can view assignments and schedule employees from several different vantage points. The Daily view shows all shift and time off assignments for each employee for each day in a specified period, at specific posts/locations. The Shift view shows staffing for each shift along with coverage summary for each job position. The Calendar view presents work and time off assignments for each employee similar to a calendar or monthly planner. The Task view allows you to assign tasks, duties, or breaks for each employee within a shift.

- **Easily assign shifts, mark time off, move or copy assignments with a simple drag & drop.** Complex shift assignments, such as split shifts, multiple shifts, paid/unpaid time off, and on calls, are all supported. You can schedule with confidence because **Snap Schedule** automatically alerts you to any scheduling conflicts. The impact of scheduling changes on coverage can be seen in real time and are checked to ensure they are in compliance with your business and personnel rules.

- **Reduce the time to track and assign employee training, vacation and time off requests.** You can define as many time-off reasons as you like and simply drag and drop a reason onto the schedule planner to mark when an employee will be on training or absent. **Snap Schedule** keeps you up to date on who won't be coming to work and why. Its comprehensive reports provide details on planned vacation, training, and time off hours for any time period you select.

- **Compile time sheet data and pass the information on to payroll.** Adjust the shift scheduled start and end time to reflect actual work hours and automatically report the hours and costs. Add notes and reasons to record or explain deviations.

Snap Schedule's familiar Windows® and Microsoft Office® look and feel makes learning intuitive and easy — even for first-time users. Because the software is based on Microsoft SQL Server and .NET technologies, it is fully scalable and can grow as your company grows.

System Requirements

To install and run **Snap Schedule**, your computer must meet or exceed the following requirements:

1. **Computer/processor** PC with a Pentium III 800 MHz or faster processor.
2. **Memory (RAM)** 512 MB or more of RAM is highly recommended.
3. **Hard disk** 80 MB of available hard-disk space is required for installation. A 20 GB hard disk is recommended.
4. **Display** Super VGA (1,024x768) or higher-resolution video adapter and monitor.
5. **Drive** CD-ROM or DVD-ROM drive. A writable CD or DVD drive is recommended for backup.
6. **Other devices** Microsoft Mouse or compatible pointing device.
7. **Operating system** Windows 8, Windows 7, Windows Vista, Windows XP with Service Pack 2 or later; Windows Server 2003 Service Pack 1 or later; or Windows Small Business Server 2003 with Service Pack 1 or later, or Windows Server 2008, or Windows Server 2012.

Related topics

Installing Snap Schedule

The **Snap Schedule** setup program makes installing the software easy and straightforward. Once started, the setup program will guide you through the installation process.

To install, you must log on using a user account that belongs to the Microsoft Windows Administrator group in order to have full access to all installation features. In other words, you must log on using a computer administrator account type on Windows XP Home operating system, or a standard user account on Windows XP Pro, or an account in the Administrators group on Windows 8, Windows 7, Windows Vista or Windows Server 2003 domain.

Follow the steps below to install **Snap Schedule** on your local hard drive:

1. Close any running programs.
2. If you have downloaded the installation file from our Web site, double click on the file (e.g., SnapSchedule13Setup.exe) to begin and follow the on-screen instructions to complete the installation. If you received the software on a CD-ROM, insert the CD into your CD-ROM drive. The setup program should start automatically. Follow the on-screen instructions to complete the installation.

Note: **Snap Schedule** requires Microsoft .Net framework 2.0 or later, SQL Server Compact Edition, and Windows Installer 3.1. The set up program will automatically install these components if they are not found on your computer. This process will take a few minutes and you may have to restart your computer.

Starting Snap Schedule

To run **Snap Schedule**, click the program icon on your desktop or run the program from the Windows **Start** menu. Alternatively, you can double-click a specific **Snap Schedule** file (a file with the .ssf file extension) to open the schedule file and run **Snap Schedule.**

The first screen that appears is the **Getting Started** screen. Note that if you started **Snap Schedule** by double-clicking a specific schedule file then the main screen will be displayed instead. From this page, you can see examples of schedule files, create a new schedule file, open an existing schedule file, or learn more about Snap Schedule and how to upgrade to Snap Schedule Premium should you need more capabilities like multiple schedulers and employee on-line access.

When creating a new schedule file, you can choose either to create the new schedule using a wizard or to create it using a pre-designed plan. When you choose to create a new schedule from a pre-designed schedule plan, **Snap Schedule** uses the information in the plan to create shifts, days on/off patterns, teams, employees, and to automatically generate employee schedules for the specified time period. If your schedule (shifts, days on/off, etc.) does not follow a predictable, repeatable pattern, you may not find a pre-designed plan that fits your needs. In this case, you should start with creating a new schedule using a wizard then use **Snap Schedule**'s drag-and-drop scheduling capability to make schedule assignments.

To see an example schedule file:

1. Start **Snap Schedule** from the Start menu or from a shortcut.
2. On the **Getting Started** screen, click the **See Examples** tab (selected by default). The **Available Example Schedules** pane will be displayed showing a list of icons representing sample schedules for typical companies in a variety of industries.
3. Select the example you would like to see and click **OK**. **Snap Schedule** will display a file save dialog box for you to enter the schedule file name and the location where it will be stored. The default location is the **My Documents** folder but you can change it as well as the suggested schedule file name if so desired.
4. Click **Save** to begin. **Snap Schedule** will create a new schedule file at the location you specified and fills it with employee data, shifts, and rotation pattern from a fictitious company. It also creates work assignments for the past six months and the next six months from the current date and randomly inserts time off assignments to show scheduling conflicts.
5. **Snap Schedule** loads the schedule and displays the **Schedule Outlook** view on the main screen. From here, you will be ready to start exploring and learning **Snap Schedule**'s capabilities with absolutely no data entry.

To create a new schedule file using a wizard:

1. Start **Snap Schedule** from the **Start** menu or from a program shortcut.
2. The **Getting Started** screen appears.
3. On the **Getting Started** screen, click the **Create Schedule** button. The **New Schedule Options** pane is displayed.
4. Select **Create a new schedule using a wizard** and click **Create**. A progress bar will be shown while **Snap Schedule** creates an empty schedule file.
5. At the **Welcome** pane, click **Next** to begin.
6. The wizard will present you with survey questions and ask you to select the answers that best fit your business operations and scheduling needs. When you click **Next** and confirm your selections, the wizard will generate the required shifts, time off reasons, employee information,and tasks based on the answers you provided.
7. You can click **Next** or **Back** to move between the different panes to review the generated data, make changes, or add new information as necessary. At the **Business Information** pane, you can enter your business address and contact information. At a minimum, you must enter your business name.
8. After completing the last step, you can click **Finish** to specify a file name for the new schedule file and where it will be stored. Snap Schedule will display the Daily view where you can simply drag-and-drop shifts to employees to make shift assignments. You may see the **Software License Activation** window if your copy of **Snap Schedule** has not been activated or you are running **Snap Schedule** in the 30-day evaluation mode.

To create a new schedule file from a pre-designed plan:

1. Start **Snap Schedule** from the **Start** menu or from a program shortcut.
2. The **Getting Started** screen appears.
3. On the **Getting Started** screen, click the **Create Schedule** button. The **New Schedule Options** pane will be displayed.
4. Select **Create a new schedule using a pre-designed plan.** When you select a plan from the list of pre-designed plans, its brief description is shown. If you have access to the Internet, you can click the **See more information about this plan** link for a detailed description of the plan including a diagram showing shift/rotation patterns. In subsequent steps, the wizard will help you create employee records using generic employee names and automatically assign shifts to them as prescribed by the schedule plan. After the assignments have been generated, you can change employee information and adjust employee shift assignments as necessary. You can also schedule tasks or breaks within each assigned shift.

To open an existing schedule file:

1. Start **Snap Schedule** from the **Start** menu or from a shortcut.
2. The **Getting Started** screen appears.
3. On the **Getting Started** screen, click the **Open Schedule** button. The **Recently Used Schedule Files** pane is displayed showing a list of the most recently used schedule files. If this is the very first time you run **Snap Schedule**, the list will be empty.

4. Click the schedule file that you want to open. When there is no recently used file or if you know where the schedule file is located, click the **Browse for more schedule files** link to locate or specify the file path.

5. **Snap Schedule** automatically loads the schedule file and displays the main screen. Note that only one user running Snap Schedule can make modifications to the schedule file at a time. If the schedule file is located on a network and there are multiple users trying to open the schedule file, the user who first opens the file will have total control and can save any modifications back to the file. Other users can only open the file in Read Only mode, meaning they can open the file to view data only and cannot not save any changes. Like Microsoft Word, Snap Schedule will let you to make changes when you are viewing the file in Read Only mode but the changes you make will be discarded upon exiting and you will not be able to save your changes back to the original file. In this case, you must explicitly save the changed schedule file to a different file name and there is no way to merge the changes back to the original file.

Activating Your Software

We ask that you activate your software to help us combat software piracy and to ensure that your software is genuine. Software activation is an easy, anonymous process that authenticates your software license. It works by verifying that the product key issued to you at the time of purchase is valid and that it has not been used on more computers than is allowed by the software's license agreement.

You can try **Snap Schedule** free for thirty (30) days. This trial period starts on the date of installation. After the 30-day trial is over, you must activate your software to continue using it. At any time, you can activate your software and turn your trial into a full, permanent license without losing any data that you have set up. To view your activation status and product key, click the File tab and select the Help command.

Activation is very simple and takes only a few seconds via the Internet. The computer where you are activating your software from must have access to the Internet for activation to work. If you do not have Internet access, one of our customer service representatives will be able to assist you over the phone.

To activate the software:

1. Start **Snap Schedule.**
2. Each time you start, the software will check and remind you to activate if you have not done so. A software license activation dialog box is displayed for you to enter the product key which was issued to you at the time of purchase and the name of the computer on which **Snap Schedule** is being installed. The suggested computer name is your current Windows computer name but you can change it if so desired. The computer name will help us identify the correct installation instance in case you need to transfer the license from one computer to another in the future. Click the radio button labeled **"I want to activate the software now"**.
3. Enter the product key and computer name then click the **OK** button to activate. If the product key is not entered correctly (or invalid) or the computer name is blank, the **OK** button will be disabled.
4. Upon successful completion, software operation will continue and the activation dialog box will no longer be displayed. If the software is unable to complete the activation process because of Internet communication errors or activation server unavailability, you can try again or continue to run **Snap Schedule** in a 30-day temporary license mode (activation pending).

Uninstalling Snap Schedule

To uninstall **Snap Schedule**, you must have Windows Administrator rights. Note that uninstalling **Snap Schedule** will not remove any pre-requisite components (e.g. .NET Framework, Windows Installer 3.1) and schedule files that you may have created. On the Windows **Start** menu, simply run **Uninstall Snap Schedule** in the **Snap Schedule** program group.

To remove **Snap Schedule**, simply run **Uninstall Snap Schedule** in the **Snap Schedule** program group. Alternatively, you can use the Add or Remove Programs command in the Windows Control Panel to remove **Snap Schedule** as described below.

To remove **Snap Schedule** from a Windows XP computer:

1. Quit all programs.
2. On the **Start** menu, click **Control Panel**.
3. Double-click **Add or Remove Programs**.
4. Select **Snap Schedule**.
5. Click **Change/Remove**.
6. To confirm, click **Yes**.

To remove **Snap Schedule** from a Windows Vista computer:

1. On the **Start** menu, click **Control Panel**.
2. Double-click **Programs and Features** .
3. Select **Snap Schedule**, then click the **Uninstall** button.
4. To confirm, click **Yes**.

To remove **Snap Schedule** from a Windows 7 computer:

1. On the **Start** menu, click **Control Panel**.
2. Double-click **Uninstall a program** .
3. Select **Snap Schedule**, then click the **Uninstall** button.

Introduction

Snap Schedule provides a number of examples that you can use to familiarize yourself with the software product. For a quick introduction and tutorial on **Snap Schedule**'s features, we'll use a Security Guard Services example schedule file.

Notes: The companies, organizations, names, addresses, e-mail addresses, phone numbers, logos, people, places, events, etc. depicted in the sample schedule file are fictitious. No association with any real companies, entities, persons, products, places, or events is intended or inferred.

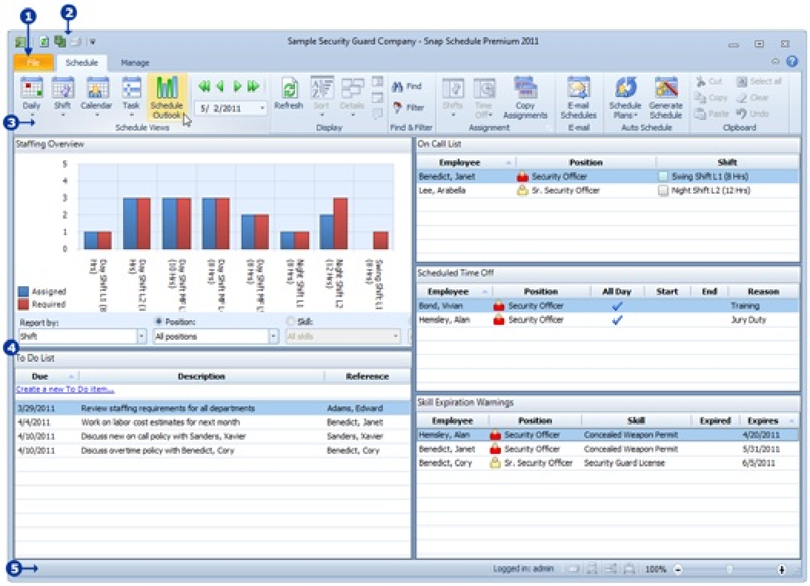
To begin:

1. Start **Snap Schedule** from the **Windows Start** menu or from a shortcut on your desktop.
2. On the **Getting Started** page, click the **See Examples** button. The **Available Example Schedules** pane is displayed showing a list of icons representing all available examples. Select the **Security Guard Services** example.
3. Enter a file name for the demo schedule. If you don't enter a file extension, the default extension of .ssf will be used. To change the file location, click the **Browse** button and select a new location.
4. Click **Create** to begin generating the demo schedule. You may see the **Software License Activation** window if your copy of **Snap Schedule** has not been activated or you are running **Snap Schedule** in the 30-day evaluation mode.
5. **Snap Schedule** creates a new demo schedule file at the location you specified, loads the schedule, and displays the main screen.

About the User Interface

Looking at the main screen, you will notice that **Snap Schedule** uses the licensed Microsoft Office® 2010 user interface. It has a similar appearance and contains many of the same graphic components, such as the Backstage view, Ribbon, toolbars, and dialog boxes found in Microsoft Office programs.

If you have learned to use any of the Microsoft Office 2007/2010 programs, you can use the same skills to navigate around **Snap Schedule**. If you are new to Office, you will find that **Snap Schedule**'s friendly user interface makes it easy to discover commands and features that otherwise might have been hidden beneath layers of toolbars and menus. The screen layout is designed to help you quickly find the commands you need to complete a task and reflect the way you do scheduling. Commands for tasks you frequently perform are logically organized and plainly visible. Refer to *Guide to the User Interface* section for more information on how to use the interface elements.



The user interface consists of the following elements:

1. The Backstage view, displayed when you click on the File tab, is where you can perform operations related to managing the schedule as a whole such as New, Open, Save, Print, etc. It replaces the Application Menu existed in older releases of **Snap Schedule**.

2. The Quick Access Toolbar provides access to commands that are needed throughout the entire program, regardless of context or mode. By default, the Quick Access Toolbar includes core commands such as Save or Print, making them one click away from anywhere in the program. You can add commands to the Quick Access Toolbar so that they are available regardless of which tab is currently selected. The Quick Access Toolbar can grow to accommodate as many commands as you want to add. Refer to Quick_Access Toolbar section for information on how to customize and place commands on the toolbar.

   The Title bar displays the program title and your business name. On the right end, you will find the three buttons commonly found in any Windows-based program. Click the Minimize button to temporary hide and minimize the main screen, click the Maximize button to restore to full screen mode, and click the Close button to close and exit **Snap Schedule**.

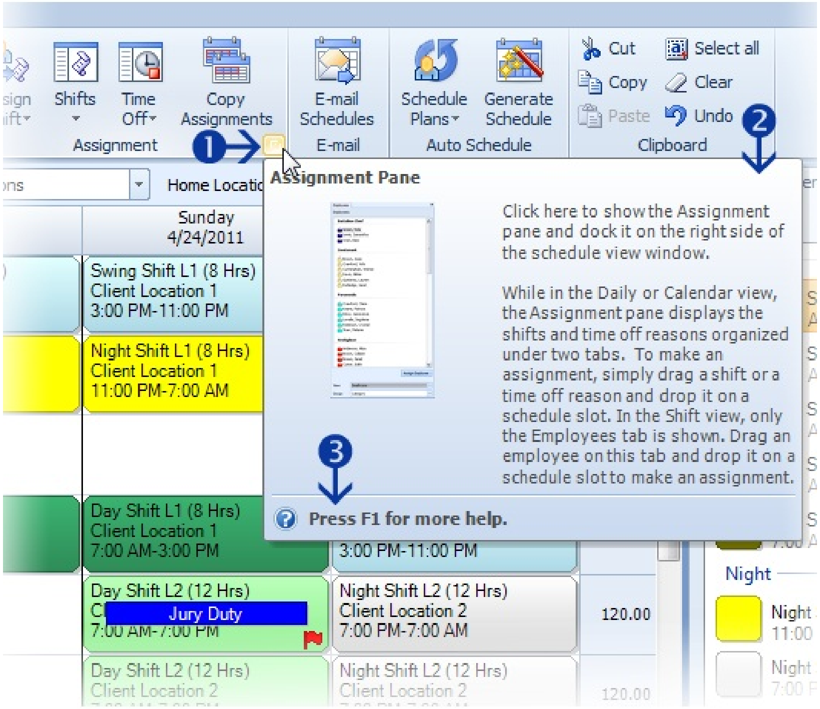
3. The Ribbon is a region at the top of the screen that presents easy-to-browse commands and is organized into a set of three tabs. Commands in each tab are further organized under feature or task specific groups of command buttons. Only commands that can be performed on the selected view, list, or object are enabled. You will spend the majority of time using the Schedule tab which shows commands related to scheduling and shift assignment. The Manage tab shows commands for managing the information on employees, shifts, tasks, and users. In addition, other tabs referred to as contextual tabs, appear only when needed to show commands that are pertinent to a selected object. For example, when you are working with a list, the Ribbon displays the Action Tab which contains commands that are specific to the selected entry on the list. When you cancel the selection of the list, this contextual tab disappears. Refer to Working_with The_Ribbon for more information on the Ribbon.

4. The Content Pane is your work area and it displays information resulted from your commands. It is context sensitive, meaning that its content changes when you select a new schedule view, list, or report. The content pane is where you view, add, and work with schedules and data in **Snap Schedule**. Depending on the tab and commands you have selected, this area may show a daily, shift, or calendar view of the schedule; a schedule outlook dashboard; or a list of items. Use the vertical and horizontal scroll bars, when displayed, to scroll through the items displayed in the work area.

5. The Status Bar is located across the bottom of the program window. If you are running **Snap Schedule** with an Evaluation License, a notice will be displayed on the Status Bar. At the right end is the View toolbar, which provides commands to stretch schedule cells horizontally or vertically and a slider to zoom your view of the schedule.

Mouse-Over Tooltips

Ever wonder what a command button does? When you hover the mouse over a command button, **Snap Schedule** shows a Super Tooltip pop-up that explains its function in just a few lines of text. Pictures, diagrams, and **F1** hot link to the Help file may also appear if they apply.



1 Move the mouse to and hover over the dialog box launcher on the **Assignment** group of the **Schedule** tab.

2 Observe the Super Tooltip pop up.

3 Press the **F1** key to get to the on-line help on the subject.

You should repeat this procedure on the remaining icons to get a feel for the command sets available in **Snap Schedule**.

Changing Views

Snap Schedule provides different viewing options for the same schedule information. There are five available views: the Daily view, the Shift view, the Calendar view, the Task view, and the Schedule Outlook view. You can select or switch views using commands in the Schedule Views group on the Schedule tab.

Each view has specific functions and components to help you effective manage your scheduling needs. You may use any view that fits your scheduling method or you may use different views at various times in the scheduling process. For example, you might prefer to view your schedule graphically - in a spreadsheet-like format by day (Daily view) but when making shift assignments you might use the Shift view for drag-and-drop scheduling and shift coverage monitoring.

Snap Schedule formats and displays date and time information using Windows system settings. If you set your Windows operating system to show time information in 24 hour format (military time format), **Snap Schedule** will show time information in 24 hour time format. You can use the Control Panel - Regional and Language Options command to set or change the Windows operating system time format.

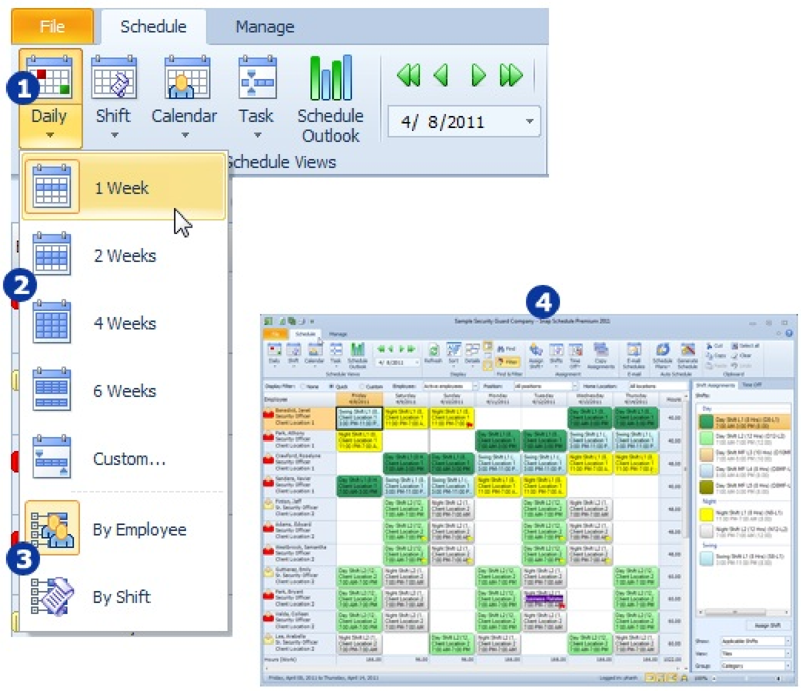
Daily View

The Daily view presents scheduling information in a spreadsheet-like table that lists days across the top, employees or shifts down the left-most column, and the Assignment Pane docked to the right side of the window by default. The number of days displayed at the top can be 1, 2, 4, 6 weeks, or a user-defined range, selectable from the drop-down menu. From the same drop-down menu, you can view scheduling information by employee or by shift.

By Employee Display Option

Use the Daily View by Employee display option to show employee assignments in a tabulated format that lists each employee down the left-most column, days across the top, and employees' shift and time off assignments in table cells. Each cell contains shift and time off assignments for a corresponding employee and date. Optionally, work hours for the shifts are totalled horizontally for each employee and vertically each day for all employees. To make an assignment, simply drag a shift or time off from the Assignment Pane and drop it into a cell. Alternatively, you can double-click a cell to bring up a dialog box that lets you quickly add or edit an assignment. For more information on what you can do in this view, refer to Changing What You See in the By Employee Daily View.

To select or switch to Daily View by Employee:



TRY IT!

1 Click the **Daily** icon to switch to Daily view display. **Snap Schedule** will show the Daily view with the display date range last selected. To change the display range, click the drop-down menu icon to bring up additional command options.

2 Select a display range. Note that the icon of the last selected range is highlighted.

3 Click the By Employee icon to select. Note that the icon of the last selected display option is highlighted.

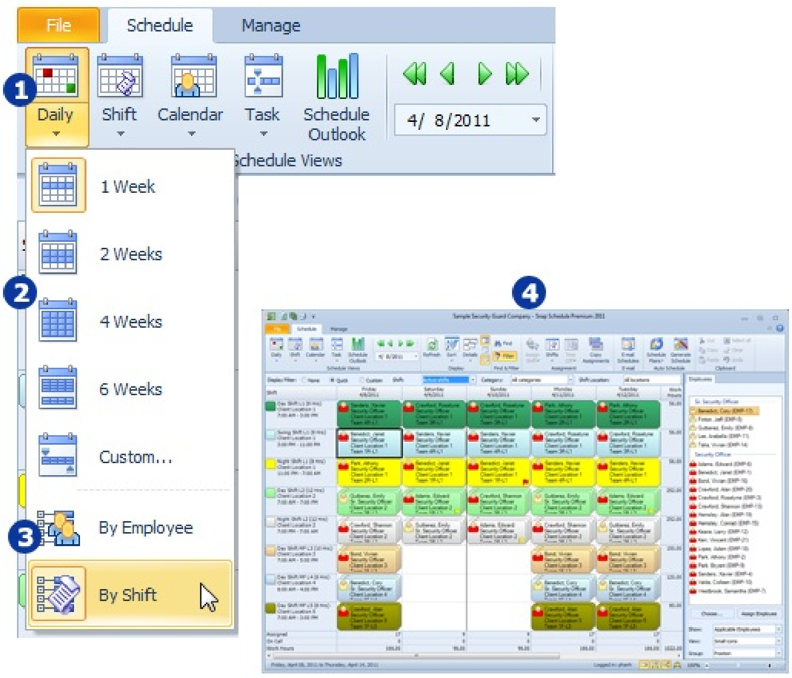
4 The contents area will show schedule information in the Daily View By Employee format for the date range selected.

Refer to Changing What You See in the By Employee Daily View for things that you can do to customize this view.

By Shift Display Option

Use the Daily View by Shift display option to show employee's assignments in a tabulated format that lists each shift down the left-most column, days across the top, and employees in table cells. Each cell contains the employees assigned to a corresponding shift and date. Employee's work hours for the shifts are totalled horizontally for each shift and vertically each day for all shift, along with employee head counts and on-calls for each day. To make an assignment, simply drag an employee from the Assignment Pane and drop it into a cell. Alternatively, you can double-click a cell to bring up a dialog box that lets you quickly add or edit an assignment. For more information on what you can do in this view, refer to Changing What You See in the By Shift Daily View.

To select or switch to Daily View By Shift display mode:



TRY IT!

1 Click the **Daily** icon to switch to Daily view display. **Snap Schedule** will show the Daily view with the display date range last selected. To change the display range, click the drop-down menu icon to bring up additional command options.

2 Select a display range. Note that the icon of the last selected range is highlighted.

3 Click on By Shift icon to select By Shift display mode. Note that the icon of the last selected display mode is highlighted.

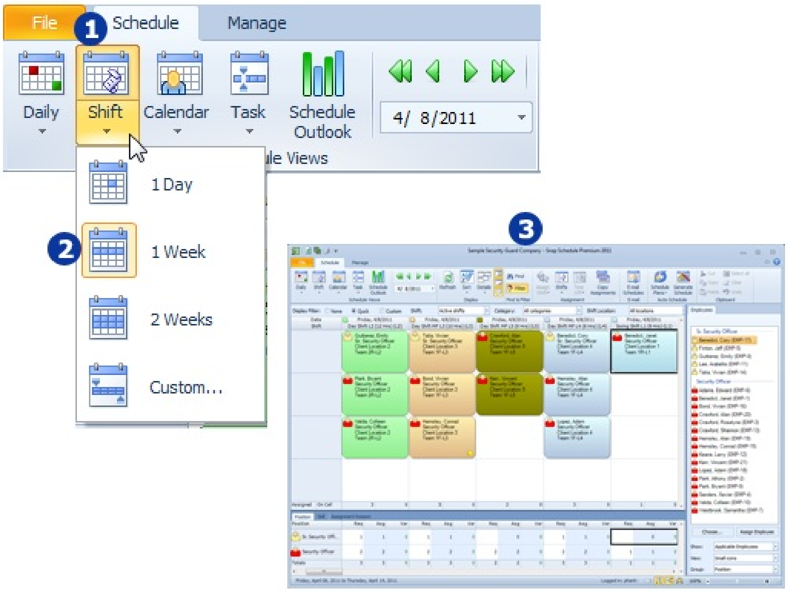
4 The contents area will show schedule information in the Daily View By Shift format for the date range selected.

Refer to Changing What You See in the By Shift Daily View for things that you can do to customize this view.

Shift View

The Shift view presents work assignments for each day organized by shift in a tabular format. The number of days displayed at the top can be 1 day, 1, week, 2 weeks, or a user-defined range, selectable from the drop-down menu. Each shift occupies one column and each employee assigned to the shift is shown in a cell under the column header. The Assignment Pane is docked to the right side of the window by default. The coverage requirements (required personnel, assigned, and variance counts) are shown at the bottom of the grid. To make an assignment, you simply drag an employee entry from the Assignment Pane and drop it into a cell. Alternatively, you can double-click a cell to bring up a dialog box that lets you quickly add or edit an assignment.

To select or switch to Shift view:



TRY IT!

1 Click the **Shift** icon to switch to Shift view display. **Snap Schedule** will show the Shift view with the display date range last selected. To change the display range, click the drop-down menu icon to bring up additional command options.

2 Select a display range. Note that the icon of the last selected range is highlighted.

3 The contents area will show schedule information in the Shift view format.

Refer to Changing What You See in the Shift View for things that you can do to customize this view.

Task View

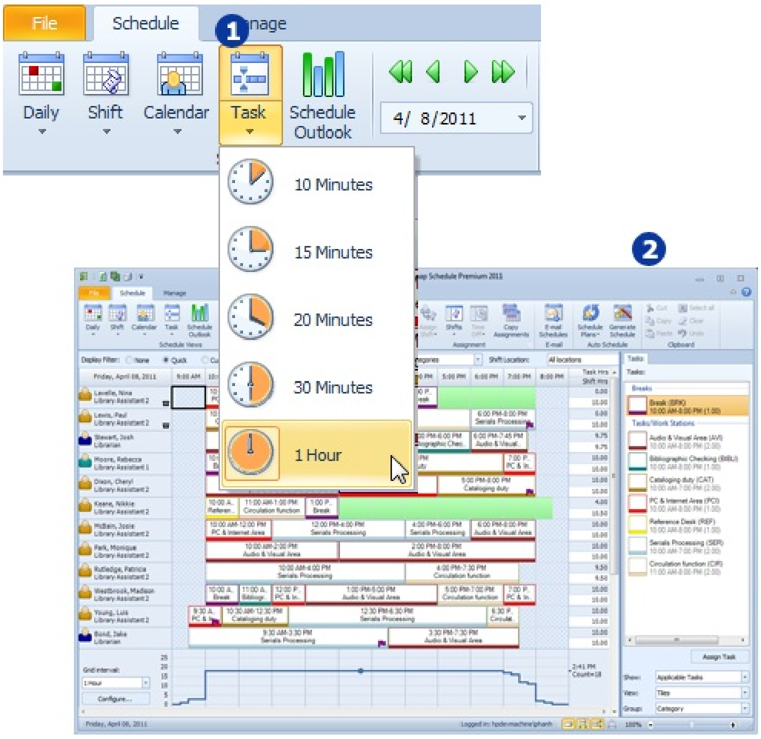
The Task view presents tasks assignments for each employee working on the selected shift. It is a graphical representation of the timing and duration of the various tasks an employee is scheduled to perform within a given shift. You can select the date and the shift to view using the current view date picker and the Shift drop-down list.

The Task view lists each employee down the left-most column, time blocks across the top, the Employee Count Graph at the bottom, and the Assignment Pane docked to the right side of the window. The number of time blocks displayed across the top will vary depending on the selected display time scale.

The Employee Count Graph shows the total number of employees scheduled for each time block. You can use the **Configure** button to select the tasks to be included in the employee count. To find the number of employees assigned to a specific time block, hover the mouse over the line graph and the time and count display on the right side will be automatically updated.

To make a task assignment, you can simply drag a task from the Assignment Pane and drop it onto the employee's shift bar. Alternatively, you can double-click a cell to bring up a dialog box that lets you quickly add or edit an assignment.

To select or switch to Task view:



TRY IT!

1 Click the **Task** icon to switch to Task view display. **Snap Schedule** will show the Task view with the display time interval last selected. To change the display time interval, click the drop-down menu icon to bring up additional command options.

2 Select a display time scale. Note that the icon of the last selected time scale is highlighted.

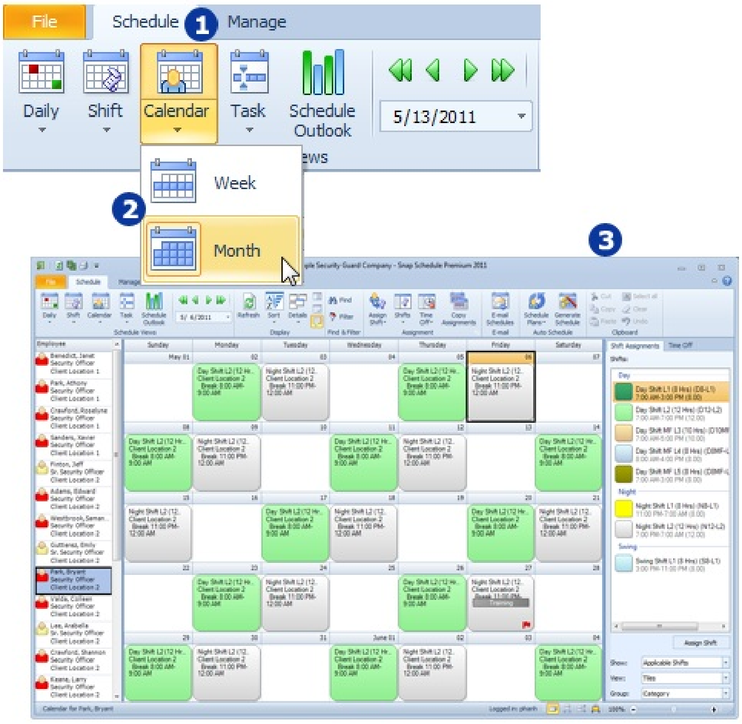
3 The contents area will show schedule information in the Task view format.

Refer to Changing What You See in the Task View for things that you can do to customize this view.

Calendar View

The Calendar view presents work and time off assignments for each employee similar to a calendar or monthly planner. You can choose to show a one week or one month calendar. In this view, a list of employees is shown on the left column, and the schedule of the selected employee is shown in a calendar in the contents area. The Assignment Pane is docked to the right side of the window by default. To make an assignment, you can simply drag a shift from the Assignment Pane and drop it into a cell. Alternatively, you can double-click a cell to bring up a dialog box that lets you quickly add or edit an assignment.

To select or switch to Calendar view:



TRY IT!

1 Click the **Calendar** icon to switch to Calendar view display. **Snap Schedule** will show the Calendar view with the display date range last selected. To change the display range, click the drop-down menu icon to bring up additional command options.

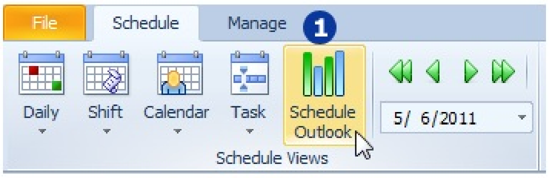
2 Select a display range. Note that the icon of the last selected range is highlighted.

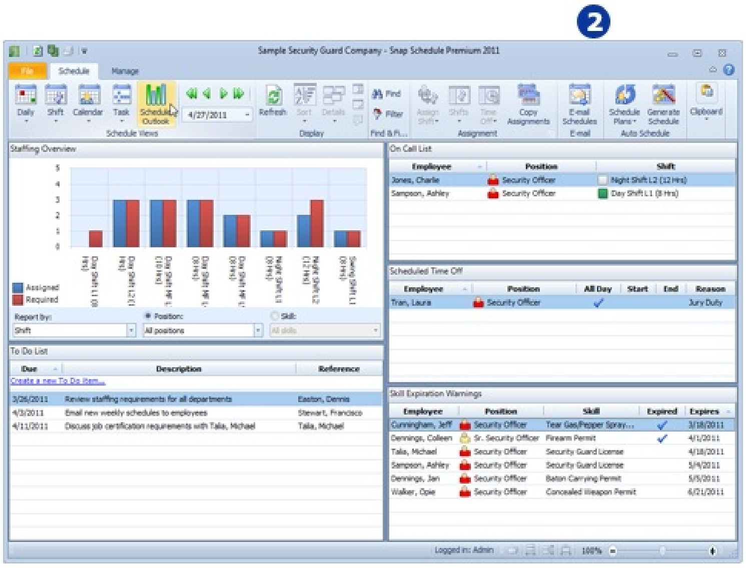
3 The contents area will show schedule information in the Calendar view format.

Schedule Outlook

The Schedule Outlook view shows the staffing profile in a graphical format for a specific date (the current view date), along with to-do tasks, employees being on-call, employee taking time off, and a list of skill/certification expiration warnings This is the default view when you first start **Snap Schedule.** It serves as a dashboard for your daily monitoring.

To select or switch to the Schedule Outlook view:





TRY IT!

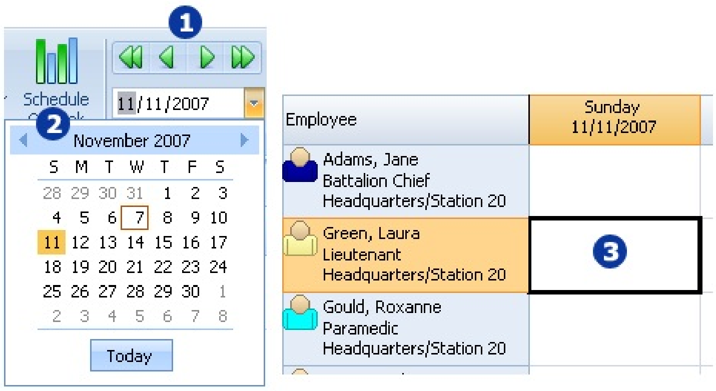
1 Click the **Schedule Outlook** icon to switch to the Schedule Outlook view display.

2 The contents area will show schedule information for the current view date in the Schedule Outlook view format. Note that the expired status presented in Skill Expiration Warnings is determined from today's date and it is not based on the current view date.

Current View Date

When you choose a date to view, this date becomes the current view date and is shown on the Schedule Views group. The current view date remains in effect for all views until it is changed. For example, if you view schedule data on the Daily view for March 1, 2007, and then switch to Schedule Outlook view, the Staffing Overview graph will show the staffing profile on March 1, 2007 until you change the current view date.

There are many ways to change the current view date:



1 Use the Date Adjustment Control to move the date forward or back by one day or one week.

Or:

2 Click the drop down icon to use the Date Picker to select a particular day.

Or:

3 Click on any schedule cell in the Daily, Shift, or Calendar view.

Working with Employee Data

Entering employee information is the first task you need to do before starting shift scheduling. You can add a virtually unlimited number of employee records to your schedule file. **Snap Schedule** simplifies the way you manage employee records and makes important information like contact information, availability, position, authorized work locations, skills, etc. available at your fingertips. Additionally, you can define up to 25 custom data fields to keep track of anything you choose about the employee. Contacting replacements for no-shows or scheduling employees with the proper skills, seniority, or training is quick and easy. For rudimentary ad-hoc scheduling, you only need to create employee records and enter the employee name and a unique code for each employee.

When removing an employee record, **Snap Schedule** checks to ensure that the record is not used elsewhere in the schedule file before deleting. You can simply mark an employee inactive to make the employee not available for scheduling while retaining all past assignments and related data for reporting.

Snap Schedule's advanced features use the information you entered for positions, teams, skills, and time off reasons when generating shift assignments, checking for conflicts, ensuring shift coverage, and reporting.

Add employee Positions if you want to use them to group/filter employees, track shift coverage by position, or select employees in a particular position to fill a shift. An employee can hold only one position at any given time. Likewise, you can define Skills to keep track of an employee's training and certifications and use them as criteria for selecting employees to fill a shift.

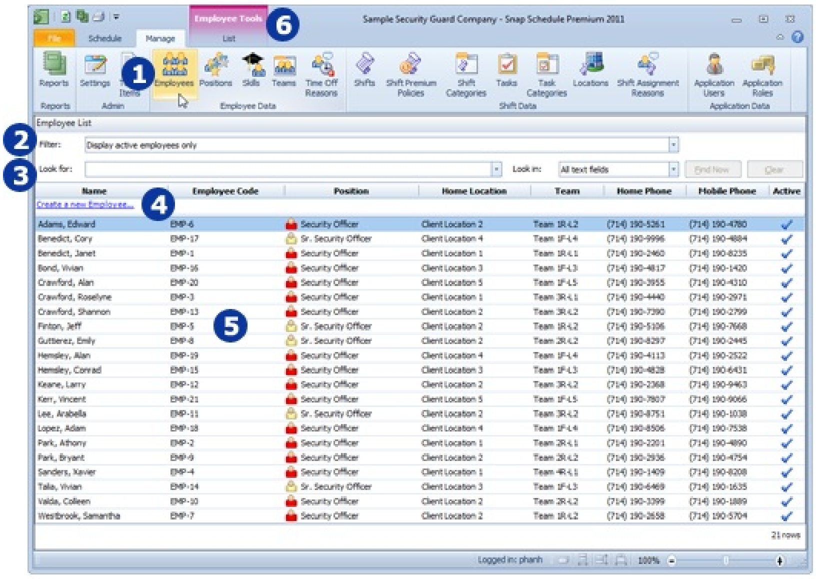
Teams are primarily used in automatic scheduling. A team is a group of employees working together for a common goal. Typically, team members are scheduled to work the same shift and rotation patterns (i.e. team members have the same days on, days off, and rotation sequence) but this is not necessarily a requirement. An employee can belong to only one team or no team at all.

Define Time Off Reasons to classify the time period when an employee will not work or has not worked. For example, vacation, sick leave, jury duty, etc.

The Employee Data group in the Manage tab contains all commands for you to manage employee data. Clicking any of the icons will display the corresponding list. Let's take a look the Employee list and how to use it.

Example: Employee List

You can manage employee records using the Employee List, which can be accessed by clicking the Employees icon on the Manage tab. While viewing the list, you can create a new employee record, edit or delete an existing record, and sort or group any field. Right-clicking an entry brings up a menu showing additional commands that are pertinent to the selection.



1. Select the **Manage** tab and click the **Employees** icon to display the Employee List.

2. By default, only active employees are listed. Use the **Filter** drop-down list to set the filter to show all employees or inactive employees only. Filter selection remains in effect until changed. If the **Filter** bar is not shown, click the **List** contextual tab then click the **Filter** button to display it.

3. To find an employee on the list, use the **Find** control. Enter the text to look for and click **Find Now** to start. Those records containing the text will be listed. Click **Clear** to remove the find results. If the **Find** bar is not shown, click the **List** contextual tab then click the **Find** button to display it.

4. To create a new employee record, click the **Create a new employee** link. This will bring up the Employee form for you to fill in employee data. You don't need to enter all the information, only the employee name and a unique code are required for scheduling.

5. Double-click any entry on the list to edit the entry.

6 Click the **List** contextual tab to access other commands for sorting, grouping, and exporting the list to Excel.

Shift Data

Shift is the term used in **Snap Schedule** to describe the divisions of work in a day. A shift is a predefined time period in which employees can be on or off duty. The most common shifts are Day, Evening, and Night shifts. Full-time shifts are normally defined to be eight hours, part-time shifts are anything less than eight hours. A contiguous shift is one in which there is no break specifically scheduled. Shifts are very flexible in **Snap Schedule**. You can use shifts to describe divisions of labor, responsibilities or any other categories of work you would like to assign to your employees. Each shift has a start time, an end time, a work location, and applicable days of the week. Shifts may overlap one another but they may not be longer than 24 hours. Additionally, you can define up to 25 custom data fields to keep track of anything you choose about a shift.

Shift Categories are used to group the shifts for filtering and reporting purposes.

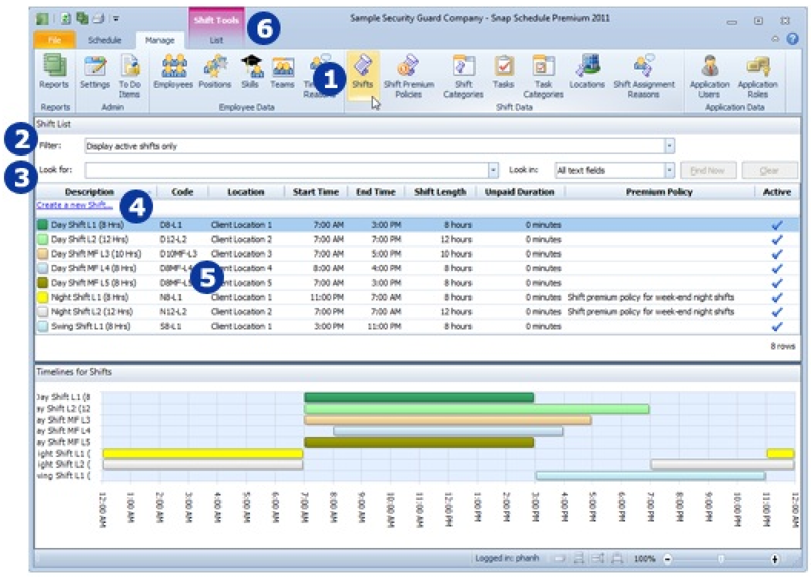
Location refers to a physical area or facility where employees are scheduled to work like a building, an assembly line, or a patrol route. For each employee, you can specify a home location where the employee is normally scheduled to work and other locations where the employee is authorized to work. **Snap Schedule** will generate a warning when you schedule an employee to work at a location where the employee is not authorized to work.

You can define Shift Assignment Reasons in order to group common type of assignments for reporting purpose. For examples, you may want to define "Extra Duty" to group and track assignments made outside of the employee's normal shift duties.

The Shift Data group in the Manage tab contains all commands to manage shift data. Clicking any of the icons will display the corresponding list. Let's take a look the Shift list and how to use it.

Example: Shift List

You can manage shift records using the Shift List which can be accessed by clicking the **Shifts** icon on the Manage tab. While viewing the list, you can create a new shift, edit or delete an existing shift, and sort or group any field. Right-click an entry brings up a menu showing additional commands that are pertinent to the selection.



1 Select the **Manage** tab and click the **Shifts** icon to display the Shift List.

2 By default, only active shifts are listed. Use the **Filter** drop-down list to set the filter to show all shifts or inactive shifts only. Filter selection remains in effect until changed. If the **Filter** bar is not shown, click the **List** contextual tab then click the **Filter** button to display it.

3 To find a shift on the list, use the **Find** control. Enter the text to look for and click **Find Now** to start. Those records containing the text will be listed. Click **Clear** to remove the find results. If the **Find** bar is not shown, click the **List** contextual tab then click the **Find** button to display it.

4 To create a new shift record, click the **Create a new shift** link. This will bring up the Shift form for you to fill in shift data.

5 Double-click any entry on the list to edit the entry.

6 Click the **List** contextual tab to access other commands for sorting, grouping, and exporting the list to Excel.

Overview

Snap Schedule uses the licensed Microsoft Office® user interface. It has a similar appearance and contains many of the same graphic components such as the Ribbon, toolbars, Backstage view, and dialog boxes that can be found in Microsoft Office programs.

If you have learned to use any of the Microsoft Office programs, you can use the same skills to navigate around **Snap Schedule**. If you are new to Office, you will find that **Snap Schedule**'s friendly user interface makes it easy to discover commands and features that otherwise might have been hidden beneath layers of toolbars and menus. The screen layout is designed to help you quickly find the commands you need to complete a task. Commands for tasks you frequently perform are logically organized and plainly visible in the Ribbon. When you hover the mouse over a command button, **Snap Schedule** shows a Super Tooltip pop-up that explains its function in just a few lines of text.

Snap Schedule's interactive interface supports drag-and-drop scheduling. In the Daily view and Calendar view, you can click and drag a shift from the Shift Assignments panel to a cell on the contents pane to assign that shift to an employee for a specific date. You can drag a single cell to another cell to move assignments for an employee for a single day, or you can drag a group of cells to a new destination area for a block change. Similarly in the Shift view, you can drag an employee from the Employees panel to a cell on the contents pane to assign that employee to a shift for a specific date. You can drag a selected group of cells from one shift to another to change shift assignment for a block of employees.

Snap Schedule also performs validation checks to detect shift assignment and employee availability conflicts. When a validation check fails, **Snap Schedule** will display the appropriate warning flags in each affected cell to alert you to the scheduling conflicts.

Read on to find out — and to see how **Snap Schedule** is so intuitive and easy to use.

Working with The Ribbon

The Ribbon offers an intuitive way to locate commands. Instead of having commands buried in menus, toolbars, or dialog boxes, you now have one control center that organizes them around common activities and shows a variety of two-dimensional layouts that communicate priority and hierarchy to you.

There are three basic components to the Ribbon.

1 Tabs contain context sensitive commands to a collection of related features. Tabs sit across the top of the Ribbon and provide you with one-click access to commands. Each tab is clearly labeled to help you visually identify the appropriate icon or button for a specific command. The principal task in **Snap Schedule** is scheduling, so you will be working with the Schedule tab most of the time. This tab shows commands that you use most often when making work assignments: viewing daily and shift assignments, making shift assignments, marking time-off, and automatic scheduling. The Manage tab presents commands to manage employee data, shift data, task reminders, and to run reports. The Backstage view, displayed when you click on the File tab, is where you perform operations related to managing the schedule as a whole such as New, Open, Save, Print, etc. It replaces the Application Menu existed in older releases of **Snap Schedule**.

2 Groups are sets of related commands, displayed on tabs. They pull together all the commands you're likely to need for a type of task. Careful consideration are given to the priority or importance of commands and how to best present them at various screen resolutions. Large buttons show the most frequently used commands, while small buttons grouped together show a relationship of minor features that are designed to work together. The buttons in each group automatically change size depending on the width of the program window. They remain on display and are readily available to give you rich visual aids. If you make the program window smaller, some groups will display only the group names and you will need to click the arrow on the group button to display the commands.

3 Commands are arranged in groups. A command can be a button, a menu, or a box where you can enter information. The commands on the Ribbon can be active or disabled (grayed out)depending on the currently active object or selected view.

To select a tab

1. Run **Snap Schedule**.
2. Click the desired tab.

-or-

1. Run **Snap Schedule**.
2. Press and release the **ALT** key.
3. The keyboard tips appear.
4. Press the key or keys shown in the keyboard tip on or closest to the command tab that you want.

To execute a command

You can execute a command in a number of different ways. The quickest and most direct route is to double-click the command icon. You can also use the keyboard shortcut associated with the command.

Using the Dialog Box Launcher

When you see a small arrow in the lower-right corner of a group, it means there are more options available for the group. Click the arrow (called the Dialog Box Launcher), and you'll see a dialog box or a task pane with more commands.

For example, when you click the Dialog Box Launcher on the Assignment tab, you will see the **Assignment Pane** docked on the right hand side of the screen. This pane gives you a convenient way to make shift assignments using the drag-and-drop style. Clicking the Dialog Box Launcher again hides the task pane.

Minimizing the Ribbon

There are times when you might need a little more space for your work area. For those instances, groups and commands on the Ribbon can be collapsed so that only the bar with the command tabs remains.

To minimize or restore the Ribbon:

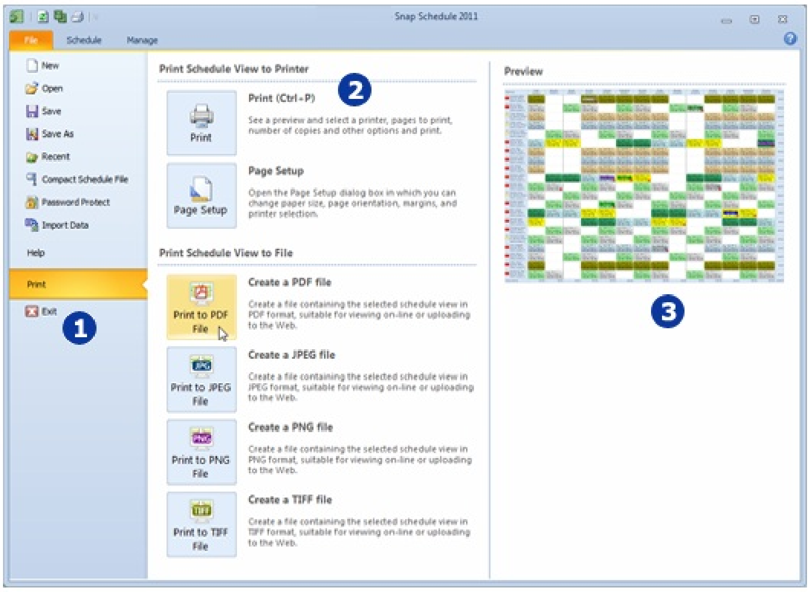
1. Right-click the desired tab. A drop-down menu will be shown.
2. Check the **Minimize the Ribbon** command to collapse the ribbon..
3. Un-check the **Minimize the Ribbon** command to restore the Ribbon.

Or:

1. To minimize the Ribbon, double-click the active command tab (the active tab is the highlighted tab).
2. To restore the Ribbon, double-click the active command tab again.

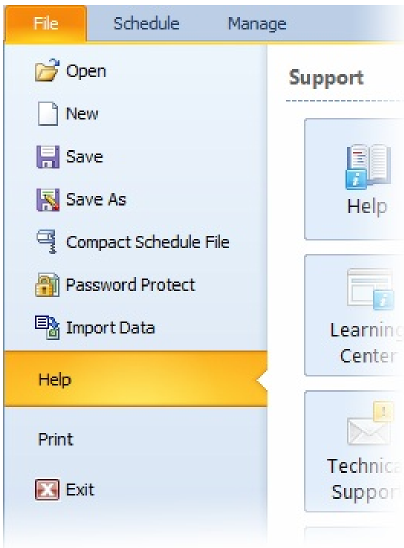
The File Tab and Backstage View

Clicking the File tab, located at the top-left of the window, will take you to the **Snap Schedule** Backstage view. The Backstage view is where you can perform operations related to managing the schedule as a whole such as New, Open, Save, Print, etc. If you decide to not do anything in the Backstage view, clicking the File tab again will take you back to wherever you were in originally.



Commands that you can performed in the Backstage view are shown in the navigation panel 1 as buttons or tabs. Buttons in the Backstage navigation panel are sometimes referred to as fast commands, because they are intended to provide a single command and then return back to wherever you were in originally. Tabs, like Print and Help, group related commands and may be organized into one or two columns. The first column 2 contains command buttons and the second column 3 presents additional information, or shows a print preview.

Command that you can perform while in the Backstage view are:

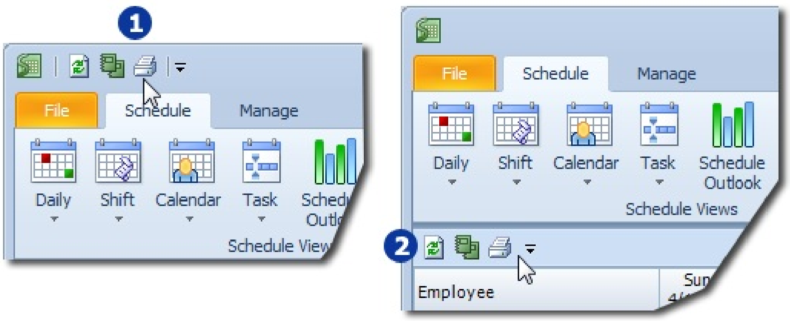
	Name	Description
	**Open**	Displays the list of recently used schedule files and provides the capability to browse and open any schedule file on disk.
	New	Prompts for saving any changes to the current schedule file and creates a new schedule file. Upon successful completion, closes the current schedule file and loads the newly created file.
	Save	Saves the current schedule to a file on disk.
	Save As	Saves the current schedule file to disk under a different name.
	Compact Schedule File	Compacts the current schedule file by removing any gaps and unused space in the file.
	Password Protect	Encrypts and protects the schedule file using a user supplied password.
	Import Data	Imports employee information from QuickBooks, Microsoft Office Accounting 2007, or a Microsoft Excel file.
	Help	This tab provides links to additional help and support information, information about the software version you are using, product activation information, and information on the currently connected database.
	Print	This tab provides commands to print a schedule view to a printer or a file.

	When printing to a printer, you can change paper size, page orientation, margins, and printer selection to support the Print command. When printing to a file, you can select the file format (PDF, JPEG, PNG, or TIFF) that is suitable for viewing online or uploading to the Web.
Exit	Terminates the program and exits.

Quick Access Toolbar

The Quick Access Toolbar provides access to commands that are needed throughout the program, regardless of which tab is currently selected. It is located above the Ribbon when you first start the program. By default, the Quick Access Toolbar includes core commands such as Save or Print, making them one click away from anywhere in the program. You can customize the Quick Access Toolbar and add commands to it.

The Quick Access Toolbar can be located in one of two places:



1	Upper-left corner, next to the Application Button (default location)
2	Below the Ribbon

If you don't want the Quick Access Toolbar to be displayed in its current location, you can move it by clicking and dragging it to the other location.

Adding Commands to the Quick Access Toolbar

1. Click the drop-down icon on the Quick Access Toolbar (or right-click the toolbar).
2. From the drop-down menu, select the command you wish to add to the toolbar. The icon of the selected command will show up on the toolbar.

Note: You can also add a command by locating it on the Ribbon, right-clicking on the command, and choosing **Add to Quick Access Toolbar**.

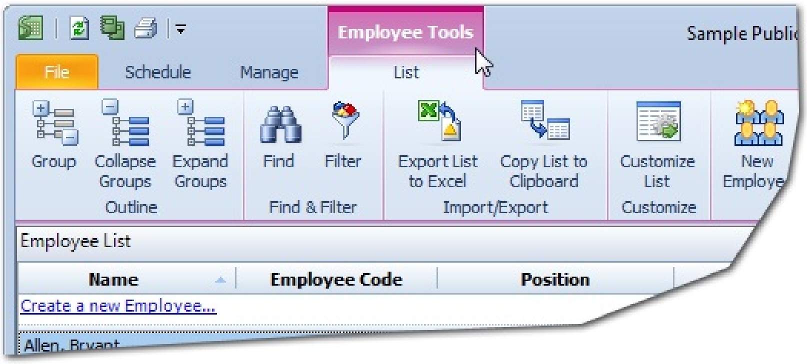
Removing Commands from the Quick Access Toolbar

1. Click the drop-down icon on the Quick Access Toolbar (or right-click the toolbar).
2. From the drop-down menu, de-select the commands you wish to remove from the toolbar.

Note: You can also remove a command by locating it on the Quick Access Toolbar, right-clicking the command, and choosing **Remove from Quick Access Toolbar**.

Contextual Tabs

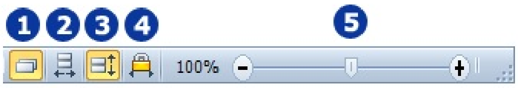
Contextual tabs bring context sensitive and appropriate command options to your attention precisely when you need them. Depending on your context – that is, which object you are working with and what you are doing – one or more contextual tabs might appear on the Ribbon.



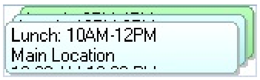
Contextual tabs contain all the features you need for working with the selected object. When you de-select the object, the contextual tabs will go away, because the commands would have otherwise been disabled. For example, when you select an entry on a list, a contextual tab will appear, containing only commands applicable to the selected item on the list. Contextual tabs work the same way as regular tabs.

The View Toolbar

The View Toolbar is located at the lower right corner of your screen and it contains four buttons that affect the display of the scheduling worksheet. It also contains a zoom slider to allow zooming in or out the worksheet content. The View Toolbar is active only when you are working with the scheduling worksheet in the Daily view or Shift view.



1. This button is active only in the Daily or Calendar view. When selected, multiple shift assignments in each cell are shown in cascading format. De-selecting it will display multiple assignments in stacked format.



Cascading

Stacked

2. When selected, the **Stretch Cell Horizontally** button will expand the cells in the worksheet horizontally to fill any blank space on the right hand side of the worksheet window. Depending on the resolution of your computer display and the number of days or shifts selected for viewing, blank spaces may be present. Stretching the cells will allow more text and data to fit into the cells. To return the cells to their default width, de-select the **Stretch Cell Horizontally** button.

3. When selected, the **Stretch Cell Vertically** button will expand the cells in the worksheet vertically to fill the blank space on the bottom of the worksheet window. Depending on the resolution of your computer display and the number of employees or shift assignments, blank spaces may be present. Stretching the cells will allow more text and data to fit into the cells. To return the cells to their default height, de-select the **Stretch Cell Vertically** button.

4. When selected, the schedule view **Scroll Lock**  button will prevent cursor movement beyond the display range to avoid unnecessary data loading. When the **Scroll Lock** button is de-selected  and the cursor is positioned at the beginning or at the end of the display window, you can use the right or left arrow key to move the display window backward or forward one day at a time.

5. The Zoom slider allows you to easily adjust the zoom level of the schedule worksheet. When you grab and slide the slider with the mouse, the worksheet resizes as you slide so you can adjust the zoom magnification to the desired level. You can also click the + and – buttons to increment or decrement the zoom factor by 10% per click. Clicking the midpoint mark on the slider tape will reset the zoom level to 100%.

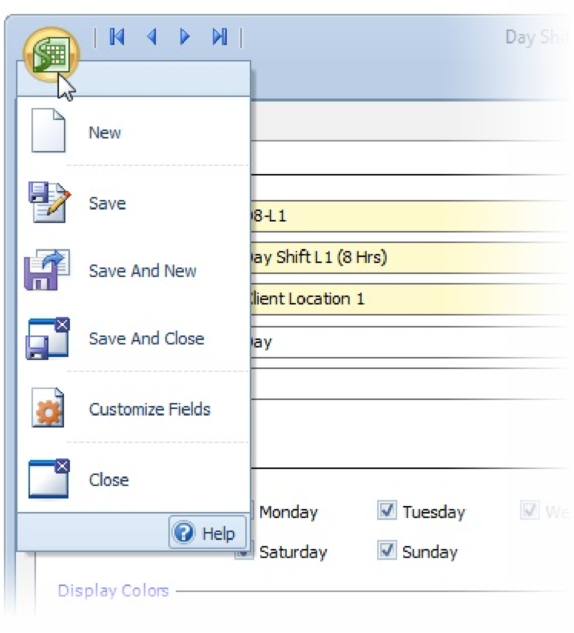
Lists

Lists provide an easy way to find, group, filter, sort, and present a large number of data records. You can select which list to view from the **Manage Tab** and the list content will be displayed in tabular format in the work area. Double-clicking a record on the list will open a data entry form that allows you to view and edit detailed record data. Right-clicking an entry on the list will display a context menu containing available commands specific to the entry. Refer to the About Lists section for additional information.

Menu Button on Forms

Forms provide a way for you to interact with **Snap Schedule**. They are used mainly for data entry, i.e. to display information and to accept your input data into the program. Forms appear as separate windows from the main application when you double-click a record on a list.

The menu button  is located at the top-left of each form. Clicking this button will bring up a menu containing context sensitive commands that are currently available.



About Data Entry Controls

Snap Schedule provides additional data entry controls to help make data entry tasks simple and accurate. They use the same familiar look-and-feel as Windows controls and are enhanced to handle specific tasks.

To learn more about these control, follow the links below.

Working with the Date Picker control

Entering date and time

Using the drop-down list

Entering address information

Using the action text box

Working with an editable grid

Entering notes with time stamps

Using the Action Text Box

Action text boxes show data in a text box with a command button on the right hand side. The icon on the button identifies the command. When you click the icon, the command is activated and data in the text box is passed along to the command. For example, when you click the e-mail icon, **Snap Schedule** will run your e-mail program and fill the **To** field with the email address shown in the text box.

Icon	Command
	Dial the number in the text box. If your computer has a modem connected to a voice telephone line and a phone handset, you can use this feature to dial the phone number specified in the text box. Before **Snap Schedule** can make phone calls for you, you must set up your computer and a modem for automatic phone dialing. Refer to your Windows manual for information on how to setup and configure your modem. When dialing, a pop-up window will show dialing status and you will be able to hear the ring tones on your computer speaker. When your call is answered, pick up the phone handset and begin your conversation.
	Invoke your default e-mail program to send an email message to the e-mail address specified in the text box. You can enter multiple e-mail addresses in this field using the ";" separator.
	File browsing. When the text box is blank, clicking this icon will bring up the Windows browse dialog box to let you locate files and folders. After you've selected a file and click the Open button, the path of the selected file will be automatically entered into the text box.
	Launch or open the document or file whose path is specified in the text box..

Working with the Date Picker

The **Date Picker** displays a calendar and enables you to view and choose a date from a single month graphical calendar. By default, the calendar is set to the current month and the current date is outlined in a red box. The basic calendar looks like this:

- To advance to the next month, click the arrow in the top right corner.
- To move to the previous month, click the arrow in the top left corner.
- Click a date to select. This date will be highlighted in yellow and the software will take appropriate action in response to the date entry.
- Click **Today** to select today's date.
- Click **None** to enter a blank date as in the case where a date entry should be left blank.

Entering Date and Time Information

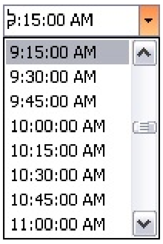
Entering date or time information is made easy by the date and time data entry controls. These controls check for valid date/time format and allow you to type in the data, or choose from a drop-down list/calendar. Snap Schedule formats and displays date and time information using Windows system settings. If you set your Windows operating system to show time information in 24 hour format (military time format), Snap Schedule will show time information in 24 hour time format. You can use the Control Panel - Regional and Language Options command to set or change the Windows operating system time format.

The date control displays data in this format:

You can change the highlighted date, month, or year part by entering a new value or pressing the **Up Arrow** or **Down Arrow** key. Clicking the drop-down arrow will bring up a Calendar for you to select a date using a mouse.

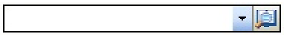
The time control displays data in this format:

Clicking the drop-down arrow will bring up a list of allowable times for you to select. While the cursor is inside the box, pressing the **Up Arrow** or **Down Arrow** key will change the time to the next or previous entry on the list.



Using a Drop-Down List with Lookup

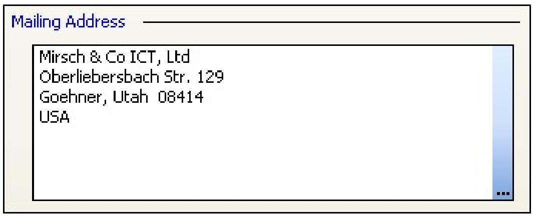
A drop-down list with lookup capability has a button located on the right side of the drop-down list. A sample drop-down list with lookup is shown below.



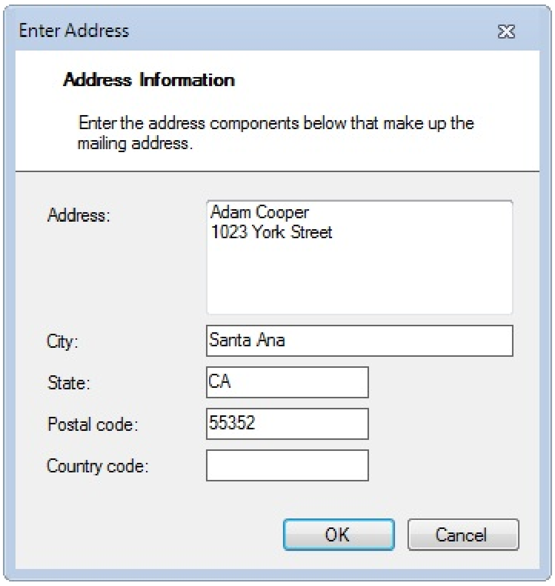
You can enter data into the text box or select an entry from the drop-down list. As you type each character, the software will narrow down the list and show entries that most closely match what you have typed. This way, you save time while benefiting from the convenience of a drop down list. For very long lists, you can click the lookup button to search for entries that match your criteria. You then have the option to view, edit, delete, or add a new entry.

Entering Address Information

To enter a mailing address, you can type in the address information in the space provided or on an address form if you prefer. The information in the mailing address box is similar to a postal mailing label. You type in the company name, followed by the street name and number, city, state, zip code, and optional country code as shown below. The software will parse the information into mailing address components and store the data.

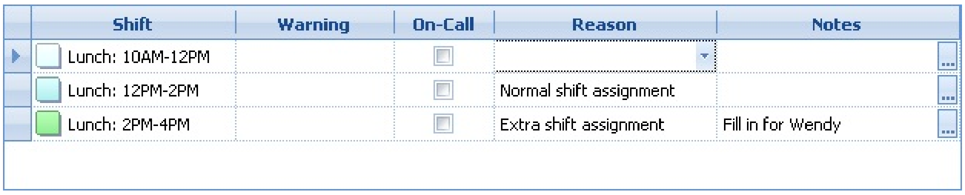


If you prefer to fill in the data on a form, click the blue **More Detail** button to open an address entry form as show below.



Working with an Editable Grid

An editable grid lets you enter and edit data in tabular format. You use the **Tab** key or the mouse to move between cells. The triangle in the first column indicates the currently selected row. An editable grid may contain both read-only and editable cells. A sample editable grid is shown below.



To edit contents of an editable grid

To move around in an editable grid

Entering Notes with Time Stamp

You can use the time stamp feature on Notes text boxes to insert the current date or date and time into the text box. This is useful when you want to record time related events like a phone call record. To insert a time stamp in the text box, click the icon and select the **Insert date** or **Insert date and time** command as appropriate.

Options in Creating a New Schedule

When creating a new schedule, you can choose either to create the new schedule using a wizard or to create it using a pre-designed plan. The table below explains the differences in the two options.

<table>
<tr><th></th><th>Create a New Schedule Using a Wizard</th><th>Create a New Schedule Using a Pre-Designed Plan</th></tr>
<tr><td>Which option should you choose? (you may try both options to see which one best fits your needs)</td><td>Choose this option if:
Your staffing requirements are demand-driven and you must schedule employees on an as-needed basis, or
You have part time employees that must be scheduled depending on their availability, or
You use skill-based scheduling and need to select employees with certain skills to fill each shift.</td><td>Choose this option if:
You want to adopt an industry standard schedule plan for your shift work requirements, or
You want a systematic way to generate schedules for your employees based on pre-defined shift patterns and rotation sequences, or
Your employees work in teams (crews) to provide the needed coverage.</td></tr>
<tr><td>What does the program do for each option?</td><td>The program guides you through the steps to enter data for your shifts, time off reasons, employees, and task definitions.
The program creates a schedule file with all the basic information you need to begin scheduling your employees.</td><td>The program asks you to select a pre-designed schedule plan.
The program creates a schedule file and automatically generates:
- The shifts and teams prescribed by the plan.
- Generic (placeholder) employee records to meet your staffing requirements.
- Employee shift assignments in accordance with the plan over a time period you specify.</td></tr>
<tr><td>What should you do next?</td><td>Begin scheduling your employees. You can assign shifts and time off for your employees from any of the schedule views.
You can assign tasks or breaks from the Task view.
You can copy existing assignments to any future period and make changes as necessary using the Copy/Paste command.
Publish your schedules.</td><td>You need to update generic employee records to reflect actual employee data.
You can enter time off reasons and task definitions as applicable.
You can change the automatically generated shift assignments from any of the schedule views.
You can assign tasks or breaks from the Task view.
Publish your schedules.
Your selected schedule plan is saved in the schedule file. Use the Generate Schedule Wizard to automatically generate employee shift assignments for any future period.</td></tr>
</table>

Creating a New Schedule Using a Wizard

Choose this option to create a new schedule file from scratch. The wizard will present a short survey on your scheduling needs. Based on your answers to the survey questions, the wizard will fill in shift information, time off reasons, employee information, and task information and let you review/edit the information before creating a new schedule file. Then, you can use **Snap Schedule**'s drag-and-drop capability to easily assign employees to shifts, mark employee time off from work, assign breaks and tasks within shifts, or design your own schedule plan.

To create employee work schedules for a scheduling period, simply assign shifts to your employees. You can make a shift assignment in any of the three views: Daily, Shift, and Calendar. By default, the Daily view is shown after a new schedule has been created. The Daily view presents scheduling information in a spreadsheet-like format with each employee listed down the leftmost column, days across the top, and the Assignment Pane docked to the right side of the window by default. To make an assignment, simply drag a shift or time off from the Assignment Pane and drop it into a schedule cell. Alternatively, you can double-click a cell to bring up a dialog box that lets you quickly add or edit an assignment and adjust start and end times.

After you have entered employee availability, skills, labor rates, and the required number of employees for each time period, you can use the information to build the best possible schedule. The main goal is to match the number of employees scheduled to the required number of employees while satisfying labor rules and employee preferences as much as possible. The employee characteristics that should be considered when assigning employees may include seniority, skills required for the different positions being scheduled, planned time-off days, restrictions on the minimum and maximum work hours, and employee preferences. You can do all that using the Select an Employee for the Shift command. Continual review and refinement of the planned schedule are often needed due to last minute changes in business demand and employee availability. You can record vacation and time off requests in advance and Snap Schedule will alert you when there is a conflict.

Once you've completed all shift assignments for a scheduling period, you can use **Snap Schedule** to e-mail work schedules or print schedules, daily roster, work assignment calendars, and reports. For the next scheduling period, you can simply copy shift assignments from the last period and make adjustments as required.

To create a new schedule file:

1. Start **Snap Schedule** from the **Start** menu or from a program shortcut.
2. The **Getting Started** page appears.
3. On the **Getting Started** page, click the **Create Schedule** button. The **New Schedule Options** pane is displayed.
4. Select **Create a new schedule using a wizard** and click **Create**. A progress bar will be shown while **Snap Schedule** creates an empty schedule file.
5. At the **Welcome** pane, click **Next** to begin.
6. The wizard will present you with survey questions and ask you to select the answers that best fit your business operations and scheduling needs. When you click **Next** and confirm your selections, the wizard will generate the required shifts, time off reasons, employee information,and tasks based on the answers you provided.
7. You can click **Next** or **Back** to move between the different panes to review the generated data, make changes, or add new information as necessary. At the **Business Information** pane, you can enter your business address and contact information. At a minimum, you must enter your business name.
8. After completing the last step, you can click **Finish. Snap Schedule** will display the Daily view where you can simply drag-and-drop shifts to employees to make shift assignments. You may see the **Software License Activation** window if your copy of **Snap Schedule** has not been activated or you are running **Snap Schedule** in the 30-day evaluation mode.

Creating a New Schedule Using a Pre-designed Plan

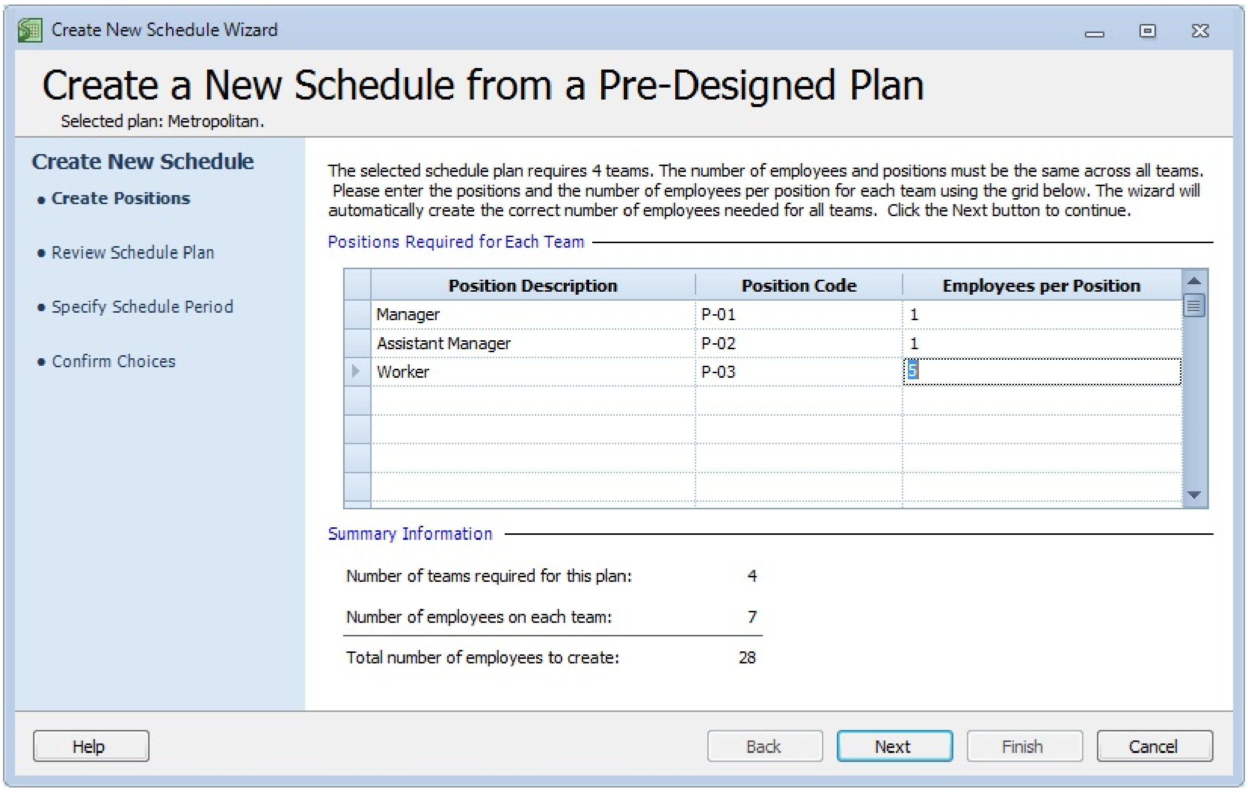
When you choose to create a new schedule from a pre-designed schedule plan, **Snap Schedule** uses the information in the plan to create shifts, days on/off patterns, teams, employees, and to automatically generate employee schedules for the specified time period. If your schedule (shifts, days on/off, etc.) does not follow a predictable, repeatable pattern, you may not find a pre-designed plan that fits your needs. In the case that a pre-designed schedule does not meet your needs, you should start by creating a new schedule using a wizard and then use **Snap Schedule**'s drag-and-drop scheduling capability to make schedule assignments.

Snap Schedule comes with a collection of pre-designed schedule plans that implement commonly used shift schedules for virtually all industries. Each plan is characterized by the type of coverage (24/7 or non-continuous), number of teams required, shift lengths, average work hours per week, rotating or fixed plan, and repeat cycle. Fixed plans require employees on the same team to always work the same shift (e.g. Day, Swing, or Night) as opposed to rotating plans which rotate teams through the different shifts in a predetermined sequence. Note that **Snap Schedule** uses teams to group employees who work the same shift and rotation patterns - much like squad, division, or group is used in some organization.

When you select a plan from the list of pre-designed plans, its brief description is shown. If you have access to the Internet, you can click the **See more information about this plan** link for a detailed description including a diagram showing shift/rotation patterns. For subsequent steps, the wizard will help you create employee records using generic employee names and automatically assign shifts to them as prescribed by the schedule plan. After the assignments have been generated, you can change employee information and adjust employee shift assignments as necessary. You can also schedule tasks or breaks within each assigned shift.

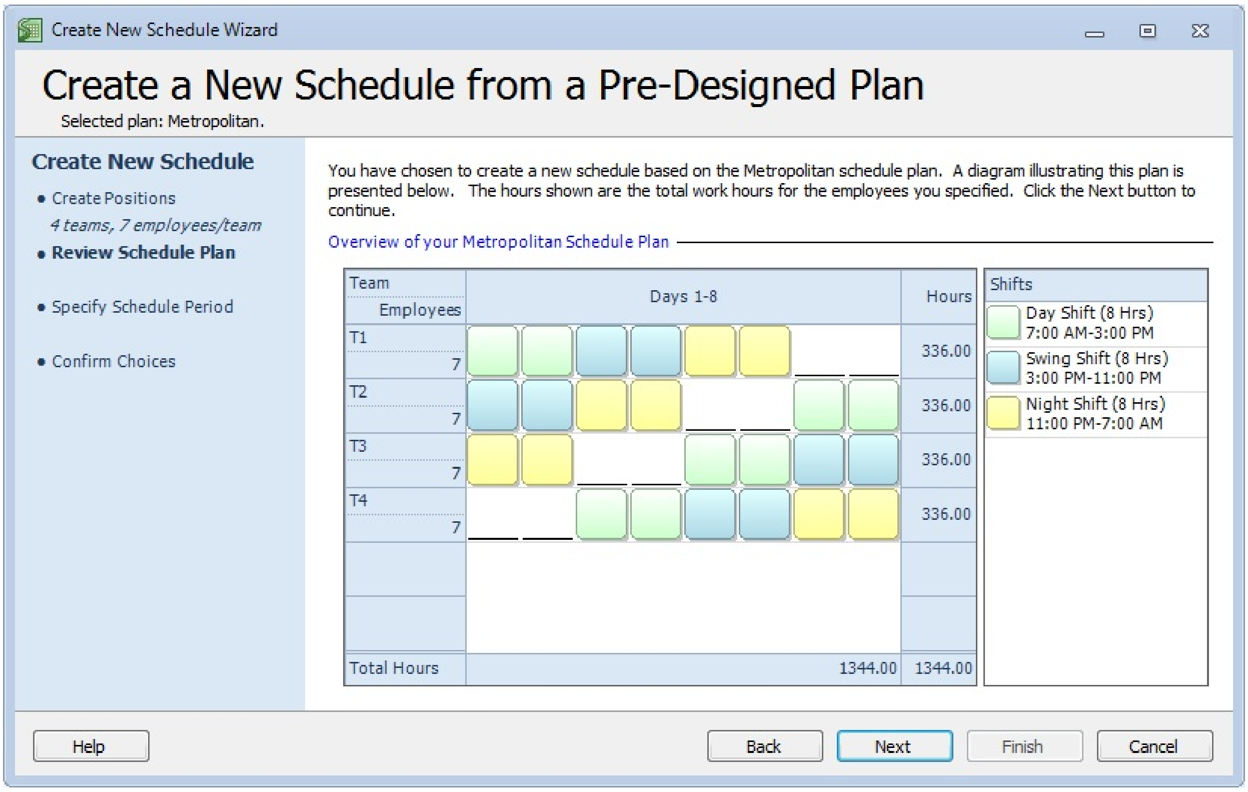
To create a new schedule using a pre-designed plan:

1. Start **Snap Schedule** from the **Start** menu or from a program shortcut or select the **New** command if you are already running **Snap Schedule**.
2. The **Getting Started** page appears. On the **Getting Started** page, click the **Create Schedule** button.
3. The **New Schedule Options** pane is displayed. Select **Create a new schedule using a pre-designed plan** and pick a pre-designed plan that closely match your scheduling needs. Note that pre-designed plans are continually added and you can download the latest list if you have access to the Internet. In this example, we'll pick the Metropolitan plan.
4. Click **Create.** A progress bar will be shown while **Snap Schedule** creates an empty schedule file. Once this is done, the **Create New Schedule Wizard** will be run to help you quickly enter the minimum required data.
5. The **Create Positions** page of the Create New Schedule wizard will be displayed.



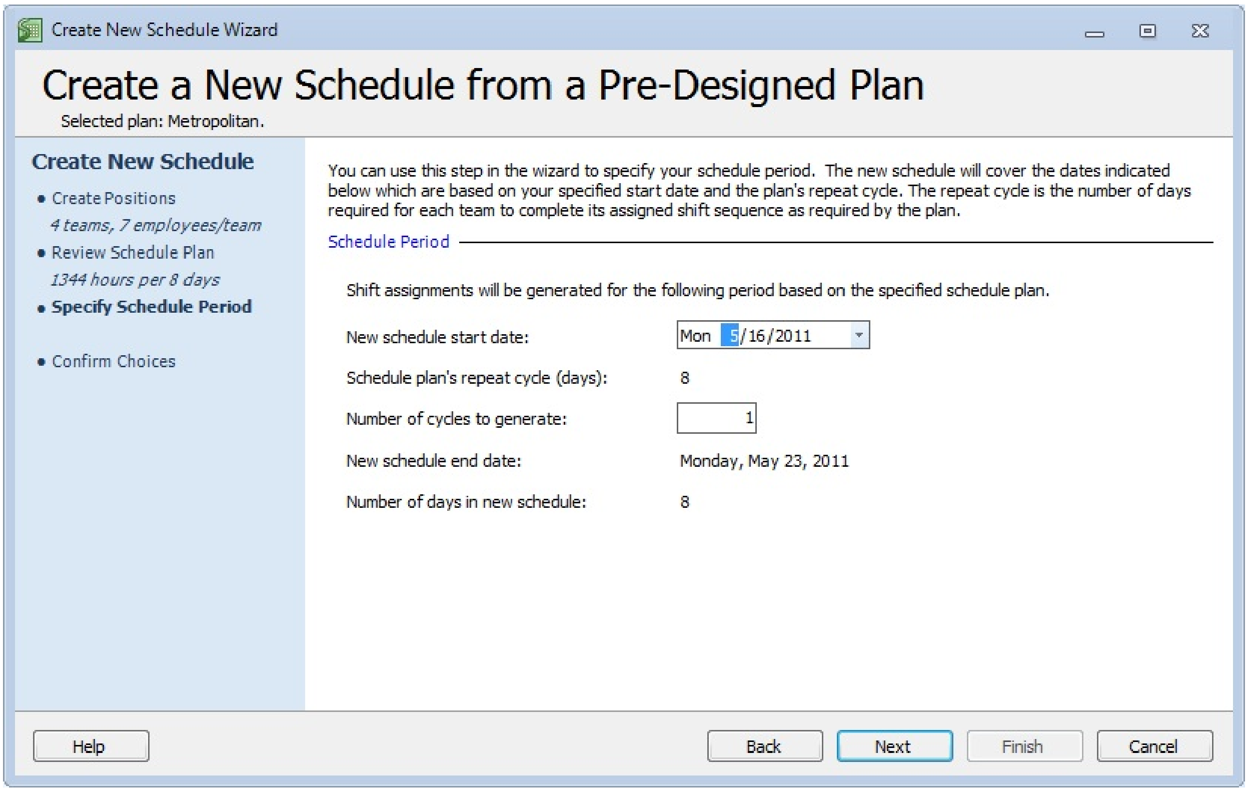
On this page, use the grid to enter the positions and the number of employees occupying each position per team. The wizard will create generic employee records for the correct number of employees needed for all teams. You can change the generic employee names and provide additional employee information after the schedule file has been created. Click **Next** when done.

5. The **Review Schedule Plan** page of the Create New Schedule wizard will be displayed.



The grid shows how shifts are allocated to each team. Empty cells or underlined spaces represent off days. The hours worked by each team over the repeat cycle are shown in the Hours column. The total hours shown under each column represent the hours worked by all teams for the number of days specified in the column header. Looking horizontally (across), you will see the day-on/day-off pattern for each team. For example, members in Team T1 work the Day shift for two days, Swing shift for two days, Night shift for two days, then take two days off. This sequence is repeated after eight days. Looking down (vertically), you will see that twenty-four hour coverage is provided by having three of four teams working the Day. Swing, and Night shifts each day. After reviewing, click **Next** to continue.

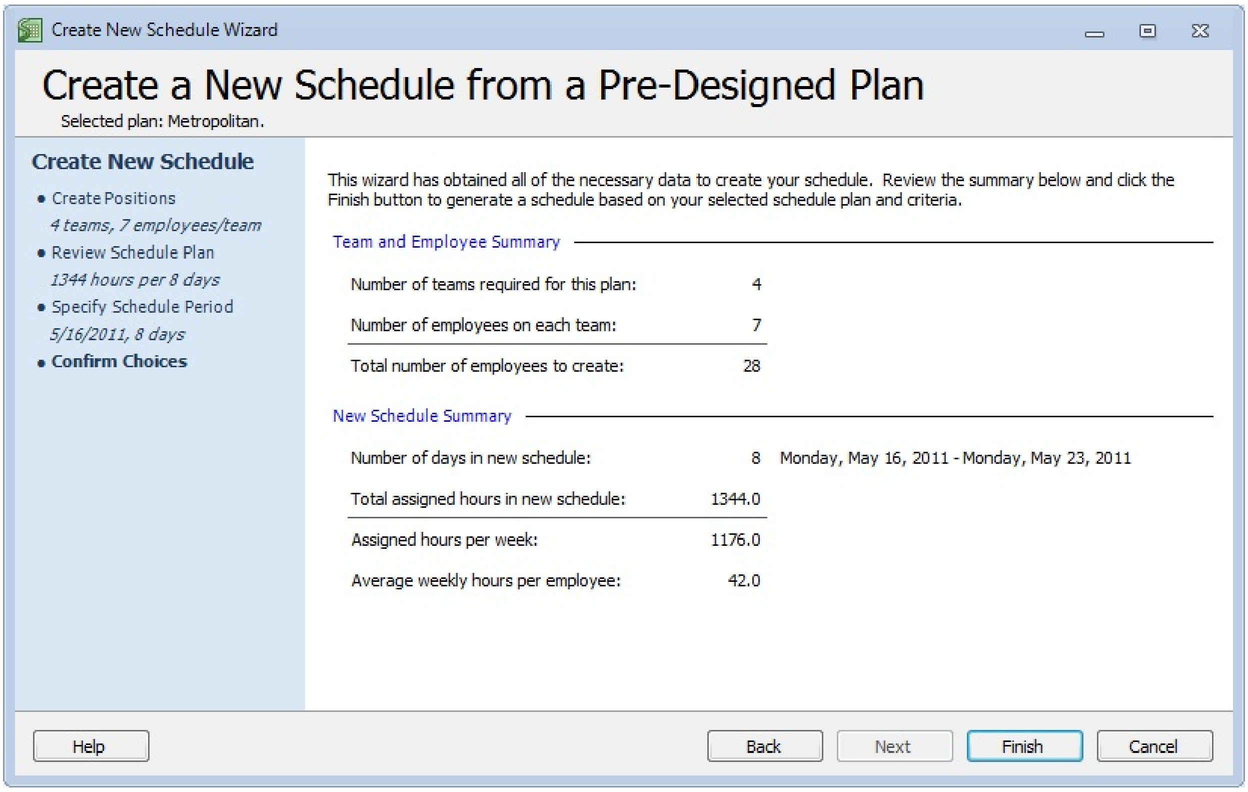
6. The **Specify Schedule Period** page of the Create New Schedule wizard will be displayed.



Use this page to specify the start date for the new schedule and the schedule duration in term of repeat cycles. The **New schedule start date** field is set to the next Monday by default but you can use the drop-down calendar box to specify any date. Instead of explicitly specifying an end date, you specify the number of repeat cycles to ensure that the generated schedule always ends on a completed rotation. When you enter a value into the **Number of cycles to generate** field, the wizard will automatically compute and display the schedule end date using the repeat cycle obtained from the schedule plan selected in the previous step. If you enter a 0, the wizard will create the employees, teams, positions, and shifts required by the plan but will not generate any shift assignments for the employees.

Once completed, click **Next** to move to the next step.

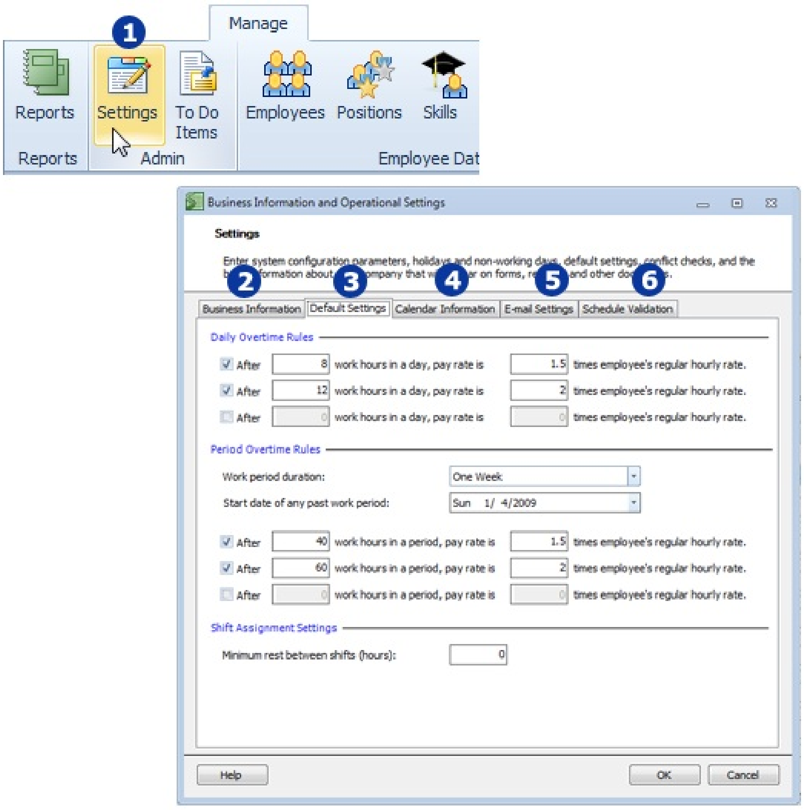
7. The wizard displays the **Confirm Choices** step.



Review the information presented and click **Finish** to begin the schedule creation. Once completed, shift assignments will be saved in the schedule file and can be seen in any of the schedule views. You can change the generic employee names, provide additional employee data, enter vacations and time off requests, and make last minute schedule changes as required. For the next scheduling period, simply run the Generate Schedule wizard to generate a new schedule.

Entering Business Information and Operational Settings

When creating a new schedule, you need to enter configuration parameters, holidays and non-working days, overtime pay rules, default settings, and the basic information about your company that will appear on forms, reports, and other documents. In general, you need to define these entries only once, but from time to time, you may need to review and update them as required.



To begin:

1. Select the **Manage** tab and click **Settings** to bring up the **Business Information and Operational Settings** form.

2. Enter your business name and contact information which will be used on forms, reports, and other documents.

3. Click the **Default Settings** tab to enter overtime and time off related parameters.

4. Click the **Calendar Information** tab to enter holidays, non-working days, and first day of the week.

5. If you plan to e-mail schedules to your employees from **Snap Schedule**, click the **E-mail Settings** tab to configure SMTP mail server parameters.

6. Click the Schedule Validation tab to specify the conflict checks you would like the system to perform and select the color of each resulting error flag.

Refer to the Business Information Form section for detailed instructions on how to complete this form.

Entering Employee Data

In order for **Snap Schedule** to assign employees to shifts, you must enter your employee data into the new schedule file. **Snap Schedule** keeps a separate record for each employee in the schedule file. It simplifies the way you manage employee records and makes important information like contact information, availability, position, authorized work locations, and skills available at your fingertips. Additionally, you can define up to 25 custom data fields to keep track of anything you choose about the employee. Contacting replacements for no-shows or scheduling employees with the proper skills, seniority, or training is quick and easy once you have the information entered.

For quick and simple scheduling, you only need to create employee records and enter the employee name and a unique code for each employee. In most cases, you will want to schedule employees based on positions, teams, skills, and authorized work locations.

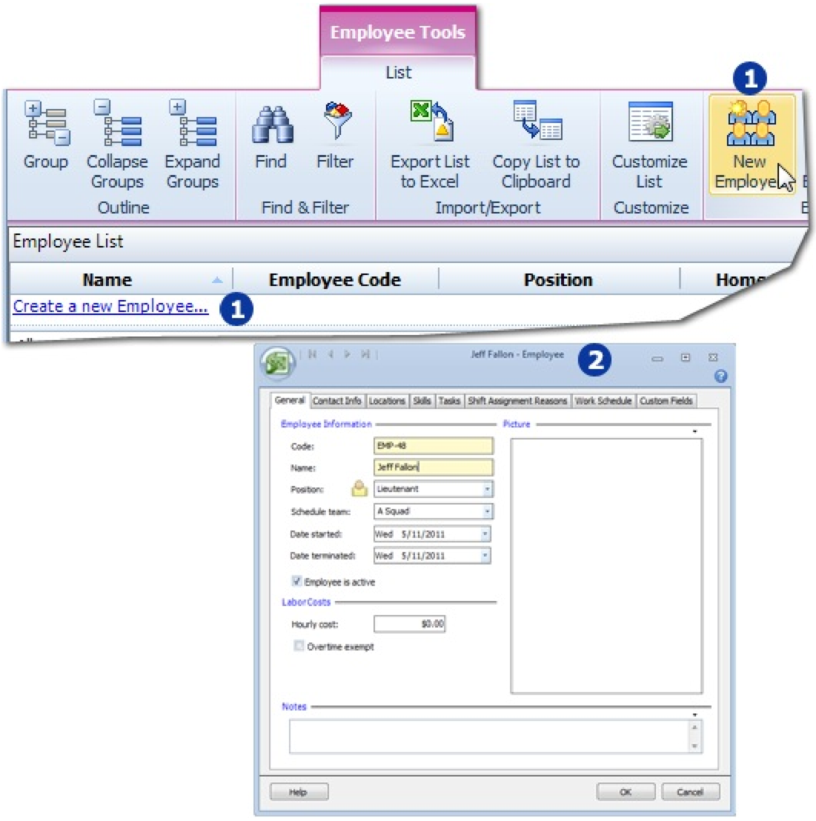
Location refers to a physical area or facility where employees are scheduled to work like a building, an assembly line, or a patrol route. For each employee, you can specify a home location where the employee is normally scheduled to work and other locations where the employee is authorized to work. **Snap Schedule** will generate a warning when you schedule an employee to work at a place the employee is not allowed to work. You must define at least one location for your business.

Add Positions if you want to use them to group/filter employees, track shift coverage by position, or select employees having a particular position to fill a shift. An employee can hold only one position at any given time. Likewise, you can define Skills to keep track of employees' training and certification and use them as criteria for selecting employees to fill a shift.

Add Teams if you will be doing rotating shift scheduling and plan to use **Snap Schedule** automatic scheduling feature. A team is a group of employees working together for a common goal. Typically, team members are scheduled to work the same shift and rotation patterns (i.e. team members have the same days on, days off, and rotation pattern) but this is not necessarily a requirement. An employee can belong to only one team or no team at all.

You can enter employee data using the multi-tabbed **Employee** form. From this form, you can conveniently add new positions, teams, and locations if so desired. If you are using Intuit QuickBooks, Microsoft Office Accounting 2007, or have employee information available in Excel, you can save time by using the **Snap Schedule Import Data Wizard** to import employee name, identification, and contact information. Refer to the Import Data Wizard for more information on how to use this feature.

To add a new employee:



1. On the **Ribbon**, click **New Employee** to bring up a blank **Employee** form. You can also click **Create a new Employee** on the Employee list.

2. On the **Employee** form, enter the required employee name and employee code. Other data fields are not required but they should be entered if you want to make full use of **Snap Schedule**'s capabilities. Refer to the Employee Form section for detailed instructions on how to complete this form.

Importing Employee Information

If you are currently using Intuit QuickBooks software or Microsoft Excel software, you can use the **Import External Data** wizard to import employee data from these software packages into **Snap Schedule**. This wizard also allows you to enter employee data into a Microsoft Office Excel template and transfer the data directly into **Snap Schedule**.

The Wizard will guide you through a series of steps and you must provide all required inputs for one step before moving on to the next. Each step is presented as a dialog page with familiar controls such as text boxes, drop-down lists, and grids that you would normally find on a form . You can click **Next** to move to the next step or **Back** to review your inputs in the previous step. After completing the last step, you can click **Finish** to start the task based on the inputs you have provided.

To run the Import External Data wizard

1. On the Ribbon, click the File tab to display the Backstage view then select **Import Data**. The **Select Software** page of the Import External Data wizard will be displayed.

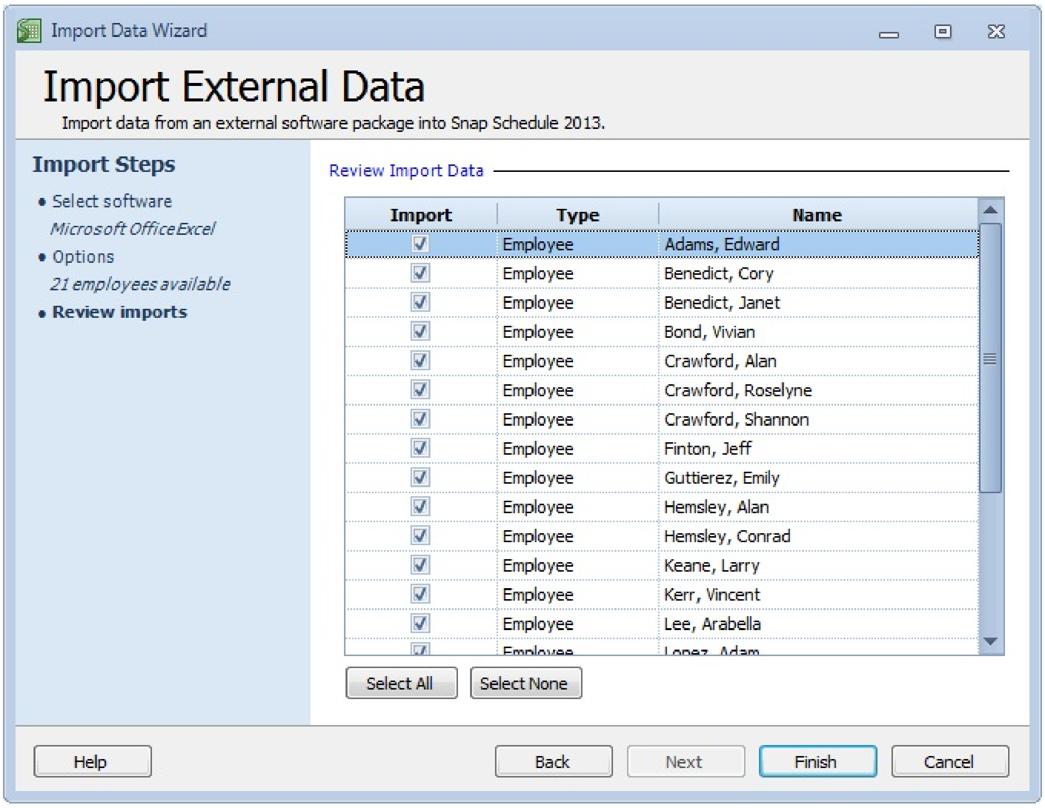
2. Select the software package from which you want to import employee data and click **Next** to continue.

3. The wizard will display a new page for more information about the external software. You will need to provide additional inputs as described below.

   If you have selected the Intuit QuickBooks option

   If you have selected the Microsoft Office Excel option

4. Click **Next**. The wizard will display the **Review Import Data** step.



On this page, you can select which employee records to import from the selected external software. By default, all employee records are selected but you can un-check the individual **Import** boxes for employee records you do not want to import. You can click **Select All** to select all records to import or click **Select None** to select none of the records.

Click **Finish** to begin the import process. Once completed, the imported employee records will be saved. You can open the Employees List to view the imported employee records.

Data field mapping information

External software packages have different database structure and field naming convention than **Snap Schedule**. During the import process, employee data fields from Intuit QuickBooks and Microsoft Office Accounting will be mapped to internal data fields in **Snap Schedule** as follows.

- **Intuit QuickBooks employee data field mapping**

QuickBooks Employee Data Field	Snap Schedule Employee Data Field	Notes

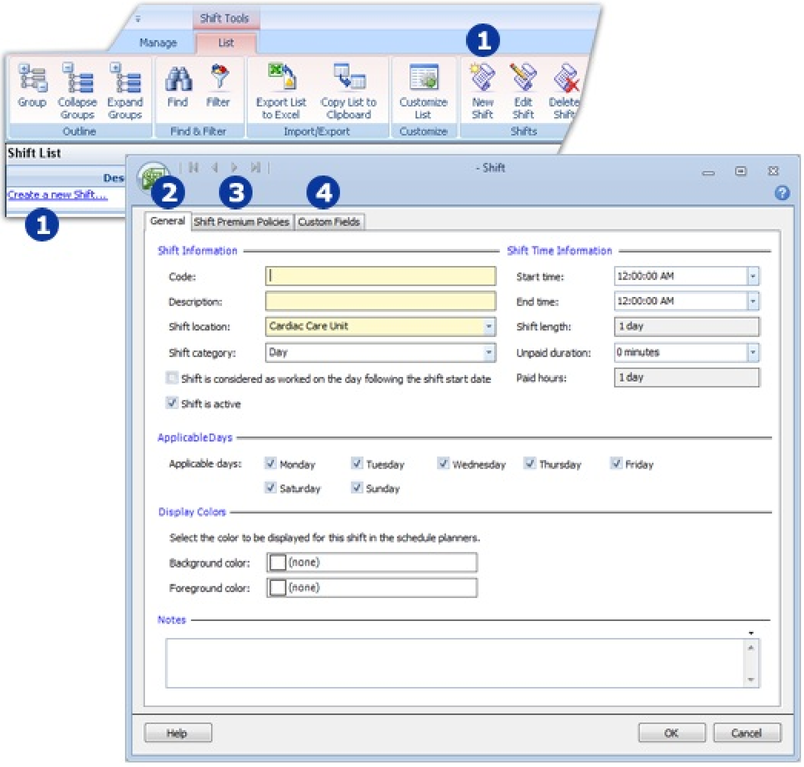
Salutation (Mr./Ms./...)	Salutation	
First Name	First Name	
M.I.	Middle Name	
Last Name	Last Name	
Suffix	Name Suffix	
Employee Name	Name	QuickBooks automatically creates this field as First Name + M.I. + Last Name
Employee Is Inactive	Employee Is Active	
Address	Mailing Address	
City	City	
State	State	
Zip	Postal Code	
Country	Country Code	
Phone	Home Phone	
Cellular	Mobile Phone	
Alt. Phone	Other Phone	
Fax	Fax	
E-mail	E-mail	
Account No. (Employee ID)	Code	A unique employee code will be automatically generated in **Snap Schedule** if this field is blank in the QuickBooks record. If the same non-blank employee code already exists in **Snap Schedule**, the employee record corresponding to that code will be updated with data from the QuickBooks record.
Notes	Notes	
Hire Date	Date Started	
Employment Type	Position	If a position with the same description does not already exist in **Snap Schedule**, it will be automatically created.

Entering Shift Information

Shift is the term used in **Snap Schedule** to describe the divisions of work in a day. You can use shifts to describe divisions of labor, responsibilities or any other categories of work you would like to assign to your employees. Each shift has a start time, an end time, a work location, and applicable days of the week. Shifts may overlap one another but they may not be longer than 24 hours. Additionally, you can define up to 25 custom data fields to keep track of anything you choose about a shift.

Shifts are very flexible in **Snap Schedule**. You can define as many shifts of any duration as you like and you can de-activate shifts that you no longer use. The most common shifts are Day, Evening, and Night shifts. Full-time shifts are normally defined to be eight hours, part-time shifts are anything less than eight hours. A contiguous shift is one in which there is no break specifically scheduled.

To add a new shift:



1. On the **Ribbon**, click **New Shift** to bring up a blank **Shift** form. You can also click **Create a new Shift** on the Shift list.

2. On the **General** tab, enter a unique code and a description for the shift. Use the **Shift Location** drop-down lists to select or create a new location.

   You can type in start and end times or use the drop-down list to select. The **Shift length** is automatically computed from the start and end times. **Paid hours** are computed as Shift length minus any unpaid duration.

   Use the **Shift category** drop-down list to select or create a new category. Shift categories are used to group shifts for filtering and reporting purposes.

   Check the box **Shift is considered as worked on the day following the shift start date** if you want to credit the hours that your employees worked on shifts crossing midnight to the day following the shift start date.

   Under **Applicable Days** un-check the boxes for those days the shift is not applicable.

   Setting the shift display colors will help you differentiate the shift on schedule views.

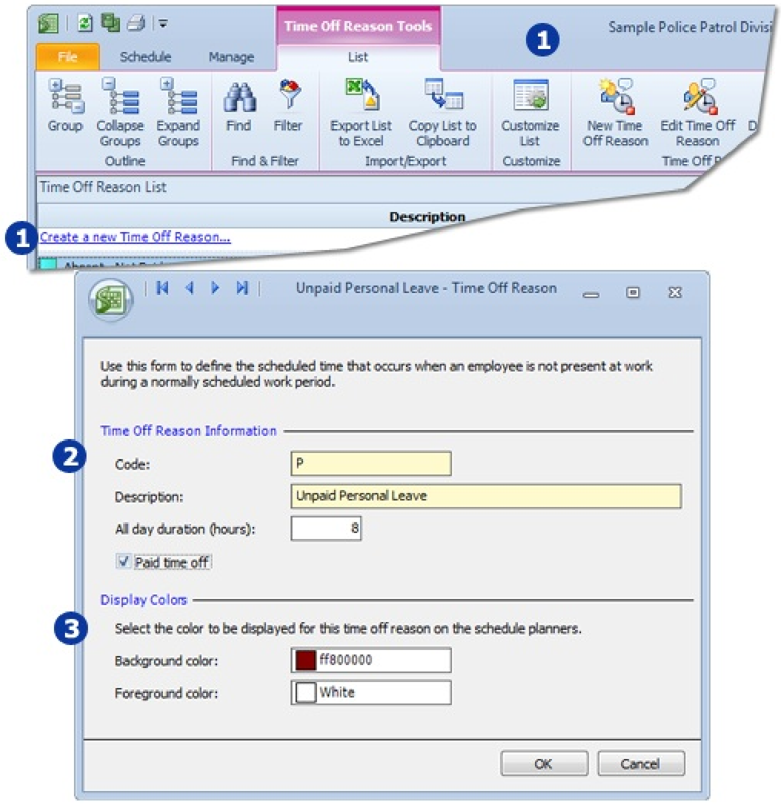
3. Use the **Premium policy** tab to select or create a shift premium policy if you would like to offer additional compensation for employees working this shift. You can also define a shift premium policy to provide compensation for employees who are on-call. Multiple shift premium policies can be associated with a shift for additive effects.

4. Enter any custom data fields you have defined using the **Custom Fields** tab.

Defining Time Off Reasons

You can define Time Off Reasons to classify the scheduled time that occurs when an employee is not present at work during a normal work period. Time off requests are usually approved and scheduled in advance for events such as vacation, training, medical leave, military service, jury duty, and personal leave that cannot be scheduled outside of regular work hours.

To add a new Time Off Reason:



1. On the **Ribbon**, click **New Time Off Reason** to bring up a blank **Time Off Reason** form. You can also click **Create a new Time Off Reason** on the Time Off Reason list.

2. Enter a unique code and a description for the Time Off Reason.

   When you make a time off assignment, it is marked as an all day event unless you specify the start and end times. By default, all day duration is set to 8 hours for a normal working day but you can change to any value. For reporting and pay calculation purposes, **Snap Schedule** will use the value entered in this field for the duration of an all-day event.

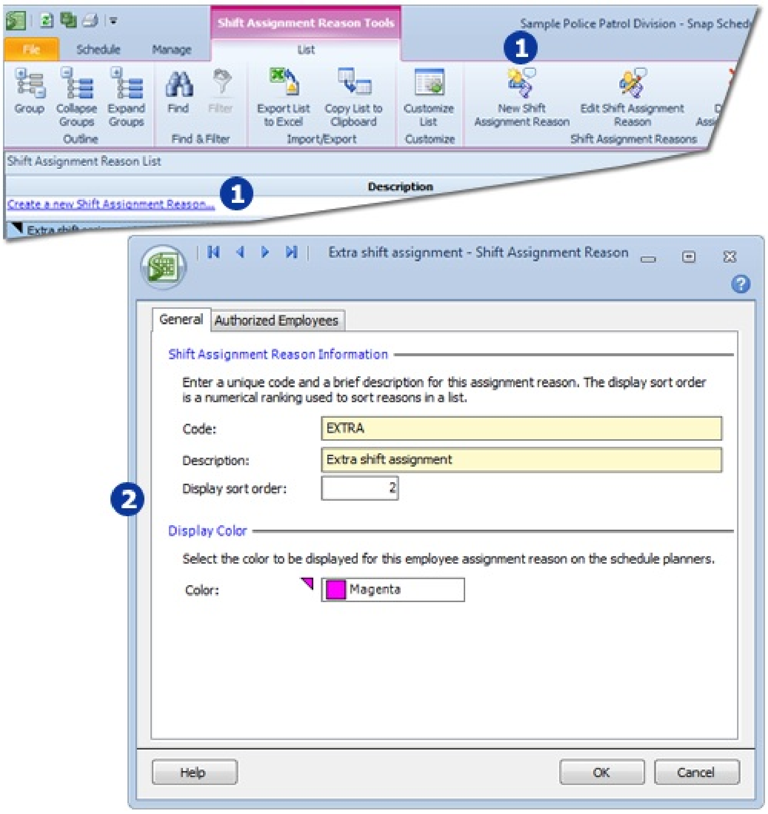
   Check the **Paid time off** box if the employee will be compensated for the absence (paid vacation, paid sick leave, etc.).

3. Setting the Time Off Reason colors will help you differentiate the Time Off Reason entry Family Illness on schedule views. The foreground color will be used for the text description.

Defining Shift Assignment Reasons

Shift Assignment Reasons are used to provide additional details and explanations when making a shift assignment. You can define a list of commonly used reasons and select one from the list when you want to add details to a shift assignment. This way, you save time and the reasons can be used to group and filter assignments.

To add a new Shift Assignment Reason:



1. On the **Ribbon**, click **New Shift Assignment Reason** to bring up a blank **Shift Assignment Reason** form. You can also click **Create a new Shift Assignment Reason** on the Shift Assignment Reason list.

2. Enter a unique code and a description for the Shift Assignment Reason.

   You can also enter a display sort order value to effect the placement of the reason in the Shift Assignment Reasons drop-down list. This is helpful when you have a large number of assignment reasons and would like to place the most frequently used reasons at the top of the list to minimize scrolling.

   By default, the shift assignment icon is shown on the schedule planners in black. You can change the color to differentiate the various assignment reasons.

   When you create a new shift assignment reason, all employees you have defined are allowed to use the shift assignment reason by default. Use the **Authorized Employees** tab to change the authorization settings as necessary. **Snap Schedule** will issue an alert when you assign a reason to an unauthorized employee.

Saving Your Schedule File

Snap Schedule keeps all employees, shifts, and scheduling information in a single SQL Server database file. This file has the default extension of .ssf which is associated with **Snap Schedule** by the installation program. Although you can create as many Snap Schedule data files as you like, you can only work and make changes to a single data file at a time.

You should save the schedule file often to avoid losing data because of an unexpected power failure or other problems.

To save your work and continue, click the **File** tab, then click **Save**.

You can also use the **Save As** command to save a copy of the schedule file you are currently working on under a different name. Consider this option when you are about to make changes that you are unsure of or to experiment with different scheduling scenarios.

Compact Your Schedule File

As you work with the schedule file over a long period of time, its internal structure may fragment resulting in a waste of disk space and slow performance. You can compact the schedule file to avoid fragmentation and to get better performance using the **Compact Schedule File** command. To do so, click the **File** tab, then click **Compact Schedule File**.

Overview

With **Snap Schedule**, you can schedule your employees visually using drag-and-drop scheduling or take advantage of its advanced auto-scheduling feature to generate shift assignments automatically based on a schedule plan. You can also use a combination of both.

If your schedules change frequently, or you have a small number of employees to deploy, or you don't want to use any schedule plan, ad hoc scheduling is the way to go. You can make shift assignments for each employee manually for one scheduling period and once you are satisfied, use the Copy & Paste Assignments function to replicate the assignments to the next scheduling period. Once you have set up a schedule file with employees and shifts, you are ready to start scheduling. For each scheduling period, you can start with an assessment of work load and staffing requirements (i.e. the number of employee needed), personnel availability and preference, and other constraints. A scheduling period (also known as planning period) is the time frame for which employee work schedules are developed and published at one time. Two to six weeks planning periods are typical for most industries, though **Snap Schedule** has no limit on how long the planning period can be. Typically, your work-flow will consist of entering time off requests as they are received, making work assignments, reviewing and publishing the schedule for each scheduling period, and editing existing schedules as needed based on business demands or changing employee situations.

When you make a work assignment, you can specify the shift and the date an employee will be working. You can do this in the Daily view, Shift view, or Calendar view. Each view has special functions that can be performed as applicable at various times in the scheduling process. You can freely switch between views and work with the one that suits you best using commands in the **Schedule Views** group on the **Schedule** tab. What you see on the schedule view window can be printed using the **Print** command on the **File** tab.

If you have been scheduling using pencil-and-paper, the schedule board, or Excel spreadsheets, you will find scheduling in the By Employee Daily view a natural for your ad hoc scheduling method. This view presents scheduling information in a spreadsheet-like format that lists each employee down the leftmost column, days across the top, and the Assignment Pane docked to the right side of the window by default. The number of days displayed at the top can be 1, 2, 4, 6 weeks, or a custom range, selectable from the drop-down menu. Employees' shift and time off assignments are shown in the cells of the table. Each cell corresponds to a specific employee and a date. Optionally, combinations of work hours, on call hours, paid time off hours, and labor costs can be totalled horizontally for each employee and vertically each day for all employees. To make an assignment, simply drag a shift or time off from the Assignment Pane and drop it into a cell. Alternatively, you can double-click a cell to bring up a dialog box that lets you quickly add or edit an assignment.

Use the Shift view when you want to schedule by employee position or to ensure adequate shift coverage. The Shift view presents work assignments for each day as organized by shift in a tabular format. The number of days displayed at the top can be 1 day, 1, week, or 2 weeks, or a custom range, selectable from the drop-down menu. Each shift occupies one column and each employee assigned to the shift is shown in a cell under the column header. The Assignment Pane is docked to the right side of the window by default. The coverage requirements (required personnel, assigned, and variance counts) are shown at the bottom of the grid. To make an assignment, you can simply drag an employee from the Assignment Pane and drop it into a cell. Alternatively, you can double-click a cell to bring up a dialog box that lets you quickly add or edit an assignment.

The Calendar view presents work and time off assignments for each employee similar to a calendar or monthly planner. You can choose to show a one week or one month calendar. In this view, a list of employees is shown in the left column and the schedule of the selected employee is shown in a calendar in the contents area. The Assignment Pane is docked to the right side of the window by default. To make an assignment, you can simply drag a shift from the Assignment Pane and drop it into a cell. Alternatively, you can double-click a cell to bring up a dialog box that lets you quickly add or edit an assignment.

In addition to shift scheduling, **Snap Schedule** lets you schedule tasks within an employee's shift. You can accomplish this by first assigning a shift to an employee, then schedule the employee to perform various tasks during the shift. Tasks can be of any duration and can be assigned to an employee through the same simple drag/drop operations while in the Task View.

Using auto-scheduling will greatly save you time and speed up complex scheduling tasks. Scheduling shift work with multiple crews, day on-off patterns, and rotating shifts with different start dates can be a daunting task if done manually with pencil and paper or Excel. For auto-scheduling to work, you will need to define a schedule plan. A plan serves as a blue print to build day-to-day work schedules and define the number of teams (or crews), shifts and shift lengths, days on-off , and rotation patterns required to provide the kind of coverage you want. You can design your own plan or use one of the pre-designed plans. Once a plan has been defined, you can run the Generate Schedule Wizard to generate assignments for each team member for the specified scheduling period based on the plan. You can review the work assignments and make changes as appropriate. To prepare schedules for the next planning period, simply run the wizard again and specify a new date range. Refer to About_Auto-Scheduling for more information.

Assignment Conflict Flags

For each shift assignment displayed in any of the schedule views, **Snap Schedule** performs a set of conflict checks to determine if an assignment conflicts with other shift assignments, time off, employee availability, employee work hour limits, or your business' work schedules. **Snap Schedule** also performs a set of conflict checks on each task assignment displayed in the Task view to determine if the task assignment conflicts with other task assignments within the shift or if the task assignment conflicts with the shift requirements.

When a conflict check detects an exception, **Snap Schedule** displays a small flag (e.g.) at the lower right corner of the assignment cell in the color specified for the conflict check. To see the warning message, you can hover the mouse pointer over the assignment cell and read the tooltip. Alternatively, you can double-click the assignment cell to bring up the assignment form to view assignment details and make any changes as necessary.

Note that you can also run the Daily Assignment Validation report to obtain the results of these conflict checks, organized by date for a specific date range. This report provides a more detailed description of each exception.

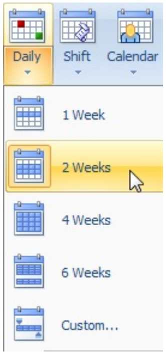
You can specify the validation checks you would like the system to perform and select the color of each resulting error flag using the Schedule Validation tab in the Business Information and Operational Settings form.

Changing What You See in the By Employee Daily View

The By Employee Daily view presents scheduling information in a spreadsheet-like format that lists each employee down the leftmost column, days across the top, and the Assignment Pane docked to the right side of the window by default. The number of days displayed at the top can be 1, 2, 4, or 6 weeks, or a custom date range, selectable from the drop-down menu. Employees' shift or time off assignments are shown in the cells of the table. Each cell corresponds to a specific employee and a date. Optionally, combinations of work hours, on call hours, paid time off hours, and labor costs can be totalled horizontally for each employee and vertically each day for all employees. To make an assignment, simply drag a shift or time off from the Assignment Pane and drop it into a cell. Alternatively, you can double-click a cell to bring up a dialog box that lets you quickly add or edit an assignment.

You can use the commands in the Display and Filter & Find groups on the Ribbon to filter what to be shown, change the level of details, and hide the various elements to suit your preferences. **Snap Schedule** will remember your settings the next time you log on, even when you log on to a different computer.

Set display date range



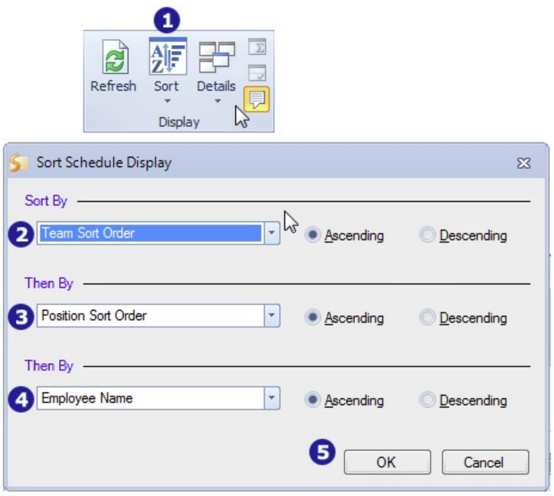
You can select the number of days to be shown at any one time using the Daily view drop down menu. Pre-set display ranges are 1, 2, 4, and six weeks, matching planning periods that are typical for most industries. When your scheduling period is not one of those preset ranges, you can specify the number of days to display (up to 365 days) by clicking **Custom**. Keep in mind that **Snap Schedule** must load and process scheduling data for all days in the display range so the initial response may be slow on long display ranges.

Think of the display range as a moving window over the perpetual scheduling calendar. Each day in the range occupies one column so the 1 or 2 week range may fit entirely on the screen depending on the level of details. A horizontal scroll bar is shown when days in the range could not fit in the available space. You can turn on the schedule view scroll lock to prevent cursor movements beyond the display range to avoid unnecessary loading of data while scheduling within your scheduling period. When the **Scroll Lock** button is off and the cursor is positioned at the beginning or at the end of the display window, you can use the right or left arrow key to move the display window backward or forward one day at a time.

You can configure the details to be shown on the display including the summary totals where **Snap Schedule** automatically sums up the daily work hours and/or costs vertically for each day and horizontally for each employee over the selected range.

List employees in a particular order

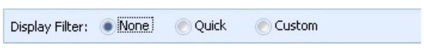
There are times when you will want the information on the Daily view to be sorted, or arranged in a particular order. Sorting employees and their assignments helps you quickly visualize and understand your schedules better, organize and find what you want, and ultimately make more effective decisions. You might sort and display employees by more than one criterion. For example, you can first sort by team (to group employees in the same team together), then by position (to group team members by position), and then sort by name (to put the names in alphabetical order within each position).



1. On the Ribbon, click **Sort** then **Sort Settings** to open the Sort Schedule Display dialog box for entering sort criteria.
2. Use the drop-down list to select the first sort criterion, then check **Descending** if you want to sort in descending alphanumeric order.
3. Use the drop-down list to select the second sort criterion. Select **None** if you don't want to specify a sort criterion. Check **Descending** if you want to sort in descending alphanumeric order.
4. Use the drop-down list to select the third sort criterion. Select **None** if you don't want to specify a sort criterion. Check **Descending** if you want to sort in descending alphanumeric order.
5. Click **OK** to apply the sort order. The Daily view will show the list of employees and their schedules in the new sort order.

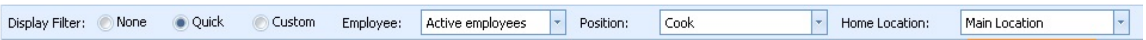
Filter what you don't want to see

When you apply a filter, **Snap Schedule** will display only rows that meet the criteria you specified and hide rows that you do not want displayed. Filters are additive, which means that each additional filter is based on the current filter and further reduces the subset of data. You can specify filters using the Filter pane which is displayed at the top of the Daily schedule view.

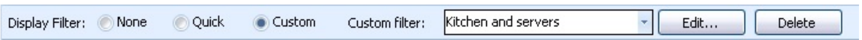


There are three filter choices:

1. None: When this radio button is selected, all employees defined in the schedule file will be shown.
2. Quick: This option presents three drop down list boxes that you can use to quickly specify filtering criteria. The first, Employee, offers three choices: All employees, Active employees only, or Inactive employees only. Use the second, Position, to show all employees regardless of position or employees who hold a specified position. Use the third, Home Location, to narrow down to employees matching the first and second criteria and whose home location is as specified. For example, the filters shown below will display only employees who are currently active and whose position is a cook and whose home location is the Main Location.



3. Custom: When selected, this option lets you use a custom filter to display employees on the Daily view. You can create a new custom filter using the Custom Filter form and save it in the schedule file for future use. This way, you can customize the Daily view to display virtually any combinations of employees. For example, if you prefer to schedule employees by team, define a custom filter for each team; or define a custom filter to show schedules of employees who possess certain skills, etc.   For more information on how to define custom filters, refer to the Custom Filter form.

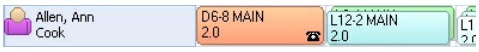


Minding the Details

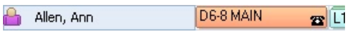
In the By Employee Daily view, a shift assignment is represented by a rounded corner rectangle whose background color is the same as the background color designated for the shift.   This helps you quickly visualize shift patterns for rotating shift schedules. You can select what additional shift details to show in this rectangle by using the commands listed on the Details menu.   Use the Configure command to change the default values and specify what you want to show for each of the three levels.

This option presents the most details. Unless you have changed the default values using the Configure command, the shift description, location, and shift start and stop times will be displayed. You can select the background and the text colors when you define the shift. Multiple shift assignments on a single day are shown stacked. For each employee cell, the employee name, position, home location and a color coded icon representing the employee position will be displayed. For example:

This option substitutes full descriptions with abbreviated codes. Unless you have changed the default values using the Configure command, the shift code, location code, and shift duration in hours will be displayed.   For each employee cell, the employee name, position, and a color coded icon representing the employee position will be displayed. For example:



If you would like to have the most employees shown, select this option. Unless you have changed the default values using the Configure command, the shift code and the location code will be displayed.   For each employee cell, only the employee name and a color coded icon representing the employee position will be displayed. For example:



Resizing Cells

When data in a cell exceeds the width (or height) of a cell, the information may not be completely visible as the cell's contents may be cut off. You can manually resize the rows and columns of the grid to better fit the cell contents. The header column (Employee) and header row can be resized independently of the content columns and content rows.

To resize, place the cursor between columns (or rows) until the resize pointer appears then hold down the left button of the mouse and drag to resize.

Before

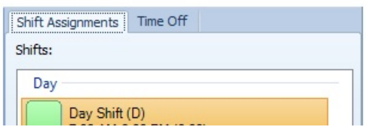
After

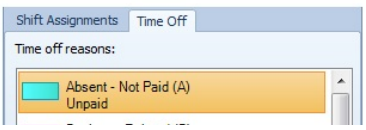
Show/hide summary hours

Click the Summary icon to show on the Daily view the total hours and associated labor costs for each employee over the selected date range and a summary of daily total hours and associated costs by all personnel. Click it again to hide the summary data. The total hours can be any combination of the work hours, on call hours, and paid time off hours that you can configure using the Configure Details form.

Show/Hide Assignment Pane

By default, the Assignment pane is docked on the right side of the schedule view window. If you prefer to use the right click menu over drag-and-drop scheduling, you can hide

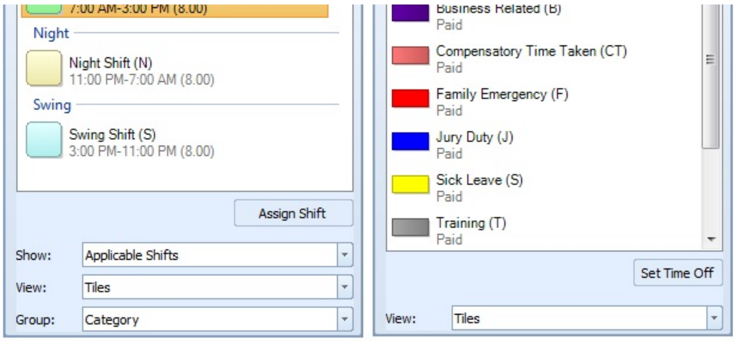




the Assignment pane to make more room for displaying shift assignments.

To show the Assignment pane, click the Dialog Box Launcher on the Assignment command group and you will see the **Assignment Pane** docked on the right hand side of the screen. Use the Shift Assignments tab and the Time Off tab to assign shifts and time off absences to employees.

By default, only applicable shifts (i.e. shifts employees listed on the schedule view are allowed to perform) will be shown in the Shift Assignment tab. You can use the Show drop-down menu to show all shifts.



The Time Off tab shows all time off reasons you have defined. The View drop-down menus lets you change how the list of shifts or time off reasons will appear in the assignment pane.

Show/hide tooltips

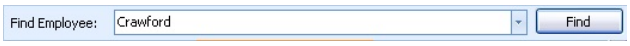
Tooltip is a small text box that appears when a mouse pointer is hovered over a shift or time off assignment to provide details about the assignment. When the mouse is moved away from the icon or button, the tooltip will disappear from view. This is especially useful when you are working with a large number of employees in the four or six weeks display range and want to quickly find the cause of the warning flags, see the detailed description, assignment reason, or attached notes.

By default, **Snap Schedule** will display tooltips as indicated by the Show Tooltips button being highlighted. until you turn it off. To disable, click the highlighted button. Note that you can independently enable or disable tooltips for each of the schedule views.

Finding a particular employee

You can quickly locate an employee's assignment in the display range (not all assignments in the schedule file) using the Find command. To find an employee:

1. Click the Find button Find to show the Find pane at the top of the Daily view window.



2. Type the employee name or the search string into the text box and click Find.
3. If found, the employee will be highlighted as shown below.

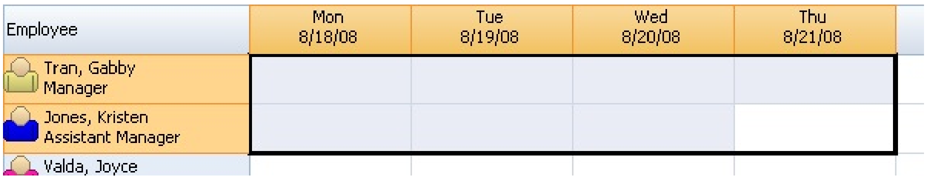
Assigning Shifts to Employees

Employee's assignments are shown in the cell under the days when the employee is scheduled to work. Multiple shift assignments in a single day are allowed, and they are shown in stacked format. To make an assignment, simply drag a shift or time off from the Assignment Pane and drop it into a cell. Alternatively, you can double-click a cell to bring up a dialog box that lets you quickly add or edit an assignment.

To assign a shift to an employee

1. On the Daily view, navigate to the desired week using the current view date picker.
2. Drag the desired shift from the Shift Assignments tab on the Assignment Pane and drop it into the cell that corresponds to the day and employee.
3. You can also right-click the schedule cell and select the desired shift from the right click menu to assign the shift. Alternatively, you can double-click the cell that corresponds to the day and employee to open the Daily view assignment form to add shift assignments. On this form, you can specify a shift assignment reason and add additional notes if so desired.

To assign a shift to an employee for several days at once

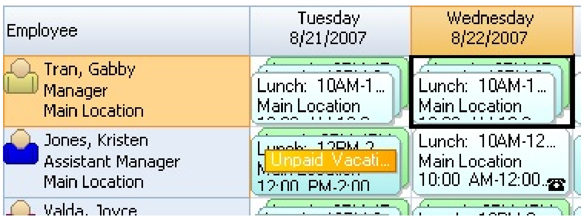
1. On the Daily view, navigate to the desired week using the current view date picker.
2. Hold down the **Shift** key and drag the mouse to select as many dates as you want to schedule. **Snap Schedule** will highlight the selected days. You can use the keyboard to select multiple dates by holding down the **Shift** key and press the **arrow** keys to move around. 

3. On the Shift Assignment tab, click the desired shift to select.
4. Click the Assign Shift button and the selected shift will be assigned to the highlighted dates.

To schedule multiple shifts on the same day

Snap Schedule allows you to schedule split shift and multiple assignments to an employee on the same day. Multiple shifts are shown on the Daily view in the stacked format. If there are any overlapping shift assignments, a red warning flag will be displayed and it is up to you to resolve the conflict.

1. On the Daily view, navigate to the desired week using the current view date picker.
2. Drag the desired shift from the Shift Assignments tab on the Assignment Pane and drop it into the cell that corresponds to the selected day and employee.
3. Repeat the previous step to assign the remaining shifts.
4. The resulting shift assignments are shown in the stacked format. If you have Show Tooltips enabled, hovering the mouse pointer over the stacked assignments will display a pop up panel to provide additional details.



Entering Time Off

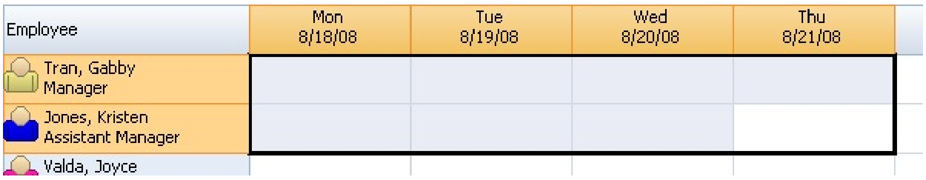
Time off is the scheduled time that occurs when an employee is not or will not be present at work during a normally scheduled work period. When an employee requests a time off and it is approved, you can enter it on the schedule at any time. If there is any overlapping between time off and shift assignments, a red warning flag will be displayed and it is up to you to resolve the conflict. Multiple time off and shift assignments in a single day are allowed. By default, a time off is treated as an all day event and **Snap Schedule** uses the all day duration value you defined for each time off reason for reporting purpose unless you specify a different duration for the time off by changing the Start and Stop times using the Daily view assignment form.

To enter Time Off for an employee while in the Daily view

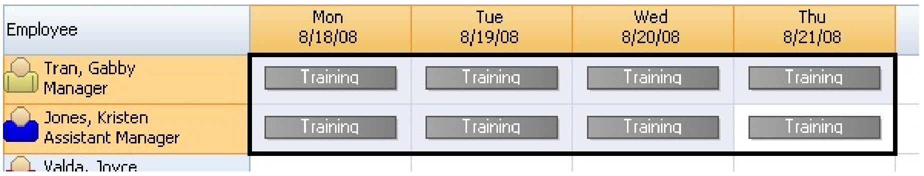
1. On the Daily view, navigate to the desired week using the current view date picker.
2. Drag the desired time off reason from the Time Off tab on the Assignment Pane and drop it into the cell that corresponds to the day and employee.
3. You can also right-click the schedule cell and select the desired time off reason from the right click menu to set the time off. Alternatively, you can double-click the cell that corresponds to the day and employee to open the Daily view assignment form to add the time off. On this form, you can specify start and stop times and add additional notes if so desired.

To enter Time Off for several days at once

1. On the Daily view, navigate to the desired week using the current view date picker.
2. Hold down the left mouse button and drag to select as many dates as you want to schedule. **Snap Schedule** highlights the selected days. You can also use the keyboard to select multiple dates by holding down the **Shift** key and press the **arrow** keys to move around.



3. On the Assignment Pane Time Off tab, click the desired time off reason to select.
4. Click the Set Time Off button and the selected time off will be assigned to the highlighted dates.



Marking an Assignment as On Call

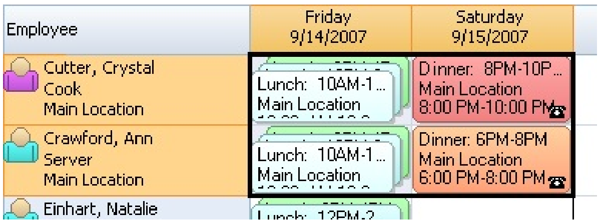
On call shift assignments occur when an employee is instructed by appropriate management to remain available to work during an off-duty period. The employee is required to leave word where he/she may be reached by phone or by electronic signaling device and must be available to return to the work location on short notice to perform the assigned duties. When you mark a shift assignment as on call, the shift duration is not included in the total work hours calculations.

To change a shift assignment's on call status in the Daily view

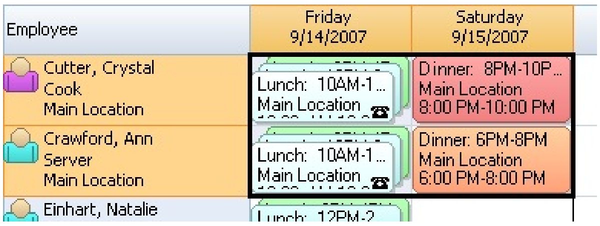
1. In the Daily view, locate the shift assignment that you would like to change its on call status.
2. Right-click the shift assignment and select the **Toggle On Call Status** command from the menu. Alternatively, you can select the **Toggle On Call Status** command from the Shifts drop-down menu on the Ribbon.
3. On call shift assignments will show a black telephone icon at the bottom right corner.

To change on call status for several days at once

1. In the Daily view, navigate to the correct week using the current view date picker.
2. Hold down the left mouse button and drag to select as many dates as you want to schedule. **Snap Schedule** will highlight the selected days. You can also use the keyboard to select multiple dates by holding down the **Shift** key and press the **arrow** keys to move around.

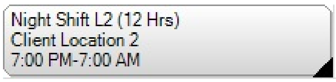


3. Right-click the selected cells and select the **Toggle On Call Status** command from the menu. Alternatively, you can select the **Toggle On Call Status** command from the Shifts drop-down menu on the Ribbon.
4. The on-call status for the selected assignments will be toggled



Adding Shift Assignment Notes

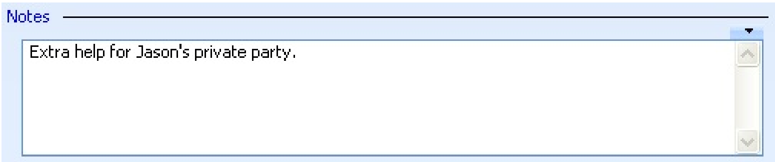
You can optionally record additional information about a shift assignment in the Notes field. Shift assignments with notes will be shown on schedule views with a color triangle at the lower right corner as a visual cue. The default color is black, but you can specify any color for the note marker triangle using the Configure Details Form.



If you have Show Tooltips  enabled, hovering the mouse over the shift assignment will display a pop-up panel to provide additional details.

To add notes to a shift assignment

1. In the Daily view, locate the shift assignment your want to add notes to.
2. Double-click the assignment to open the Daily view assignment form.
3. Enter up to 256 characters in the Notes field to provide additional information regarding this assignment and close the form when done.

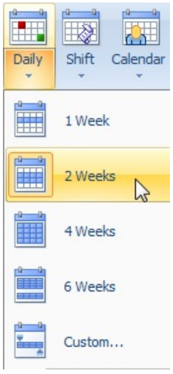


Changing What You See in the By Shift Daily View

The By Shift Daily view presents scheduling information in a spreadsheet-like format that lists each shift down the leftmost column, days across the top, and the Assignment Pane docked to the right side of the window by default. The number of days displayed at the top can be 1, 2, 4, or 6 weeks, or a custom date range, selectable from the drop-down menu. Employees' shift assignments are shown in the cells of the table. Each cell corresponds to a specific shift and date and may contain one or more assignments that can be configured to be shown in cascading or stacked format. Optionally, work hours for each shift are totaled horizontally for all employees assigned to it. The work hours are also totaled vertically each day for all shifts, along with employee assignment and on call head counts. To make an assignment, simply drag an employee from the Assignment Pane and drop it into a cell. Alternatively, you can double-click a cell to bring up a dialog box that lets you quickly add or edit assignments.

You can use the commands in the Display and Filter & Find groups on the Ribbon to filter what to be shown, change the level of details, and hide the various elements to suit your preferences. **Snap Schedule** will remember your settings the next time you log on, even when you log on to a different computer.

Set display date range



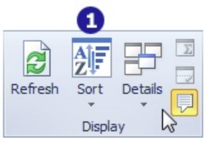
You can select the number of days shown at any one time using the Daily view drop down menu. Pre-set display ranges are 1, 2, 4, and six weeks matching planning periods that are typical for most industries. When your scheduling period is not one of those preset ranges, you can specify the number of days to display (up to 365 days) by clicking **Custom**. Keep in mind that **Snap Schedule** must load and process scheduling data for all days in the display range so the initial response may be slow on long display ranges.

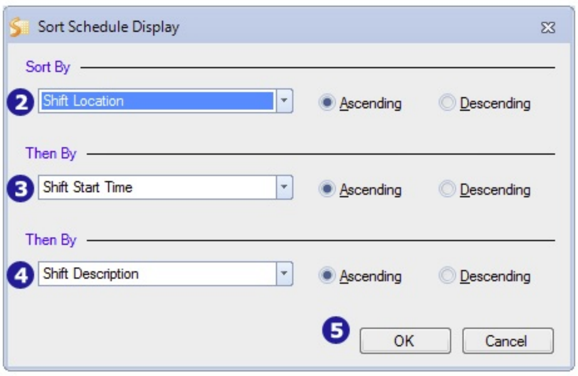
Think of the display range as a moving window over the perpetual scheduling calendar. Each day in the range occupies one column so one or two week ranges may fit entirely on the screen depending on the level of details. A horizontal scroll bar is shown when days in the range could not fit in the available space. You can turn on the schedule view scroll lock to prevent cursor movements beyond the display range and avoid unnecessary loading of data while scheduling within your scheduling period. When the scroll lock is off and the cursor is positioned at the beginning or the end of the display window, you can use the right or left arrow key to move the display window backward or forward one day at a time. **Snap Schedule** will load and refresh the display so the response may be slow on long display ranges.

You can configure the details to be shown on the display including summary totals where **Snap Schedule** automatically sums up the employee head count, work hours, and on call hours vertically for each day and horizontally for each shift over the selected range.

List shifts in a particular order

There are times when you will want the shifts shown on the By Shift Daily view to be sorted or arranged in a particular order. Sorting shifts helps you quickly visualize and understand your schedules better, organize and find what you want, and ultimately make more effective decisions. You might sort and display shifts by more than one criterion. For example, you can first sort by team (group employees in the same team together), then by position (group team members by position), and then sort by name (names in alphabetical order within each position). Note that if you add, delete, or move assignments around, you will need to re-apply the sort command to refresh the display.





1 On the Ribbon, click **Sort** then **Sort Settings** to open the Sort Schedule Display dialog box for entering the sort criteria.

2 Use the drop-down list to select the first sort criterion then check **Descending** if you want to sort in descending alphanumeric order.

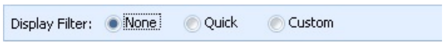
3 Use the drop-down list to select the second sort criterion. Select **None** if you don't want to specify a sort criterion. Check **Descending** if you want to sort in descending alphanumeric order.

4 Use the drop-down list to select the third sort criteria. Select **None** if you don't want to specify a sort criterion. Check **Descending** if you want to sort in descending alphanumeric order.

5 Click **OK** to apply the sort order. The By Shift Daily view will show the shifts (listed in the first column) in the new sort order.

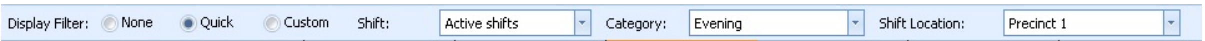
Filter what you don't want to see

When you apply a filter, **Snap Schedule** displays only shifts (rows) that meet the criteria you specify and hides rows that you do not want displayed. Filters are additive, which means that each additional filter is based on the current filter and further reduces the subset of data. You can specify filters using the Filter pane which is displayed at the top of the schedule view.

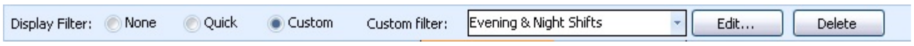


There are three filter choices:

1. None: When this radio button is selected, all shifts defined in the schedule file are shown.
2. Quick: This option presents three drop-down list boxes that you can use to quickly specify filtering criteria. The first, Shift, offers three choices: All shifts, Active shifts only, or Inactive shifts only. Use the second, Category, to show all shifts regardless of categories or only those in the specified category. Use the third, Shift Location, to narrow down to shifts matching the first and second criteria and whose location is as specified. For example, the filters shown below will display only currently active Evening shifts for Precinct 1.



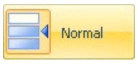
3. Custom: When selected, this option lets you use a custom filter to display only the desired shifts. You can create a new custom filter using the Custom Filter form and save it in the schedule file for future use. This way, you can customize this view to display virtually any combination of shifts. For example, you can define a custom filter to schedule Evening and Night shifts together; or define a custom filter to schedule weekend shifts separately from weekday shifts. For more information on how to define custom filters, refer to the Custom Filter - Shift View form.



Minding the Details

In the By Shift Daily view, an assignment is represented by a rounded corner rectangle whose background color is the same as the color designated for the shift. You can select what additional shift details to be shown on this rectangle using the commands listed on the Details menu. Use the Configure command to change the default values and specify what you want to show on each of the three levels.

This option presents the most details, thus taking up the most real estate. Unless you have changed the default values using the Configure command, the employee name, position, shift location, team, and a color coded icon representing the employee position will be displayed. For example:



This option substitutes abbreviated codes for full descriptions. Unless you have changed the default values using the Configure command, the employee code, position code, location code, and team code will be displayed. For example:

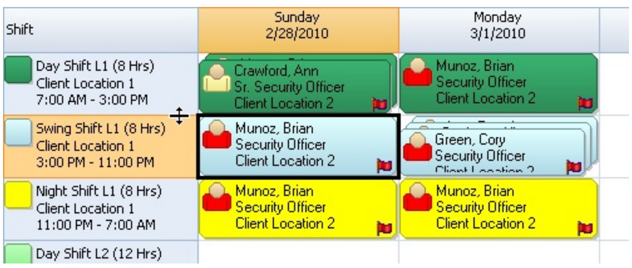
If you would like to have the most assignments shown, select this option. Unless you have changed the default values using the Configure command, the employee code and the team code will be displayed.

Resizing Cells

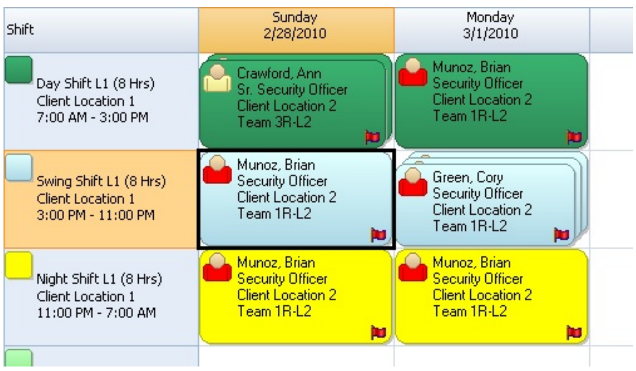
When data in a cell exceeds the width (or height) of a cell, the information may not be completely visible as the cell's contents may be cut off. You can manually resize the rows and columns of the grid to better fit the cell contents. The header column (Shift) and header row can be resized independently of the content columns and content rows.

To resize, place the cursor between columns (or rows) until the resize pointer appears, then hold down the left button of the mouse and drag to resize.

Before



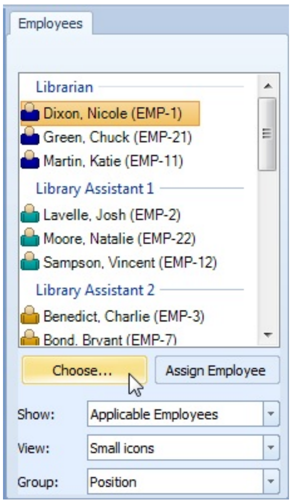
After



Show/hide Shift Summary Hours

Click the Show Summary Hours icon to show the Work Hours column and the summary rows at the bottom of the screen. Click it again to hide the grid.

Show/hide Assignment Pane



By default, the Assignment pane is docked on the right side of the schedule view window. If you prefer to use the right click menu over drag-and-drop scheduling, you can hide the Assignment pane to make more room for displaying shift assignments.

To show the Assignment pane, click the Dialog Box Launcher on the Assignment tab and you will see the **Assignment Pane** docked on the right hand side of the screen.

By default, only applicable employees (i.e. employees who are authorized to work on those shifts shown on the Shift View) will be shown in the assignment pane. This way, you can drag-and-drop an employee onto the desired shift on the schedule view to schedule with confidence that the employee is authorized to work the shift. You can use the Show drop-down menu to show all employees.

The Choose button brings up the Select Employees To Fill A Shift form to help you find the best available employees to fill a shift. You can specify the selection criteria and in a few simple mouse clicks, this tool will display a list of employees with matching criteria for you to choose from.

The View and Group drop-down menus let you change how the list of employees will appear in the assignment pane.

Show/hide tooltips

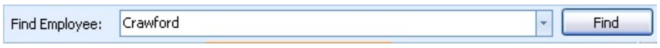
Tooltip is a small text box that appears when a mouse pointer is hovered over a shift or time off assignment to provide details about the assignment. When the mouse is moved away from the icon or button, the tooltip will disappear from view. This is especially useful when you are working with a large number of employees in the four or six weeks display range and want to quickly find the cause of the warning flags, see the detailed description, assignment reason, or attached notes.

By default, **Snap Schedule** will display tooltips as indicated by the Show Tooltips button being highlighted, until you turn it off. To disable tooltips, click the highlighted button. Note that you can independently enable or disable tooltips for each of the schedule views.

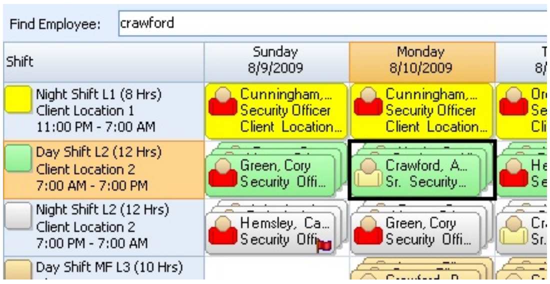
Finding a particular employee

You can quickly locate an employee's assignment in the display range (not all assignments in the schedule file) using the Find command. To find an employee:

1. Click the Find button Find to show the Find pane at the top of the By Shift Daily view window.



2. Type the employee name into the text box and click Find.
3. If found, the employee will be highlighted as shown below.



Adding Shift Assignments

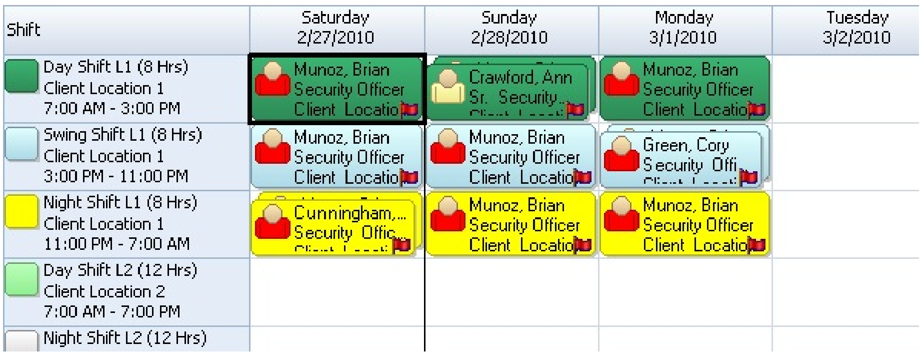
To assign an employee to a shift while in the By Shift Daily View

1. In the By Shift Daily view, navigate to the date you want to schedule using the current view date picker.
2. Drag the desired employee from the Assignment Pane and drop the employee into a cell that corresponds to the day and the shift you want to assign. You can have multiple employees assigned to a cell but they may not be all visible due to cell space limitation. Hovering the mouse pointer over a cell will show a pop up window that lists all assignments contained in the cell.
3. You can also right-click an empty cell that corresponds to the day and the shift you want and use the [Select Employee for the Shift] command to make an assignment. Alternatively, you can double-click the empty cell to open the Daily view assignment form to add shift assignments. On this form, you can specify a shift assignment reason and add additional notes if so desired.

To assign an employee to several shifts and/or days at once

1. On the By Shift Daily view, navigate to the desired date using the current view date picker.
2. Hold down the left mouse button and drag to select as many shifts and days as you want to schedule. **Snap Schedule** will highlight the selected cells. You can also use the keyboard to select multiple cells by holding down the **Shift** key and press the **arrow** keys to move around.

3. On the Assignment pane, click the desired employee to select.
4. Click the Assign Employee button and the selected employee will be assigned to the highlighted cells. Note that newly assigned employees may be hidden behind existing ones in a stacked format.



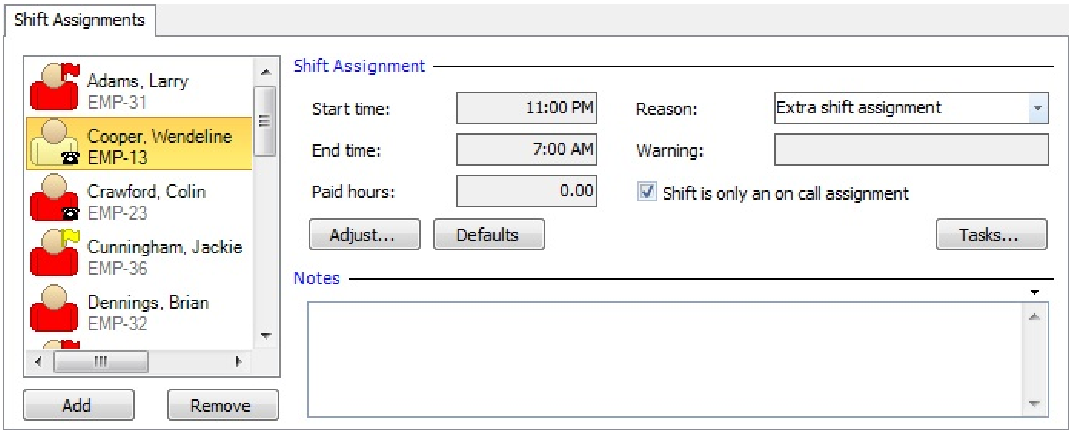
Marking an Assignment as On Call

On call shift assignments occur when an employee is instructed by appropriate management to remain available to work during an off-duty period. The employee is required to leave word where he/she may be reached by phone or by electronic signaling device and must be available to return to the work location on short notice to perform the assigned duties. When you mark a shift assignment as on call, the shift duration is not included in the total work hours calculations.

To change a shift assignment's on call status in the By Shift Daily view

1. Locate the shift assignment that you would like to change its on call status. If the shift assignment is hidden, locate the cell that corresponds to the desired date and shift.

2. Double-click the cell to bring up the By Shift Daily view assignment form. On this form, locate the employee who should be on call and check the **Shift is only an on call assignment** box to set the assignment status to on call.



Changing What You See in the Shift View

When you first start **Snap Schedule** , the Shift view is shown using the default layout and settings. In this layout, the display range is one day with each shift within that day occupies one column and each employee assigned to the shift is shown in a cell under the column header. The Assignment Pane is docked to the right side of the window and the coverage requirements grid (required personnel, assigned, and variance counts) are shown at the bottom.

You can use the commands in the Display and Filter & Find groups on the Ribbon to filter what to be shown, change the level of details, and hide the various elements to suit your preferences. **Snap Schedule** will remember your settings the next time you log on, even when you log on to a different computer.

Set display date range

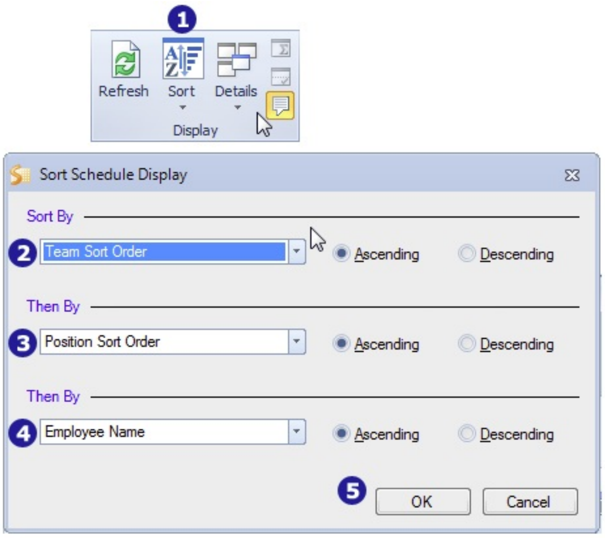
You can select the number of days shown at any one time using the Shift view drop down menu. Pre-set display ranges are 1 day, 1 week, and 2 weeks, matching planning periods that are typical for most industries. When your scheduling period is not one of those preset ranges, you can specify the number of days to display (up to 365 days) by clicking **Custom**. Keep in mind that **Snap Schedule** must load and process scheduling data for all days in the display range so the initial response may be slow on long display ranges.

Think of the display range as a moving window over the perpetual scheduling calendar. Each shift occupies one column so one or two week ranges may fit entirely on the screen depending on the level of details. Shifts within the same day are bordered by two black vertical lines. A horizontal scroll bar is shown when days in the range could not fit in the available space. You can turn on the schedule view scroll lock to prevent cursor movements beyond the display range and avoid unnecessary loading of data while scheduling within your scheduling period. When the scroll lock is off and the cursor is positioned at the beginning or the end of the display window, you can use the right or left arrow key to move the display window backward or forward one day at a time. **Snap Schedule** will load and refresh the display so the response may be slow on long display ranges.

You can configure the details to be shown on the display by clicking the **Details** button on the Ribbon.

List assignments in a particular order

There are times when you will want the employee shift assignments shown on the Shift view to be sorted, or arranged in a particular order. Sorting employee assignments helps you quickly visualize and understand your schedules better, organize and find what you want, and ultimately make more effective decisions. You might sort and display employees by more than one criterion. For example, you can first sort by team (to group employees in the same team together), then by position (to group team members by position), and then sort by name (to put the names in alphabetical order within each position). Note that if you add, delete, or move assignments around, you will need to re-apply the sort command to refresh the display.



1. On the Ribbon, click **Sort** then **Sort Settings** to open the Sort Schedule Display dialog box for entering the sort criteria.

2. Use the drop-down list to select the first sort criterion, then check **Descending** if you want to sort in descending alphanumeric order.

3. Use the drop-down list to select the second sort criterion. Select **None** if you don't want to specify a sort criterion. Check **Descending** if you want to sort in descending alphanumeric order.

4. Use the drop-down list to select the third sort criterion. Select **None** if you don't want to specify a sort criterion. Check **Descending** if you want to sort in descending alphanumeric order.

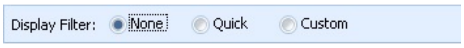
5. Click **OK** to apply the sort order. The Shift view will show assignments in the new sort order.

As you move or delete assignments, empty slots may be created. You can use the Remove Blank Cell command to eliminate interspersed blank cells and pack assignments together.

Similarly, you can use the On Calls to Bottom  command to move all on call shift assignments to the bottom of their respective columns.

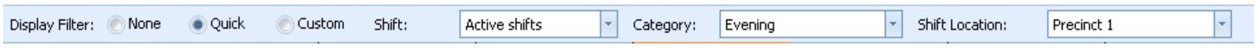
Filter what you don't want to see

When you apply a filter, **Snap Schedule** displays only shifts (columns) that meet the criteria you specify and hides columns that you do not want displayed. Filters are additive, which means that each additional filter is based on the current filter and further reduces the subset of data. You can specify filters using the Filter pane which is displayed at the top of the Shift schedule view.

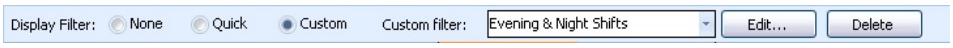


There are three filter choices:

1. None: When this radio button is selected, all shifts defined in the schedule file are shown.
2. Quick: This option presents three drop-down list boxes that you can use to quickly specify filtering criteria. The first, Shift, offers three choices: All shifts, Active shifts only, or Inactive shifts only. Use the second, Category, to show all shifts regardless of categories or only those in the specified category. Use the third, Shift Location, to narrow down to shifts matching the first and second criteria and whose location is as specified. For example, the filters shown below will display only currently active Evening shifts for Precinct 1.



3. Custom: When selected, this option lets you use a custom filter to display shifts on the Shift view. You can create a new custom filter using the Custom Filter form and save it in the schedule file for future use. This way, you can customize the Shift view to display virtually any combination of shifts. For example, you could define a custom filter to schedule Evening and Night shifts together; or define a custom filter to schedule weekend shifts separately from weekday shifts. For more information on how to define custom filters, refer to the Custom Filter - Shift View form.



Minding the Details

On the Shift view, an assignment is represented by a rounded corner rectangle whose background color is the same as the color designated for the shift. You can select what additional shift details to be shown on this rectangle using the commands listed on the Details menu. Use the Configure command to change the default values and specify what you want to show on each of the three levels.

This option presents the most details, thus taking up the most real estate. Unless you have changed the default values using the Configure command, the employee name, position, shift location, team, and a color coded icon representing the employee position will be displayed. For example:

This option substitutes abbreviated codes for full descriptions. Unless you have changed the default values using the Configure command, the employee code, position code, location code, and team code will be displayed. For example:

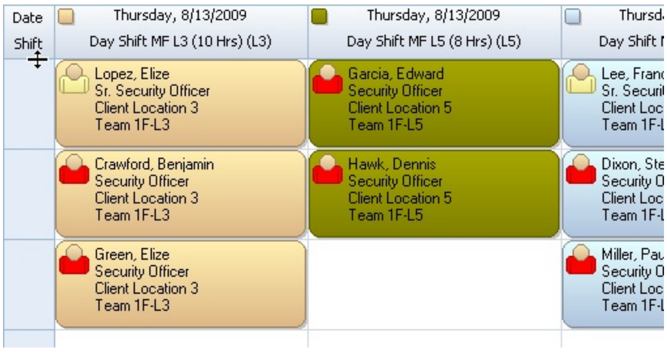
If you would like to have the most assignments shown, select this option. Unless you have changed the default values using the Configure command, the employee code and the team code will be displayed.

Resizing Cells

When data in a cell exceeds the width (or height) of a cell, the information may not be completely visible as cell's contents may be cut off. You can manually resize the rows and columns of the grid to better fit the cell contents. The header column (Date/Shift) and header row can be resized independently of the content columns and content rows.

To resize, place the cursor between columns (or rows) until the resize pointer appears then hold down the left button on the mouse and drag to resize.

Before **After**

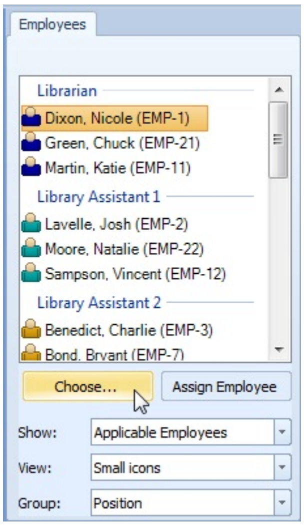


Show/hide Shift Coverage Planner

Click the Shift Coverage Planner icon to show the Shift Coverage Planner grid at the bottom of the screen. The required personnel, assigned, and variance counts are shown by shift and by position. Click it again to hide the grid.

the grid.

Show/Hide Assignment Pane



By default, the Assignment pane is docked on the right side of the schedule view window. If you prefer to use the right click menu over drag-and-drop scheduling, you can hide the Assignment pane to make more room for displaying shift assignments.

To show the Assignment pane, click the Dialog Box Launcher on the Assignment tab and you will see the **Assignment Pane** docked on the right hand side of the screen.

By default, only applicable employees (i.e. employees who are authorized to work on those shifts shown on the Shift View) will be shown in the assignment pane. This way, you can drag-and-drop an employee into the desired shift on the schedule view to schedule with confidence that the employee is authorized to work the shift. You can use the Show drop-down menu to show all employees.

The Choose button brings up the Select Employees To Fill A Shift form to help you find the best available employees to fill a shift. You can specify the selection criteria and in a few simple mouse clicks, this tool will display a list of employees with matching criteria for you to choose from.

The View and Group drop-down menus let you change how the list of employees will appear in the assignment pane.

Show/hide tooltips

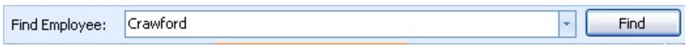
Tooltip is a small text box that appears when a mouse pointer is hovered over a shift or time off assignment to provide details about the assignment. When the mouse is moved away from the icon or button, the tooltip will disappear from view. This is especially useful when you are working with a large number of employees in the four or six weeks display range and want to quickly find the cause of the warning flags, see the detailed description, assignment reason, or attached notes.

By default, **Snap Schedule** will display tooltips as indicated by the Show Tooltips button being highlighted. until you turn it off. To disable, click the highlighted button. Note that you can independently enable or disable tooltips for each of the schedule views.

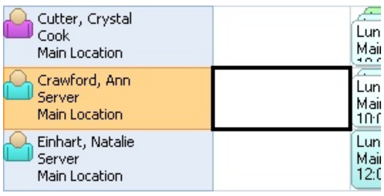
Finding a particular employee

You can quickly locate an employee's assignment in the display range (not all assignments in the schedule file) using the Find command. To find an employee:

1. Click the Find button Find to show the Find pane at the top of the Shift view window.



2. Type the employee name into the text box and click Find.
3. If found, the employee will be highlighted as shown below.



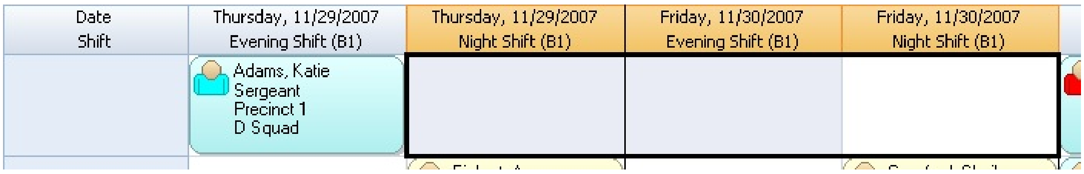
Adding Shift Assignments

To assign an employee to a shift

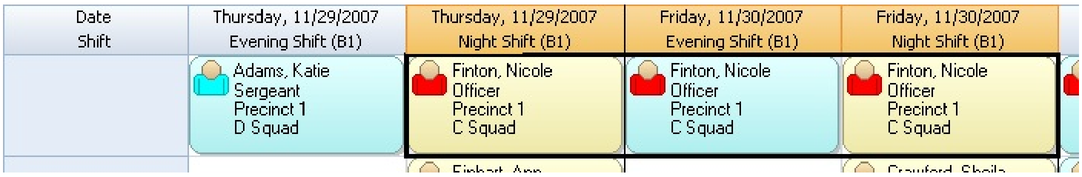
1. On the Shift view, navigate to the date you want to schedule using the current view date picker.
2. Drag the desired employee from the Assignment Pane and drop it into an empty cell that corresponds to the day and the shift you want to assign.
3. You can also right-click an empty cell that corresponds to the day and the shift you want and use the Select Employee for the Shift command to make an assignment. Alternatively, you can double-click the empty cell to open the Shift view assignment form to add shift assignments. On this form, you can specify a shift assignment reason and add additional notes if so desired.

To assign an employee to several shifts at once

1. On the Shift view, navigate to the desired date using the current view date picker.
2. Hold down the **Shift** key and drag the mouse to select as many shifts as you want to schedule. **Snap Schedule** will highlight the selected cells. You can use the keyboard to select multiple dates by holding down the **Shift** key and press the **arrow** keys to move around.



3. On the Assignment pane, click the desired employee to select.
4. Click the Assign Employee button and the selected employee will be assigned to the highlighted cells.

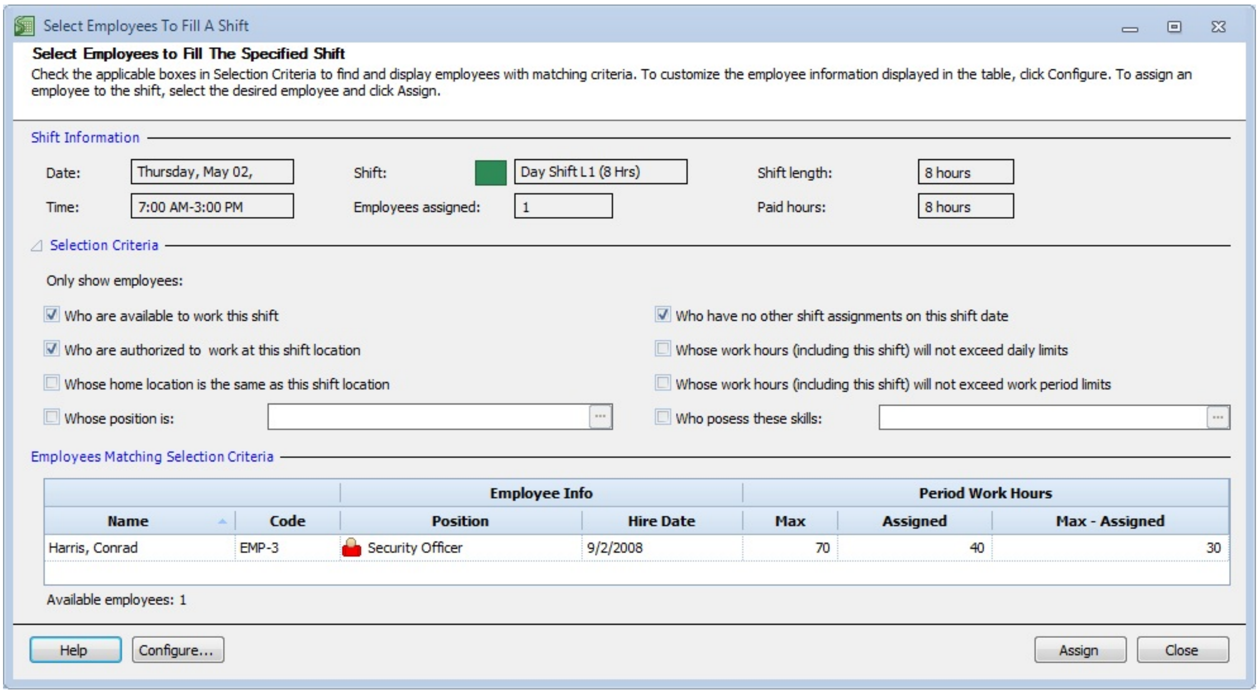


Selecting the Right Employee for the Shift

With **Snap Schedule**, choosing the right employee for the shift is easy with the Select Employees To Fill A Shift tool. You can specify the attributes you are looking for in a few simple mouse clicks and this tool will display a list of qualified employees for you to choose from.

To use this feature

1. On the Shift view, right-click an empty cell that corresponds to the day and the shift you want to fill.
2. From the right-click menu, click **Select an Employee for the Shift**. Alternatively, you can click the **Choose** button on the Employees pane.
3. The Select Employees to Fill The Specified Shift form is displayed.
4. Check the applicable boxed in the Selection Criteria section to specify the conditions you are looking for. If the check boxes are hidden, click the icon to expand the section.
5. Employees with matching criteria are displayed in a table under the Employees Matching Selection Criteria section, along with pertinent employee information to help you select the most qualified, cost effective candidates . To customize the data columns, click **Configure**. You can change the sort order of the list at any time by clicking the heading of the column you want to sort by. The small arrow indicates ascending or descending order for the column. Note that columns are re-sizable.
6. To assign an employee to the shift, select the desired employee and click **Assign**. Repeat this step to assign multiple employees to the shift. Click **Close** when done.



Shift Information Section

This section provides information on the shift you are trying to fill.

Selection Criteria Section

This section can be expanded or collapsed by clicking the icon. Use the controls in this section to specify the search conditions for the employees you are looking for to fill the shift. The selection criteria are described below.:

Who are available to work this shift. If checked, only employees whose availability schedules, as defined in the employee records, do not conflict with the shift will be included in the list.

Who are authorized to work at this location. If checked, only employees who are authorized to work at the location defined in the shift will be included in the list.

Whose home location is the same as this shift location. If checked, only employees whose home location is the same as the location defined in the shift will be included in the list.

Who have no other shift assignments on this date. If checked, only employees who currently have no shift assignments scheduled for the selected date will be included in the list.

Whose work hours (including this shift) will not exceed daily limits. If checked, only employees whose hours assigned for the selected date do not exceed the maximum work hours per day, as defined in the employee records, will be included in the list.

Whose work hours (including this shift) will not exceed work period limits. If checked, only employees whose hours assigned for the work period do not exceed the maximum work hours per work period, as defined in the employee records, will be included in the list.

Whose position is. Use this filter criterion to include only employees with the specified positions. Click the icon to add or remove positions.

Who have these skills. Use this filter criterion to narrow the list to show only those employees who meet the skills requirements. Click on the icon to add or remove skills.

Employees Matching Selection Criteria Section

This section shows eligible employees who match your selection criteria. You can configure additional data columns to be shown in this table by clicking the **Configure** button.

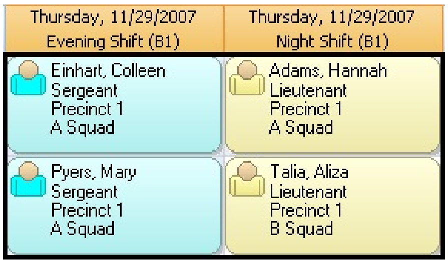
Marking a Shift Assignment as On Call

To change a shift assignment's on call status

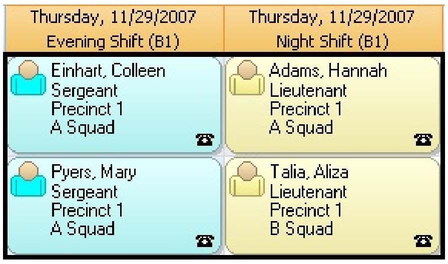
1. In the Shift view, locate the assignment that you would like to change its on call status.
2. Right-click the shift assignment and select the **Toggle On Call Status** command from the menu. Alternatively, you can select the **Toggle On Call Status** command from the **Shifts** drop-down menu on the Ribbon.
3. On call shift assignments will show a black telephone icon at the bottom right corner.

To change on call status for multiple assignments

1. In the Shift view, navigate to the assignments.
2. Hold down the left mouse button and drag to select assignments. **Snap Schedule** will highlight the selected cells. You can also use the keyboard to select multiple dates by holding down the **Shift** key and press the **arrow** keys to move around.



3. Right-click the selected cells and select the **Toggle On Call Status** command from the menu. Alternatively, you can select the **Toggle On Call Status** command from the Shifts drop-down menu on the Ribbon.
4. The on-call status for the selected assignments will be toggled

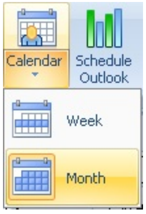


Changing What You See in the Calendar View

The Calendar view presents work and time off assignments for each employee similar to a weekly calendar or monthly planner. You can choose to show a one week or one month calendar. In this view, a list of employees is shown on the left column and the schedule of the selected employee is shown in a calendar in the contents area. The Assignment Pane is docked to the right side of the window by default. To make an assignment, you can simply drag a shift from the Assignment Pane and drop it into a cell. Alternatively, you can double-click a cell to bring up a dialog box that lets you quickly add or edit an assignment.

You can use the commands in the Display and Filter & Find groups on the Ribbon to filter what to be shown, change the level of details, and hide the various elements to suit your preferences. **Snap Schedule** will remember your settings the next time you log on, even when you log on to a different computer.

Set display date range and format



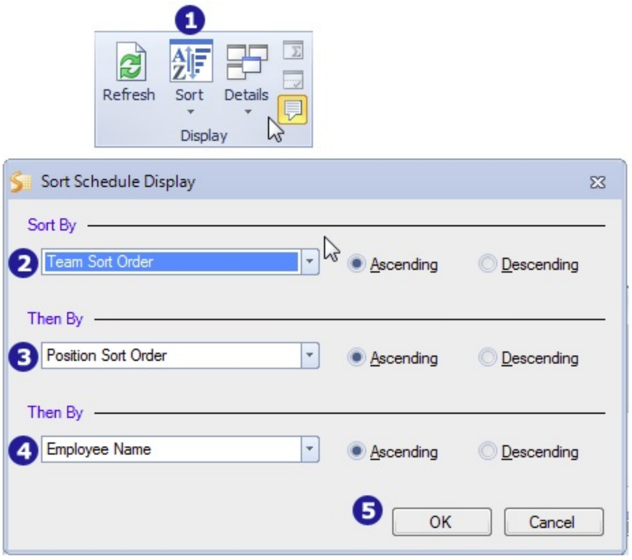
You can select the number of days shown at any one time using the Calendar view drop-down menu. Available display ranges are 1 week and 1 month.

Selecting Week will display assignments in a weekly calendar format.

Selecting Month will display assignments in a monthly calendar format.

List employees in a particular order

There are times when you will want the employee information in the Calendar view to be sorted, or arranged in a particular order. Sorting employees and their assignments helps you quickly visualize and understand your schedules better, organize and find what you want, and ultimately make more effective decisions. You might sort and display employees by more than one criterion. For example, you can first sort by team (to group employees in the same team together), then by position (to group team members by position), and then sort by name (to put the names in alphabetical order within each position).



1. On the Ribbon, click **Sort** then **Sort Settings** to open the Sort Schedule Display dialog box for entering sort criteria.

2. Use the drop-down list to select the first sort criterion then check **Descending** if you want to sort in descending alphanumeric order.

3. Use the drop-down list to select the second sort criterion. Select **None** if you don't want to specify a sort criterion. Check **Descending** if you want to sort in descending alphanumeric order.

4. Use the drop-down list to select the third sort criterion. Select **None** if you don't want to specify a sort criterion. Check **Descending** if you want to sort in descending alphanumeric order.

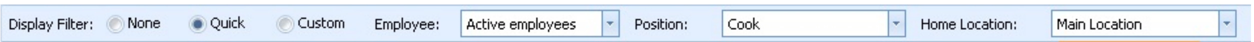
5. Click **OK** to apply the sort order. The Calendar view will show the list of employees and their schedules in the new sort order.

Filter what you don't want to see

When you apply a filter, **Snap Schedule** displays only employee rows that meet the criteria you specify and hides rows that you do not want displayed. Filters are additive, which means that each additional filter is based on the current filter and further reduces the subset of data. You can specify filters using the Filter pane which is displayed at the top of the Calendar schedule view.

There are three filter choices:

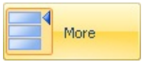
1. None: When this radio button is selected, all employees defined in the schedule file are shown.
2. Quick: This option presents three drop down list boxes that you can use to quickly specify filtering criteria. The first, Employee, offers three choices: All employees, Active employees only, or Inactive employees only. Use the second, Position, to show all employees regardless of position or employees who hold a specified position. Use the third, Home Location, to narrow down to employees matching the first and second criteria and whose home location is as specified. For example, the filters shown below will display only employees who are currently active and whose position is a cook and whose home location is the Main Location.



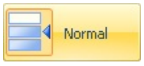
3. Custom: When selected, this option lets you use a custom filter to display employees in the Calendar view. You can create a new custom filter using the Custom Filter form and save it in the schedule file for future use. This way, you can customize the Calendar view to display virtually any combination of employees. For example, if you prefer to schedule employees by team, define a custom filter for each team; or define a custom filter to show schedules of employees who possess certain skills, etc. For more information on how to define custom filters, refer to the Custom Filter form.

Minding the Details

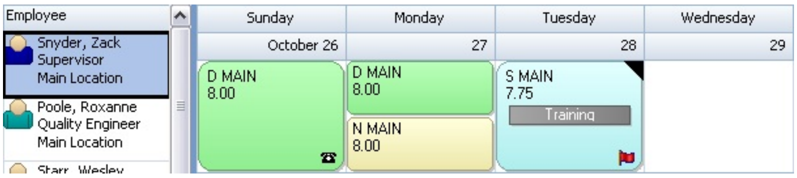
In the Calendar view, a shift assignment is represented by a rounded corner rectangle whose background color is the same as the color designated for the shift. You can select what additional shift details to be shown on this rectangle using the commands listed on the Details menu. Use the Configure command to change the default values and specify what you want to show on each of the three levels.



This option presents the maximum level of details. By default, the shift description, location, and shift start and stop times will be displayed. Multiple shift assignments on a single day are shown stacked. For each employee cell, the employee name, position, home location and a color coded icon representing the employee position will be displayed. For example:



This option presents the medium level of details. By default, the shift code, location code, and shift duration in hours will be displayed. For example:



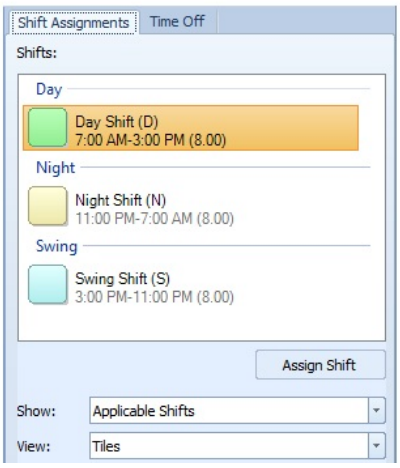
This option presents the minimum level of details. By default, only the shift code and the location code will be displayed. For example:

Show/Hide Assignment Pane

By default, the Assignment pane is docked on the right side of the schedule view window. If you prefer to use the right click menu over drag-and-drop scheduling, you can hide the Assignment pane to make more room for displaying shift assignments.

To show the Assignment pane, click the Dialog Box Launcher on the Assignment command group and you will see the **Assignment Pane** docked on the right hand side of the screen. Use the Shift Assignments tab and the Time Off tab to assign shifts and time off absences to employees.

By default, only applicable shifts, i.e. shifts employees listed on the



schedule view are allowed to perform, will be shown on the Shift Assignment tab. You can use the Show drop-down menu to show all shifts.

The Time Off tab shows all time off reasons you have defined. The View drop-down menus lets you change how the list of shifts or time off reasons will appear on the assignment pane.

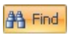
Show/hide tooltips

Tooltip is a small text box that appears when a mouse pointer is hovered over a shift or time off assignment to provide details about the assignment. When the mouse is moved away from the icon or button, the tooltip will disappear from view.

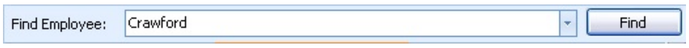
By default, **Snap Schedule** will display tooltips as indicated by the Show Tooltips  button being highlighted. until you turn it off. To disable, click the highlighted button. Note that you can independently enable or disable tooltips for each of the schedule views.

Finding a particular employee

You can quickly locate an employee's assignment in the display range (not all assignments in the schedule file) using the Find command. To find an employee:

1. Click the Find button 

 to show the Find pane at the top of the Calendar view window.



2. Type the employee name or the search string into the text box and click Find.
3. If found, the employee will be highlighted.

Assigning Shifts to Employees

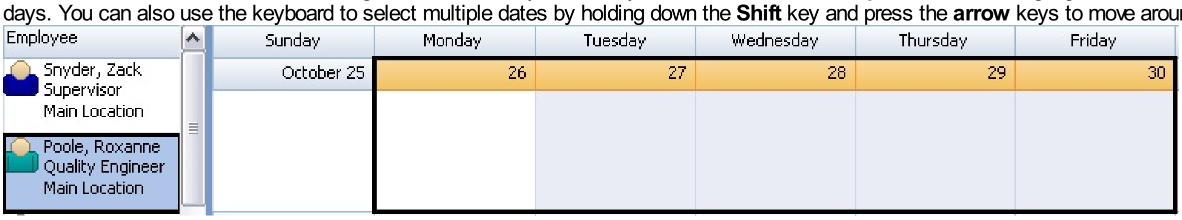
Each employee's daily assignments are shown in the cell under the day the employee is scheduled to work. Multiple shift assignments in a single day are allowed and they are shown in stacked format. To make an assignment, simply drag a shift or time off from the Assignment Pane and drop it into a cell. Alternatively, you can double-click a cell to bring up a dialog box that lets you quickly add or edit an assignment.

To assign a shift to an employee

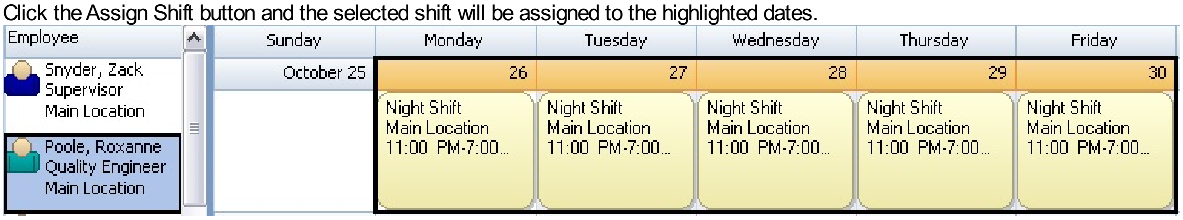
1. In the Calendar view, navigate to the desired week or month using the current view date picker.
2. Drag the desired shift from the Shift Assignments tab on the Assignment Pane and drop it into the cell that corresponds to the desired day and employee.
3. You can also right-click the schedule cell and select the desired shift from the right click menu to assign the shift. Note that the right-click drop-down menu only shows those shifts the employee is authorized to perform, Alternatively, you can double-click the cell that corresponds to the desired day and employee to open the Daily view assignment form to add shift assignments. On this form, you can specify a shift assignment reason and add additional notes if so desired.

To assign a shift to an employee for several days at once

1. In the Calendar view, navigate to the desired week using the current view date picker.
2. Hold down the left mouse button and drag to select as many dates as you want to schedule. **Snap Schedule** will highlight the selected days. You can also use the keyboard to select multiple dates by holding down the **Shift** key and press the **arrow** keys to move around.



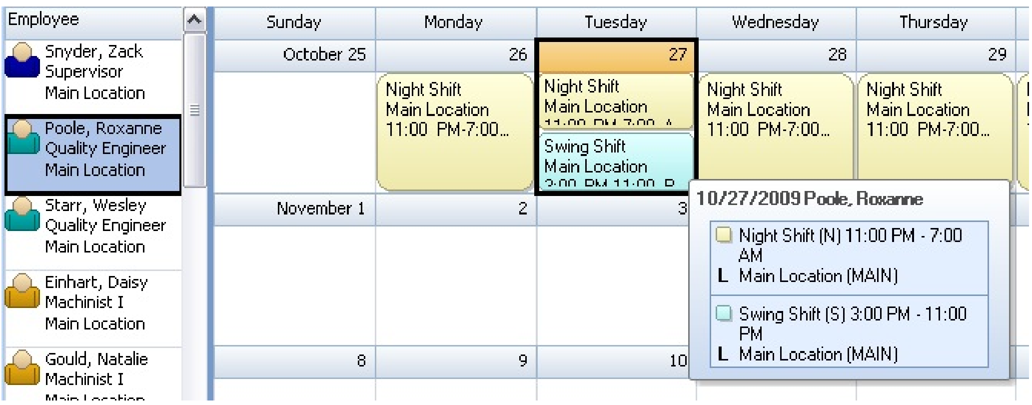
3. On the Shift Assignment tab, click the desired shift to select.
4. Click the Assign Shift button and the selected shift will be assigned to the highlighted dates.



To schedule multiple shifts on the same day

Snap Schedule allows you to schedule split shifts and multiple assignments to an employee on the same day. Multiple shifts are shown on the Calendar view in stacked format. If there are any overlapping shift assignments, a red warning flag will be displayed and it is up to you to resolve the conflict.

1. In the Calendar view, navigate to the desired week using the current view date picker.
2. Drag the desired shift from the Shift Assignments tab on the Assignment Pane and drop it into the cell that corresponds to the desired day and employee.
3. Repeat the previous step to assign the remaining shifts.
4. The resulting shift assignments are shown in stacked format. If you have Show Tooltips enabled, hovering the mouse pointer over the stacked assignments will display a pop up panel to provide additional details.



Entering Time Off

Time off is the scheduled time that occurs when an employee is not or will not be present at work during a normally scheduled work period. When an employee requests a time off and it is approved, you can enter it on the schedule at any time. If there is any overlapping between time off and shift assignments, a warning flag will be displayed and it is up to you to resolve the conflict. Multiple time off and shift assignments in a single day are allowed. By default, a time off is treated as an all day event and **Snap Schedule** uses the all day duration value you defined for each time off reason for reporting purpose unless you specify a different duration for the time off by changing the Start and Stop times using the Daily view assignment form.

To enter Time Off for an employee while in the Calendar view

1. In the Calendar view, navigate to the desired week or month using the current view date picker.
2. Drag the desired time off reason from the Time Off tab on the Assignment Pane and drop it into the cell that corresponds to the day and employee.
3. You can also right-click the schedule cell and select the desired time off reason from the right click menu to set the time off. Alternatively, you can double-click the cell that corresponds to the day and employee to open the Daily view assignment form to add the time off. On this form, you can specify start and stop times and add additional notes if so desired.

To enter Time Off for several days at once

1. In the Calendar view, navigate to the desired week using the current view date picker.
2. Hold down the left mouse button and drag to select as many dates as you want to schedule. **Snap Schedule** highlights the selected days. You can also use the keyboard to select multiple dates by holding down the **Shift** key and press the **arrow** keys to move around.

3. On the Assignment Pane Time Off tab, click the desired time off reason to select.
4. Click the Set Time Off button and the selected time off will be assigned to the highlighted dates.

Marking an Assignment as On Call

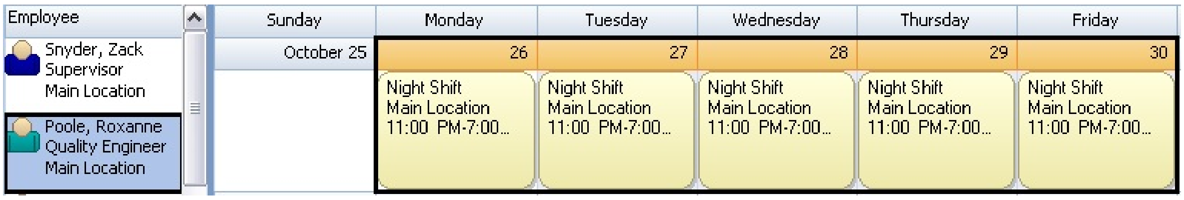
On call shift assignments occur when an employee is instructed by appropriate management to remain available to work during an off-duty period. The employee is required to leave word where he/she may be reached by phone or by electronic signaling device and must be available to return to the work location on short notice to perform the assigned duties. When you mark a shift assignment as on call, the shift duration is not included in the total work hours calculations.

To change a shift assignment's on call status

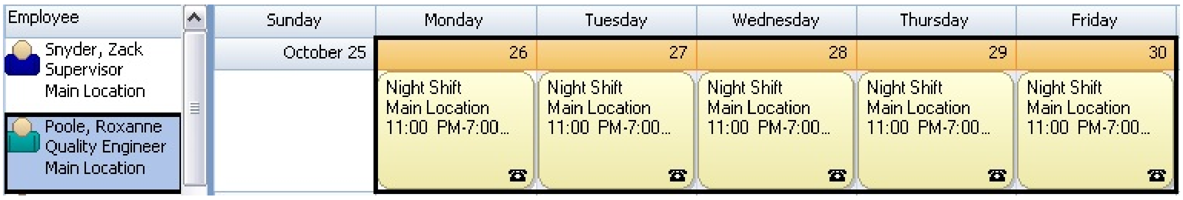
1. In the Calendar view, locate the shift assignment that you would like to change its on call status.
2. Right-click the shift assignment and select the **Toggle On Call Status** command from the menu. Alternatively, you can select the **Toggle On Call Status** command from the Shifts drop-down menu on the Ribbon.
3. On call shift assignments will show a black telephone icon at the bottom right corner.

To change on call status for several days at once

1. In the Calendar view, navigate to the correct week using the current view date picker.
2. Hold down the left mouse button and drag to select as many dates as you want to schedule. **Snap Schedule** will highlight the selected days. You can also use the keyboard to select multiple dates by holding down the **Shift** key and press the **arrow** keys to move around.



3. Right-click the selected cells and select the **Toggle On Call Status** command from the menu. Alternatively, you can select the **Toggle On Call Status** command from the Shifts drop-down menu on the Ribbon.
4. The on-call status for the selected assignments will be toggled.



About Task Scheduling

In addition to shift scheduling, **Snap Schedule** lets you schedule tasks within an employee's shift. You can accomplish this by first assigning a shift to an employee, then schedule the employee to perform various tasks during the shift. Tasks can be of any duration and can be assigned to an employee through the same simple drag/drop operations while in the Task View.

Let's walk through a simple example to illustrate the concept. Suppose you are running a public library that opens from 10 am to 8 pm every day except Sunday. You employ full-time and part-time librarians who are assigned to various desks (tasks) at different times during the day. To maintain customer service levels during busy hours, you also would like to schedule when your staff can take lunch and breaks. You and your staff need to know in advance the date and time each employee is scheduled to work and the tasks each employee will be performing. Your daily schedules must document hour by hour what task or service point the staff member is responsible for. Follow these simple steps to schedule your employees:

- Create a new schedule file and the Wizard will guide you through the steps of entering shifts, time off reasons, employee information,and tasks. For simplicity, you can use one 10-hour shift to cover the entire library business day from 10 am to 8 pm and adjust the start time and end time of individual shift assignments for part-timers or employees who are not working the full 10-hour shift. The tasks may include breaks or duties such as cataloging, bibliographic checking, serials processing, reference desks, etc. While defining tasks, you can define who are authorized to perform each task. **Snap Schedule** will alert you when an employee is assigned a task he or she is not authorized to perform.
- In the Shift view, select the date and shift to schedule and simply drag-and-drop employees to make shift assignments and adjust the shift assignment start time and end time as required. This is the first step in the two-step scheduling process, and it gives you the date and time each employee is scheduled to work. Use the coverage planner at the bottom of the screen to determine if you have adequate skill and position coverage.
- Click the Task button on the Ribbon to complete the second step of assigning tasks to each employee's shift. This Task view shows all employees that have been assigned to work on the selected shifts for the currently selected date. Simply drag-and-drop tasks to assign tasks to employees while they are on duty. You can move, adjust start/end times, copy and paste assignments while in the Task view. As you make task assignments, **Snap Schedule** will sum up and display shift and task hours for each employee and alert you of any conflicts.
- There are many ways you can view and distribute schedules that include task assignments. You can print what you see on the Daily, Shift, and Task views or you can use reports. If you prefer to hand out weekly task assignments to each employee, you can use the Configure command and select the option to display the task list in the Calendar view. You can then print the monthly or weekly Calendar view or the Daily Task Assignments report to publish the employee task assignments for each shift, organized by date for each day in the report date range. You can also run the Task Assignment Details by Employee and Task Assignment Summary by Employee reports to track detailed and summary task assignment data for each employee. The Task Hours by Employee Position report provides a breakdown of task hours performed by each job position over a specific time period.

Changing What You See in the Task View

The Task view presents tasks assignments for each employee working on the selected shifts. It is a graphical representation of the timing and duration of the various tasks an employee is scheduled to perform within a given shift. You can select the date and the shift to view using the current view date picker and the Shift drop-down list.

The Task view lists each employee down the leftmost column, time blocks across the top, the Employee Count Graph at the bottom, and the Assignment Pane docked to the right side of the window. The number of time blocks displayed across the top will vary depending on the selected time interval. Since the start and end times for individual employee shift assignments may be adjusted from the default shift start and end times, the overall time window starts with the earliest shift assignment start time and ends with the latest shift assignment end time so that all employee shift assignments will be visible. For each employee, Snap Schedule draws a solid color shift bar representing the shift and its start and end time. The cross hatched areas indicate the time periods that the employee is not scheduled to work. Tasks assigned to an employee are shown on the shift bar as color coded horizontal blocks, each one represents a specific task that begins and ends as indicated. The task and shift hours scheduled for each employee are automatically updated and shown in the rightmost column.

The Employee Count Graph shows the total number of employees scheduled for each time block. You can use the **Configure** button to select the tasks to be included in the employee count and to hide those tasks that are excluded from the task view. To find the number of employees assigned to a specific time block, hover the mouse over the line graph and the time and count display on the right side will be automatically updated.

To make a task assignment, you can simply drag a task from the Assignment Pane and drop it onto the desired employee's time bar. Alternatively, you can double-click a cell to bring up a dialog box that lets you quickly add or edit an assignment.

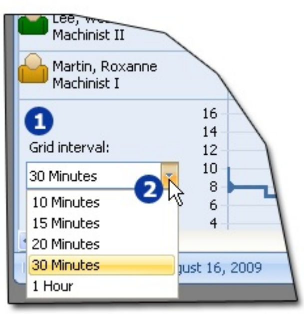
You can use the commands in the Display and Filter & Find groups on the Ribbon to filter what to be shown, change the level of details, and hide the various elements to suit your preferences. Your new settings will remain in effect until you exit **Snap Schedule**.

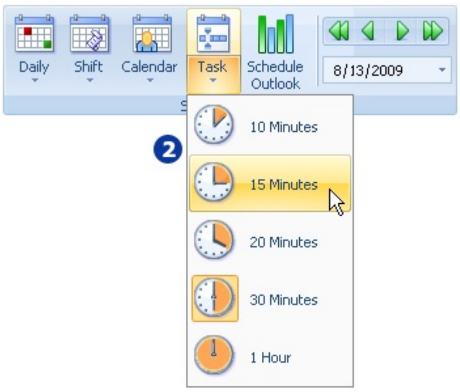
Select the date to view

By default, tasks assigned to all shifts on the currently selected date will be displayed. To select a new date to view, on the Ribbon, use the Date Adjustment Control to move the date forward or back by one day or one week or click the drop down icon to select a specific date on the Date Picker.

Changing the time scale

To change the display time scale:



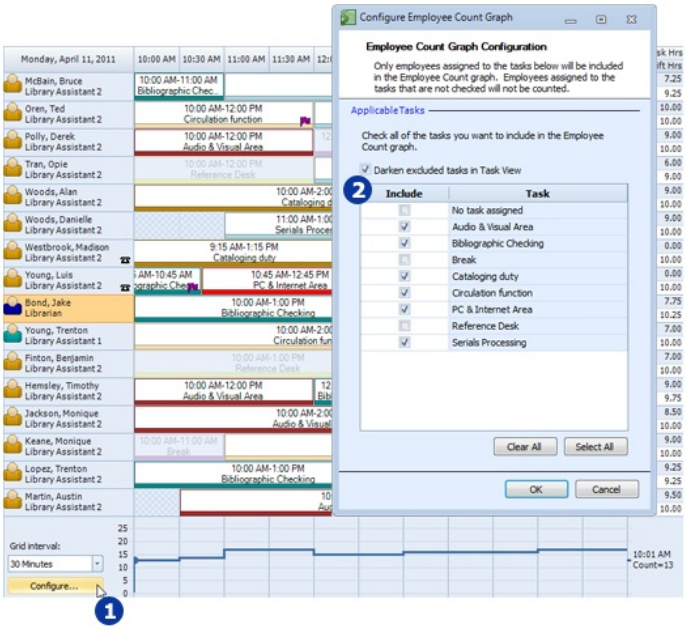


1. Locate the Grid interval drop-down list at the lower left corner of the display.

2. Use the drop-down list to select the desired time interval. Alternatively, you can change the display time scale from the Task command icon on the ribbon.

Selecting which tasks to hide or include in the Employee Count Graph

Use the **Configure** button to bring up the Configure Employee Count Graph form to specify which tasks to be included.

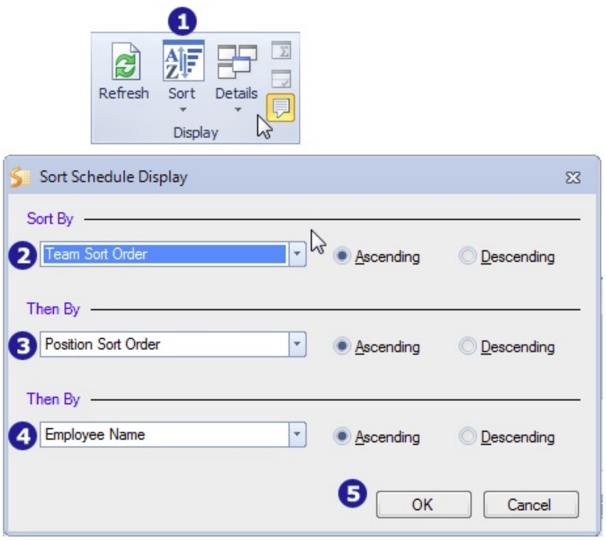


1. Click the Configure button to bring up the Configure Employee Count Graph form.

2. By default, all tasks are checked and employees assigned to those tasks are counted. Use the check boxes to include or exclude the tasks listed. When the **No task assigned** check box is checked, employees who have not been assigned any task will also be counted. To make those tasks that are included in the profile more visible on the task view, check the box **Darken excluded tasks in Task View**

List employees in a particular order

There are times when you will want the employees shown in the Task view to be sorted, or arranged in a particular order. Sorting employee helps you quickly visualize and understand your schedules better, organize and find what you want, and ultimately make more effective decisions. You might sort and display employees by more than one criterion. For example, you can first sort by team (to group employees in the same team together), then by position (to group team members by position), and then sort by name (to put the names in alphabetical order within each position). Note that if you add, delete, or move assignments around, you will need to re-apply the sort command to refresh the display.



1. On the Ribbon, click **Sort** then **Sort Settings** to open the Sort Schedule Display dialog box for entering the sort criteria.

2. Use the drop-down list to select the first sort criterion then check **Descending** if you want to sort in descending alphanumeric order.

3. Use the drop-down list to select the second sort criterion. Select **None** if you don't want to specify a sort criterion. Check **Descending** if you want to sort in descending alphanumeric order.

4. Use the drop-down list to select the third sort criterion. Select **None** if you don't want to specify a sort criterion. Check **Descending** if you want to sort in descending alphanumeric order.

5 Click **OK** to apply the sort order. The Task view will show assignments in the new sort order.

Filter what you don't want to see

When you apply a filter, **Snap Schedule** displays only rows that meet the criteria you specify and hides rows that you do not want displayed. Filters are additive, which means that each additional filter is based on the current filter and further reduces the subset of data. You can specify filters using the Filter pane which is displayed at the top of the Task view. To hide the Filter pane, un-select the **Filter** button on the Ribbon.

There are three filter choices:

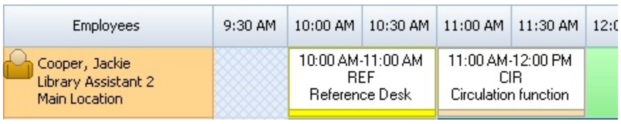
1. None: When this radio button is selected, no filter is applied and employees assigned to all shifts are shown.
2. Quick: This option quickly presents three drop down list boxes that you can use to quickly select the shifts and to display only employees assigned to those shifts. The first drop-down box, Shift, offers three choices: All shifts, Active shifts, and Inactive shift. Use the second drop-down box, Category, to select shifts that match the first criteria and belong to a particular shift category or All categories. Use the third drop-down box, Shift location, to narrow down to shifts matching the first and second criteria and whose shift location is as specified. For example, the filters shown below will display task assignments of employees who are assigned to Swing shifts at the Main Factory location.

3. Custom: When selected, this option lets you use a custom filter to display task assignments for employees who are assigned to shifts that meet your specific criteria. You can create a new custom filter using the Custom Filter form and save it in the schedule file for future use. This way, you can customize the Task view to display virtually any combination of shifts. For more information on how to define custom filters, refer to Custom Filter form.

Minding the Details

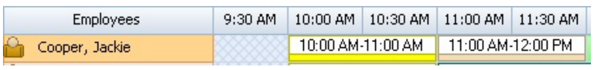
In the Task view, a task assignment is represented by a rectangular block with a stripe at the bottom whose background color is the same as the color designated for the task. You can select what additional task details to be shown on this rectangle using the commands listed on the Details menu. Use the Configure command to change the default values and specify what you want to show on each of the three detail levels.

This option presents the maximum level of details. By default, the task time, task code, and task description will be displayed. For each employee cell, the employee name, position, home location, and a color coded icon representing the employee position will be displayed. For example:



This option presents the medium level of details. By default, the task time and task description will be displayed. For each employee cell, the employee name, position, and a color coded icon representing the employee position will be displayed. For example:

This option presents the minimum level of details. By default, the task time will be displayed. For each employee cell, only the employee name and a color coded icon representing the employee position will be displayed. For example:

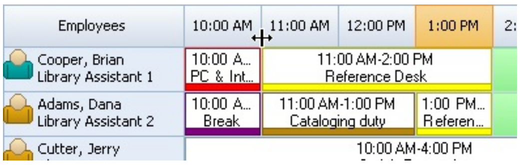


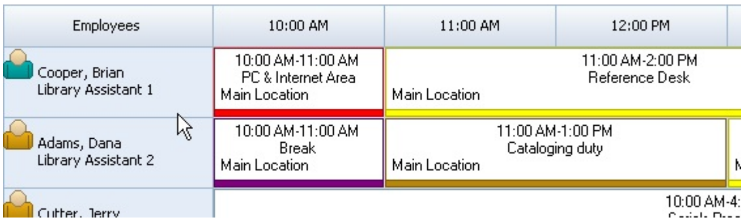
Resizing Cells

When data in a cell exceeds the width (or height) of a cell, the information may not be completely visible as the cell contents may be cut off. You can manually resize the rows and columns of the grid to better fit the cell contents. The header column (Employees) and header row can be resized independently of the content columns and content rows.

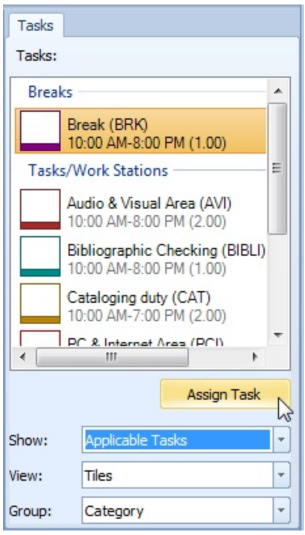
To resize, place the cursor between columns (or rows) until the resize pointer appears then hold down the left button of the mouse and drag to resize.

Before **After**





Show/hide Assignment Pane



By default, the Assignment pane is docked on the right side of the schedule view window. If you prefer to use the right click menu over drag-and-drop scheduling, you can hide the Assignment pane to make more room for displaying task assignments.

To show/hide the Assignment pane, click the Dialog Box Launcher on the Assignment command group and you will see the **Assignment Pane** docked on the right hand side of the screen.

By default, only applicable tasks (i.e. tasks employees listed on the Task View are allowed to perform) will be shown in the task assignment pane. This way, you can drag-and-drop a task into the desired employee on the Task View to schedule with confidence that the employee is authorized to perform the task. You can use the Show drop-down menu to show all tasks. The View and Group drop-down menus lets you change how the list of tasks will appear in the task assignment pane.

Show/hide tooltips

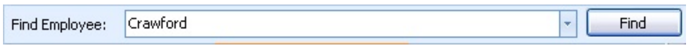
In the Task view, the tooltip is a small text box that appears when a mouse pointer is hovered over a task assignment. When you move the mouse pointer away, the tooltip will disappear from view. The tooltip provides additional details about the task assignment and is especially useful when you are working with a large number of employees and want to quickly find the cause of the warning flags, see detailed description and start, end times for each task assignment.

By default, **Snap Schedule** will display tooltips as indicated by the Show Tooltips button being highlighted. until you turn it off. To disable, click the highlighted button. Note that you can independently enable or disable tooltips for each of the schedule views.

Finding a particular employee

You can quickly locate an employee's assignment in the display range (not all assignments in the schedule file) using the Find command. To find an employee:

1. Click the Find button to show the Find pane at the top of the Task view window.



2. Type the employee name into the text box and click Find.
3. If found, the employee task assignment will be highlighted.

Adding Task Assignments

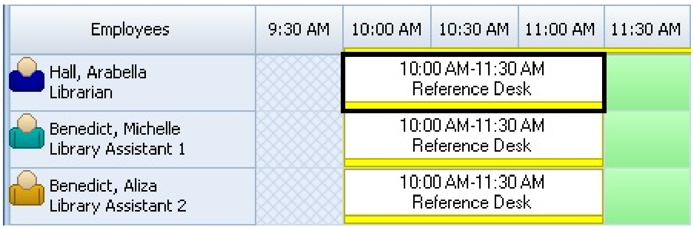
To add a task to an employee's shift assignment

1. Click the Task button on the Ribbon to display the **Task** view.
2. Navigate to the date you want to schedule using the current view date picker.
3. Drag a task from the Tasks Pane and drop it into the time slot where you want to assign. You can use the mouse to move the task or adjust the start and end time by dragging the right or left edge of the rectangle.
4. You can also select a time slot (or multiple horizontal slots), right-click the time slot and use the Assign Task command to make a task assignment. **Snap Schedule** will assign the task and automatically adjust the task duration to fit the time slot. Note that the right-click drop-down menu only shows those tasks the employee is authorized to perform, Alternatively, you can double-click on any time slot to open the Task assignment form to add, edit, or remove task assignments. On this form, you can adjust the task start and end time.

To assign a task to several employees at once

1. Click the Task button on the Ribbon to display the **Task** view.
2. Navigate to the date you want to schedule using the current view date picker.
3. Drag the mouse to select as many adjoining time slots as you want to schedule. **Snap Schedule** will highlight the selected cells. Alternatively, you can use the keyboard to select multiple slots by holding down the **Shift** key and press the **arrow** keys to move around.

3. On the Tasks pane, click the desired task to assign.
4. Click the Assign Task button and the selected task will be assigned to the highlighted slots. Note that the tasks are automatically fitted to the selected time window.



Moving and Adjusting a Task Assignment

With simple mouse movements, you can move a task assignment or adjust its start and end time.

To move a task assignment

1. Click a task assignment to select. The task will be highlighted with a black border.
2. Move the mouse pointer over the selected task border and when it changes into a move pointer, drag the task and drop it into a new destination.

To adjust a task start time

1. Click a task assignment to select. The task will be highlighted with a black border.
2. Move the mouse pointer over the left edge of the selected task border and when the cursor changes into a horizontal resize pointer ↔, hold down the mouse left button and drag to adjust the task start time.
3. Alternatively, you can double click a task assignment to bring up the task assignments form to adjust the start and end time.

To adjust a task end time

1. Click a task assignment to select. The task will be highlighted with a black border.
2. Move the mouse pointer over the right edge of the selected task border and when the cursor changes into a horizontal resize pointer 1, hold down the mouse left button and drag to adjust the task end time.
3. Alternatively, you can double click a task assignment to bring up the task assignments form to adjust the start and end time.

About Auto-Scheduling

With **Snap Schedule**, you can schedule your employees visually using drag-and-drop scheduling or take advantage of its advanced auto-scheduling feature to generate shift assignments automatically based on a schedule plan. Auto-scheduling is useful only when you have a well established shift system with repeatable shift patterns.

Using auto-scheduling will greatly save you time and speed up complex scheduling tasks for shift work. For auto-scheduling to work, you will need to define a schedule plan. A plan serves as a blue print to build day-to-day work schedules and defines the number of teams (or crews), shifts and shift lengths, days on-off and rotation patterns required to provide the kind of coverage you want. You can design your own plan or use one of the pre-designed plans. **Snap Schedule** comes with a large collection of pre-designed schedule plans that implement standard and popular shift schedules for virtually all industries. Unless your operation is one of a kind, chances are you will find one that fits your needs. If not, use these pre-designed schedule plans as the initial starting point and modify them to suit your needs.

The critical building block in a schedule plan is the number of teams (teams and crews are used interchangeably herein) needed to cover the work demand. For scheduling purposes, team members are assigned to work the same shift and rotation patterns (i.e. team members have the same days on, days off, and rotation pattern). The number of teams dictates the average number of hours worked by each employee. For example, there are 8,736 hours (364 days per year x 24 hours per day) to be worked in continuous 24/7 operations. If you use four teams then each team member must work an average of 2,184 hours per year (8,736 hours / 4 teams) or 42 hours (2,184 hours / 52 weeks) per week. Plans employing 4 teams are very popular in 24/7 operations because they closely approximate the 40-hour workweek and provide an optimal balance between work, health and safety, and social demands.

The next key building block is the shift rotation. On fixed shifts (also called straight shifts), a team member always works the same shift (Day, Afternoon, or Night). While workers on day and afternoon shifts usually get adequate nocturnal sleep, night shift workers do not. Beside this obvious inequity, skill imbalance and communication problems are frequently associated with fixed shift operations. On rotating shifts, a team member rotates from one shift to another according to a specific arrangement. Since everyone will rotate through the same schedule of days, afternoons, nights, weekends, and off days, fairness and skill balance are built-in and interactions between day staff and shift workers are generally better.

Shift length and shift pattern are other building blocks. The right length for shifts will depend on the type of work performed, work environment, and operating hours. For example, with 24/7 operations, three 8-hr shifts or two 12-hour shifts are most commonly used but you can use any combination of shift lengths on the same plan. For non-continuous operations, compressed work week schedules using 10 hour shifts or a combination 8 and 9 hour shifts permit employees the option of finishing their usual number of working hours in fewer days per week, or fewer days per pay period. A shift pattern describes a sequence of working days and off days over a fixed time period. When selecting the shift length and the pattern of days on/off, you must also take into accounts Federal regulations, union, and company rules that may restrict the number of consecutive work days and hours worked, or require a minimum rest period between assignments.

You can use the **Manage Schedule Plans** command in the **Auto Schedule** group to create a new plan or edit an existing one. When you create a new schedule plan, you can layout the shift sequences for a period that each team will follow. It is natural that you need to define employees, teams, shifts, and shift patterns prior to creating a schedule plan. When you use a pre-designed schedule plan to create a new schedule file, you can save time because **Snap Schedule** automatically creates the required employees, teams, shifts, and shift patterns based on your selected plan.

Once a plan has been defined, you can run the Generate Schedule Wizard to generate assignments for each team member for the specified scheduling period based on the plan. With all the mundane and repetitive tasks taken care of, all you will have to do after running the Wizard is to review the generated schedules, run the Daily Assignment Validation report and resolve any conflicts, or make last-minute changes to reflect employee availability and work load fluctuation.

Managing Teams

A team is a group of employees working together for a common goal. For scheduling purpose, team members are assigned to work the same shift and rotation patterns (i.e. team members have the same days on, days off, and rotation pattern) but this is not necessarily a requirement. You must define teams first, then add or remove employees from teams as needed.

Teams are primarily used with schedule plans. If you plan to manually schedule employees instead of using the auto scheduling feature, there is no need to define teams.

Note that adding an employee to an existing team does not cause the employee to have the same shift assignments as other team members. Doing so merely associates the employee with the team so that the next time you run the Generate Schedule Wizard, the employee's shift assignments will be generated at the same time as other team members.

To define a new team

1. On the Ribbon, select the **Manage** tab and click the **Teams** icon to display the Team List.
2. Click **Create a New Employee Team**.
3. On the Employee Team form, enter a description and a unique code to identify the team.
4. Optionally, you can enter a number in the Display sort order field for sorting and filtering.

To add or remove team members

1. On the Ribbon, click **Schedule Plans** and select the **Manage Employee Teams** command from the drop-down menu.
2. The Manage Schedule Teams form will be displayed. Use this form to add or remove team members.

Define and Manage Shift Patterns

A shift pattern is a sequence of working days and off days over a fixed time period. It is a basic building block to construct a schedule plan. Shift patterns are defined using the Shift Pattern Table form. You can keep as many patterns as you like in this table provided that all patterns have the same number of days in the work block. This number of days is also referred to as a leg.

Shift patterns are used only with schedule plans. If you plan to manually schedule employees instead of using the auto scheduling feature, there is no need to define shift patterns.

To define and manage shift patterns

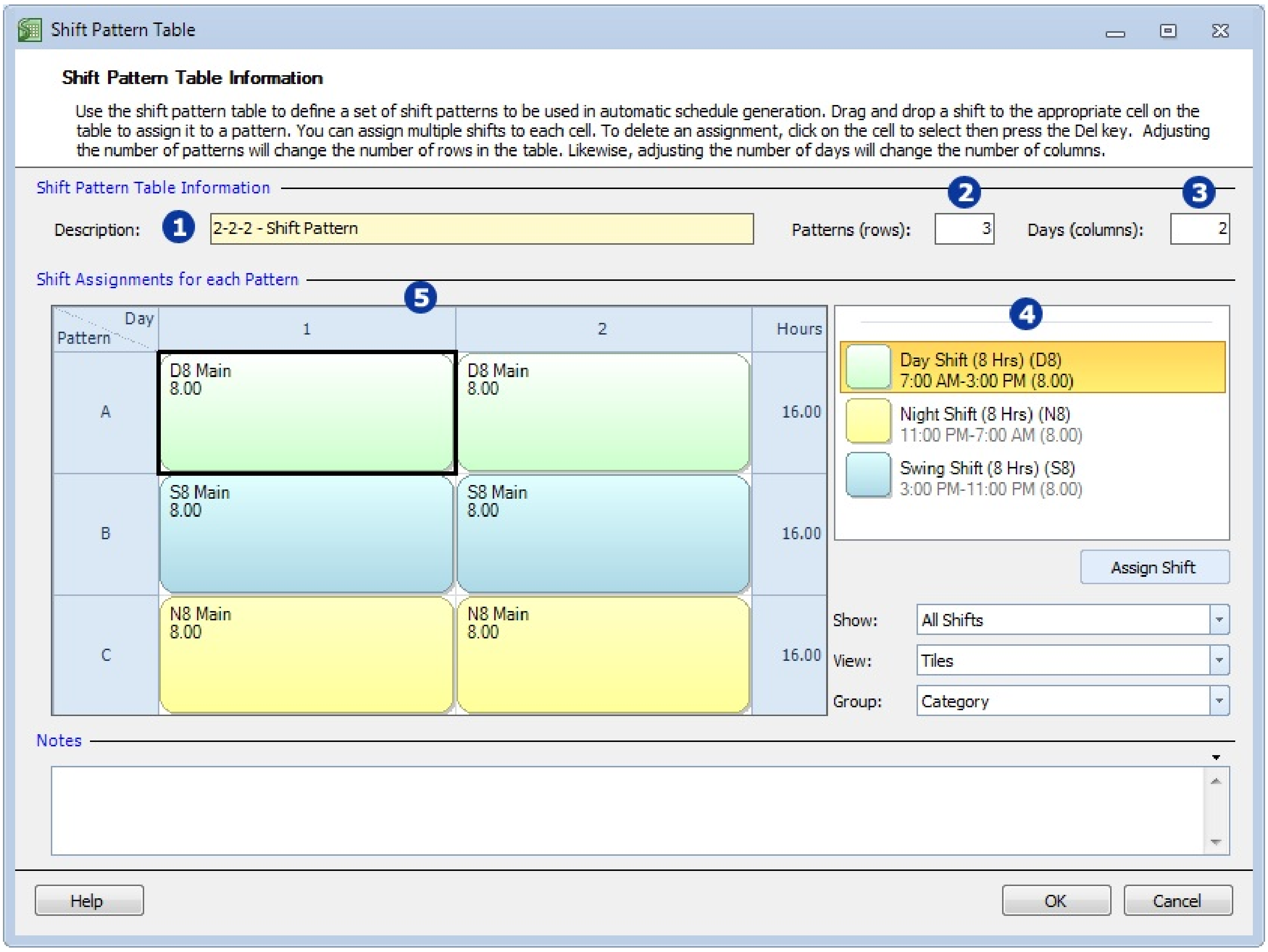
1. On the Ribbon, click **Schedule Plans** and select the **Manage Shift Patterns** command from the drop-down menu. The Manage Shift Patterns form will be displayed.
2. To add a new shift pattern table, click **Add** or **Create a new shift pattern**. The Shift Pattern Table form will be displayed. Use this form to enter the required information.
3. To edit an existing shift pattern table on the list, highlight the desired record then click **Edit** to open the Shift Pattern Table form. Double-clicking the record will also open the form. Right clicking on a cell will bring up a context menu which includes the Clear, Cut, Copy, and Paste commands to facilitate cell contents editing. You can also resize the grid column widths and row heights to make the cells as big or small as you like.
4. To delete an existing shift pattern table on the list, highlight the desired record, then click **Remove**.

To illustrate how shift patterns are defined and used, consider the following example using one of the most popular schedule for 24/7 operations: the 2-2-2 Rota (also known as the Metropolitan schedule plan). In this plan, we need to rotate employees between shifts using the 2-2-2 pattern: 2 days on Day shift, then 2 days on Swing shift, then 2 days on Night shift, followed by 2 days off. As you can see, there are three shift patterns over a 2-day period:

Day 1	**Day 2**
D	D
S	S
N	N

D = Day shift (8hrs) E = Evening shift (8hrs) N = Night shift (8hrs)

The Shift Pattern Table form shown below implements the four patterns. Refer to Define and Manage Schedule Plans to see how a shift pattern table is used in constructing a schedule plan.



1. This required descriptive text identifies the shift pattern table.

2. There are three shift patterns in this table as defined in this field. Each one is automatically assigned a single letter name starting from A. The number of rows on the Shift Assignments for each Pattern grid are automatically adjusted to match this entry.

3. There are two days in each shift pattern as defined in this field. Each day in the pattern is represented by one column and the number of columns on the Shift Assignments for each Pattern grid will be automatically adjusted to match this entry.

4. This pane shows all available shifts that you defined in the schedule file. Use the **View** and **Group** drop-down lists to organize and change how the shifts are displayed. You can drag and drop a shift from this pane into the appropriate cell on the grid to define the shift pattern. You can assign multiple shifts to each cell as in the case of split shifts.

5. This grid shows the shift patterns. Empty cells represent off days. Like on the schedule views, you can grab a shift assignment and move it around to reassign. The total work hours for each pattern over the work period are shown on the Hours column assuming that each team consists of only one employee.

Define and Manage Schedule Plans

In constructing a schedule plan, you can layout the shifts and a sequence of working days and off days over a fixed time period that each team will follow using teams, shifts, and shift patterns you defined. The Generate Schedule Wizard uses the information in the schedule plan to generate shift assignments for each team member. You can think of the schedule plan as a blue print from which shift assignments can be generated.

To define and manage schedule plans

1. On the Ribbon, click **Schedule Plans** and select the **Manage Schedule Plans** command from the drop-down menu. The Manage Schedule Plans form will be displayed.
2. To add a new schedule plan, click **Add** or **Create a new schedule plan**. The Schedule Plan form will be displayed. Use this form to enter the required information.
3. To edit an existing schedule plan on the list, highlight the desired record then click **Edit** to open the Schedule Plan form. Double-clicking the record will also open the form. Right click on a cell to bring up a context menu which includes the Clear, Cut, Copy, and Paste commands to facilitate cell contents editing. You can also resize the grid column widths and row heights to make the cells as big or small as you like.
4. To delete an existing schedule plan on the list, highlight the desired record then click **Remove**.

To illustrate how schedule plans are defined and used, consider the following example for a 24/7 operation.

Let's say we want to provide 24/7 coverage using standard 8-hour shifts and we need to have two employees working at any given time. Since there are 24 hours in a day, we will need to create three 8-hour shifts with one starting right after another. Let's call them Day shift, Swing shift, and Night shift. To ensure fairness and skills distribution, we don't want a situation where certain employees have to always work the night shifts while others only work the Day or Swing shifts, so we need a rotation scheme that will assign the different shifts equally among the employees over a period of time. Since two employees are required at any given time, for convenience we will create teams consisting of two employees each so members of the same team will work the same shift sequence. At a glance, it appears we would need three teams to cover the three shifts each day. However, this means each team would work an average of 56 hours per employee per week (8 hours/day times 7 days per week), far exceeding normal work week hours. To reduce the workload, we can always add additional teams to our work schedule. Mathematically, using 4 teams will lower the average weekly work hours to 42 (56 hours times 3 teams/4 teams) while using 5 teams will lower the average employee weekly work hours to 33.6 (56 hours times 3 teams/5 teams). Since 42 hours are the closest to the standard 40-hour work week, we will settle with four teams.

In summary, to support our 24/7 operation we will:

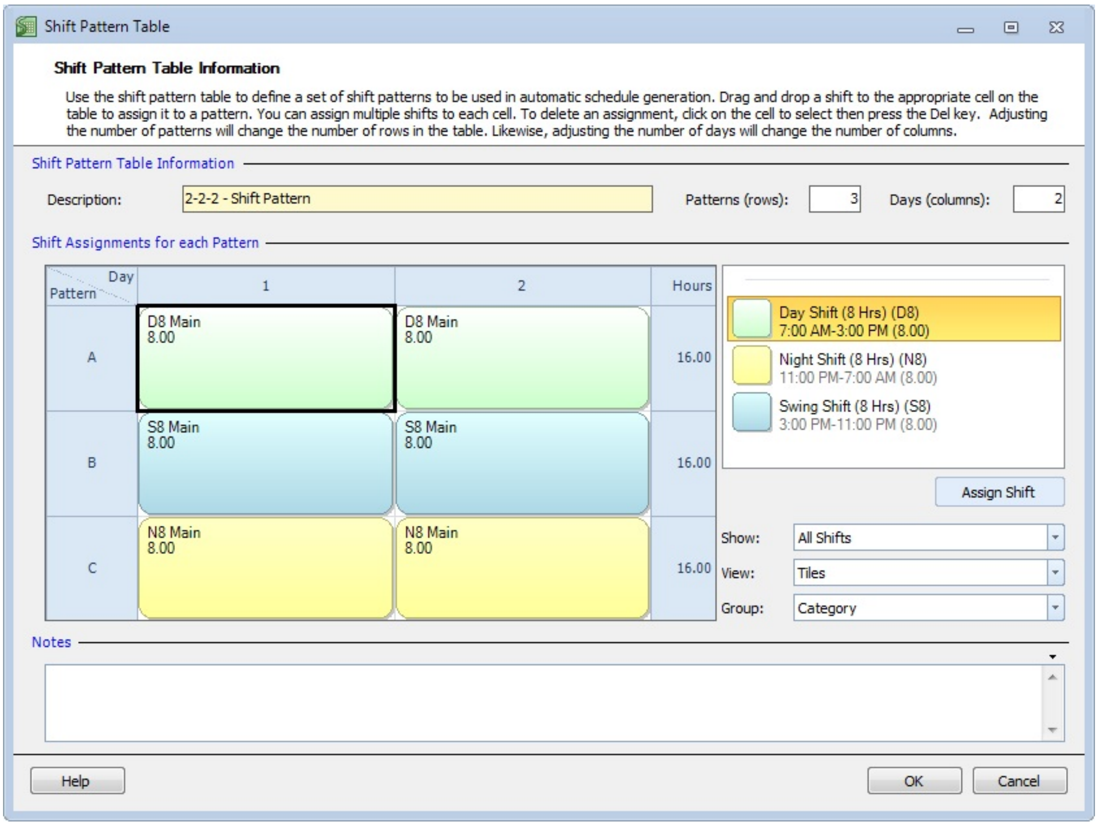
1. Create three 8- hour shifts: Day shift, Swing shift, and Night shift (see Entering Shift Information). The exact shift start and end times are not critical as long as one starts right after another to provide 24-hour continuous coverage.
2. Create four teams: T1 to T4, each consisting of 2 employees for a total of 8 employees (see Entering Employee Data to create employees and Managing Teams to assign employees to teams)
3. Define a schedule plan that rotates the Day, Swing, and Night shift assignments equally for the teams (See below).
4. Use the defined schedule plan to automatically generate shift assignments for the employees (see Using the Generate Schedule Wizard) .

For Step (3), there are many ways to construct a schedule plan that uses 4 teams and 8-hour shifts to support 24/7 operations but let's design our plan based on the popular Metropolitan plan, also known as the 2-2-2 rota. Our schedule plan will rotate each team through a sequence of 2 days on the Day shift, 2 days on the Swing shift, 2 days on the Night shift, followed by 2 days off over an 8 day period. This plan provides each team with 2 consecutive days off every 8 days and requires a maximum of 2 consecutive Night shifts. Each employee will work six 8-hour shifts every 8 days for a total of 48 hours or an average of 42 hours per week (48 hours times 7 days/8 days).

To construct the schedule plan, we must first create the shift patterns then define the plan based on the shift patterns created. Each shift pattern is an unique sequence of shifts to be performed over a consecutive number of days, also referred to as a leg. All shift patterns for a given schedule plan must have the same leg length.

In general, we use the shifts as building blocks to create shift patterns then use the shift patterns as building blocks to create a schedule plan. In its simplest form, a shift pattern can be just one shift with a leg of one day and the schedule plan will simply be a sequence of individual shifts. However, when laying out a more complex schedule plan, we want to identify repeatable multi-day patterns of shifts and build our plan based on those patterns instead of individual shifts to save time and avoid errors.

Since our plan contains the simple 2-2-2 shift sequence, we will create three unique shift patterns representing 2 consecutive Day shifts, 2 consecutive Swing shifts, and 2 consecutive Night shifts as shown below (see Define and Manage Shift Patterns).

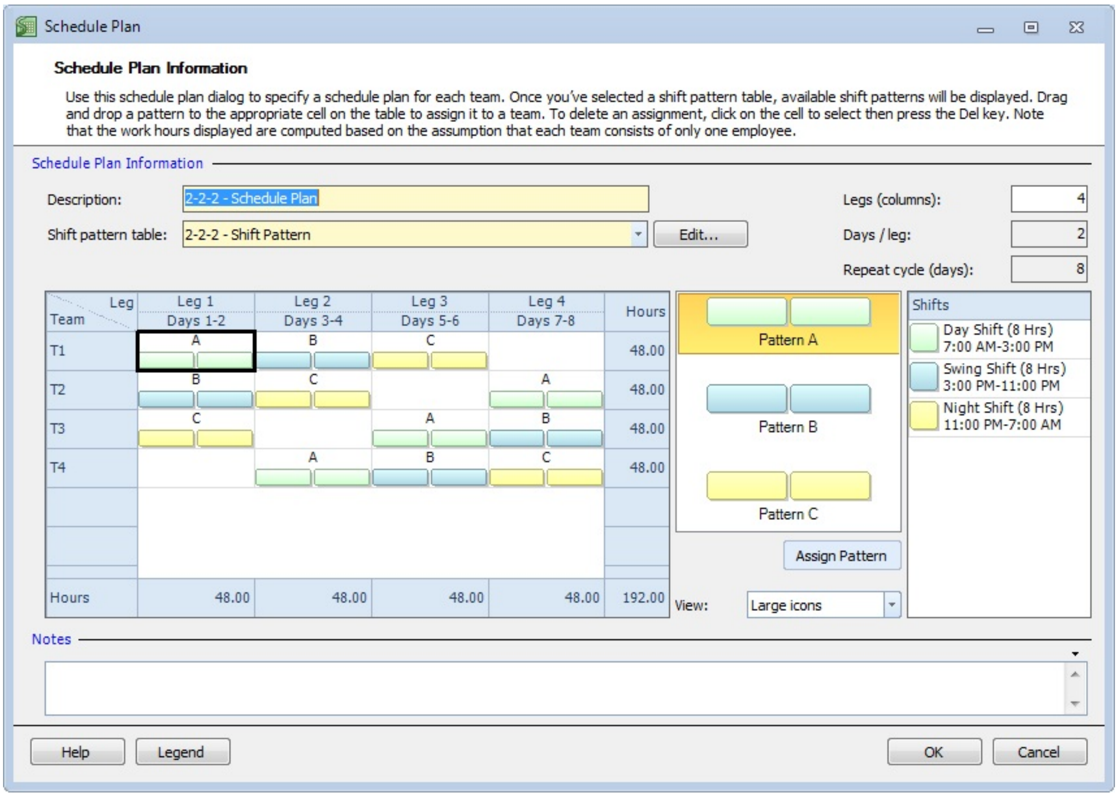


Now that we have the shift patterns defined, we will create a plan called the 2-2-2 Schedule Plan to define shift work sequences for each team based on these shift patterns. On the Schedule Plan form, select the 2-2-2 Shift Patterns table defined in the previous step. The Repeat Cycle field shows the number of days required for each team to complete its assigned shift sequence in a schedule plan. At the end of each repeat cycle, the team starts the same shift sequence over again. This field is computed as the number of legs times the Days/Leg field. Since our leg length is 2 days, we need to enter 4 for the Legs field to have a repeat cycle of 8 days.

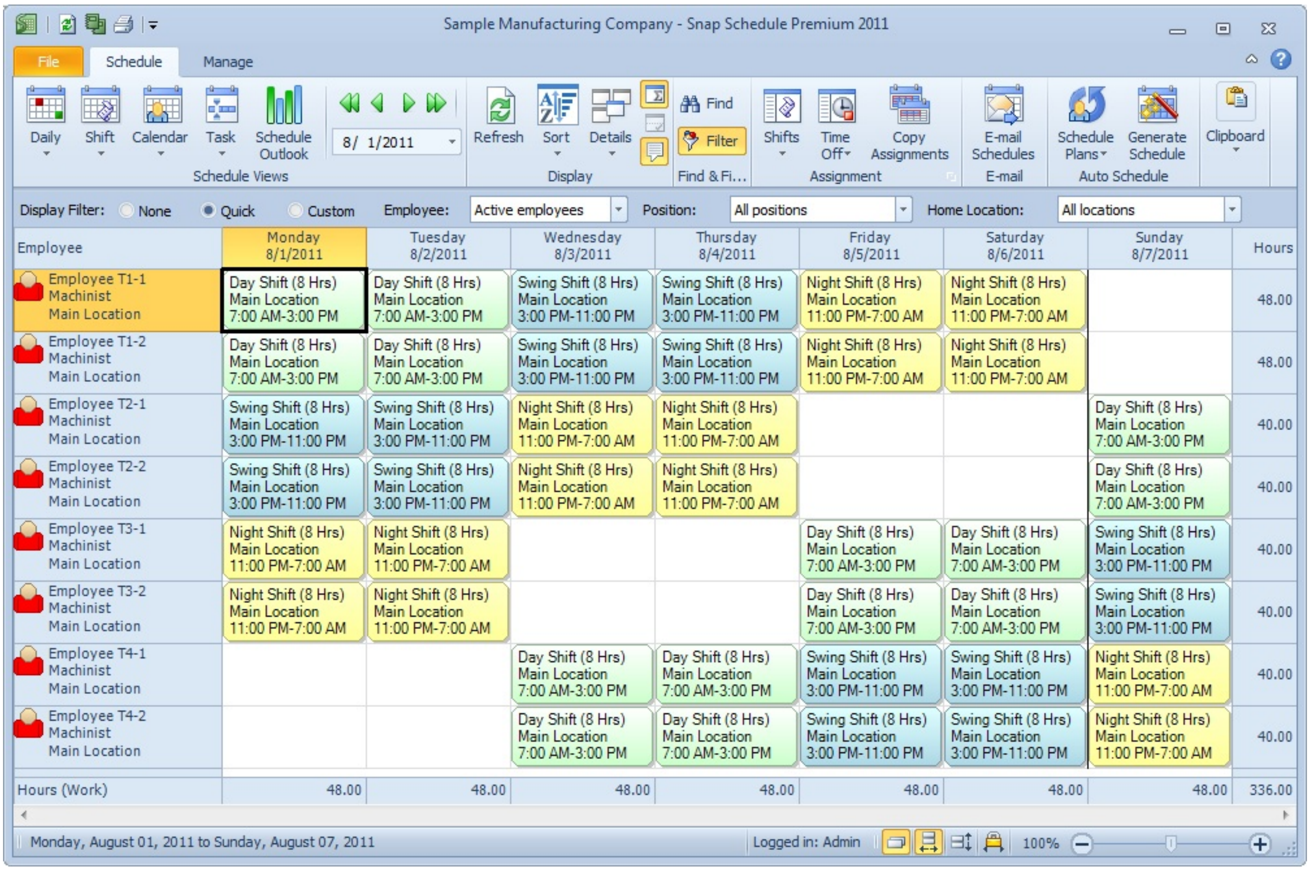
The grid shows how shift patterns are allocated to each team. Empty cells or underlined spaces represent off days. You can click the **Legend** button to show or hide the **Shifts** panel. Like on the schedule views, you can grab a shift pattern and move it around to reassign. The total work hours for each team over the repeat cycle are shown in the Hours column. The total hours shown under each column (leg) represent the hours worked by all teams for the number of days in the leg, assuming there is only one employee on each team. Looking horizontally (across), you will see the shift patterns for each team. The entire sequence is repeated after 8 days. Looking down (vertically), you will see the different shifts that are assigned for each day in the cycle.

For our schedule plan, drag patterns A, B, and C to the grid to define the work sequence for team T1 so that this team will start the 8 day cycle with 2 Day shifts, followed by 2 Swing shifts, 2 Night shifts, then 2 days off. Similarly, define the work sequences for teams T2 through T4 so that team T2 will start the cycle with pattern B (2 Swing shifts), team T3 with pattern C (2 Night shifts), and team T4 with 2 days off.

Looking at the schedule plan layout, there are always three teams working the Day, Swing, and Night shifts on any given day while one team is off. Since all three 8-hour shifts are always scheduled, 24/7 coverage is achieved. You can now click **OK** to save this schedule plan in the schedule file.



Once the schedule plan has been defined, you can run the **Generate Schedule Wizard** to generate assignments for each team member for the specified scheduling period based on the plan. Below is an example of the generated shift assignments for one 8-day cycle. Note how the actual shift assignments reflect the layout of the 2-2-2 schedule plan.

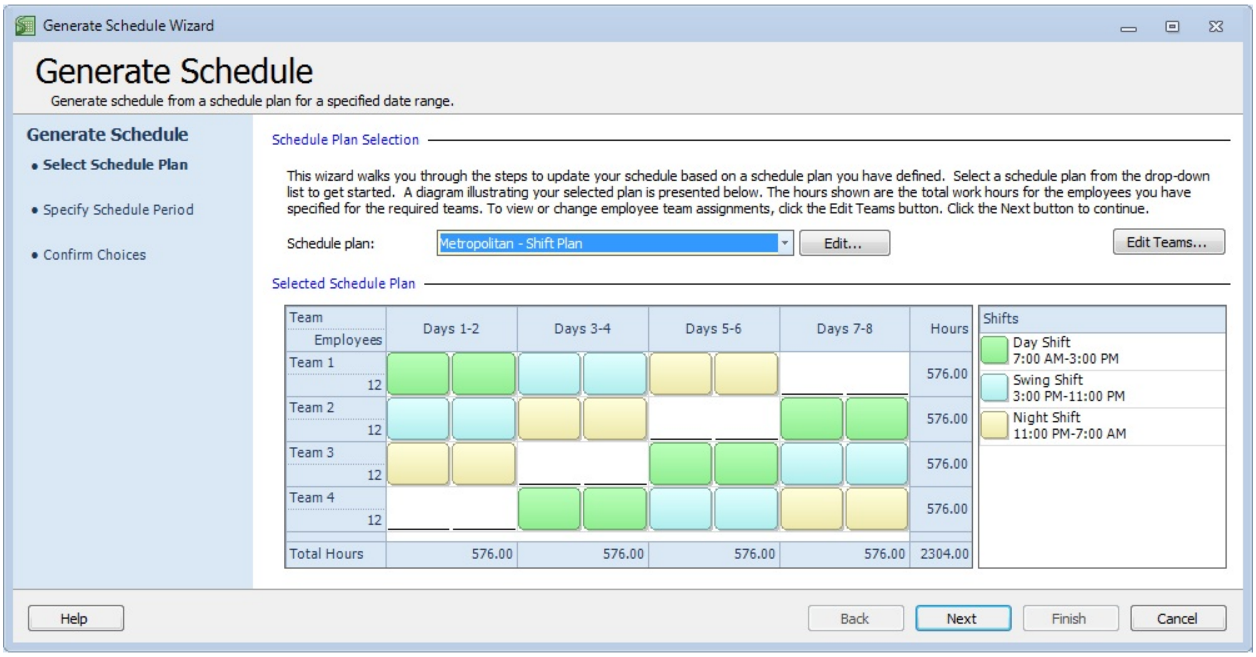


Using the Generate Schedule Wizard

Once you have successfully defined a schedule plan, you can run the Generate Schedule wizard to create shift assignments for each team defined in the plan. The wizard will guide you through a series of steps and you must provide all required inputs for one step before moving on to the next. Each step is presented as a dialog page with familiar controls such as text boxes, drop-down lists, and grids that you would normally find on a form . You can click **Next** to move to the next step, or **Back** to review your inputs in the previous step. After completing the last step, you can click **Finish** to generate the shift assignments for the specified period.

To run the Generate Schedule wizard

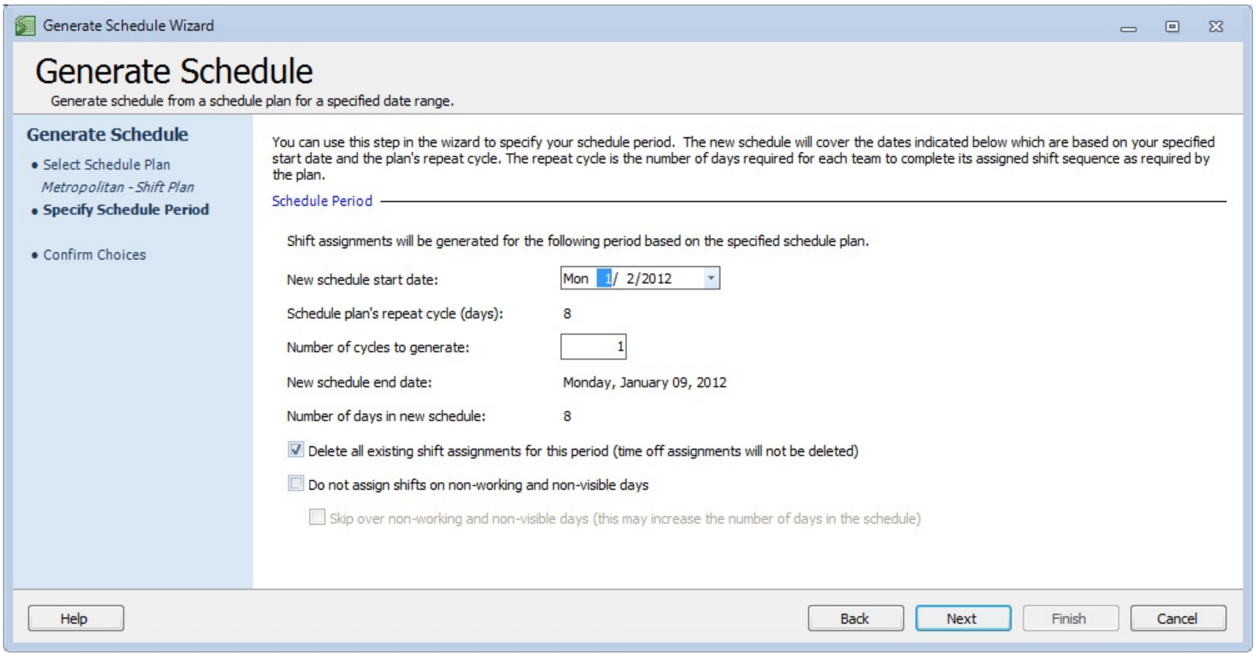
1. On the Ribbon, click **Generate Schedule**.
2. The **Select Schedule Plan** page of the Generate Schedule wizard will be displayed.



On this page, use the Schedule Plan drop-down box to select a plan from the list. Click **Edit** if you want to modify the selected plan without leaving the wizard. If you don't have any plan defined, the grid will be blank and the Edit button will change to **New** to allow you to create a new plan. Once you have selected a plan, its layout will be shown to provide a visual cue on how shift assignments will be made for each team member. In the above example, there are two employees assigned to each team. According to the selected plan, the shift patterns repeat after 8 days so the grid shows the shift layout for days 1 to 8. Let's say you want to generate a schedule starting on Monday April 7, 2008 then on that Monday, employees assigned to team T1 will work the Day shift, team T2 will work the Swing shift, team T3 will work the Night shift, and team T4 will be off. Likewise, the same working pattern will be on Tuesday April 8, 2008 but it will change on Wednesday April 9, 2008 as shown on the grid. At the end of one repeat cycle (8 days), each team would have worked a total of 96 hours, and all team members would have worked a total of 384 hours.

Click **Edit Teams** button to re-assign or move employees between teams. Once completed, click **Next** to move to the next step.

3. The wizard displays the **Specify Schedule Period** step.



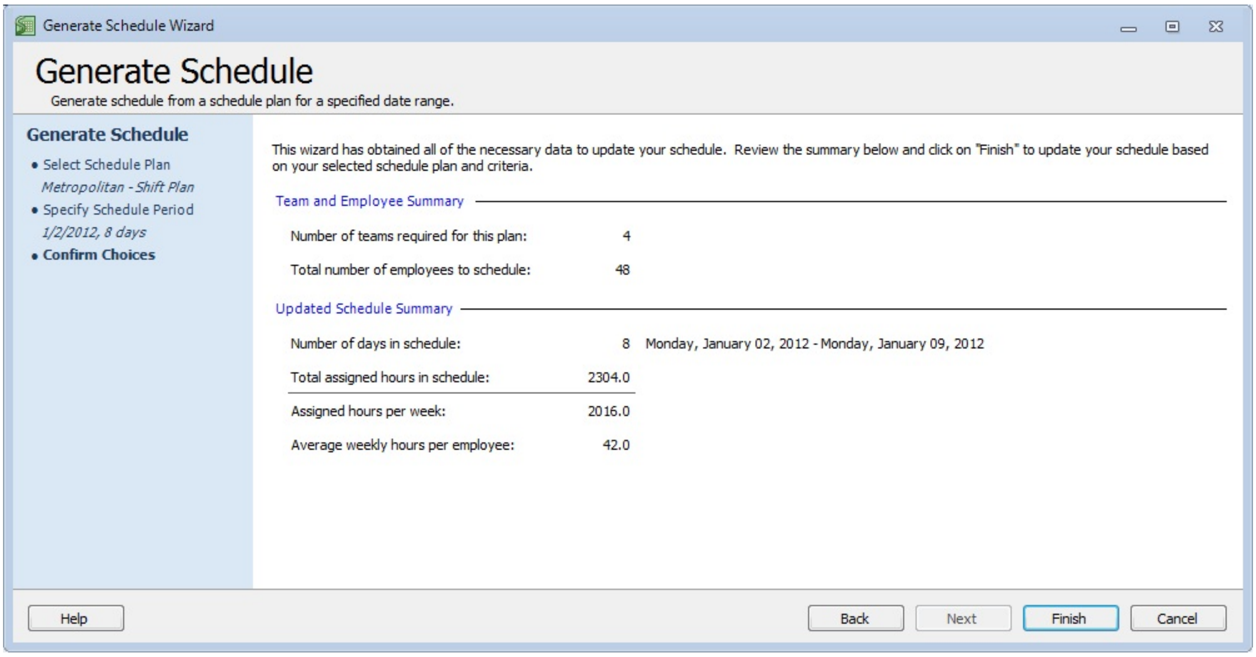
Use this form to specify the start date for the new schedule and the schedule duration in term of repeat cycles. The **New schedule start date** field is set to the next Monday by default but you can use the drop-down calendar box to specify any date. Instead of explicitly specifying an end date, you specify the number of repeat cycles to ensure that the generated schedule always ends on a completed rotation. When you enter a value into the **Number of cycles to generate** field, the wizard automatically computes and displays the schedule end date using the repeat cycle obtained from the schedule plan selected in the previous step.

Un-check the **Delete all existing shift assignments for this period** checkbox if you want to keep existing shift assignments and add the newly generated assignments to the schedule.

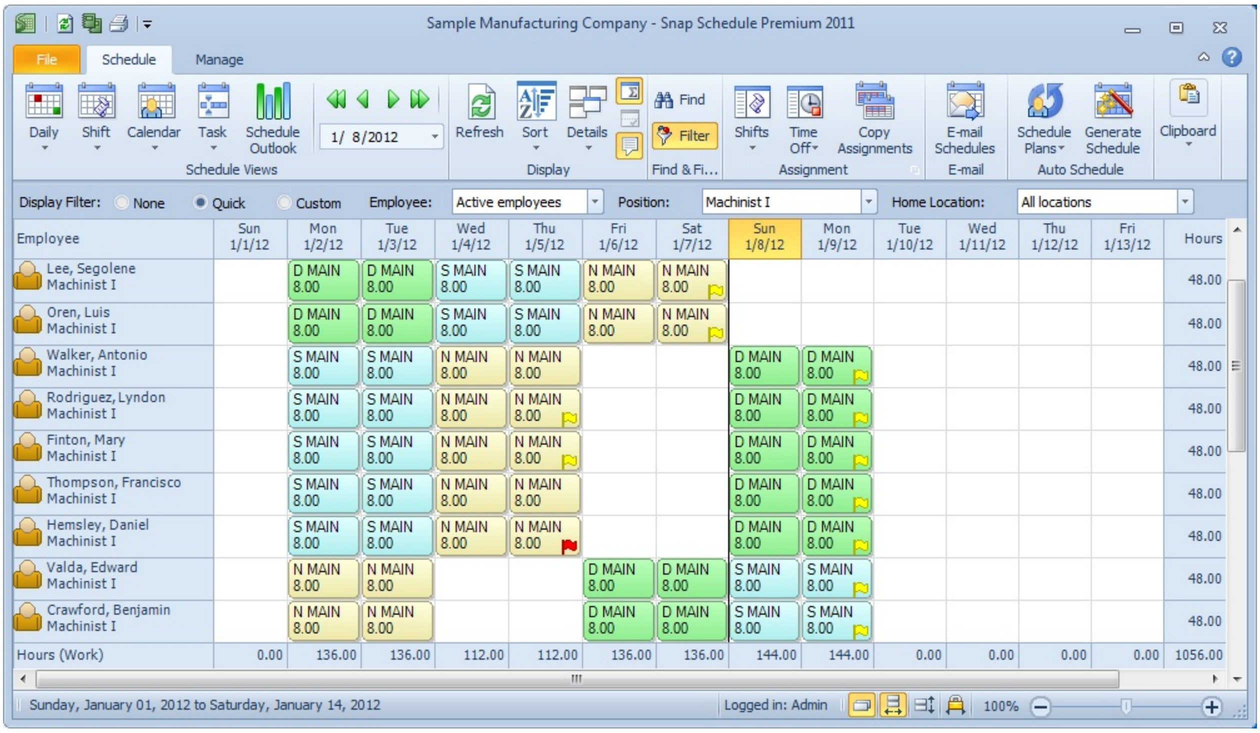
Check the **Do not assign shifts on non-working and non-visible days** checkbox if you do not want the wizard to generate shift assignments for non-working days and non-visible days , i.e. days that are configured to be hidden from Daily views. Check the **Skip over non-working and non-visible days** checkbox if you want to skip over those days and continue with the shift pattern sequence as if those days do not exist. Keep in mind that when this option is checked, the number of days in the generated schedule may increase to account for the days that are skipped over.

Once completed, click **Next** to move to the next step.

4. The wizard displays the **Confirm Choices** step.



Review the information presented and click **Finish** to begin the shift assignment generation. Once completed, the shift assignments will be saved in the schedule file and can be seen in any of the schedule views as shown below.



Using the Shift Coverage Planner

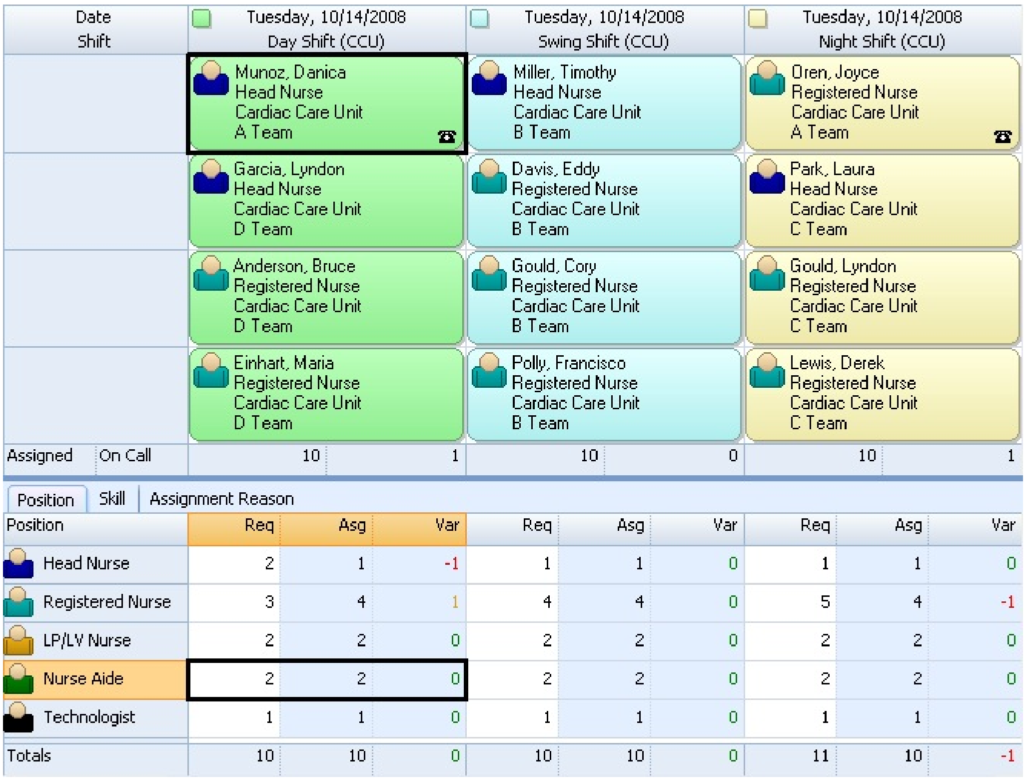
The main goal of employee scheduling is to match the number of available employees with the demand that exists in a given time period. Having too many employees than needed reduces operating margins and having too few employees adversely affects customer service levels. The Shift Coverage Planner lets you define how many people you need by position, skill, or shift assignment reason and it will indicate if you have over/under staffed a shift.

The Shift Coverage Planner, available only in the Shift view, is docked to the bottom of the shift view screen. To show the planner, click the **Show Coverage Requirements** icon in the **Display** group of the **Schedule** tab. Click the icon again to hide the planner if you need more screen space for displaying shift assignments.

Coverage by Position

Snap Schedule lets you instantly know how many people you have scheduled on each shift, by position, and if you have specified how many people you need at each position, it will automatically compute and display color coded numbers to identify whether the assigned head counts are over or under. To use this feature, you must first define all employee positions you would like to cover in the **Position** list then assign each employee a position. Note that an employee can hold only one position at any given time.

To display coverage by position for each shift, click on the **Position** tab. The planner presents shift coverage information in a spreadsheet-like format that lists all available positions down the leftmost column - one row for each position - as shown below.



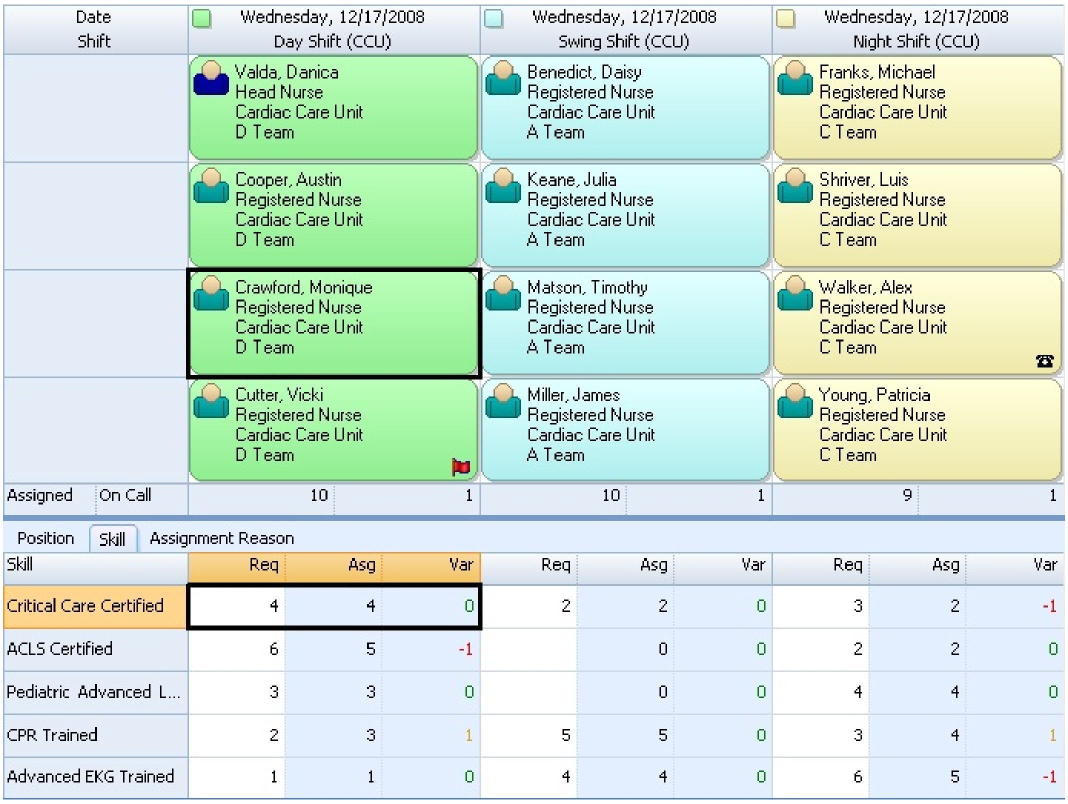
Corresponding to each shift, there is a three-column coverage profile shown directly below it. The first column (**Req**) in the profile contains the required head counts for each position. The second column (**Asg**) shows the numbers of employees assigned to the shift and the third column (**Var**) shows the variances in staffing (assigned head count - required head count). Note that the **Asg** and **Var** columns are read-only because the values contained in these columns are automatically computed.

You determine the required head count for each position per shift and enter the data in the **Req** column. **Snap Schedule** automatically computes and displays the assigned head counts and variances. The variances are color coded to identify wether the assigned head counts are over or under. Red indicates under staffing, orange indicates over staffing, and green indicates the right level of staffing. For example, in the planner shown above you can quickly see that you under staffed one Head Nurse and over staffed one Registered Nurse for the Day Shift on Tuesday 10/14/2008.

Coverage by Skill

Similar to coverage by position, you can instantly know how many people you have scheduled on each shift, by the type of skills. If you have specified how many people you need to have a particular skill, **Snap Schedule** will automatically compute and display color coded numbers to identify wether the assigned head counts are over or under. To use this feature, you must first define all skills you would like to cover in the Skill list then associate each employee with one or more skills. Because an employee can have more than one skills, the employee may be counted multiple times - one for each skill possessed.

To display coverage by skill for each shift, click on the **Skill** tab. The planner presents shift coverage information in a spreadsheet-like format that lists all available skills down the leftmost column - one row for each skill - as shown below.



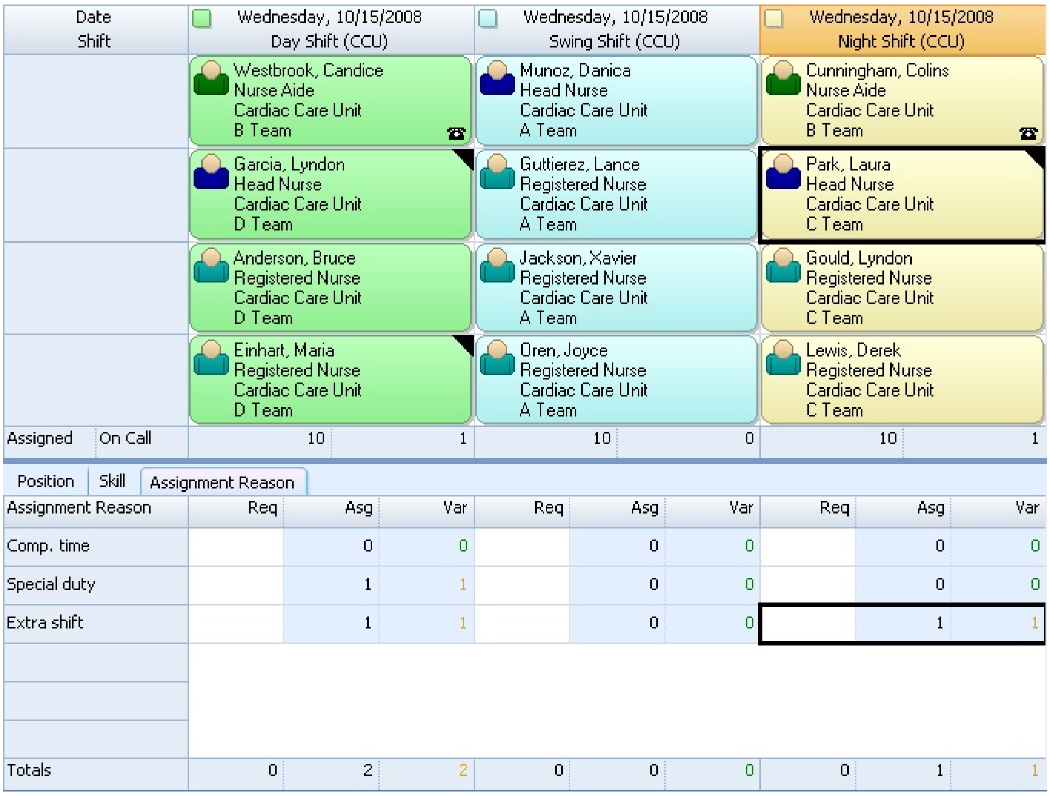
Corresponding to each shift, there is a three-column coverage profile shown directly below it. The first column (**Req**) in the profile contains the required head counts for each skill. The second column (**Asg**) shows the numbers of employees assigned to the shift and the third column (**Var**) shows the variances in staffing (assigned head count - required head count). Note that the **Asg** and **Var** columns are read-only because the values contained in these columns are automatically computed.

You determine the required head count for each skill per shift and enter the data in the **Req** column. **Snap Schedule** automatically computes and displays the assigned head counts and variances. The variances are color coded to identify wether the assigned head counts are over or under. Red indicates under staffing, orange indicates over staffing, and green indicates the right level of staffing. For example, in the planner shown above you can quickly see that you under staffed two person with CPR Trained skill and over staffed one person with ACLS Certified skill for the Day Shift on Tuesday 10/14/2008.

Coverage by Assignment Reason

Similar to coverage by position, you can instantly know how many people you have scheduled on each shift by assignment reason. If you have specified how many people you need for a particular assignment reason, **Snap Schedule** will automatically compute and display color coded numbers to identify wether the assigned head counts are over or under. To use this feature, you must first define all assignment reasons you would like to cover in the Shift Assignment Reason list. Then when making a shift assignment, you associate the shift assignment with a reason that you would like to track.

To display coverage by assignment reason for each shift, click on the **Assignment Reason** tab. The planner presents shift coverage information in a spreadsheet-like format that lists all available assignment reasons down the leftmost column - one row for each reason - as shown below.



Corresponding to each shift, there is a three-column coverage profile shown directly below it. The first column (**Req**) in the profile contains the required head counts for each assignment reason. The second column (**Asg**) shows the numbers of employees assigned to the shift and the third column (**Var**) shows the variances in staffing (assigned head count - required head count). Note that the **Asg** and **Var** columns are read-only because the values contained in these columns are automatically computed.

You can determine the required head count for each reason per shift and enter the data in the **Req** column. **Snap Schedule** automatically computes and displays the assigned head counts and variances. The variances are color coded to identify wether the assigned head counts are over or under. Red indicates under staffing, orange indicates over staffing, and green indicates the right level of staffing. If you don't enter any required head counts, **Snap Schedule** simply displays the assigned head counts and variances as shown in the picture above. In this particular case, **Snap Schedule** simply shows how many people are on compensatory time, special duty, and extra shift.

Entering Shift Coverage Requirements

Once you have determined the number of people required for each shift by position, skill, or assignment reason, you can enter them directly into the Shift Coverage Planner.

1. Locate the cell in the Shift Coverage Planner that corresponds to the desired position, skill, or assignment reason for the specific shift.
2. Click the cell and type a required head count value which must be a positive integer.
3. Press **Enter** or **Tab** to move the next entry to the right. Note that you can use the **arrow** keys to move up, down, or side way to the next entry.

If you make a mistake, use the **Undo** command or enter the **Ctrl+Z** key combination to reverse the last action.

To move or copy required head count cells

1. Select the cells that you want to copy or move. To select a single cell, click the cell, or press the **arrow** keys to move to the cell. To select a range of cells, click the first cell in the range then drag to the last cell, or hold down the **Shift** key while you press the **arrow** keys to extend the selection. To select all cells in the display range, click the **Select All** button. Note: To cancel a selection of cells, click any cell on the display.
2. On the **Schedule** tab of the Ribbon, in the **Clipboard** group, do one of the following:
   - To move cells, click **Cut**. You can also press **Ctrl+X** on the keyboard, or right-click the selected cells and select **Cut**.
   - To copy cells, click **Copy**. You can also press **Ctrl+C** on the keyboard, or right-click the selected cells and select **Copy**.
3. Select the upper-left cell of the paste area.
4. On the **Schedule** tab of the Ribbon, in the **Clipboard** group, click **Paste**. You can also press **Ctrl+V**, or right click on the selected cells and select **Paste**.
5. **Snap Schedule** will paste the copied data into consecutive rows or columns.

Use the Copy Assignments command to copy required head count cells

You can setup required head counts once and copy them week after week, making only minor changes as needed. Use the Copy Assignments command to copy and paste shift coverage requirements for any range of dates.

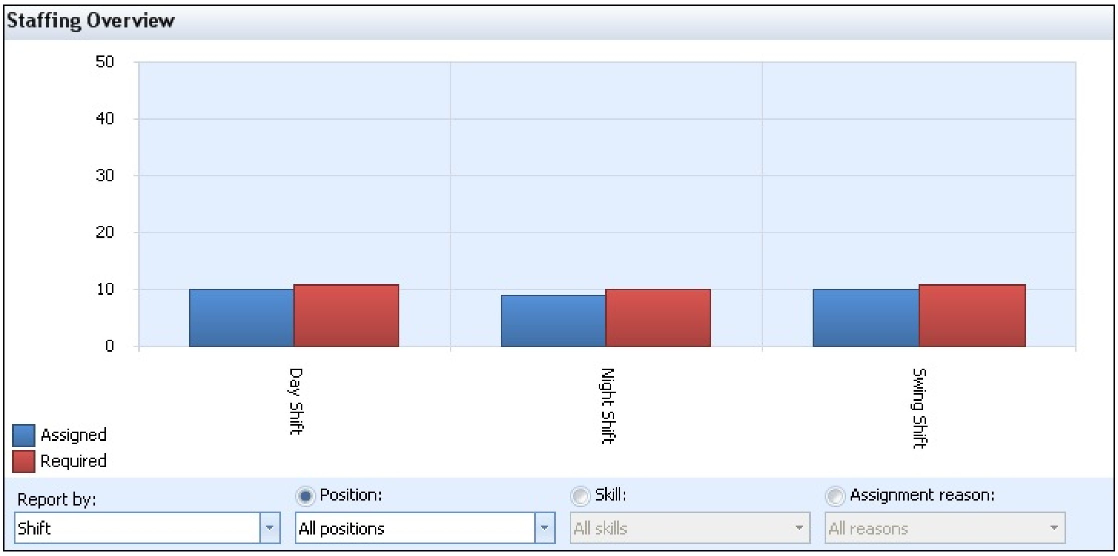
Using the Daily Staffing Graph

The Daily Staffing Graph allows you to quickly view in graphical format the staffing coverage (required vs assigned) on any given day by location, by shift, or by hourly coverage. The graph is a part of the Schedule Outlook screen that also includes a list of on-call employees, a list of employees who are taking time off, and a to do list. Staffing coverage by location and by shift are presented in bar graph format, with the number of employees assigned to each location (or shift) and the number of required employees shown side by side. Hourly coverage data is shown in 2-D line format. You can also filter the data by position, skill, or assignment reason.

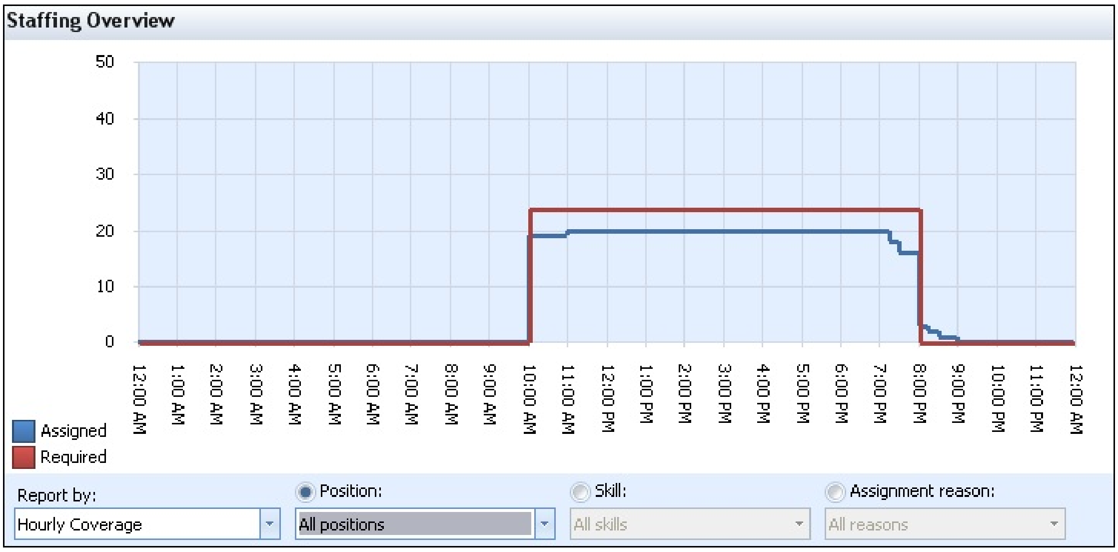
To view the graph

1. On the **Schedule** tab of the Ribbon, in the **Schedule View** group, click **Schedule Outlook**.
2. The Daily Staffing graph for the selected date will be displayed on the Schedule Outlook screen. Use the current view date control 

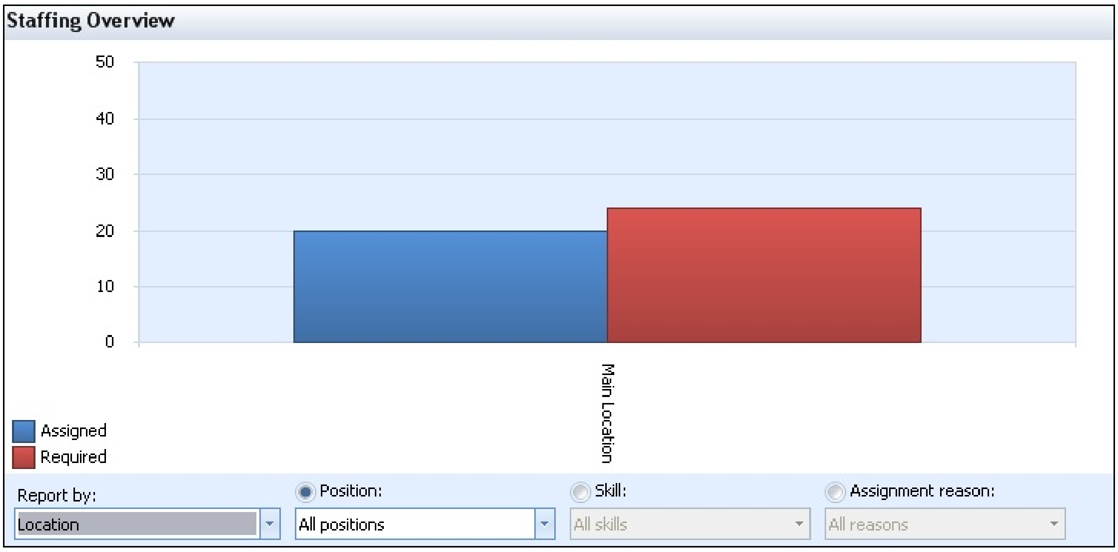
to move to a new date. By default, the graph shows coverage by shift for all positions, skills, and assignment reasons.



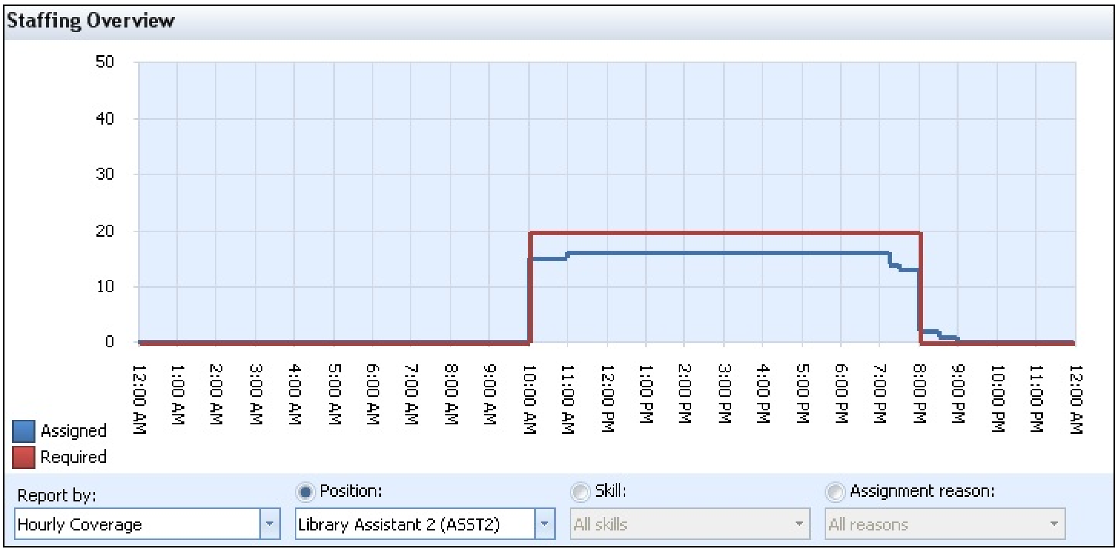
3. To report hourly coverage, select **Hourly Coverage** on the **Report by** drop-down list.



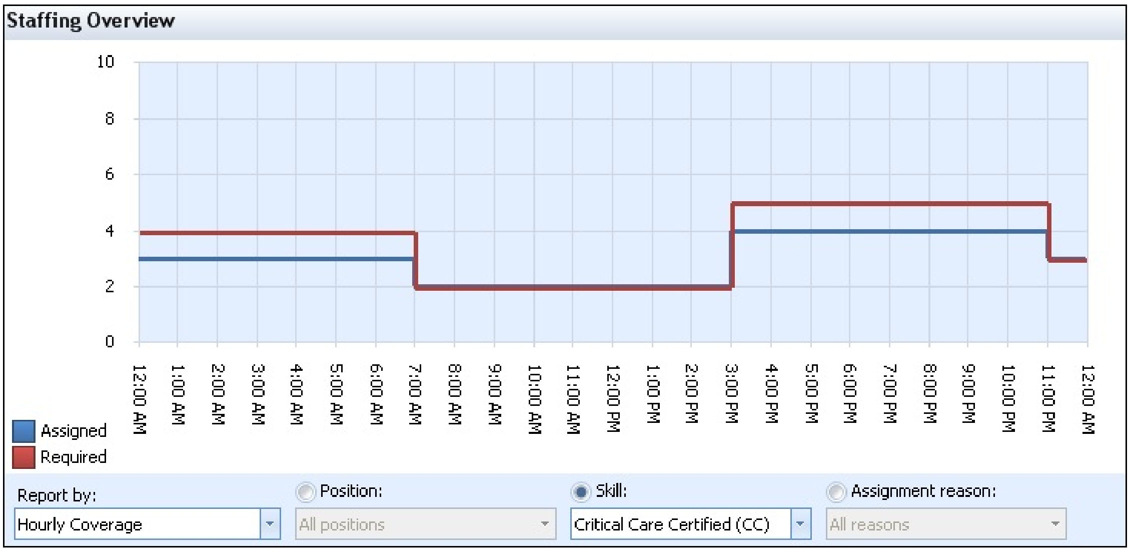
4. To report by shift location, select **Location** on the **Report by** drop-down list. By default, the graph will show coverage for all positions.



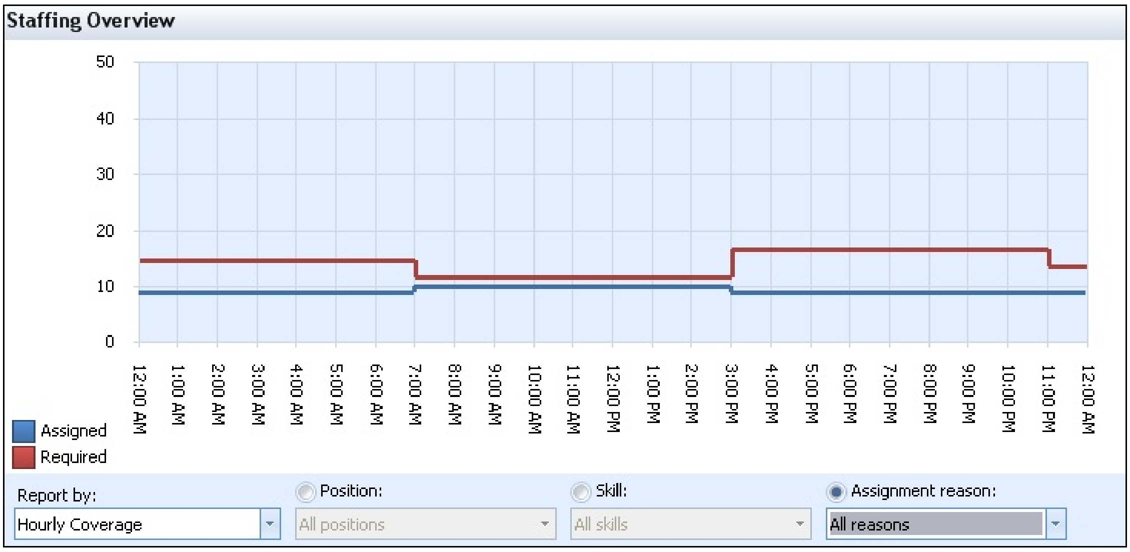
5. To display coverage for a particular position, click the **Position** radio button and use the **Position** drop-down list to select the desired position.



6. To display coverage for a particular skill, click the **Skill** radio button and use the **Skill** drop-down list to select the desired skill.



7. To display coverage for a particular assignment reason, click the **Assignment Reason** radio button and use the **Assignment Reason** drop-down list to select the desired assignment reason.


Staffing Overview
50
40
30
20
10
0
12:00 AM
1:00 AM
2:00 AM
3:00 AM
4:00 AM
5:00 AM
6:00 AM
7:00 AM
8:00 AM
9:00 AM
10:00 AM
11:00 AM
12:00 PM
1:00 PM
2:00 PM
3:00 PM
4:00 PM
5:00 PM
6:00 PM
7:00 PM
8:00 PM
9:00 PM
10:00 PM
11:00 PM
12:00 AM
Assigned
Required
Report by:
Hourly Coverage
Position:
All positions
Skill:
All skills
Assignment reason:
All reasons

Deleting Shift Assignments and Time Off

To delete Shift Assignments and Time-Off

1. Select a cell by clicking on it, or click and drag to select a range of cells containing the shift and time off assignments you want to remove.
2. Click the **Clear** button in the Ribbon's **Clipboard** group or press the **Delete** key to remove all shift and time off assignments in the selected cell(s). When you have a mix of shift and time off assignments in the same cell, right-click the cell and select **Clear Time Off** if you want to remove only the time off assignments. Likewise, select **Clear Shift Assignments** if you want to remove only the shift assignments.

If you make a mistake, use the **Undo** command or enter the **Ctrl+Z** key combination to reverse the last action.

Moving Assignments using the Mouse

You can use the mouse to move cells if so desired. If you make a mistake, use the **Undo** command or enter the **Ctrl+Z** key combination to reverse the last action.

1 Select the cells that you want to move. To select a single cell, click the cell, or press the **arrow** keys to move to the cell. To select a range of cells, click the first cell in the range then drag to the last cell, or hold down the **Shift** key while you press the **arrow** keys to extend the selection. To select all cells in the display range, click the **Select All** button. Note: To cancel a selection of cells, click any cell on the display.

Point to the border of the selection. When the pointer becomes a move pointer hold down the left mouse button and drag the cell or range of cells to where you want to move the assignments to.

2 You will see a ghost image of your selection as you are dragging. When you are at the desired location, release the mouse button.

3 The assignments will be moved to the new location.

Adding or Removing Shift Assignment Reason

Shift Assignment Reasons are used to provide additional details and explanations when making a shift assignment. You can select one from the list of commonly used reasons when you want to add details to a shift assignment. You save time this way, and the reasons can be used to group and filter assignments.

To add a Shift Assignment Reason to an assignment

1. Double-click the desired cell to open the shift assignment form.
2. Click the **Reason** drop-down list and select an appropriate reason from the list.
3. Click **OK** to close the form.

To remove a Shift Assignment Reason from an assignment

1. Double-click the desired cell to open the shift assignment form.
2. On the **Reason** list, click to select the existing entry.
3. Press the **Delete** key to clear the entry.
4. Click **OK** to close the form.

Editing Shift Assignment or Time Off Notes

To edit notes for a shift or time off assignment

1. Locate the shift assignment or time off your want to edit.
2. Double-click the cell to open its assignment form.
3. Locate the **Notes** field and make the desired changes.
4. Click **OK** to close the form.

Undo

If you complete certain scheduling assignment actions and then decide that you do not want to keep the changes, **Snap Schedule** lets you undo those changes. For example, if you accidentally move or delete a shift assignment, you can use the Undo command to restore the schedule back to its original contents. When the Undo command is not available (in disabled state), there is nothing to undo or the last command cannot be undone.

To Undo the last action that you made

1. Click **Undo** on the Ribbon, or press **Ctrl+Z**.
2. The previous action will be reversed. Note that the undo action will begin with the most recently completed action and you may only undo the actions in the reverse order in which they occurred. For example, you deleted a shift assignment and then you deleted a time off. You cannot undo just the deletion of the shift assignment without undoing the deletion of the time off.

Using Copy, Cut, and Paste

When you schedule manually, you may need to make identical assignments to other employees or time periods in your schedule. By using the **Cut, Copy**, and **Paste** commands, you can easily move or copy the contents of multiple cells to another on-screen location. To copy and paste a block of your schedule (everyone's assignments) to another time frame, use the Copy Assignments command instead.

Move or copy cells

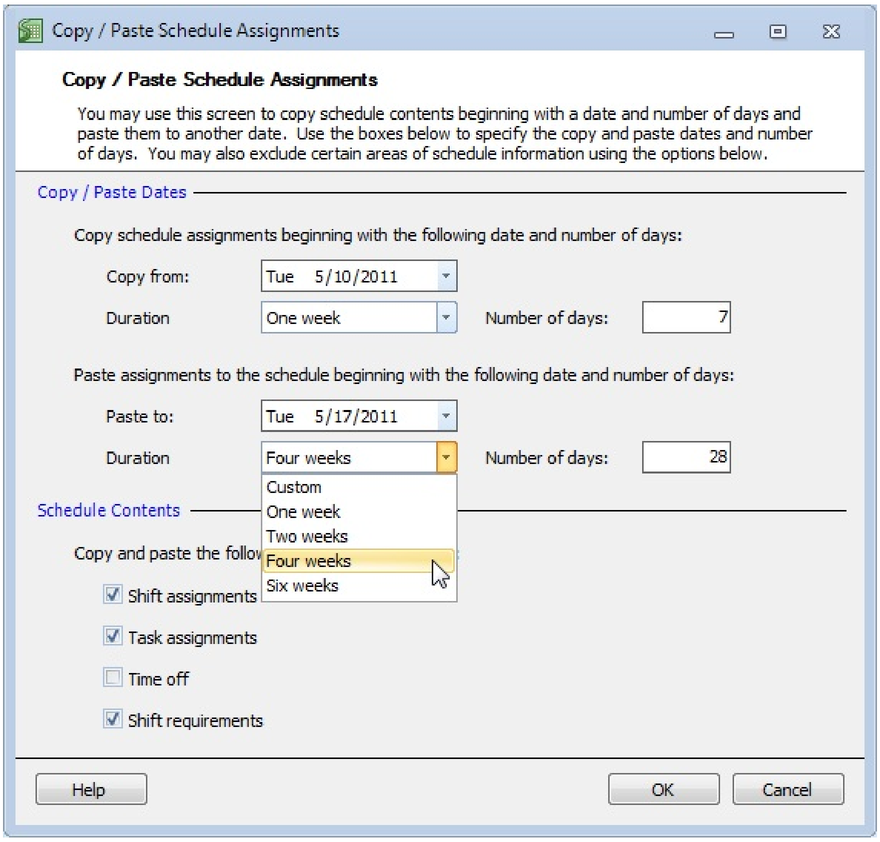
1. Select the cells that you want to copy or move. To select a single cell, click the cell, or press the **arrow** keys to move to the cell. To select a range of cells, click the first cell in the range then drag to the last cell, or hold down the **Shift** key while you press the **arrow** keys to extend the selection. To select all cells in the display range, click the **Select All** button. Note: To cancel a selection of cells, click any cell on the display.
2. On the **Schedule** tab of the Ribbon, in the **Clipboard** group, do one of the following:
   - To move cells, click **Cut**. You can also press **Ctrl+X** on the keyboard, or right-click the selected cells and select **Cut**.
   - To copy cells, click **Copy**. You can also press **Ctrl+C** on the keyboard, or right-click the selected cells and select **Copy**.
3. Select the upper-left cell of the paste area.
4. On the **Schedule** tab of the Ribbon, in the **Clipboard** group, click **Paste**. You can also press **Ctrl+V**, or right-click the selected cells and select **Paste**.
5. **Snap Schedule** will paste the copied data into consecutive rows or columns.

Copy and Paste Schedule Data

Let's say you have scheduled all of your employees for the last scheduling period and everything was fine. Now it is time to start scheduling for the next period. You have determined that except for a few employees taking time off, everything stays essentially the same. Instead of manually entering the schedule data from scratch, you can use the Copy Assignments command to copy the data from last scheduling period to this period and make minor changes. This saves you time and minimize data entry errors. You have the option of copying shift assignments, time off, shift coverage requirements, or any combination thereof..

To use the Copy Assignments command

1. Click **Copy Assignments** on the Ribbon.
2. The **Copy / Paste Assignments** form is displayed.



On this form, the **Copy from** field is defaulted to today's date. Use the drop-down date picker to select the beginning date of schedule data to be copied.

Use the **Duration** drop-down list to select the number of days to copy. Besides the standard 1, 2, 4, and 6 week ranges, you can select **Custom** to specify the exact number of days.

Enter the beginning date to copy to in the **Paste to** field. You can use the drop-down date picker to select a date.

By default, shift assignments, task assignments, and shift coverage requirements data will be copied (boxes checked). Un-check the appropriate check boxes if you so desire.

3. When done, click **OK** to start the copying process. Depending on the amount of data to be copied, this may take several minutes to complete.

More Ways to Publish and Distribute Schedules

With **Snap Schedule**, publishing daily rosters and work assignment calendars takes just a few mouse clicks. E-mailing schedules is a quick way to distribute the schedules to your employees in a timely manner.

If you are accustomed to distributing and posting work schedules by paper, you can print what you see on the Daily, Shift, Task, or Calendar view or you can print reports to a printer. The Daily Shift Assignments report is the daily roster that tells you who is working on what shift and in what position. The Weekly Assignment and Time Off Calendar report shows a full week of assignments and time offs in the familiar calendar format. The Monthly Assignment and Time Off Calendar report shows a full month of assignments and time offs. The Employee Weekly Calendar report shows each employee's schedule in the weekly calendar format. The Employee Monthly Calendar report shows each employee's schedule in the monthly calendar format.

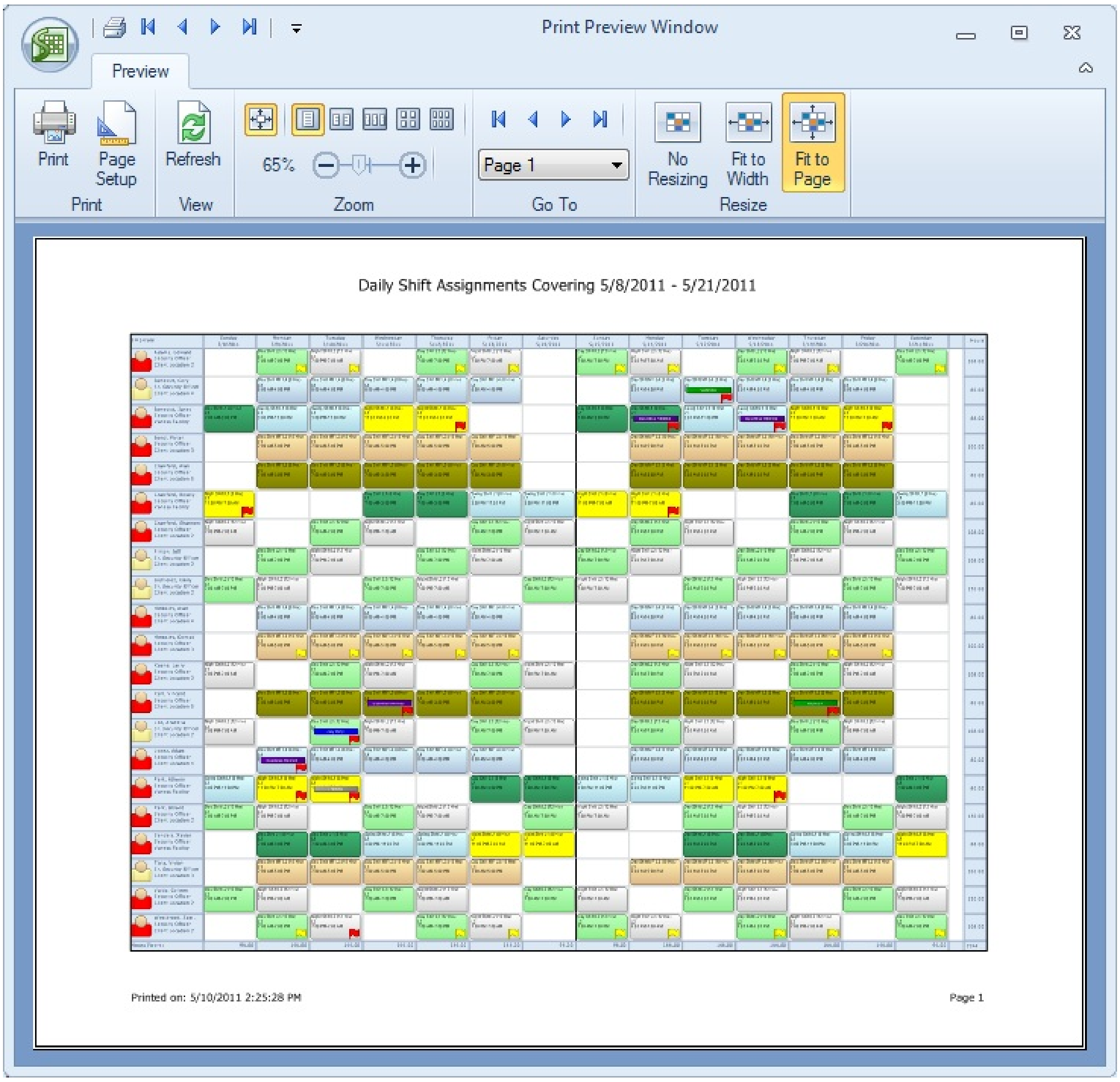
To publish work schedules electronically for online viewing or Web access, you can print what you see on the Daily, Shift, Task, or Calendar view to a file or export any report to PDF and a variety of other file formats, suitable for uploading to the Web or your SharePoint portal, e-mailing, or distributing the resulting files electronically.

Printing What You See on Schedule Views

You can print the contents of the Daily, Shift, Task, or Calendar view to communicate schedule information to management or your employees. The printout will show what you see on the screen, in color if your printer is so capable. The range of dates to be printed is exactly the same as the display range you selected for the Daily, Shift, or Calendar view. For example, if you are displaying the Daily view in 4-weeks range, the printout will show the daily schedule for the same four weeks. You can preview, select which printer, and change paper size and orientation before printing.

To preview/print

1. Select the schedule view you would like to print and resize schedule cells as required to get the schedule view to appear as what you would like to be printed.
2. Click the **File** tab and click **Print** to display the print Backstage view. Note that this command will be disabled if you were not displaying the Daily, Shift, Task, or Calendar view prior to clicking the **File** tab.
3. Click the **Print** button under **Print Schedule View to Printer**.
4. The **Print Viewer** will be displayed, showing the first page of the printout. Use the commands in the **Preview** tab to manipulate the print preview display.



Print: Select a printer, pages to print, number of copies and other options and print.

Page Setup: Open the Page Setup dialog box, in which you can change paper size, page orientation, margins, and printer selection.

Refresh: Update the display using the latest schedule view date range settings and data from the schedule file.

Zoom: Use the commands in this group to change how the printout is shown on screen.

Zoom to fit: Zoom to fit entire contents on screen.

One Page: Zoom to fit one single page in the display window.

Two Pages: Zoom to fit two pages in the display window.

Three Pages: Zoom to fit three pages in the display window.

Four Pages: Zoom to fit four pages in the display window.

Six Pages: Zoom to fit six pages in the display window.

Zoom Slider: Manually adjust the zoom of the schedule worksheet. When you grab and slide the slider with your mouse, the worksheet resizes as you slide, so you can adjust to the zoom level you want before you let go of the slider. You can also click the + and – buttons to increment or decrement the zoom factor by 10% per click, or click the midpoint mark on the slider tape to set the zoom level to 100%.

Go To: Use the commands in this group to paginate the display.

First Page: Go to the first page.

Previous Page: Go back one page.

Next Page: Go to the next page.

Last Page: Go to the last page.

Resize: Use the commands in this group to control how the entire schedule view content will be printed.

No Resizing: Do not scale schedule view contents and print on as many pages as required.

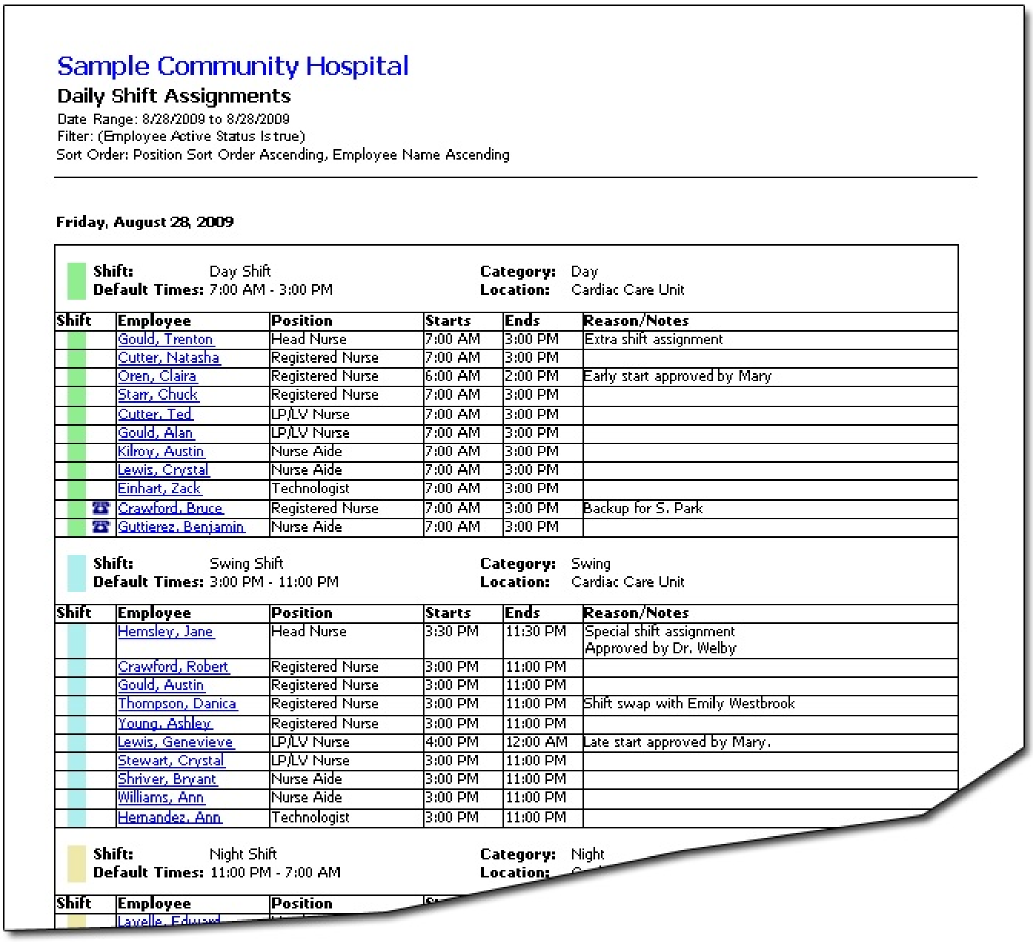
Fit to width: Scale schedule view contents to fit the width of a printed page.

Fit to page: Scale schedule view contents so everything fits entirely on a single page.

3. To exit, click the **Close** button.

Print Daily Shift Assignments

The Daily Shift Assignments report is the daily roster that tells you who is working on what shifts and in what positions. You can modify the standard report to show only the schedule information that you want. You can also save the modified reports for future use.



Sample Community Hospital

Daily Shift Assignments

Date Range: 8/28/2009 to 8/28/2009
Filter: (Employee Active Status Is true)
Sort Order: Position Sort Order Ascending, Employee Name Ascending

Friday, August 28, 2009

Shift: Day Shift **Category:** Day
Default Times: 7:00 AM - 3:00 PM **Location:** Cardiac Care Unit

Shift	Employee	Position	Starts	Ends	Reason/Notes
	Gould, Trenton	Head Nurse	7:00 AM	3:00 PM	Extra shift assignment
	Cutter, Natasha	Registered Nurse	7:00 AM	3:00 PM	
	Oren, Claira	Registered Nurse	6:00 AM	2:00 PM	Early start approved by Mary
	Starr, Chuck	Registered Nurse	7:00 AM	3:00 PM	
	Cutter, Ted	LP/LV Nurse	7:00 AM	3:00 PM	
	Gould, Alan	LP/LV Nurse	7:00 AM	3:00 PM	
	Kilroy, Austin	Nurse Aide	7:00 AM	3:00 PM	
	Lewis, Crystal	Nurse Aide	7:00 AM	3:00 PM	
	Einhart, Zack	Technologist	7:00 AM	3:00 PM	
	Crawford, Bruce	Registered Nurse	7:00 AM	3:00 PM	Backup for S. Park
	Guttierez, Benjamin	Nurse Aide	7:00 AM	3:00 PM	

Shift: Swing Shift **Category:** Swing
Default Times: 3:00 PM - 11:00 PM **Location:** Cardiac Care Unit

Shift	Employee	Position	Starts	Ends	Reason/Notes
	Hemsley, Jane	Head Nurse	3:30 PM	11:30 PM	Special shift assignment Approved by Dr. Welby
	Crawford, Robert	Registered Nurse	3:00 PM	11:00 PM	
	Gould, Austin	Registered Nurse	3:00 PM	11:00 PM	
	Thompson, Danica	Registered Nurse	3:00 PM	11:00 PM	Shift swap with Emily Westbrook
	Young, Ashley	Registered Nurse	3:00 PM	11:00 PM	
	Lewis, Genevieve	LP/LV Nurse	4:00 PM	12:00 AM	Late start approved by Mary.
	Stewart, Crystal	LP/LV Nurse	3:00 PM	11:00 PM	
	Shriver, Bryant	Nurse Aide	3:00 PM	11:00 PM	
	Williams, Ann	Nurse Aide	3:00 PM	11:00 PM	
	Hernandez, Ann	Technologist	3:00 PM	11:00 PM	

Shift: Night Shift **Category:** Night
Default Times: 11:00 PM - 7:00 AM **Location:**

Shift	Employee	Position
	Lavelle, Edward	

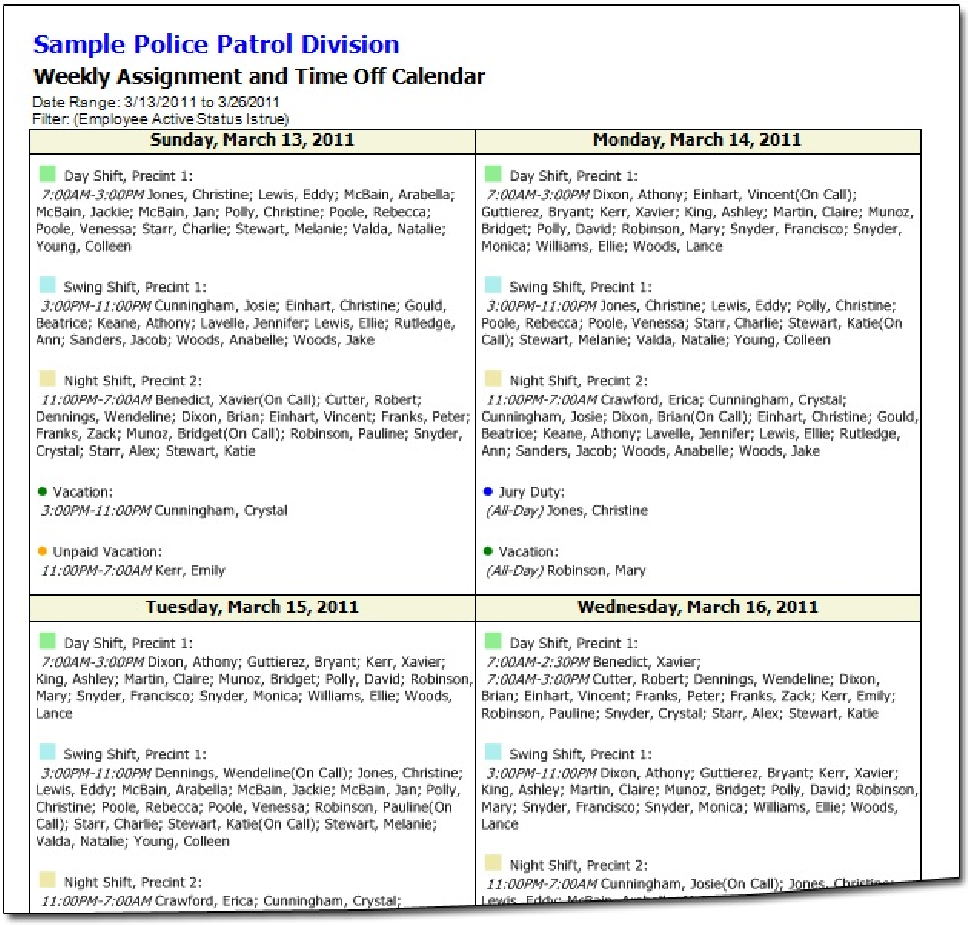
To print the Daily Shift Assignments report

1. On the **Manage** tab of the Ribbon, in the **Reports** group, click **Reports**. The **Reports** home page will be displayed.
2. Double-click the **Daily Shift Assignments** button to open the Report Viewer.
3. By default, the Report Viewer will show the printout for the current day's assignments. To select a different date or range of dates, use the **Date range** drop-down list.
4. Click **Filter** if you want to apply a filter to display only data records that meet your criteria. When you apply a filter, only those shift assignments that match your criteria are included in the report. The rest are hidden until you remove the filter. For example, you may want to apply a filter to display only shift assignments at a specific location or for a particular shift.
5. Once you are satisfied, click the **Print Report** button  on the Report Viewer Quick Access Toolbar to print.
6. To save the report with your modified settings for repeated use, click the **Save Report** button  on the Report Viewer Quick Access Toolbar

Print Weekly Assignment and Time Off Calendars

The Weekly Assignment and Time Off Calendar report shows a full week of daily assignments and time offs in the familiar calendar format. Use the report to produce a master schedule document or to distribute to employees in electronic or paper form.

For each day, the employees assigned to each shift are listed under the shift title. Employees taking time off are also shown, along with the time off reasons. When there are more assignments than can be placed on a single page, display cells are vertically extended and the calendar will be printed on multiple pages. You can also export the report to Microsoft Word for additional formatting or layout changes.



Sample Police Patrol Division

Weekly Assignment and Time Off Calendar

Date Range: 3/13/2011 to 3/26/2011
Filter: (Employee Active Status Istrue)

Sunday, March 13, 2011	Monday, March 14, 2011
Day Shift, Precint 1: *7:00AM-3:00PM* Jones, Christine; Lewis, Eddy; McBain, Arabella; McBain, Jackie; McBain, Jan; Polly, Christine; Poole, Rebecca; Poole, Venessa; Starr, Charlie; Stewart, Melanie; Valda, Natalie; Young, Colleen Swing Shift, Precint 1: *3:00PM-11:00PM* Cunningham, Josie; Einhart, Christine; Gould, Beatrice; Keane, Athony; Lavelle, Jennifer; Lewis, Ellie; Rutledge, Ann; Sanders, Jacob; Woods, Anabelle; Woods, Jake Night Shift, Precint 2: *11:00PM-7:00AM* Benedict, Xavier(On Call); Cutter, Robert; Dennings, Wendeline; Dixon, Brian; Einhart, Vincent; Franks, Peter; Franks, Zack; Munoz, Bridget(On Call); Robinson, Pauline; Snyder, Crystal; Starr, Alex; Stewart, Katie Vacation: *3:00PM-11:00PM* Cunningham, Crystal Unpaid Vacation: *11:00PM-7:00AM* Kerr, Emily	Day Shift, Precint 1: *7:00AM-3:00PM* Dixon, Athony; Einhart, Vincent(On Call); Guttierez, Bryant; Kerr, Xavier; King, Ashley; Martin, Claire; Munoz, Bridget; Polly, David; Robinson, Mary; Snyder, Francisco; Snyder, Monica; Williams, Ellie; Woods, Lance Swing Shift, Precint 1: *3:00PM-11:00PM* Jones, Christine; Lewis, Eddy; Polly, Christine; Poole, Rebecca; Poole, Venessa; Starr, Charlie; Stewart, Katie(On Call); Stewart, Melanie; Valda, Natalie; Young, Colleen Night Shift, Precint 2: *11:00PM-7:00AM* Crawford, Erica; Cunningham, Crystal; Cunningham, Josie; Dixon, Brian(On Call); Einhart, Christine; Gould, Beatrice; Keane, Athony; Lavelle, Jennifer; Lewis, Ellie; Rutledge, Ann; Sanders, Jacob; Woods, Anabelle; Woods, Jake Jury Duty: *(All-Day)* Jones, Christine Vacation: *(All-Day)* Robinson, Mary
Tuesday, March 15, 2011	**Wednesday, March 16, 2011**
Day Shift, Precint 1: *7:00AM-3:00PM* Dixon, Athony; Guttierez, Bryant; Kerr, Xavier; King, Ashley; Martin, Claire; Munoz, Bridget; Polly, David; Robinson, Mary; Snyder, Francisco; Snyder, Monica; Williams, Ellie; Woods, Lance Swing Shift, Precint 1: *3:00PM-11:00PM* Dennings, Wendeline(On Call); Jones, Christine; Lewis, Eddy; McBain, Arabella; McBain, Jackie; McBain, Jan; Polly, Christine; Poole, Rebecca; Poole, Venessa; Robinson, Pauline(On Call); Starr, Charlie; Stewart, Katie(On Call); Stewart, Melanie; Valda, Natalie; Young, Colleen Night Shift, Precint 2: *11:00PM-7:00AM* Crawford, Erica; Cunningham, Crystal;	Day Shift, Precint 1: *7:00AM-2:30PM* Benedict, Xavier; *7:00AM-3:00PM* Cutter, Robert; Dennings, Wendeline; Dixon, Brian; Einhart, Vincent; Franks, Peter; Franks, Zack; Kerr, Emily; Robinson, Pauline; Snyder, Crystal; Starr, Alex; Stewart, Katie Swing Shift, Precint 1: *3:00PM-11:00PM* Dixon, Athony; Guttierez, Bryant; Kerr, Xavier; King, Ashley; Martin, Claire; Munoz, Bridget; Polly, David; Robinson, Mary; Snyder, Francisco; Snyder, Monica; Williams, Ellie; Woods, Lance Night Shift, Precint 2: *11:00PM-7:00AM* Cunningham, Josie(On Call); Jones, Christine;

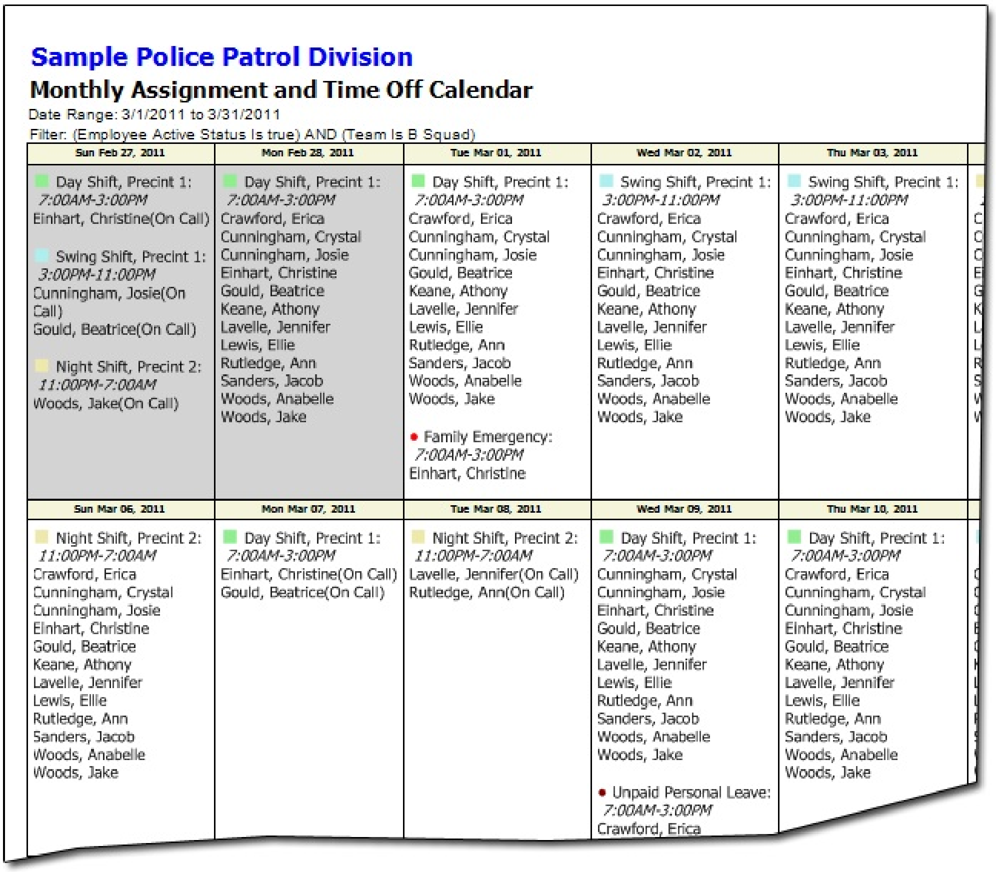
To print the Weekly Assignment Calendar report

1. On the **Manage** tab of the Ribbon, in the **Reports** group, click **Reports**. The **Reports** home page will be displayed.
2. Double-click the **Weekly Assignment Calendar** button to open the **Report Viewer**.
3. By default, the **Report Viewer** will show the printout for the current week's assignments. To select a different time period, use the **Date range** drop-down list.
4. Once you are satisfied, click the **Print Report** button  on the Report Viewer Quick Access Toolbar to print.
5. To save the report with your modified settings for repeated use, click the **Save Report** button  on the Report Viewer Quick Access Toolbar

Print Monthly Assignment and Time Off Calendars

The Monthly Assignment and Time Off Calendar report shows a full month of daily assignments and time offs in the familiar monthly calendar format. Use it to produce a master schedule document or to distribute to employees in electronic or paper form.

For each day, the employees assigned to each shift are listed under the shift title. Employees taking time off are also shown along with the time off reasons. Typically, there are five weeks shown on a single page. Days from the previous or the next month are displayed with a light gray background color. These days are shown to maintain the calendar display format even though they are outside of the date range of your selected month. When there are more assignments than can be placed on a single page, display cells are vertically extended and the calendar will be printed on multiple pages. You can also export the report to Microsoft Word for additional formatting or layout changes.



Sample Police Patrol Division

Monthly Assignment and Time Off Calendar

Date Range: 3/1/2011 to 3/31/2011

Filter: (Employee Active Status Is true) AND (Team Is B Squad)

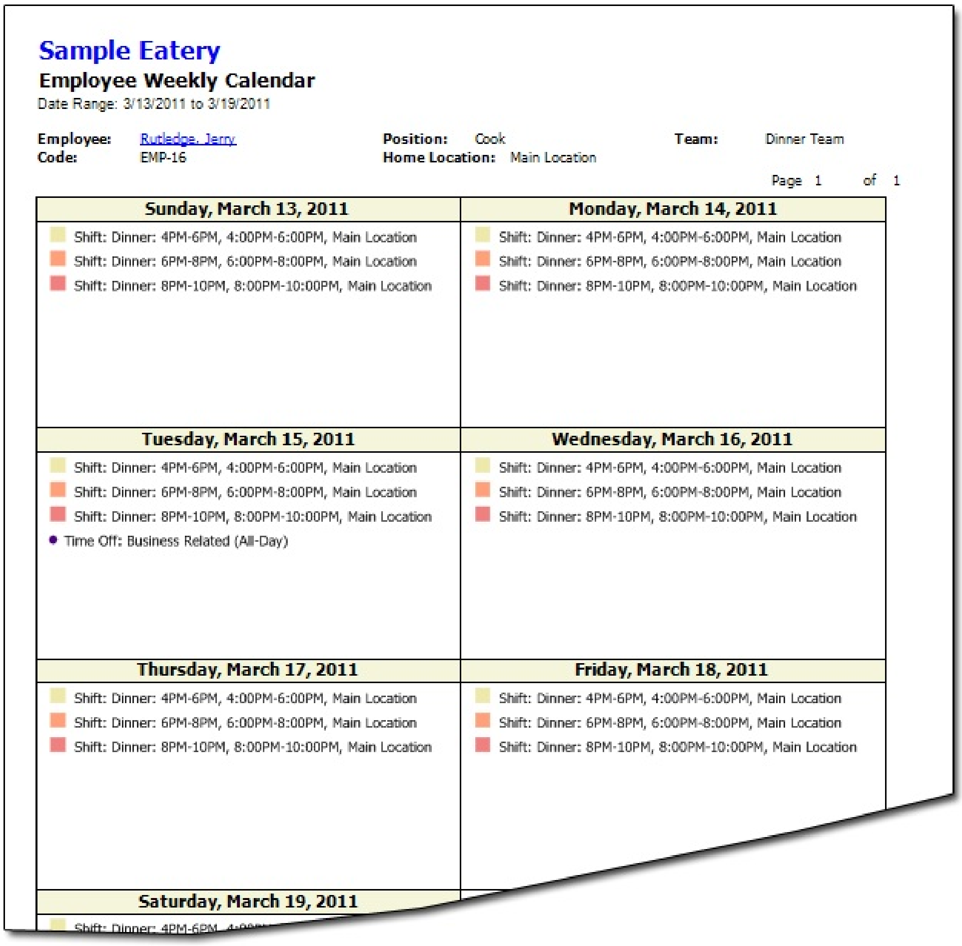
Sun Feb 27, 2011	Mon Feb 28, 2011	Tue Mar 01, 2011	Wed Mar 02, 2011	Thu Mar 03, 2011
Day Shift, Precint 1: *7:00AM-3:00PM* Einhart, Christine(On Call) Swing Shift, Precint 1: *3:00PM-11:00PM* Cunningham, Josie(On Call) Gould, Beatrice(On Call) Night Shift, Precint 2: *11:00PM-7:00AM* Woods, Jake(On Call)	Day Shift, Precint 1: *7:00AM-3:00PM* Crawford, Erica Cunningham, Crystal Cunningham, Josie Einhart, Christine Gould, Beatrice Keane, Athony Lavelle, Jennifer Lewis, Ellie Rutledge, Ann Sanders, Jacob Woods, Anabelle Woods, Jake	Day Shift, Precint 1: *7:00AM-3:00PM* Crawford, Erica Cunningham, Crystal Cunningham, Josie Gould, Beatrice Keane, Athony Lavelle, Jennifer Lewis, Ellie Rutledge, Ann Sanders, Jacob Woods, Anabelle Woods, Jake Family Emergency: *7:00AM-3:00PM* Einhart, Christine	Swing Shift, Precint 1: *3:00PM-11:00PM* Crawford, Erica Cunningham, Crystal Cunningham, Josie Einhart, Christine Gould, Beatrice Keane, Athony Lavelle, Jennifer Lewis, Ellie Rutledge, Ann Sanders, Jacob Woods, Anabelle Woods, Jake	Swing Shift, Precint 1: *3:00PM-11:00PM* Crawford, Erica Cunningham, Crystal Cunningham, Josie Einhart, Christine Gould, Beatrice Keane, Athony Lavelle, Jennifer Lewis, Ellie Rutledge, Ann Sanders, Jacob Woods, Anabelle Woods, Jake
Sun Mar 06, 2011	**Mon Mar 07, 2011**	**Tue Mar 08, 2011**	**Wed Mar 09, 2011**	**Thu Mar 10, 2011**
Night Shift, Precint 2: *11:00PM-7:00AM* Crawford, Erica Cunningham, Crystal Cunningham, Josie Einhart, Christine Gould, Beatrice Keane, Athony Lavelle, Jennifer Lewis, Ellie Rutledge, Ann Sanders, Jacob Woods, Anabelle Woods, Jake	Day Shift, Precint 1: *7:00AM-3:00PM* Einhart, Christine(On Call) Gould, Beatrice(On Call)	Night Shift, Precint 2: *11:00PM-7:00AM* Lavelle, Jennifer(On Call) Rutledge, Ann(On Call)	Day Shift, Precint 1: *7:00AM-3:00PM* Cunningham, Crystal Cunningham, Josie Einhart, Christine Gould, Beatrice Keane, Athony Lavelle, Jennifer Lewis, Ellie Rutledge, Ann Sanders, Jacob Woods, Anabelle Woods, Jake Unpaid Personal Leave: *7:00AM-3:00PM* Crawford, Erica	Day Shift, Precint 1: *7:00AM-3:00PM* Crawford, Erica Cunningham, Crystal Cunningham, Josie Einhart, Christine Gould, Beatrice Keane, Athony Lavelle, Jennifer Lewis, Ellie Rutledge, Ann Sanders, Jacob Woods, Anabelle Woods, Jake

To print the Monthly Assignment Calendar report

1. On the **Manage** tab of the Ribbon, in the **Reports** group, click **Reports**. The **Reports** home page will be displayed.
2. Double-click the **Monthly Assignment Calendar** button to open the **Report Viewer**.
3. By default, the **Report Viewer** will show the printout for the current month's assignments. To select a different time period, use the **Date range** drop-down list.
4. Once you are satisfied, click the **Print Report** button  on the Report Viewer Quick Access Toolbar to print.
5. To save the report with your modified settings for repeated use, click the **Save Report** button  on the Report Viewer Quick Access Toolbar

Print Employee Weekly Calendars

The Employee Weekly Calendar report shows each employee's schedule in the familiar weekly calendar format. Use it to produce a master schedule document or to distribute to individual employees in electronic or paper form. You can modify the standard report to show only the schedule information that you want. You can also save the modified reports for future use.


Sample Eatery
Employee Weekly Calendar
Date Range: 3/13/2011 to 3/19/2011

Employee: Rutledge, Jerry Position: Cook Team: Dinner Team
Code: EMP-16 Home Location: Main Location

Page 1 of 1

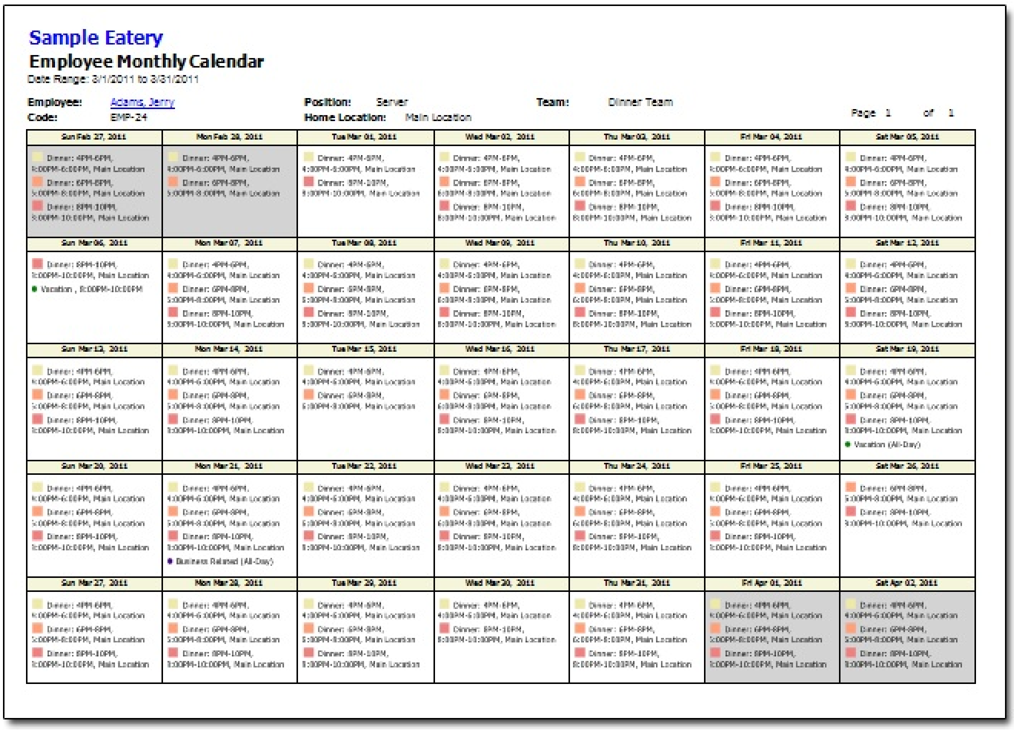
Sunday, March 13, 2011	Monday, March 14, 2011
Shift: Dinner: 4PM-6PM, 4:00PM-6:00PM, Main Location Shift: Dinner: 6PM-8PM, 6:00PM-8:00PM, Main Location Shift: Dinner: 8PM-10PM, 8:00PM-10:00PM, Main Location	Shift: Dinner: 4PM-6PM, 4:00PM-6:00PM, Main Location Shift: Dinner: 6PM-8PM, 6:00PM-8:00PM, Main Location Shift: Dinner: 8PM-10PM, 8:00PM-10:00PM, Main Location
Tuesday, March 15, 2011	**Wednesday, March 16, 2011**
Shift: Dinner: 4PM-6PM, 4:00PM-6:00PM, Main Location Shift: Dinner: 6PM-8PM, 6:00PM-8:00PM, Main Location Shift: Dinner: 8PM-10PM, 8:00PM-10:00PM, Main Location Time Off: Business Related (All-Day)	Shift: Dinner: 4PM-6PM, 4:00PM-6:00PM, Main Location Shift: Dinner: 6PM-8PM, 6:00PM-8:00PM, Main Location Shift: Dinner: 8PM-10PM, 8:00PM-10:00PM, Main Location
Thursday, March 17, 2011	**Friday, March 18, 2011**
Shift: Dinner: 4PM-6PM, 4:00PM-6:00PM, Main Location Shift: Dinner: 6PM-8PM, 6:00PM-8:00PM, Main Location Shift: Dinner: 8PM-10PM, 8:00PM-10:00PM, Main Location	Shift: Dinner: 4PM-6PM, 4:00PM-6:00PM, Main Location Shift: Dinner: 6PM-8PM, 6:00PM-8:00PM, Main Location Shift: Dinner: 8PM-10PM, 8:00PM-10:00PM, Main Location
Saturday, March 19, 2011	
Shift: Dinner: 4PM-6PM,	

To print the Employee Weekly Calendar report

1. On the **Manage** tab of the Ribbon, in the **Reports** group, click **Reports**. The **Reports** home page will be displayed.
2. Double-click the **Employee Weekly Calendar** button to open the **Report Viewer**.
3. By default, the **Report Viewer** will show the printout for today's assignments. To select a different date or a range of dates, use the **Date range** drop-down list.
4. Click **Filter** if you want to apply a filter to display only data records that meet your criteria. When you apply a filter, only those shift and time off assignments that match your criteria are included in the report. The rest are hidden until you remove the filter. For example, you may be interested in printing only assignments for a specific team or for a particular employee.
5. Once you are satisfied, click the **Print Report** button  on the Report Viewer Quick Access Toolbar to print.
6. To save the report with your modified settings for repeated use, click the **Save Report** button  on the Report Viewer Quick Access Toolbar

Print Employee Monthly Calendars

The [Employee Monthly Calendar report]() shows each employee's schedule in the familiar monthly calendar format. Use it to produce a master schedule document or to distribute to individual employees in electronic or paper form. You can modify the standard port to show only the schedule information that you want and save the modified reports for future use.



To print the Employee Monthly Calendar report

1. On the **Manage** tab of the Ribbon, in the **Reports** group, click **Reports**. The **Reports** home page will be displayed.
2. Double-click the **Employee Monthly Calendar** button to open the **Report Viewer**.
3. By default, the **Report Viewer** will show the printout for the current day's assignments. To select a different date or range of dates, use the **Date range** drop-down list.
4. Click **Filter** if you want to apply a filter to display only data records that meet your criteria. When you apply a filter, only those shift and time off assignments that match your criteria are included in the report. The rest are hidden until you remove the filter. For example, you may want to apply a filter to display only assignments for a specific team or for a particular employee.
5. Once you are satisfied, click the **Print Report** button  on the Report Viewer Quick Access Toolbar to print.
6. To save the report with your modified settings for repeated use, click the **Save Report** button  on the Report Viewer Quick Access Toolbar

Publishing Schedules in PDF and Other Formats

Snap Schedule makes it easy for you to publish schedules and any report in PDF (Portable Document Format) and a variety of other formats suitable for uploading to the Web or your SharePoint portal, e-mailing, or distributing the resulting files electronically.

To Print a Schedule View to a File

1. Select the schedule view you would like to print and resize schedule cells as required to get the schedule view to appear as what you would like to be printed.
2. Click the **File** tab and click **Print** to display the print Backstage view. Note that this command will be disabled if you were not viewing the Daily, Shift, Task or Calendar view prior to clicking the **File** tab.
3. Click the appropriate command to print the schedule view to the desired file format. PDF, JPEG, PNG, and TIFF file formats are supported.
4. The Print Schedule View dialog box will be displayed to let you enter the file name and where the file will be placed.
5. Click **Save** to print to the file in the selected file format.

Export Reports to a File in a Variety of Formats

Any report can be exported to a file in one of the following file formats:

- PDF
- Word (RTF)
- Excel and Excel XML
- Gif
- JPEG
- PNG
- Emf
- TIFF
- BMP

To export reports to a file

1. On the **Manage** tab of the Ribbon, in the **Reports** group, click **Reports**. The **Reports** home page will be displayed.
2. Click the desired report to open the **Report Viewer**.
3. From the **File** tab of the **Report Viewer**, export the report to a disk file in the desired format.

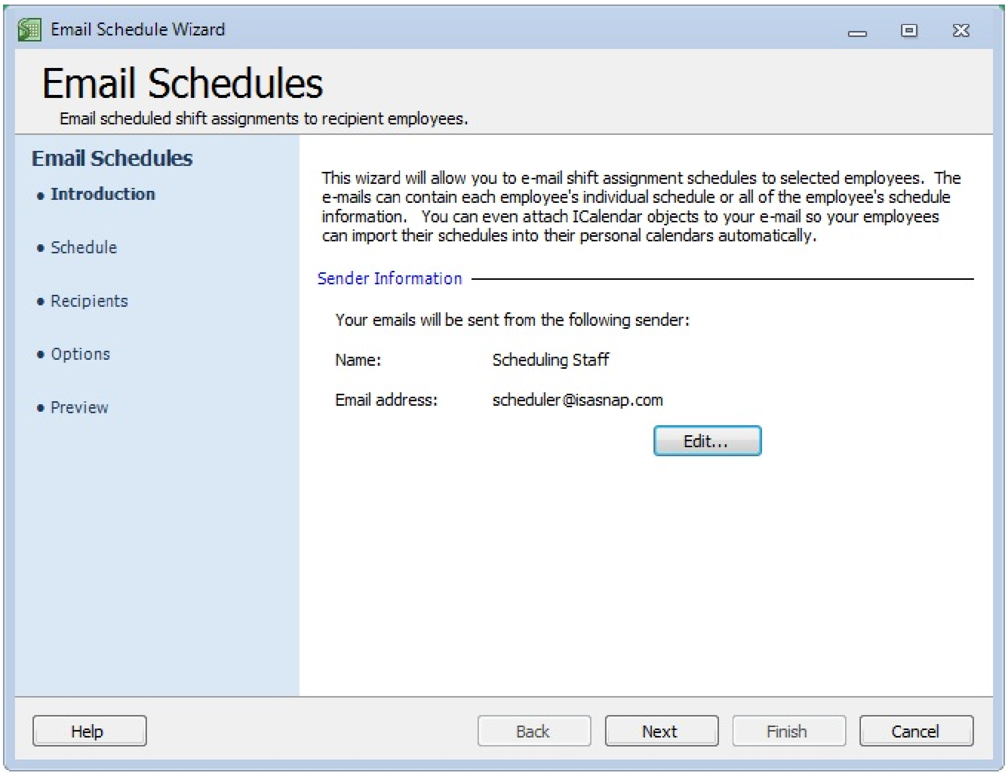
E-mailing Schedules to Employees

The E-mail Schedules wizard lets you e-mail shift assignment schedules to all or selected employees. Each e-mail can contain the employee's personal schedule or schedule information of all selected employees. You have the option to include an ICalendar formatted file that contains the employee's personal schedule so your employees can import their schedules into their calendar programs or PDAs.

To use this feature, you must first set up your e-mail preferences in E-mail Settings and have Internet access with SMTP port 25 unblocked.

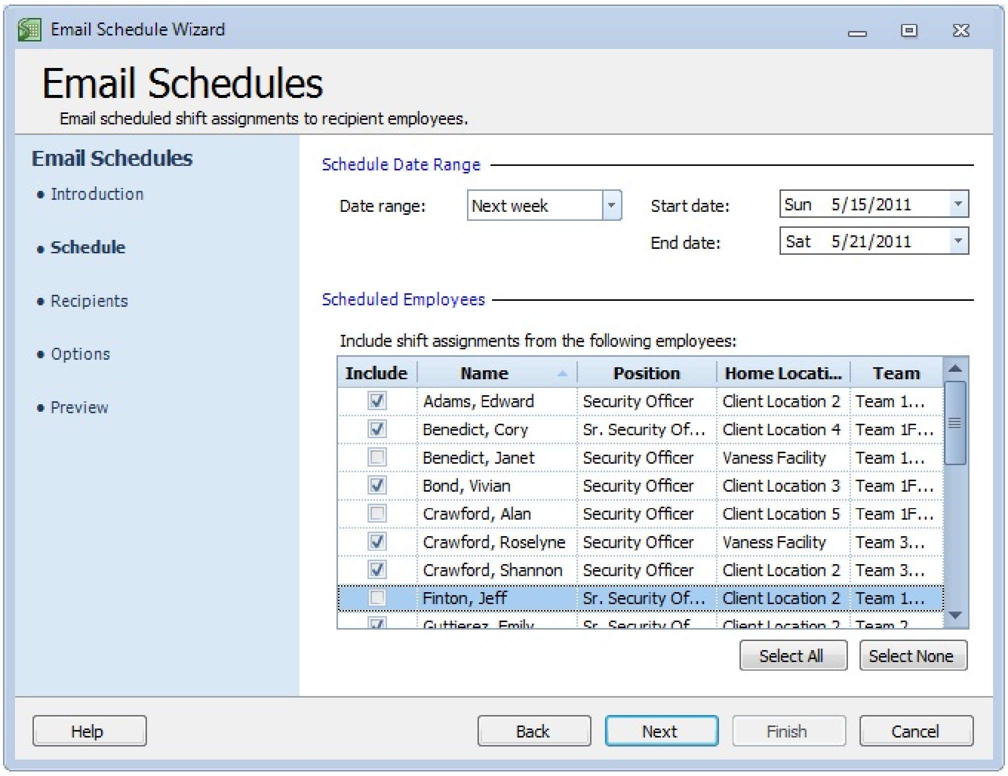
To use the E-mail Schedules wizard

1. On the **Schedule** tab of the Ribbon, in the **E-mail** group, click **E-mail Schedules**. The **E-mail Schedules** wizard will be displayed.



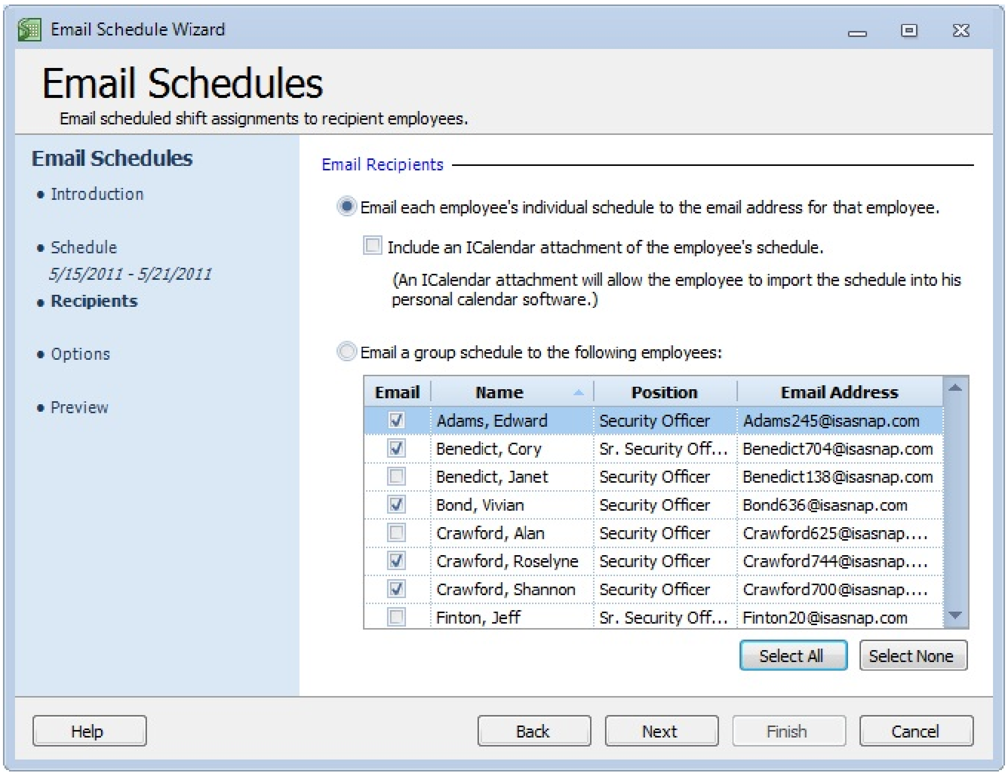
   If you have not set up your e-mail preferences in E-mail Settings, you will see a warning, and the **Name** and **Email address** fields will be blank. In this case, click the **Edit** button to fill in the fields. Once the sender information has been defined, you will be able to proceed to the next step.

2. Click **Next** to continue. The wizard will display the schedule selection screen as shown below. Note that the selection list will only show the employees with a valid e-mail address in their contact information. Refer to the Entering Employee Data section for instructions on how to enter employee contact information. Note that you can enter multiple e-mail addresses in the employee's e-mail field using the ";" separator.

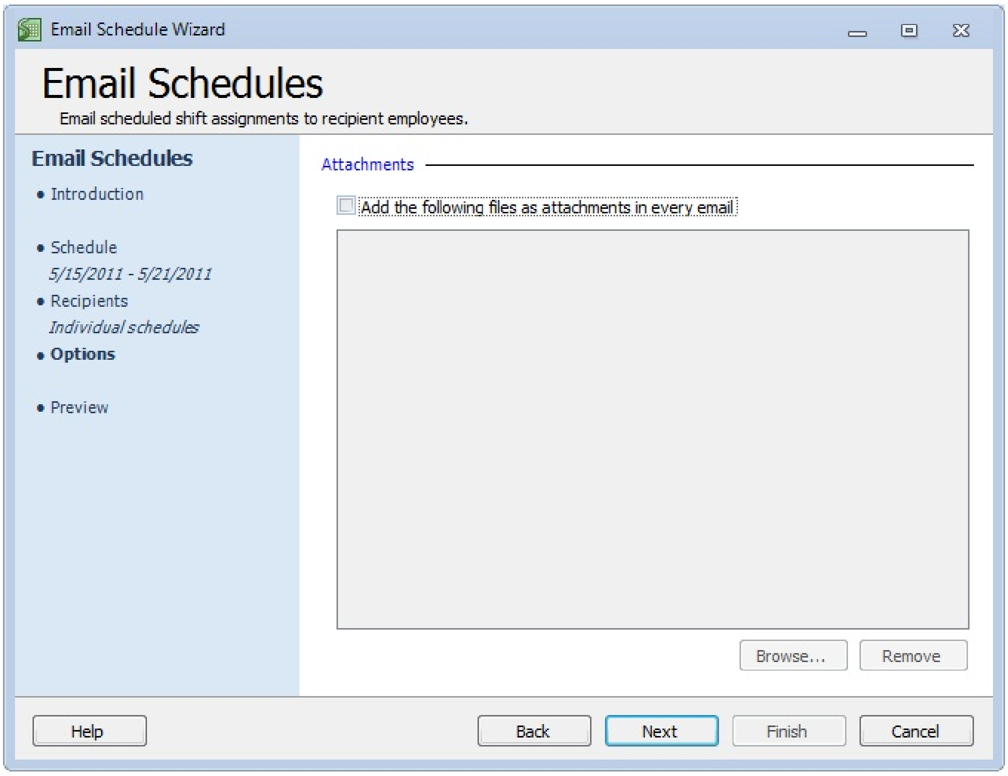


3. Use the **Date range** drop-down list to select the schedule period or enter the start and end dates. If you want to send the schedules of all employees, click **Select All**. Otherwise, click the appropriate **Include** check boxes to select the employees whose schedules you want to e-mail. Click a column header to switch between ascending and descending sort order. You will see a small arrow indicating the sort order. When you are done, click **Next** to continue. Note: The **Next** button will be enabled only when you have selected at least one employee.

4. The wizard will display the recipient selection screen as shown below. Click the appropriate radio button to select the e-mail option. If you select **Email a group schedule to the following employees**, the schedule information of the entire group of employees you selected in the previous step will be sent to each employee in the group by default. You can send the group's schedule to additional employees by checking their corresponding **Email** check boxes. When done, click **Next** to continue.

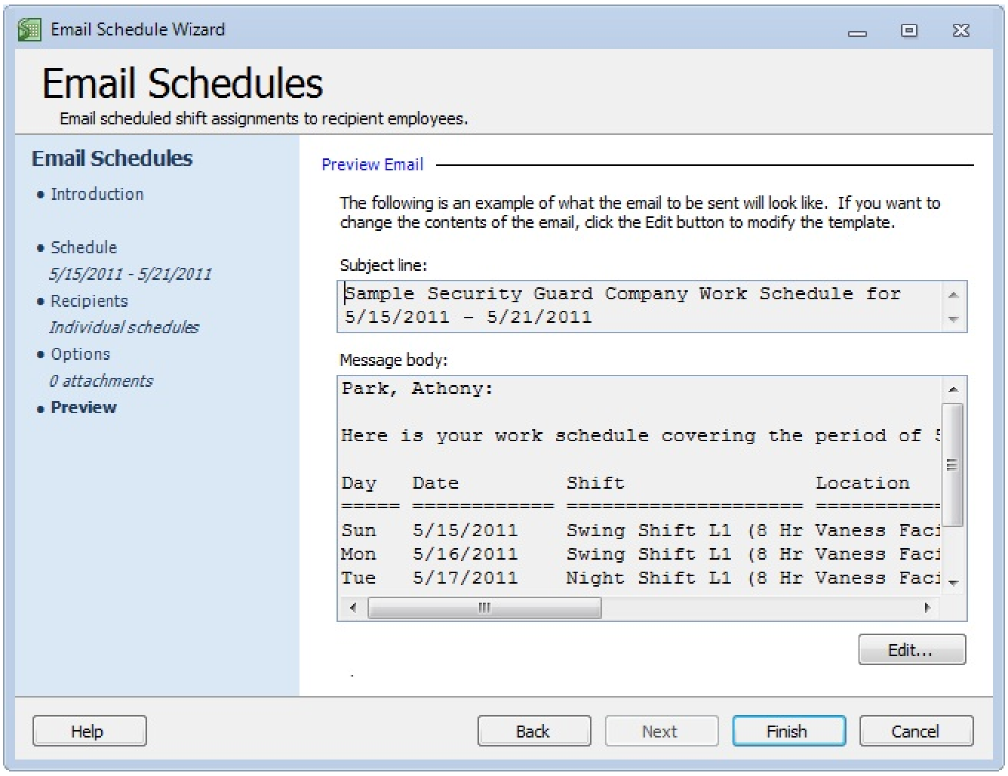


5. The following Options screen will be displayed.

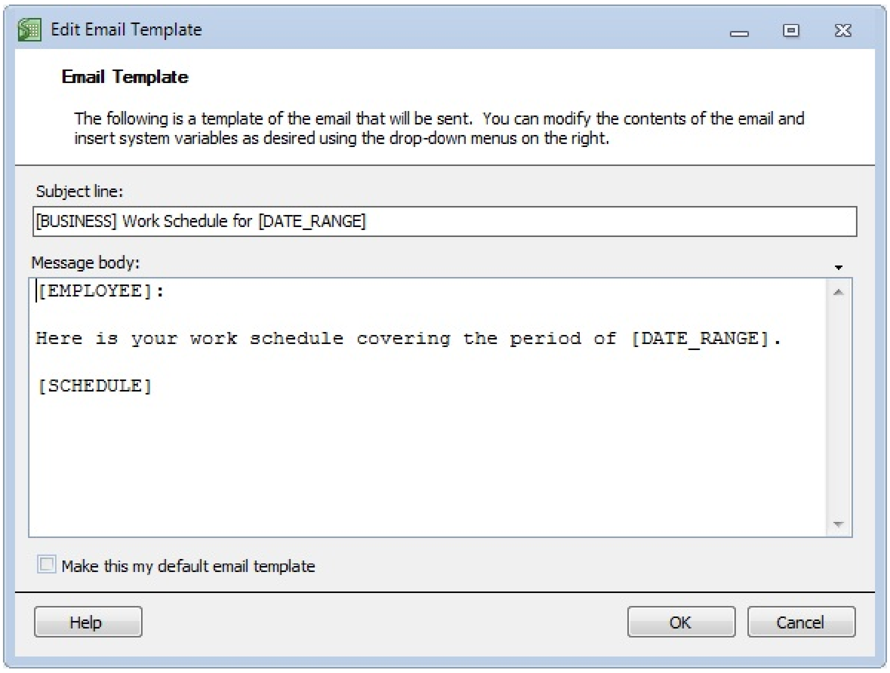


Click the check box if you would like to send a file attachment with each e-mail message, then click the **Browse** button to select the file. You can have as many file attachments as you like. Click **Next** to continue.

6. The e-mail preview screen will be displayed. What you see in the **Subject line** will appear as the subject in the recipient's e-mail message, and the text in the message body will appear as the e-mail message content.



The e-mail is composed using a template that you can modify to suit your needs. To change the subject line and the message body text in the template, click **Edit** to open the **Edit E-mail Template** form.



The e-mail template consists of two parts: 1) the subject line, and 2) the message body. For each part, you can type the text of the message and add placeholders to indicate where you want certain information, such as an employee name or schedule information, to appear. As the subject line can only be a single line of text, multiple lines in this field (including blank lines and embedded control characters) will cause an error. Therefore, care should be exercised when using placeholders in the subject line to ensure that only placeholders resulting in a single line of text are used. E-mails are composed and sent as multipart messages (Text/HTML) and it is up to your e-mail client to decide on which format (text or HTML) to display.

Snap Schedule recognizes these placeholders which are always enclosed in square brackets.

Placeholder	Will be replaced with
[BUSINESS]	The business name you defined in the Business Information Settings.
[DATE_RANGE]	The schedule start and end dates you selected in the previous step.
[EMPLOYEE]	The full name of an employee in the form of last name, first name.
[EMPLOYEE_FIRST]	An employee's first name.
[EMPLOYEE_LAST]	An employee's last name.
[SCHEDULE]	An employee's personal schedule or the schedule of the group of selected employees depending on the option you selected in the previous step. For example, if you selected a group of three employees and chose **Email the entire group's schedule to the selected employees**, this placeholder will be replaced with a multi-column table containing work assignments of the three employees. Use this placeholder when you want to provide as much schedule information in the email. The schedule information includes shift and time off assignments. When expanded, the placeholder is replaced with a multi-column table containing a column header and the following data fields: day of the week, date, employee name, shift description, location description, start time, end time, on call, and assignment reason.
[SHORT_SCHEDULE]	A shorter version of the employee's personal schedule or the schedule of the group of selected employees depending on the option you selected in the previous step. When expanded, the placeholder is replaced with a multi-column table containing the following data fields: date, employee name, shift description, location description, start time, and on call.
[MINI_SCHEDULE]	A compact version of the employee's personal schedule or the schedule of the group of selected employees depending on the option you selected in the previous step. When expanded, the placeholder is replaced with a multi-column table containing the following data fields: date, employee code, shift code, location code, and start time.
[MICRO_SCHEDULE]	An ultra compact version of the employee's personal schedule or the schedule of the group of selected employees depending on the option you selected in the previous step. When expanded, the placeholder is replaced with a multi-column table containing the following data fields: date, employee code, shift code, and start time.

[SCHEDULE_NOTES]	An expanded version of the [SCHEDULE], [SHORT_SCHEDULE], [MINI_SCHEDULE], and [MICRO_SCHEDULE] place holders that also includes the shift assignment notes for each shift assignment.
[SCHEDULE_TASKS]	An expanded version of the [SCHEDULE], [SHORT_SCHEDULE], [MINI_SCHEDULE], and [MICRO_SCHEDULE] place holders that also lists the tasks scheduled in each shift.
[SCHEDULE_NOTES_TASKS]	An expanded version of the [SCHEDULE], [SHORT_SCHEDULE], [MINI_SCHEDULE], and [MICRO_SCHEDULE] place holders that also lists the tasks scheduled in each shift and the corresponding shift assignment notes.
[CUSTOM_COLUMN_WIDTHS list-of-parameters]	A customized employee's personal schedule or the schedule of the group of selected employees depending on the option you selected in the previous step.

Use this placeholder when you want to define what to be included as columns in the schedule table. When expanded, the placeholder is replaced with a multi-column table containing a column header and the data fields (parameters) you specified in the list of parameters.

The format for the placeholder is [CUSTOM_COLUMN_WIDTHS list-of-parameters] where list-of-parameters is a list of parameters, separated by a comma (,) in the form of parameter=nn where parameter is the name of the parameter and nn is the column width. You can use any of the following parameters:

Parameter Name	Description
Day	Show the day of week on each shift assignment.
Date	Show the shift assignment date.
Employee	Show the employee's name in the form of Last name, First name.
EmployeeCode	Show the employee's code.
StartTime	Show the shift assignment start time.
EndTime	Show the shift assignment end time.
Shift	Show the shift description.
ShiftCode	Show the shift code.
Location	Show the description of the location where the employee will be working.
OnCall	Show if the shift assignment is an on-call shift.
AssignmentReason	Show the shift assignment reason, if any.
Notes	Show the shift assignment note, if any, on a separate line.
Task	Show the task information in each shift on a separate line.

The schedule table will only contain columns of data matching the specified parameters. The value of nn specifies the column width in characters (e.g. 10 means the column will be 10 characters wide). A value of 0 indicates that the column will not be shown.

The order of the columns is fixed and cannot be controlled with this placeholder. You can only specify if a column will appear or not and how wide it will be.

For example, if you specify this placeholder [CUSTOM_COLUMN_WIDTHS day=3, date=10, location=12, starttime=7, employee=16, endtime=7] in the e-mail template, you will get a table similar to the one shown below in the resulting e-mail.

```
Day Date       Employee         Location     Start   End
```

```
=== ========== ================ ============ ======= =======

Sun 9/9/2012   Allen, Viola     Cardiac Care 7:00 AM 3:00 PM

Sun 9/9/2012   Benedict, Victor Cardiac Care 7:00 AM 3:00 PM

Sun 9/9/2012   Brown, Wesley    Cardiac Care 7:00 AM 3:00 PM

Sun 9/9/2012   Franks, Opie     Cardiac Care 7:00 AM 3:00 PM

Sun 9/9/2012   Garcia, Monique  Cardiac Care 7:00 AM 3:00 PM

Mon 9/10/2012  Bond, Aliza      Cardiac Care 3:00 PM 11:00 P

Mon 9/10/2012  Garcia, Benjamin Cardiac Care 3:00 PM 11:00 P

Mon 9/10/2012  Harris, Joyce    Cardiac Care 3:00 PM 11:00 P

Mon 9/10/2012  Hawk, Lauren     Cardiac Care 3:00 PM 11:00 P
```

7. Click **Finish** to start sending e-mails. Depending on the number of e-mails to send and your Internet access speed, this may take a few minutes.

Overview

As you are making shift assignments, **Snap Schedule** automatically sums up employee work hours, calculates labor costs, and provides detailed cost reports so you know instantly if your are on budget. The ability to foresee the cost impact while making a work schedule is essential to labor cost controls. At any time, you can run the Estimated Labor Cost by Employee report or Estimated Labor Cost Summary report to instantly see if you are on budget for any reporting period and to assess and control overtime.

Snap Schedule calculates labor costs based on the hourly cost (regular hourly rate as used in this section) you entered for each employee, scheduled employee hours for the work period, applicable shift premium policies, and overtime rules. In **Snap Schedule**, the total labor cost (pay due to each employee) is the sum of all types of pay earned for the work period and computed as follows.

Total labor cost = Regular (straight time) pay + Shift premium pay + On-call pay + Overtime pay + Time off pay

To find out how **Snap Schedule** determines each cost component, click the appropriate links below.

Calculating regular pay

Calculating shift premium pay

Calculating on-call pay

Calculating overtime pay

Calculating time off pay

Calculating Regular Pay

Regular pay is the compensation made to employees for hours worked at the basic hourly rate you entered for each employee. It is computed as:

Regular pay = Regular hourly rate * Hours worked during the work period

For example, the work period you set in Snap Schedule is one week and John is scheduled to work 40 hours next week at an hourly rate of $20 per hour. John's regular pay for the work period is $800 ($20/hour * 40 hours/work period).

Calculating Shift Premium Pay

Shift premium pay is a form of incentive pay, also referred to as "shift differential." Shift premium pay is normally associated with shiftwork during odd hours or under unusual conditions. Traditionally used to incentivize employees to work outside their normal shifts or new hires to work on shifts that don't readily attract employees, shift premium pay can be used for other purposes like:

Hazard Pay

Premium pay for Holiday Work

Premium pay for Sunday Work

Premium pay for Travel Time

Snap Schedule provides a very flexible scheme to handle practically all types of incentive pay through the use of Shift Premium policies. You can define as many policies as you like. With each policy, you can specify how the premium pay will be calculated, whether or not overtime exempt employees are eligible, which days of the week and which hours are applicable, and whether or not **Snap Schedule** should include shift premium pay in overtime computations. You can then associate a shift premium policy to a particular shift, and all employees who are assigned to that shift will be subject to the premium pay policy.

You can specify up to three rules for shift premium calculation per policy. A shift premium pay can be a fixed amount per shift regardless of the number of hours worked, a fixed amount per hour for each hour worked, or a percentage of the employee's regular hourly rate for each hour worked. Note that the rules are additive so if you specify more than one rule, the total shift premium will be the sum of the premium components derived from each rule.

For example, the work period you set in **Snap Schedule** is One Week and John is scheduled to work 32 hours next week, Monday through Thursday, on the day shift at an hourly rate of $20 per hour. On Friday, you need John to fill in for Joanne who works the night shift for 8 hours. Employees who work the night shift are offered a shift premium of $30 per shift plus 10 percent of the employee's basic hourly rate. John's shift premium pay for the period is $46 ($30 per shift + [[$20 per hour * 10%] * 8 hours]). This premium pay is in addition to John's regular pay of $800 ($20 per hours * [32 hours on day shift + 8 hours on night shift]) so John's total labor cost for the week is $800 + $46 = $846.

Calculating On Call Pay

On-call pay is normally a compensation for employees who are required to be on-call and must show up at work on short notice if the need arises. Snap Schedule provides a very flexible scheme to handle practically all types of on-call pay through the use of Shift Premium Policies. You can define as many policies as you like. Each policy allows you to specify how the on-call pay will be calculated and whether or not Snap Schedule should include on-call pay in overtime computations. You can then associate a shift premium policy to a particular shift, and all employees who are on-call for that shift will be subject to the on-call pay policy.

You can specify up to three rules for on-call pay calculation in a policy. An on-call pay can be a fixed amount per shift regardless of the number of hours being on call, a fixed amount per hour for each hour being on call, or a percentage of the employee’s regular hourly rate for each hour being on-call. Note that the rules are additive, so if you specify more than one rule, the total on- call pay will be the sum of the on-call pay components derived from each rule.

For example, the work period you set in **Snap Schedule** is one week, and Steve is scheduled to work 40 hours next week on the day shift at an hourly rate of $20 per hour. On Saturday, you need Steve to be on-call for 8 hours for the day shift. Employees who are asked to be on call are compensated at $5 for each on-call hour. Steve's on-call pay for the period is $40 ($5 per hour * 8 hours). This on-call pay is in addition to Steve's regular pay of $800 ($20 per hours * 40 hours) so Steve's total labor cost for the week is $800 + $40 = $840.

Calculating Time Off Pay

Paid time off is any time not worked by an employee for which the regular hourly rate is accrued and paid to the employee. Time off is granted to employees usually in the form of vacation days, holidays, personal leave, jury duty, sick leave, etc. Because the employee is not on duty and working, time off is not taken into account when calculating overtime pay.

Time off pay is computed as:

Time off pay = Regular hourly rate * Time off hours during the work period

For example, the work period you set in Snap Schedule is one week, and Gabby is working regularly 8 hours a day, Monday through Friday, at an hourly rate of $20 per hour. Next week, Gabby is scheduled to work Monday, Tuesday, and Wednesday, then take Thursday and Friday as vacation days (paid time off). Gabby's time off pay to the work period is $320 ($20/hour * 16 hours/work period).

Calculating Overtime Pay

Overtime means hours worked for which there is an increase in the rate of pay for work on any day or in any work period in excess of the number of hours normally worked. In the United States, overtime compensation is governed by the Fair Labor Standards Act (FLSA), applicable state laws, and collective bargaining agreements.

Snap Schedule provides a very flexible scheme to handle practically all types of overtime pay through the use of daily overtime rules and work period overtime rules. The resulting overtime pay is the sum of the components derived from all rules that are enabled.

Daily Overtime Rules

Daily overtime rules specify how overtime pay is computed for work hours in excess of certain hours per day. Up to three rules (for three overtime thresholds) are provided. You can enable each rule by checking the appropriate checkbox in the Default Settings tab of the Business Information and Operational Settings form and specify the pay rate multipliers to be used. For example, if you pay one and one-half times the employee's regular rate of pay for hours worked beyond 8 hours per day and double the employee's regular rate of pay for hours worked beyond 12 hours per day, then you will set the Daily Overtime Rules as follows:

After 8 work hours in a day, pay rate is 1.5 times employee's regular hourly rate.

After 12 work hours in a day, pay rate is 2 times employee's regular hourly rate.

Work Period Overtime Rules

Work period overtime rules specify how overtime pay is computed for work hours in excess of certain hours per work period. Similar to daily overtime rules, up to three rules (for three overtime thresholds) are provided. For example, if your work period is One Week and you pay one and one-half times the employee's regular rate of pay for hours worked beyond 40 hours per week and double the employee's regular rate of pay for hours worked beyond 60 hours per week, you will set the Work Period Overtime Rules as follows:

Work period duration: One Week

After 40 work hours in a period, pay rate is 1.5 times employee's regular hourly rate.

After 60 work hours in a period, pay rate is 2 times employee's regular hourly rate.

The terms used in overtime calculations by Snap Schedule are defined below.

Work Period

A work period is a time duration, typically a week, two weeks, or a month, within which the worker's wage and overtime compensation are determined. The work period may begin on any day of the week, and it needs not coincide with the calendar week. You can define the work period duration using the Default Settings tab of the Business Information and Operational Settings form.

Number of Hours Worked

The number of hours worked is the total shift hours an employee is scheduled to be working during the work period, not including hours that are paid but not actually worked (on-call hours, paid holidays, sick leaves, etc.)

Regular Hourly Rate

The regular hourly rate is an average derived by dividing total remuneration (the sum of all monies paid to, or on behalf of, the employee) in a work period by the total number of hours actually worked by the employee during the work period. It is typically the employee's basic hourly cost as defined for each employee in the Employee form, unless you elected to include the shift premium and/or on call pay in the overtime calculations.

Important: The Daily Overtime rules will be evaluated before the Work Period Overtime rules, and daily overtime hours will not be counted again in the work period overtime calculations. Using the Daily Overtime rules and Work Period Overtime rules example above and assuming your work period starts on a Monday, if Joe works 8 hours each day from Monday through Thursday, then 10 hours on Friday, his total number of hours worked for this week will be 42 hours (4 days * 8 hours + 1 day * 10 hours). There are 2 daily overtime hours on Friday (10 hours - 8 hours), but the period overtime hours will be zero, even though the total number of hours worked for the week exceeds the 40 hour threshold by 2 hours . Exclusion of daily overtime hours in the work period overtime calculations is necessary to prevent the same overtime hours from being compensated twice. In this example, period overtime hours = 42 total hours worked - 40 hours - 2 daily overtime hours already counted = 0 hours.

Effects of Shift Premium Pay and On Call Pay on Overtime Pay Calculations

If you have shift premium pay policies or on-call pay policies in place and you select the option to have these pays included in the employee overtime calculations, Snap Schedule will adjust the way it computes overtime pay by using an adjusted hourly rate as described below.

Pay for overtime hours = Pay at regular hourly cost + Overtime premium pay at adjusted hourly rate

Where:

1. Pay at regular hourly cost = Overtime hours * hourly cost
2. Overtime premium at adjusted hourly rate = Overtime hours * (Overtime pay rate multiplier - 1) * Adjusted hourly rate

The first component is the regular pay for the hours worked computed at the hourly cost you defined for the employee. In the second component, the Overtime pay rate multiplier is as defined in your Daily Overtime rules or Work Period Overtime rules based on the overtime thresholds. The Adjusted hourly rate is calculated as follows:

Adjusted hourly rate = Hourly cost + (Shift premium pay + On-call pay) / Number of hours worked in the work period

Snap Schedule uses the same Adjusted hourly rate to compute pay for overtime hours resulting from either the Daily Overtime rules or Work

Period Overtime rules. Note that the number of hours worked in the work period does not include on-call hours or time off hours, because these are hours not spent at work.

Example: Pay calculations including overtime, shift premium, and on-call pays

In this example, Joe normally works the 8 hour day shift, Monday through Friday, and is paid $10.00 per hour. For next week, in addition to his regular work schedule, Joe is scheduled to work 4 extra hours on Wednesday and 8 hours on a Saturday for a total of 52 work hours. Also, he will be on-call for the 4-hour swing shift on Sunday. Your company pay policies are:

- Overtime pay is 1.5 times the regular hourly rate for work hours beyond 8 hours a day or 40 hours a week. The work period is one week.
- Weekend shift premium is 20% of regular hourly rate for each hour worked in addition to regular pay. Shift premium is included in overtime calculations.
- Weekend on-call pay is $5 per hour for each hour being on-call. On-call pay is included in overtime calculations.

Snap Schedule will compute Joe's total pay (labor cost) for next week as follows.

1. Regular/Overtime Hours:

   Daily Overtime Hours = (12 work hours on Wednesday - 8 hours daily threshold) = 4 hours

   Work Period Overtime Hours = (52 work hours - 40 hours work period threshold - 4 daily overtime hours already accounted for) = 8 hours

   Total Overtime Hours = 4 hours + 8 hours = 12 hours

   Regular Work Hours = Number of Hours Worked - Total Overtime Hours = 52 hours - 12 hours = 40 hours

2. Regular Pay:

   Regular Pay = Total Regular Work Hours * Regular Hourly Cost = 40 hours * $10.00 / hour = $400.00

3. Shift Premium Pay (for the 8 hours on Saturday):

   Shift Premium Pay = 8 hours * $10,00 / hour * 20% = $16.00

4. On-Call Pay (for the 4-hour on-call swing shift on Sunday):

   On-Call Pay = 4 hours * $5.00 / hour = $20.00

5. Overtime Pay:

   Adjusted Hourly Rate = Regular Hourly Cost + (Shift Premium Pay + On Call Pay) / Number of Hours Worked in the Work Period

   = $10.00 / hour + ($16,00 + $20.00) / 52 hours = $10.692 / hour

   Overtime Pay = (Overtime Hours * Regular Hourly Cost) + Overtime Hours * (Overtime Pay Rate Multiplier - 1) * Adjusted Hourly Rate

   = (12 hours * $10.00 / hour) + (12 hours * (1.5 - 1) * $10.692 / hour) = $120.00 + $64.15 = $184.15

6. Total Pay:

   Total Pay = Regular Pay + Shift Premium Pay + On Call Pay + Overtime Pay = $400.00 + $16.00 + $20.00 + 184.15 = $620.15

About Reports

Snap Schedule provides a comprehensive set of standard reports that you can use to analyze your scheduling data; prepare records for day-to-day management and planning; and track employee activities, work assignments, labor costs, coverage, and time-offs. Unlike static reports, **Snap Schedule** reports are active, meaning you can include or exclude specific information in your reports, drill-down for more details, and make changes to the report data. You can modify the standard reports (Filters, Columns, Fonts and Numbers, Header and Footer, etc.) to fit your needs and save the reports for future use.

The following reports are provided:

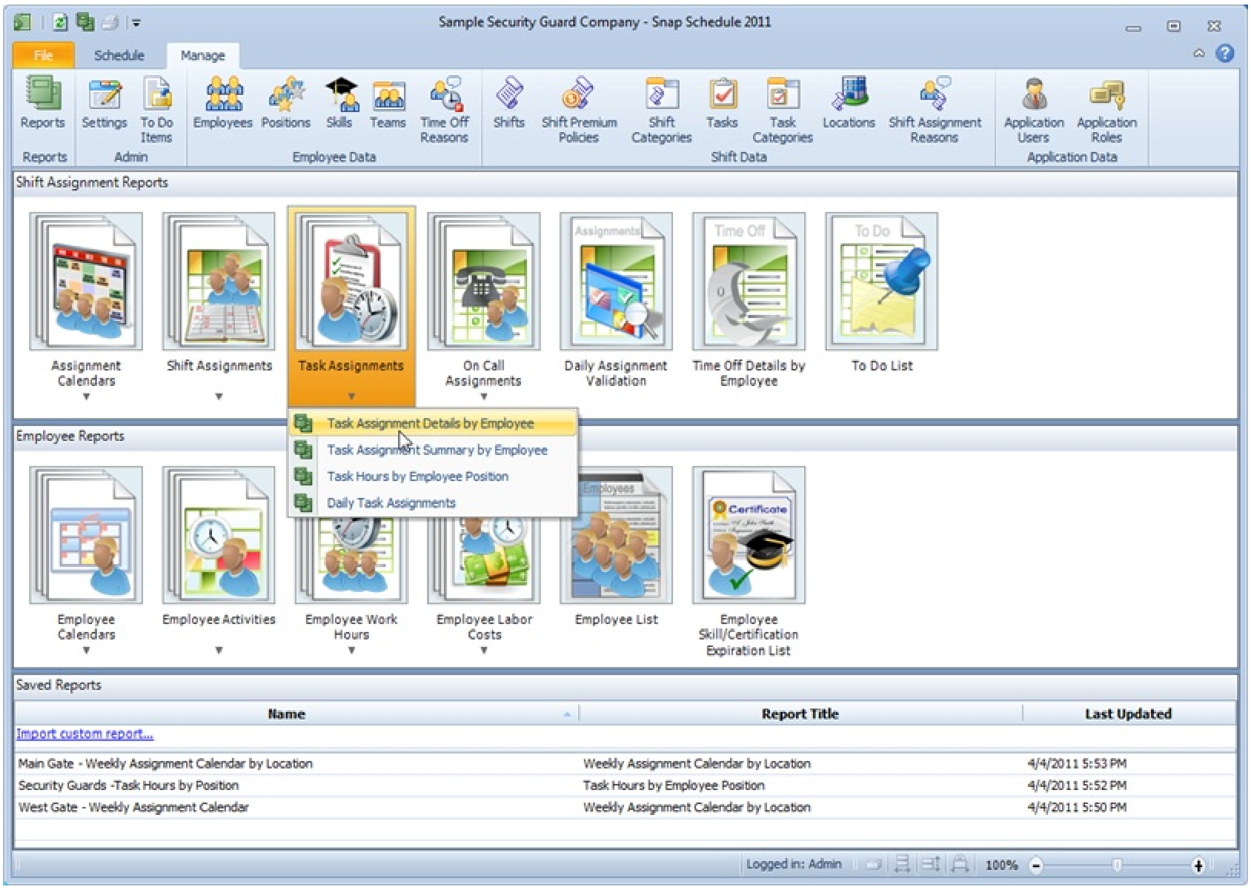
1. Bi-Weekly Time Sheet
2. Daily Assignment Validation
3. Daily On Call List
4. Daily Shift Assignments
5. Daily Task Assignments
6. Employee Activity Details
7. Employee Activity Summary
8. Employee List
9. Employee Monthly Calendar
10. Employee Skill/Certification Expiration List
11. Employee Weekly Calendar
12. Employee Work Hours By Location
13. Estimated Labor Cost By Employee
14. Estimated Labor Cost Summary
15. Monthly Assignment and Time Off Calendar
16. Monthly Assignment Calendar by Location
17. Monthly Time Off Calendar
18. On Call List By Employee
19. Period Time Sheet
20. Shift Assignments By Employee
21. Shift Coverage By Position
22. Task Assignment Details by Employee
23. Task Assignment Summary by Employee
24. Task Hours by Employee Position
25. Time Off Details by Employee
26. To Do List
27. Total Work Hours by Location
28. Weekly Assignment and Time Off Calendar
29. Weekly Assignment Calendar by Location
30. Weekly Time Off Calendar
31. Weekly Time Sheet

Even with the included comprehensive set of reports, there will be cases where custom reports specifically tailored to your unique application are required. For a custom programming fee, **Business Management Systems (BMS)** can develop such custom reports for you, and they can be imported into your schedule file just like saved reports.

Displaying a Report

You can access **Snap Schedule** reports by clicking the **Reports** button on the **Manage** tab of the Ribbon or in the Quick Access Tool bar. The Reports home page will show graphics representing the standard reports in different categories. It will also display a list of reports that you previously modified and saved.

You can run a report by simply clicking the desired report button or an entry in the Saved Report list. A Report Viewer will be displayed to show report data using the default settings for the report. The Date Range bar shows the time period the report covers. If the bar does not appear then it is not available for the selected report. From the Report Viewer, you can change report settings to display data that meet you criteria or to change the report appearance. You can print the report, export the report to a disk file, or save the report for later use with a few simple mouse clicks.



The Report Viewer

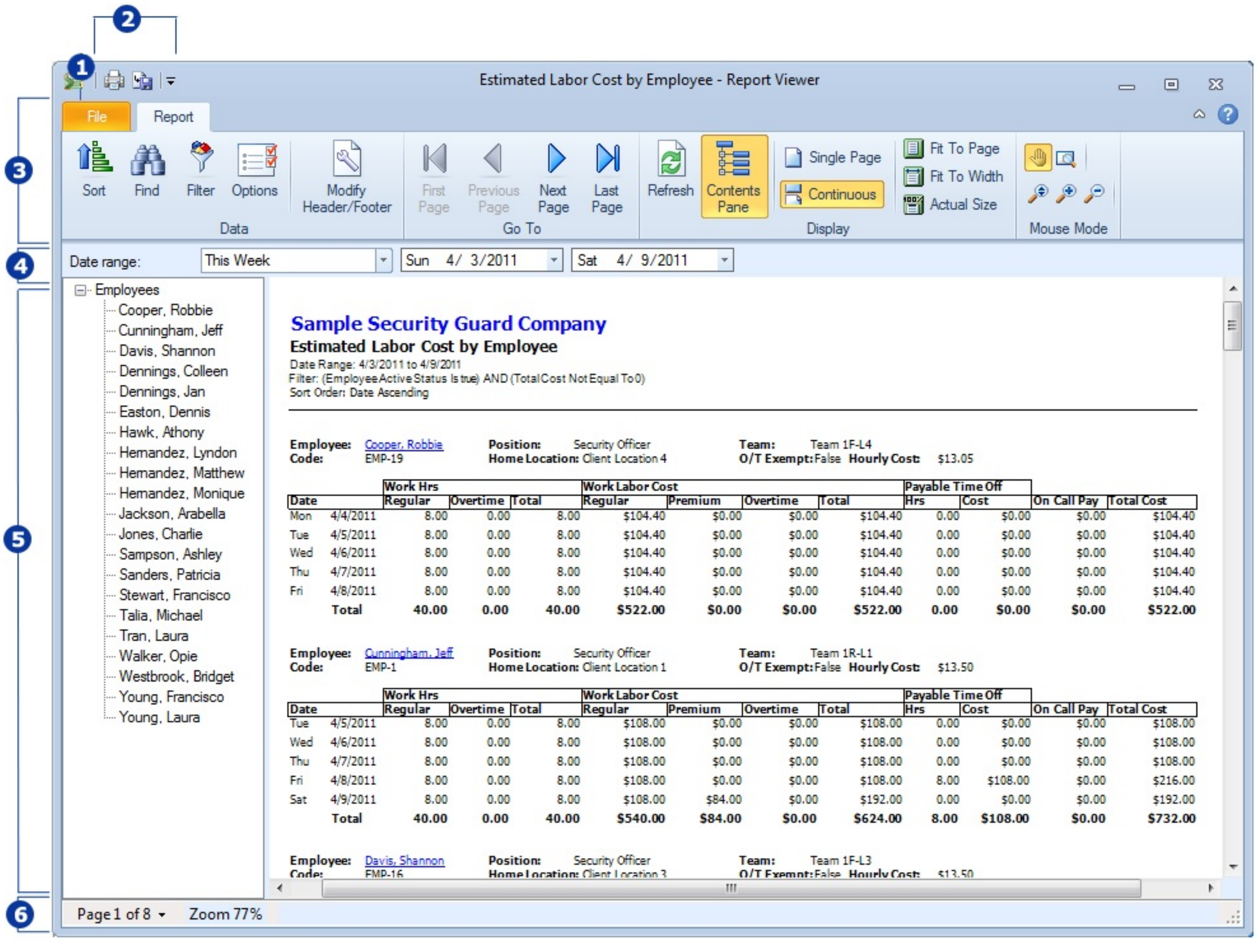
When you run a report, the **Report Viewer** will be displayed. The Report Viewer has its own set of commands to let you:

- View, filter, sort and display data.
- Modify the report settings to display only data that meet your criteria or to change the report appearance.

  Changing report settings.

- Save the report with your customized settings so it can be recalled and run later.
- Print the entire report or selected pages from the report to a printer.
- Export the report to a disk file in one of several selectable formats including Excel, PDF, and RTF.

Click here for a list of available reports.



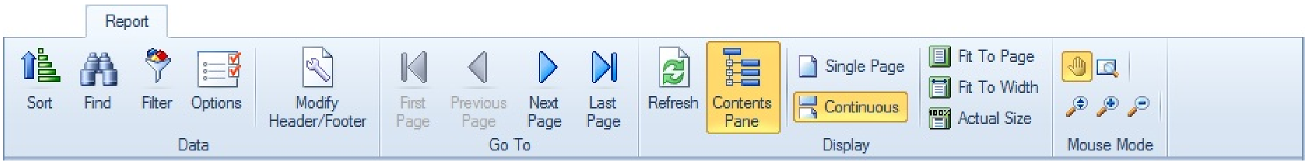
The user interface for the **Report Viewer** screen consists of the following elements:

1. The **Report Viewer File Tab**: Click this tab to see the backstage that allows you to save the report with the current settings for later use, print the report, export the report to a disk file, and exit the **Report Viewer**. To quickly return to viewing your report, click the **Report** tab, or press Esc on your keyboard.
2. The **Report Viewer Quick Access Toolbar**: The toolbar provides access to frequently used commands, and is always visible regardless of which tab is currently selected. By default, the Report Viewer Quick Access Toolbar includes core commands such as print and save. You can customize the toolbar and add commands to it.
3. **Report Viewer Ribbon:** The ribbon presents easy-to-browse commands for viewing and formatting the report contents. It also includes commands for filtering, sorting, and finding report data.
4. **Date Range Control**: This control lets you change the date range of the report.
5. Report Contents: This area shows the actual report in a WYSIWYG format.
6. The **Status Bar**: The current page and magnification factor are shown in the status bar.

Related topics

The Report Viewer Ribbon

The Report Viewer Ribbon presents easy-to-browse commands for viewing and formatting the report contents. It also includes commands for filtering, sorting, and finding report data. These commands are organized into task-specific groups of command buttons. For example, the **Go To** group contains pagination commands while the **Display** group contains commands for displaying the report pages. The size of command buttons in each group changes depending on the width of the Report Viewer window. To execute a command, click the appropriate icon. Note that inactive commands are shown in disabled state (greyed out).



Icon	Command Name	Description
	Sort	Launch the **Sort Report Data** dialog box to sort data based on your criteria.
	Find	Launch the **Find Text** dialog box to search for specific text in the report.
	Filter	Launch the Edit Report Filter dialog box to show only the data that matches your criteria.
	Modify Header/Footer	Show the Modify Report Header/Footer form to change the text and appearance of the report header and footer.
	Options	Launch the Report Options dialog box which provides additional data and format control options for the report. This icon is visible only when the report contains options.
	First Page	Go to the first page of the report.
	Previous Page	Go to the previous page of the report.
	Next Page	Go to the next page of the report.
	Last Page	Go to the last page of the report.
	Refresh	Update all information in the report. The report will be re-generated using the current settings and the latest data from the schedule file.
	Contents Pane	Show or hide the table-of-contents pane which provides a tree view of report sections organized in a hierarchical order – with the home topic at the top and the subordinated items (nodes) underneath. Clicking a tree node will display the corresponding report section. For reports without a table-of-contents, this panel is blank.
	Single Page	View the report as if it was printed on single sheet paper. When you move the vertical scroll bar, the display will scroll one page at a time.
	Continuous Forms	View the report as if it was printed on continuous-form paper. When you scroll vertically, the display will scroll continuously from one page to the next.
	Fit To Page	Magnify the report so that a page fits in the entire window.
	Fit To Width	Magnify the report so that the width of a page fits the entire window.
	Actual Size	Show the report in normal size.
	Grab and Drag	Place the mouse in **Grab and Drag** mode. When selected, you can click and hold the report content to scroll quickly from page to page

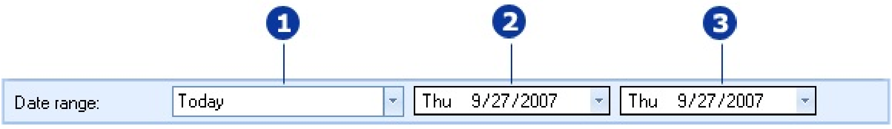
	**Dynamic Zoom**	Place the mouse in the **Dynamic Zoom** mode. When selected, you can click and hold the report content to zoom the display in and out dynamically.
	**Zoom In**	Place the mouse in the **Zoom In** mode. When selected, each click on the report content will increase the display zoom magnification.
	**Zoom Out**	Place the mouse in the **Zoom Out** mode. When selected, each click on the report content will decrease the display zoom magnification.
	**Zoom To Rectangle**	Place the mouse in the **Zoom To Rectangle** mode. When selected, you can click and hold to select a rectangular area on the report content then release the mouse button to zoom in on the area.

Date Range Control

Several reports require that you specify a date range—the time period that a report covers. For example, you may want to see shift assignments for next week when running the Shift Assignments by Employee report.

You use the Report Viewer **Date Range Control** to specify a date range for the time period to be reported. Each time you change the **Date Range** settings, the report is automatically refreshed with the latest information from the schedule file. To enter a date range, select a preset range from the Date Range Selection drop-down list and the start and end dates will be automatically filled. Alternatively, you can enter the start and end dates using the calendar drop-down boxes.

The **Date Range** bar contains the following controls:



	Name	Description
1	**Date Range Selection**	Click the down arrow to open the list of preset date ranges and select an entry such as **Today**, **Yesterday**, **Last Month**, etc. The program will automatically calculate the start date and end date for the date range.
2	**Start Date**	Click the down arrow to open the calendar and pick a start date for the date range.
3	**End Date**	Click the down arrow to open the calendar and pick an end date for the date range.

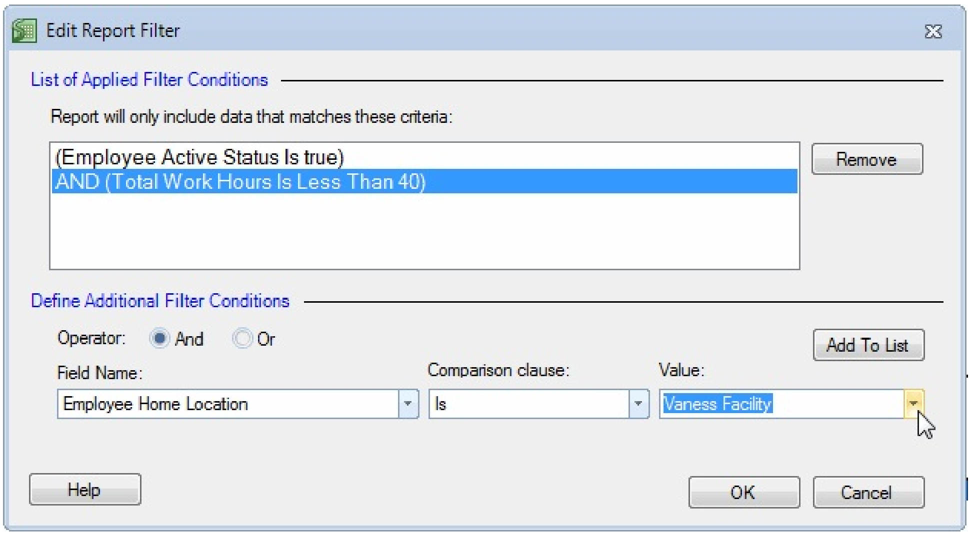
Note that when you pick the start date or end date manually, the **Date Range Selection** control will display "Custom" to indicate that the date range is not one of the preset date range values.

Filtering Report Data

When you first display a report, the Report Viewer shows report data using the default settings for that report. From the Report Viewer, you can filter report data to display only data records that meet your criteria. A filter is a set of conditions that is applied to the data when generating a report. When you apply a filter, only those values that match your criteria are included in the report. The rest are hidden until you remove the filter. For example, on the Employee Activity Summary report you may be interested in viewing only employees whose total work hours is less than 40 hours and whose home location is the Main Location.

A filter condition is a statement that specifies the criteria Report Viewer should use to determine whether the data is displayed in the report. To create a filter, you need to add at least one or more filter conditions. By using multiple filter conditions, you can create very complex filters. You can add, delete, and combine filter conditions using the "And" or the "Or" operators. When the report runs, the filter is evaluated to determine if each instance of the data meets the criteria you specified in the filter. If the data meets the criteria, it will be added to the report. Note that if you do not specify any condition in a filter, there is no filtering and all data will be included.

To define filter conditions, click the **Filter** button  on the Report Viewer Ribbon to open the **Edit Report Filter** dialog box. This dialog box shows the filter conditions in effect and allows you to add or remove filter conditions.



When the **Edit Report Filter** dialog box first opens, the Field Name drop-down list is populated with data fields available in the report. You can use any available field to create your filter condition. A filter condition is composed of three parts: the field name, the comparison clause, and the value to compare to. To add a filter condition to your report, select a name from the Field Name drop-down list and specify a comparison clause and values to compare. The available comparison clauses and values change depending on the data type of the selected field name. You can specify compound conditions using the "And" or the "Or" logical operator.

To add a filter condition:

1. From the **Field Name** drop-down list, select a data field you want to use.
2. Based on the selected data field type, a list of comparison clauses will be included in the **Comparison clause** drop-down list. Select a comparison clause for your new filter condition.
3. Enter a value in the **Value** field to compare the data field to. If the **Field Name** you selected is a text field, the **Value** field is a drop-down list pre-filled with all possible values of the data field in the report. This helps you pick a value quickly and avoid typing errors. Note that the drop-down list contains values of the data field that exist in the report and not all possible values in the schedule file.
4. Click the **And** radio button if you want to specify a logical conjunction when combining this filter condition with others in the **List of Applied Filter Conditions**. Otherwise, click the **Or** radio button if you want to specify a logical disjunction.
5. To add the new filter condition to the list of applied filter conditions, click **Add To List**.
6. After you have created all filter criteria, click **OK** to apply the filter and regenerate the report based on the new filter criteria.

To remove a filter condition:

1. On the **List of Applied Filter Conditions** text box, click the filter condition you want to remove. The selected filter condition will be highlighted.
2. Click **Remove** to delete the filter condition.
3. Click **OK** to apply the filter and regenerate the report based on the new filter criteria.

Notes:

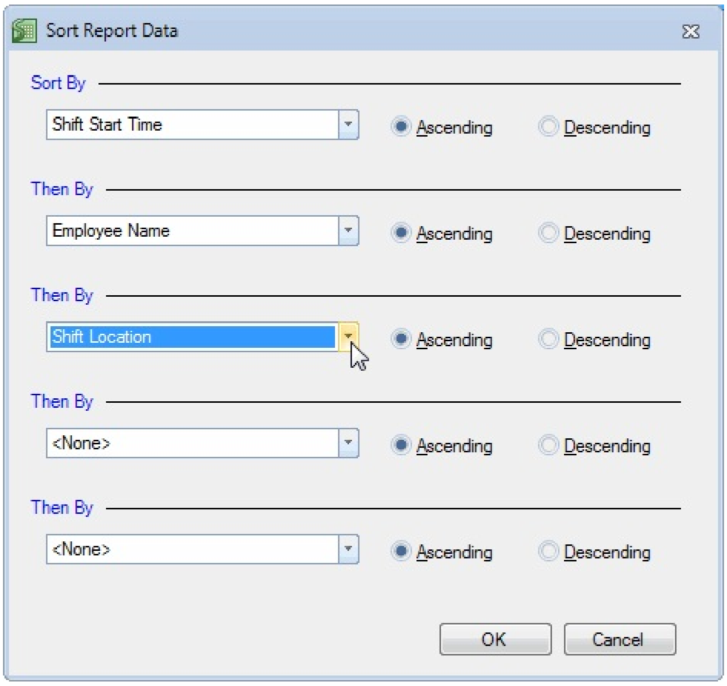
- Filter specification is displayed near the header of the report to show the filter conditions currently in effect.

Related topics

Sorting Report Data

From the Report Viewer, you can sort data records in the order you prefer.

To sort report data, click the **Sort** button  in the **Data** group of the Report Ribbon to open the **Sort Report Data** window. This window allows you to select up to five sort levels. The report is sorted by the first criterion you specified, then the second criterion, third criterion and so on as applicable. You can specify the sort order for each criterion, either **Ascending** or **Descending** without regard to case. Click **OK** to confirm the sort specification and refresh the report contents based on the new sort order. The sort specification will be displayed near the report header to show the sort order currently in effect.



Note that if a report contains groups, the groups have already been sorted in ascending order and you cannot change the sort order of the groups. You can only sort the entries within each group.

Related topics

Report Detail Drill-Down

Most reports contain hyperlinks that you can click to drill-down for more information about a data record. A hyperlink in **Snap Schedule** is displayed in blue and is underlined. Depending on the hyperlink, clicking it will open a data entry form or a sub-report. For example, in the Employee List report, all employee names are displayed as hyperlinks. Clicking an employee name will bring up the Employee form where you can see more detailed information about the employee and modify the data without ever leaving the report viewer. Note that you can use the data entry form to make changes to a data record but the changes won't be reflected in the report until you refresh the report display.

Finding Text Strings in the Report

From the Report Viewer, you can find occurrences of a specific text string in the report.

To find a text string:

1. Click the **Find Text** button in the **Data** group of the Report Viewer Ribbon to open the **Find Text** window.
2. Type the text you want to find in the **Text** field.
3. Click the **Match case** checkbox to specify if the text search should be case-sensitive.
4. Select a search **Direction**.
5. Click **Find** to start the search.
6. The first occurrence of the text string, if any, will be highlighted and you can click **Find Next** to find the next occurrence.

Related topics

Refreshing Report Data

From the Report Viewer, you can refresh the report to make sure it reflects the latest data in your schedule file. Refreshing the report will re-fetch the latest data from the schedule file without the need to exit the Report Viewer and run the report again.

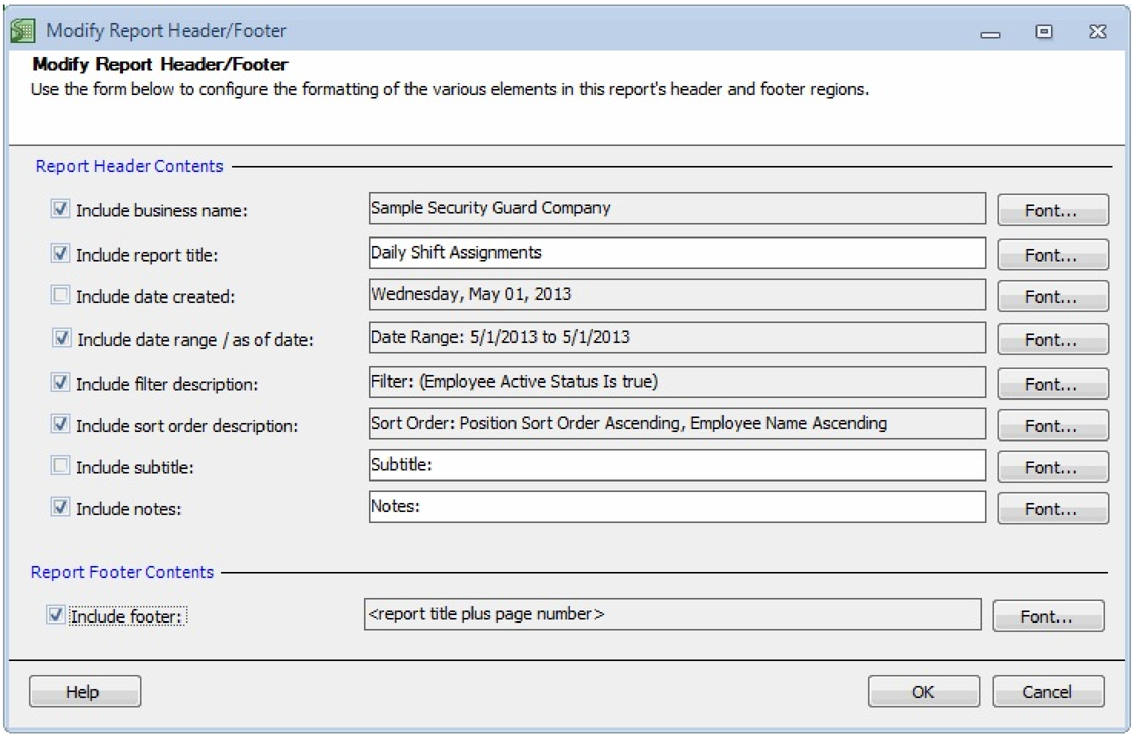
To refresh the report, click the **Refresh** button  in the **Display** group of the Report Viewer Ribbon.

Modifying Header and Footer

From the Report Viewer, you can modify the header and footer of the Report. You can choose to show or hide certain header and footer information, and you can change the font sizes and styles of the header texts.

To modify the report header and footer:

1. In the **Data** group of the Ribbon, click **Modify Header/Footer** to open the **Modify Report Header/Footer** form (shown below).
2. Check or un-check the appropriate check boxes to display or hide the corresponding texts. Editable text fields are shown on a white background.
3. Click **Font...** to change the font size, style, color, and appearance.
4. Click **OK** to save your changes. The report header and footer will be refreshed automatically.



Printing the Report

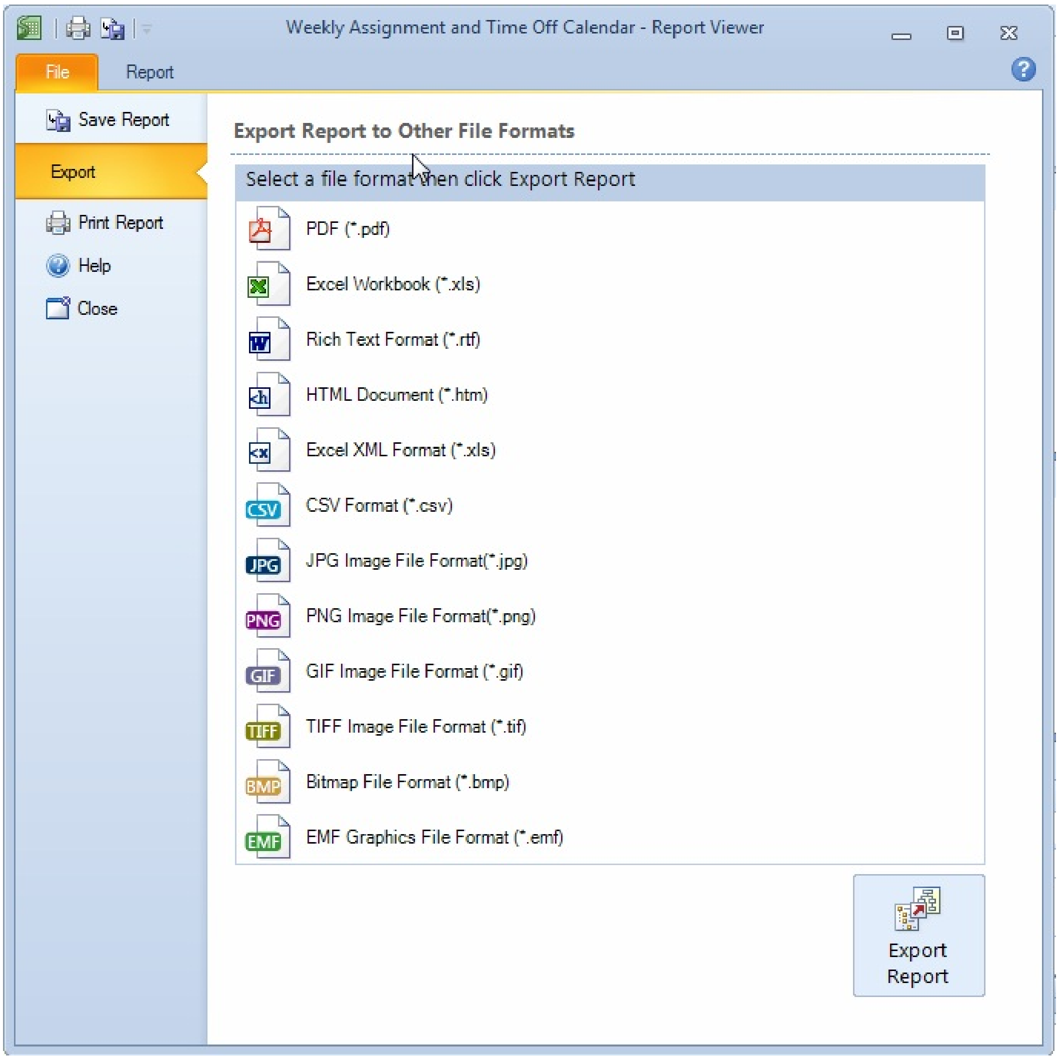
From the Report Viewer, you can print the entire report or selected pages from the report to a printer.

To print the report:

1. Click the **Print Report** button  on the Report Viewer Quick Access Toolbar, or click **Print Report** from the File tab to open the **Print** dialog box.
2. Select a printer to print the report.
3. Select the option to print all report pages or a range of pages.
4. Click **OK** to start printing.

Exporting the Report

You can export the report as seen on-screen to a variety of file formats, suitable for viewing on-line or uploading to the Web. The following file formats are supported:



- PDF
- Word (RTF)
- Excel and Excel XML
- HTML
- CSV
- Gif
- JPEG
- PNG
- Emf
- TIFF
- BMP

To export the report:

1. Click the **File** tab to display the Backstage view and select **Export**.
2. Select the desired format to export and click the **Export Report** button.
3. The file save dialog box will be displayed to allow you to select where the resulting file will be stored. Click **Save** to export the report.
4. Depending on the file format, an option dialog will be displayed to let you select the number of pages to export and make adjustment to image quality and/or resolution.

Saving the Report

Snap Schedule lets you save a report with its customized settings so you can quickly recall and run it at a later time. Normally, you would run a standard report that comes with **Snap Schedule**, customize the report settings including the setups for filters, sort orders, header/footer, and date range to fit your needs, then memorize the report under a new name. When you run the saved report , its settings will be the same as when the report was saved.

Saved reports can be located in the **Saved Reports** section of the **Reports** home page.

To save a report

1. From the Report Viewer, click the **Save Report** button  on the File tab to open the **Save Report** window.
2. Enter a new report name and click **OK**.
3. If the report name you entered already exists, you will be presented with an option to overwrite the existing report. Click **Yes** to overwrite the existing report or **No** to cancel.
4. All saved reports are listed under the **Saved Reports** section in the Content Pane. The report name, report title, and date/time when the report was last updated are displayed for each saved report.

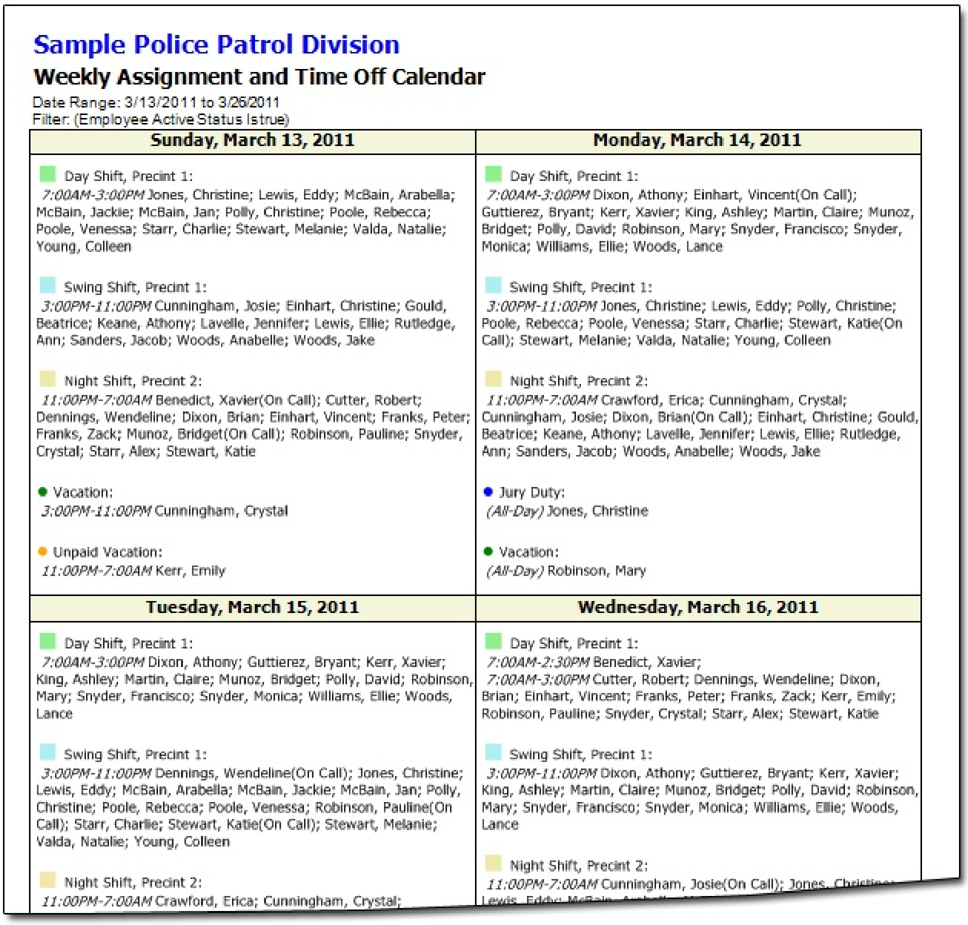
Weekly Assignment and Time Off Calendar

This report displays a full week of daily shift and assignments and time offs in the familiar weekly calendar format. For each day, employees assigned to each shift are listed under the shift title. Employees taking time off are also shown, along with the time off reasons. By default, assignments of all employees for the current week are displayed.

The calendars are always displayed in a seven-day format. beginning on the first calendar day of the week. By default, the first calendar day of the week is Sunday but you can set it to be any day of the week using the **Calendar Tab** in the Business Information Form. If the report date range you specified does not begin on the first calendar day of the week and end on the last calendar day of the week, you will see certain days displayed with a light gray background color. These days are shown in order to maintain the calendar display format even though they are outside of the date range you selected. Optionally, you can hide the shift assignments and time off absences for days outside the specified range using the **Options** command.

For each day on the calendar, the shift assignments are listed first in the order of shift start time, followed by the names of the employees assigned to the shift. Each shift is displayed with a small square in the color you defined for the shift, then the shift name, and shift location. Each time off is displayed with a small circle in the color you defined for the time off , then the time off reason, all day indication or start time and end time, and employee name. When there are more assignments than can be placed on a single page, display cells are vertically extended and the calendar will be shown on multiple pages. You can also export the report to Microsoft Word for additional formatting or layout changes.

This report is very flexible - you can use the **Filter** function on the Report Viewer Ribbon to show practically any combination of assignments that you can think of. For examples, you can set the filter to show assignments at a specified work location, on a particular shift, for what shift assignment reasons, or on-call only. You can save the report along with your filters for future use.



Sample Police Patrol Division

Weekly Assignment and Time Off Calendar

Date Range: 3/13/2011 to 3/26/2011
Filter: (Employee Active Status Istrue)

Sunday, March 13, 2011	Monday, March 14, 2011
Day Shift, Precint 1: *7:00AM-3:00PM* Jones, Christine; Lewis, Eddy; McBain, Arabella; McBain, Jackie; McBain, Jan; Polly, Christine; Poole, Rebecca; Poole, Venessa; Starr, Charlie; Stewart, Melanie; Valda, Natalie; Young, Colleen Swing Shift, Precint 1: *3:00PM-11:00PM* Cunningham, Josie; Einhart, Christine; Gould, Beatrice; Keane, Athony; Lavelle, Jennifer; Lewis, Ellie; Rutledge, Ann; Sanders, Jacob; Woods, Anabelle; Woods, Jake Night Shift, Precint 2: *11:00PM-7:00AM* Benedict, Xavier(On Call); Cutter, Robert; Dennings, Wendeline; Dixon, Brian; Einhart, Vincent; Franks, Peter; Franks, Zack; Munoz, Bridget(On Call); Robinson, Pauline; Snyder, Crystal; Starr, Alex; Stewart, Katie Vacation: *3:00PM-11:00PM* Cunningham, Crystal Unpaid Vacation: *11:00PM-7:00AM* Kerr, Emily	Day Shift, Precint 1: *7:00AM-3:00PM* Dixon, Athony; Einhart, Vincent(On Call); Guttierez, Bryant; Kerr, Xavier; King, Ashley; Martin, Claire; Munoz, Bridget; Polly, David; Robinson, Mary; Snyder, Francisco; Snyder, Monica; Williams, Ellie; Woods, Lance Swing Shift, Precint 1: *3:00PM-11:00PM* Jones, Christine; Lewis, Eddy; Polly, Christine; Poole, Rebecca; Poole, Venessa; Starr, Charlie; Stewart, Katie(On Call); Stewart, Melanie; Valda, Natalie; Young, Colleen Night Shift, Precint 2: *11:00PM-7:00AM* Crawford, Erica; Cunningham, Crystal; Cunningham, Josie; Dixon, Brian(On Call); Einhart, Christine; Gould, Beatrice; Keane, Athony; Lavelle, Jennifer; Lewis, Ellie; Rutledge, Ann; Sanders, Jacob; Woods, Anabelle; Woods, Jake Jury Duty: *(All-Day)* Jones, Christine Vacation: *(All-Day)* Robinson, Mary
Tuesday, March 15, 2011	**Wednesday, March 16, 2011**
Day Shift, Precint 1: *7:00AM-3:00PM* Dixon, Athony; Guttierez, Bryant; Kerr, Xavier; King, Ashley; Martin, Claire; Munoz, Bridget; Polly, David; Robinson, Mary; Snyder, Francisco; Snyder, Monica; Williams, Ellie; Woods, Lance Swing Shift, Precint 1: *3:00PM-11:00PM* Dennings, Wendeline(On Call); Jones, Christine; Lewis, Eddy; McBain, Arabella; McBain, Jackie; McBain, Jan; Polly, Christine; Poole, Rebecca; Poole, Venessa; Robinson, Pauline(On Call); Starr, Charlie; Stewart, Katie(On Call); Stewart, Melanie; Valda, Natalie; Young, Colleen Night Shift, Precint 2: *11:00PM-7:00AM* Crawford, Erica; Cunningham, Crystal;	Day Shift, Precint 1: *7:00AM-2:30PM* Benedict, Xavier; *7:00AM-3:00PM* Cutter, Robert; Dennings, Wendeline; Dixon, Brian; Einhart, Vincent; Franks, Peter; Franks, Zack; Kerr, Emily; Robinson, Pauline; Snyder, Crystal; Starr, Alex; Stewart, Katie Swing Shift, Precint 1: *3:00PM-11:00PM* Dixon, Athony; Guttierez, Bryant; Kerr, Xavier; King, Ashley; Martin, Claire; Munoz, Bridget; Polly, David; Robinson, Mary; Snyder, Francisco; Snyder, Monica; Williams, Ellie; Woods, Lance Night Shift, Precint 2: *11:00PM-7:00AM* Cunningham, Josie(On Call); Jones, Christine;

The report contains the following fields:

- **Report Header Information:** Your business name, report title, and the range of dates covered in the report. You can selectively hide these fields using the **Modify Header/Footer** command.

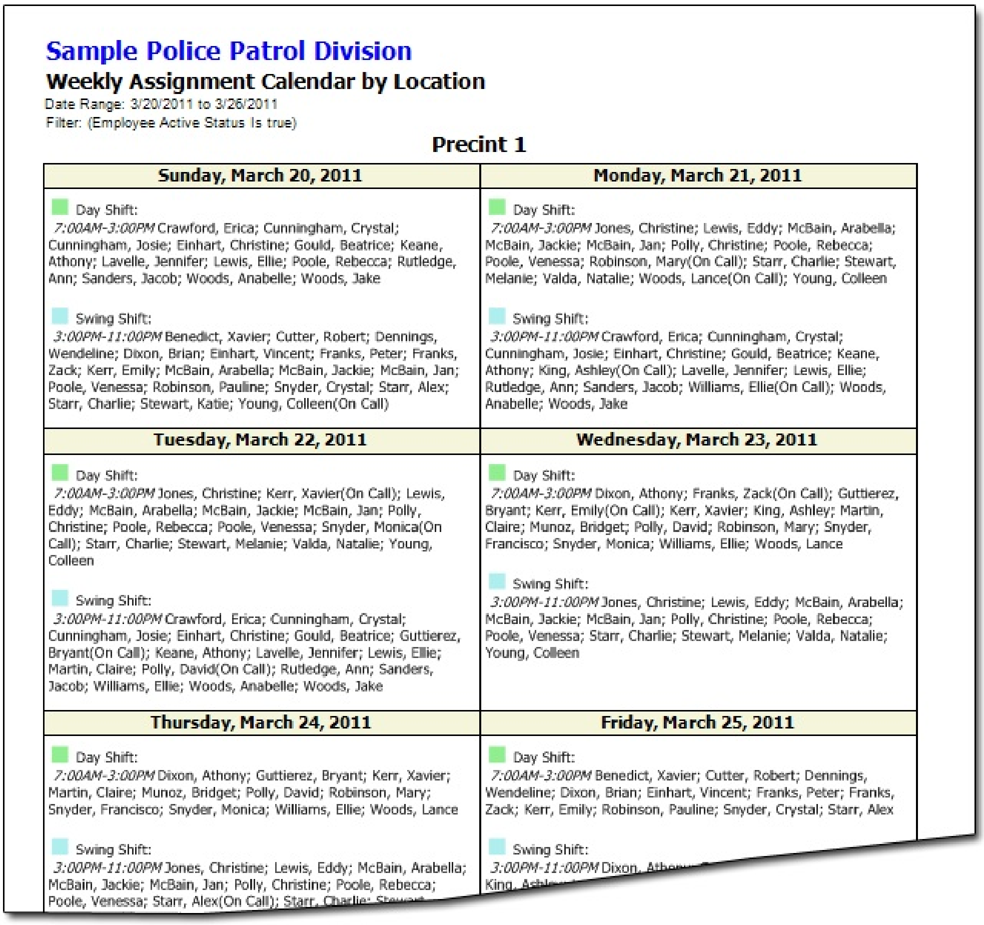
Weekly Assignment Calendar by Location

This report displays a full week of daily shift assignments in the familiar weekly calendar format, one calendar for each shift location. The Contents pane shows the tree view of the shift locations covered in this report. For each day, employees assigned to each shift are listed under the shift title. By default, assignments for all employees for the current week are displayed.

The calendars are always displayed in a seven-day format. beginning on the first calendar day of the week. By default, the first calendar day of the week is Sunday but you can set it to be any day of the week using the **Calendar Tab** in the Business Information Form. If the report date range you specified does not begin on the first calendar day of the week and end on the last calendar day of the week, you will see certain days displayed with a light gray background color. These days are shown in order to maintain the calendar display format even though they are outside of the date range you selected. Optionally, you can hide the shift assignments for days outside the specified range using the **Options** command.

For each day on the calendar, the shift assignments are listed first in the order of shift start time, followed by the names of the employees assigned to the shift. Each shift is displayed with a small square in the color you defined for the shift, then the shift name. When there are more assignments than can be placed on a single page, display cells are vertically extended and the calendar will be shown on multiple pages. You can also export the report to Microsoft Word for additional formatting or layout changes.

This report is very flexible - you can use the **Filter**  function on the Report Viewer Ribbon to show practically any combination of assignments that you can think of. For examples, you can set the filter to show assignments at a specified work location, on a particular shift, for what shift assignment reasons, or on-call only. You can save the report along with your filters for future use.



Sample Police Patrol Division

Weekly Assignment Calendar by Location

Date Range: 3/20/2011 to 3/26/2011

Filter: (Employee Active Status Is true)

Precint 1

Sunday, March 20, 2011	Monday, March 21, 2011
Day Shift: 7:00AM-3:00PM Crawford, Erica; Cunningham, Crystal; Cunningham, Josie; Einhart, Christine; Gould, Beatrice; Keane, Athony; Lavelle, Jennifer; Lewis, Ellie; Poole, Rebecca; Rutledge, Ann; Sanders, Jacob; Woods, Anabelle; Woods, Jake Swing Shift: 3:00PM-11:00PM Benedict, Xavier; Cutter, Robert; Dennings, Wendeline; Dixon, Brian; Einhart, Vincent; Franks, Peter; Franks, Zack; Kerr, Emily; McBain, Arabella; McBain, Jackie; McBain, Jan; Poole, Venessa; Robinson, Pauline; Snyder, Crystal; Starr, Alex; Starr, Charlie; Stewart, Katie; Young, Colleen(On Call)	Day Shift: 7:00AM-3:00PM Jones, Christine; Lewis, Eddy; McBain, Arabella; McBain, Jackie; McBain, Jan; Polly, Christine; Poole, Rebecca; Poole, Venessa; Robinson, Mary(On Call); Starr, Charlie; Stewart, Melanie; Valda, Natalie; Woods, Lance(On Call); Young, Colleen Swing Shift: 3:00PM-11:00PM Crawford, Erica; Cunningham, Crystal; Cunningham, Josie; Einhart, Christine; Gould, Beatrice; Keane, Athony; King, Ashley(On Call); Lavelle, Jennifer; Lewis, Ellie; Rutledge, Ann; Sanders, Jacob; Williams, Ellie(On Call); Woods, Anabelle; Woods, Jake
Tuesday, March 22, 2011	**Wednesday, March 23, 2011**
Day Shift: 7:00AM-3:00PM Jones, Christine; Kerr, Xavier(On Call); Lewis, Eddy; McBain, Arabella; McBain, Jackie; McBain, Jan; Polly, Christine; Poole, Rebecca; Poole, Venessa; Snyder, Monica(On Call); Starr, Charlie; Stewart, Melanie; Valda, Natalie; Young, Colleen Swing Shift: 3:00PM-11:00PM Crawford, Erica; Cunningham, Crystal; Cunningham, Josie; Einhart, Christine; Gould, Beatrice; Guttierez, Bryant(On Call); Keane, Athony; Lavelle, Jennifer; Lewis, Ellie; Martin, Claire; Polly, David(On Call); Rutledge, Ann; Sanders, Jacob; Williams, Ellie; Woods, Anabelle; Woods, Jake	Day Shift: 7:00AM-3:00PM Dixon, Athony; Franks, Zack(On Call); Guttierez, Bryant; Kerr, Emily(On Call); Kerr, Xavier; King, Ashley; Martin, Claire; Munoz, Bridget; Polly, David; Robinson, Mary; Snyder, Francisco; Snyder, Monica; Williams, Ellie; Woods, Lance Swing Shift: 3:00PM-11:00PM Jones, Christine; Lewis, Eddy; McBain, Arabella; McBain, Jackie; McBain, Jan; Polly, Christine; Poole, Rebecca; Poole, Venessa; Starr, Charlie; Stewart, Melanie; Valda, Natalie; Young, Colleen
Thursday, March 24, 2011	**Friday, March 25, 2011**
Day Shift: 7:00AM-3:00PM Dixon, Athony; Guttierez, Bryant; Kerr, Xavier; Martin, Claire; Munoz, Bridget; Polly, David; Robinson, Mary; Snyder, Francisco; Snyder, Monica; Williams, Ellie; Woods, Lance Swing Shift: 3:00PM-11:00PM Jones, Christine; Lewis, Eddy; McBain, Arabella; McBain, Jackie; McBain, Jan; Polly, Christine; Poole, Rebecca; Poole, Venessa; Starr, Alex(On Call); Starr, Charlie;	Day Shift: 7:00AM-3:00PM Benedict, Xavier; Cutter, Robert; Dennings, Wendeline; Dixon, Brian; Einhart, Vincent; Franks, Peter; Franks, Zack; Kerr, Emily; Robinson, Pauline; Snyder, Crystal; Starr, Alex Swing Shift: 3:00PM-11:00PM Dixon,

The report contains the following fields:

- **Report Header Information:** Your business name, report title, and the range of dates covered in the report. You can selectively hide these fields using the **Modify Header/Footer** command.

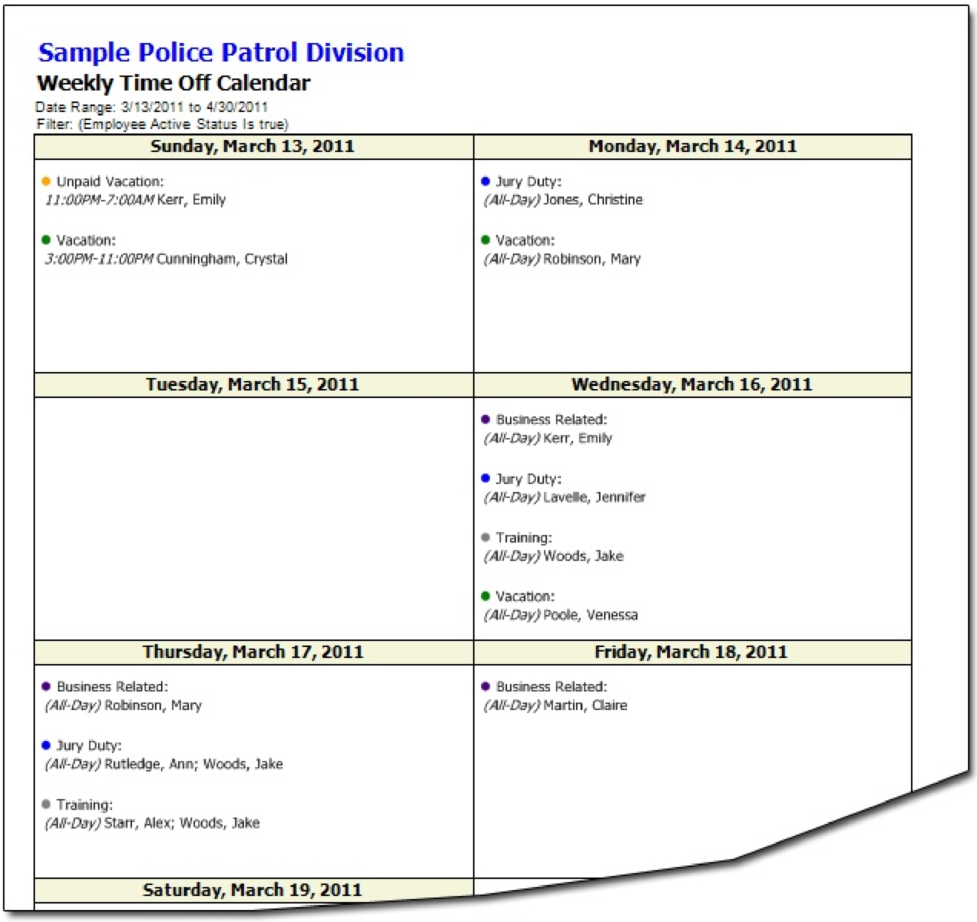
Weekly Time Off Calendar

This report displays a full week of time off absences in the familiar weekly calendar format. Employees taking time off are shown for each day, along with the time off reasons. By default, time off absences for all employees for the current week are displayed.

The calendars are always displayed in a seven-day format. beginning on the first calendar day of the week. By default, the first calendar day of the week is Sunday but you can set it to be any day of the week using the **Calendar Tab** in the Business Information Form. If the report date range you specified does not begin on the first calendar day of the week and end on the last calendar day of the week, you will see certain days displayed with a light gray background color. These days are shown in order to maintain the calendar display format even though they are outside of the date range you selected. Optionally, you can hide the time off absences for days outside the specified range using the **Options** command.

For each day on the calendar, time off absences are listed according to the sort order you selected. Each time off is displayed with a small circle in the color you defined for the time off , then the time off reason, all day indication or start time and end time, and employee name. When there are more time off absences than can be placed on a single page, display cells are vertically extended and the calendar will be shown on multiple pages. You can also export the report to Microsoft Word for additional formatting or layout changes.

This report is very flexible - you can use the **Filter**  function on the Report Viewer Ribbon to show practically any combination of assignments that you can think of. You can save the report along with your filters for future use.



Sample Police Patrol Division

Weekly Time Off Calendar

Date Range: 3/13/2011 to 4/30/2011
Filter: (Employee Active Status Is true)

Sunday, March 13, 2011	Monday, March 14, 2011
Unpaid Vacation: *11:00PM-7:00AM* Kerr, Emily Vacation: *3:00PM-11:00PM* Cunningham, Crystal	Jury Duty: *(All-Day)* Jones, Christine Vacation: *(All-Day)* Robinson, Mary
Tuesday, March 15, 2011	**Wednesday, March 16, 2011**
	Business Related: *(All-Day)* Kerr, Emily Jury Duty: *(All-Day)* Lavelle, Jennifer Training: *(All-Day)* Woods, Jake Vacation: *(All-Day)* Poole, Venessa
Thursday, March 17, 2011	**Friday, March 18, 2011**
Business Related: *(All-Day)* Robinson, Mary Jury Duty: *(All-Day)* Rutledge, Ann; Woods, Jake Training: *(All-Day)* Starr, Alex; Woods, Jake	Business Related: *(All-Day)* Martin, Claire
Saturday, March 19, 2011	

The report contains the following fields:

- **Report Header Information:** Your business name, report title, and the range of dates covered in the report**.** You can selectively hide these fields using the **Modify Header/Footer** command.

Monthly Assignment and Time Off Calendar

This report displays a full month of daily shift assignments and time offs in the familiar monthly calendar format. For each day, employees assigned to each shift are listed under the shift title. Employees taking time off are also shown, along with the time off reasons.

The calendar is always displayed in consecutive rows of seven days each with each row beginning on the first calendar day of the week. By default, the first calendar day of the week is Sunday but you can set it to be any day of the week using the **Calendar Tab** in the Business Information Form. If the report date range you specified does not begin on the first day of the week and end on the last day of the week, you will see certain days displayed with a light gray background color. These days are shown to maintain the calendar display format even though they are outside of the date range you selected. Optionally, you can hide the shift assignments and time off absences for days outside the specified range using the **Options** command.

For each day on the calendar, the shift assignments are listed first in the order of shift start time, followed by the names of the employees assigned to the shift. Each shift is displayed with a small square in the color you defined for the shift, then the shift description, and shift location. Multiple shifts are separated by blank lines. Each time off is displayed with a small circle in the color you defined for the time off, then time off reason, the all day indication or start time and end time, and the employee name. When there are more assignments than can be placed on a single page, display cells are vertically extended and the calendar will be shown on multiple pages. You can also export the report to Microsoft Word for additional formatting or layout changes.

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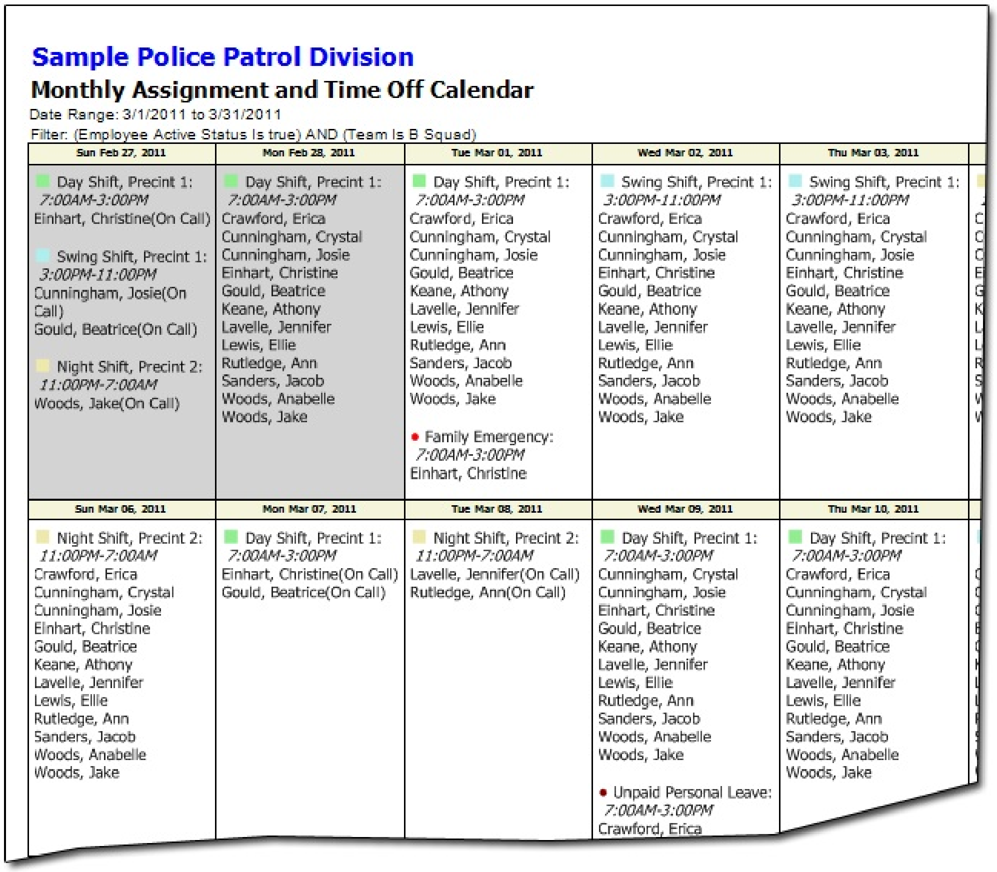

Sample Police Patrol Division

Monthly Assignment and Time Off Calendar

Date Range: 3/1/2011 to 3/31/2011

Filter: (Employee Active Status Is true) AND (Team Is B Squad)

Sun Feb 27, 2011	Mon Feb 28, 2011	Tue Mar 01, 2011	Wed Mar 02, 2011	Thu Mar 03, 2011
Day Shift, Precint 1: *7:00AM-3:00PM* Einhart, Christine(On Call) Swing Shift, Precint 1: *3:00PM-11:00PM* Cunningham, Josie(On Call) Gould, Beatrice(On Call) Night Shift, Precint 2: *11:00PM-7:00AM* Woods, Jake(On Call)	Day Shift, Precint 1: *7:00AM-3:00PM* Crawford, Erica Cunningham, Crystal Cunningham, Josie Einhart, Christine Gould, Beatrice Keane, Athony Lavelle, Jennifer Lewis, Ellie Rutledge, Ann Sanders, Jacob Woods, Anabelle Woods, Jake	Day Shift, Precint 1: *7:00AM-3:00PM* Crawford, Erica Cunningham, Crystal Cunningham, Josie Gould, Beatrice Keane, Athony Lavelle, Jennifer Lewis, Ellie Rutledge, Ann Sanders, Jacob Woods, Anabelle Woods, Jake Family Emergency: *7:00AM-3:00PM* Einhart, Christine	Swing Shift, Precint 1: *3:00PM-11:00PM* Crawford, Erica Cunningham, Crystal Cunningham, Josie Einhart, Christine Gould, Beatrice Keane, Athony Lavelle, Jennifer Lewis, Ellie Rutledge, Ann Sanders, Jacob Woods, Anabelle Woods, Jake	Swing Shift, Precint 1: *3:00PM-11:00PM* Crawford, Erica Cunningham, Crystal Cunningham, Josie Einhart, Christine Gould, Beatrice Keane, Athony Lavelle, Jennifer Lewis, Ellie Rutledge, Ann Sanders, Jacob Woods, Anabelle Woods, Jake
Sun Mar 06, 2011	**Mon Mar 07, 2011**	**Tue Mar 08, 2011**	**Wed Mar 09, 2011**	**Thu Mar 10, 2011**
Night Shift, Precint 2: *11:00PM-7:00AM* Crawford, Erica Cunningham, Crystal Cunningham, Josie Einhart, Christine Gould, Beatrice Keane, Athony Lavelle, Jennifer Lewis, Ellie Rutledge, Ann Sanders, Jacob Woods, Anabelle Woods, Jake	Day Shift, Precint 1: *7:00AM-3:00PM* Einhart, Christine(On Call) Gould, Beatrice(On Call)	Night Shift, Precint 2: *11:00PM-7:00AM* Lavelle, Jennifer(On Call) Rutledge, Ann(On Call)	Day Shift, Precint 1: *7:00AM-3:00PM* Cunningham, Crystal Cunningham, Josie Einhart, Christine Gould, Beatrice Keane, Athony Lavelle, Jennifer Lewis, Ellie Rutledge, Ann Sanders, Jacob Woods, Anabelle Woods, Jake Unpaid Personal Leave: *7:00AM-3:00PM* Crawford, Erica	Day Shift, Precint 1: *7:00AM-3:00PM* Crawford, Erica Cunningham, Crystal Cunningham, Josie Einhart, Christine Gould, Beatrice Keane, Athony Lavelle, Jennifer Lewis, Ellie Rutledge, Ann Sanders, Jacob Woods, Anabelle Woods, Jake

The report contains the following fields:

- **Report Header Information:** Your business name, report title, and the range of dates covered in the report**.** You can selectively hide these fields using the **Modify Header/Footer** command.

Monthly Assignment Calendar by Location

This report displays a full month of daily shift assignments in the familiar monthly calendar format, one calendar for each shift location. The Contents pane shows the tree view of the shift locations covered in this report. For each day, employees assigned to each shift are listed under the shift title.

The calendar is always displayed in consecutive rows of seven days each with each row beginning on the first calendar day of the week. By default, the first calendar day of the week is Sunday but you can set it to be any day of the week using the **Calendar Tab** in the Business Information Form. If the report date range you specified does not begin on the first day of the week and end on the last day of the week, you will see certain days displayed with a light gray background color. These days are shown to maintain the calendar display format even though they are outside of the date range you selected. Optionally, you can hide the shift assignments for days outside the specified range using the **Options** command.

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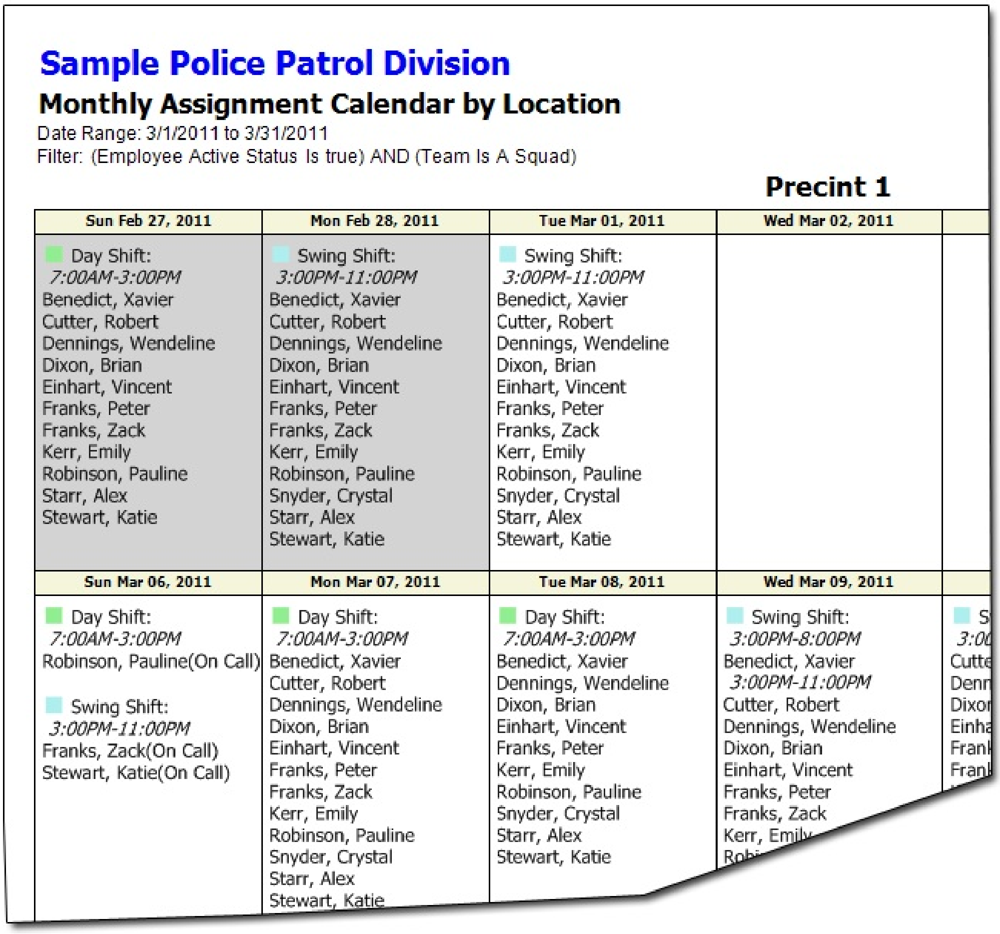

Sample Police Patrol Division

Monthly Assignment Calendar by Location

Date Range: 3/1/2011 to 3/31/2011

Filter: (Employee Active Status Is true) AND (Team Is A Squad)

Precint 1

Sun Feb 27, 2011	Mon Feb 28, 2011	Tue Mar 01, 2011	Wed Mar 02, 2011	
Day Shift: *7:00AM-3:00PM* Benedict, Xavier Cutter, Robert Dennings, Wendeline Dixon, Brian Einhart, Vincent Franks, Peter Franks, Zack Kerr, Emily Robinson, Pauline Starr, Alex Stewart, Katie	Swing Shift: *3:00PM-11:00PM* Benedict, Xavier Cutter, Robert Dennings, Wendeline Dixon, Brian Einhart, Vincent Franks, Peter Franks, Zack Kerr, Emily Robinson, Pauline Snyder, Crystal Starr, Alex Stewart, Katie	Swing Shift: *3:00PM-11:00PM* Benedict, Xavier Cutter, Robert Dennings, Wendeline Dixon, Brian Einhart, Vincent Franks, Peter Franks, Zack Kerr, Emily Robinson, Pauline Snyder, Crystal Starr, Alex Stewart, Katie		
Sun Mar 06, 2011	**Mon Mar 07, 2011**	**Tue Mar 08, 2011**	**Wed Mar 09, 2011**	
Day Shift: *7:00AM-3:00PM* Robinson, Pauline(On Call) Swing Shift: *3:00PM-11:00PM* Franks, Zack(On Call) Stewart, Katie(On Call)	Day Shift: *7:00AM-3:00PM* Benedict, Xavier Cutter, Robert Dennings, Wendeline Dixon, Brian Einhart, Vincent Franks, Peter Franks, Zack Kerr, Emily Robinson, Pauline Snyder, Crystal Starr, Alex Stewart, Katie	Day Shift: *7:00AM-3:00PM* Benedict, Xavier Dennings, Wendeline Dixon, Brian Einhart, Vincent Franks, Peter Kerr, Emily Robinson, Pauline Snyder, Crystal Starr, Alex Stewart, Katie	Swing Shift: *3:00PM-8:00PM* Benedict, Xavier *3:00PM-11:00PM* Cutter, Robert Dennings, Wendeline Dixon, Brian Einhart, Vincent Franks, Peter Franks, Zack Kerr, Emily Robi	S *3:0* Cutte Denn Dixo Einha Frank Frank

The report contains the following fields:

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Monthly Time Off Calendar

This report displays a full month of time off absences in the familiar monthly calendar format. Employees taking time off are shown for each day, along with the time off reasons. For each day, employees assigned to each shift are listed under the shift title.

The calendar is always displayed in consecutive rows of seven days each with each row beginning on the first calendar day of the week. By default, the first calendar day of the week is Sunday but you can set it to be any day of the week using the **Calendar Tab** in the Business Information Form. If the report date range you specified does not begin on the first day of the week and end on the last day of the week, you will see certain days displayed with a light gray background color. These days are shown to maintain the calendar display format even though they are outside the date range you selected. Optionally, you can hide the time off absences for days outside the specified range using the **Options** command.

For each day on the calendar, time off absences are listed according to the sort order you selected. followed by the names of the employees assigned to the shift. Each time off is displayed with a small circle in the color you defined for the time off , then the time off reason, all day indication or start time and end time, and employee name. When there are more time off absences than can be placed on a single page, display cells are vertically extended and the calendar will be shown on multiple pages. You can also export the report to Microsoft Word for additional formatting or layout changes.

This report is very flexible - you can use the **Filter**  function on the Report Viewer Ribbon to show practically any combination of time off absences that you can think of. You can save the report along with your filters for future use.

Sample Police Patrol Division

Monthly Time Off Calendar

Date Range: 3/1/2011 to 3/31/2011

Filter: (Employee Active Status Is true)

Sun Feb 27, 2011	Mon Feb 28, 2011	Tue Mar 01, 2011	Wed Mar 02, 2011	Thu Mar 03, 2011	Fri Mar 04, 2011	Sat Mar 05, 2011
• Sick Leave: *7:00AM-3:00PM* Snyder, Crystal	• Vacation: *11:00PM-7:00AM* Snyder, Monica	• Compensatory Time Taken: *11:00PM-7:00AM* Snyder, Monica • Family Emergency: *7:00AM-3:00PM* Einhart, Christine		• Family Emergency: *7:00AM-3:00PM* McBain, Jackie		• Family Emergency: *7:00AM-3:00PM* Martin, Claire
Sun Mar 06, 2011	**Mon Mar 07, 2011**	**Tue Mar 08, 2011**	**Wed Mar 09, 2011**	**Thu Mar 10, 2011**	**Fri Mar 11, 2011**	**Sat Mar 12, 2011**
	• Absent - Not Paid: *3:00PM-11:00PM* Williams, Ellie	• Vacation: *7:00AM-3:00PM* Cutter, Robert Franks, Zack	• Unpaid Personal Leave: *7:00AM-3:00PM* Crawford, Erica • Unpaid Vacation: *8:00PM-11:00PM* Benedict, Xavier	• Training: *(All-Day)* Benedict, Xavier	• Absent - Not Paid: *7:00AM-3:00PM* Polly, Christine	• Unpaid Personal Leave: *(All-Day)* Benedict, Xavier
Sun Mar 13, 2011	**Mon Mar 14, 2011**	**Tue Mar 15, 2011**	**Wed Mar 16, 2011**	**Thu Mar 17, 2011**	**Fri Mar 18, 2011**	**Sat Mar 19, 2011**
• Unpaid Vacation: *11:00PM-7:00AM* Kerr, Emily • Vacation: *3:00PM-11:00PM* Cunningham, Crystal	• Jury Duty: *(All-Day)* Jones, Christine • Vacation: *(All-Day)* Robinson, Mary		• Business Related: *(All-Day)* Kerr, Emily • Jury Duty: *(All-Day)* Lavelle, Jennifer	• Business Related: *(All-Day)* Robinson, Mary • Training: *(All-Day)* Starr, Alex	• Business Related: *(All-Day)* Martin, Claire	• Training: *(All-Day)* King, Ashley Polly, David
Sun Mar 20, 2011	**Mon Mar 21, 2011**	**Tue Mar 22, 2011**	**Wed Mar 23, 2011**	**Thu Mar 24, 2011**	**Fri Mar 25, 2011**	**Sat Mar 26, 2011**
• Jury Duty: *(All-Day)* Dixon, Brian • Training: *(All-Day)* Snyder, Monica	• Jury Duty: *(All-Day)* Crawford, Erica	• Jury Duty: *(All-Day)* Crawford, Erica		• Vacation: *(All-Day)* Poole, Venessa	• Training: *(All-Day)* Starr, Alex	• Jury Duty: *(All-Day)* Robinson, Pauline
Sun Mar 27, 2011	**Mon Mar 28, 2011**	**Tue Mar 29, 2011**	**Wed Mar 30, 2011**	**Thu Mar 31, 2011**	**Fri Apr 01, 2011**	**Sat Apr 02, 2011**
• Business Related: *(All-Day)* Valda, Natalie • Jury Duty: *(All-Day)* Dixon, Brian			• Jury Duty: *(All-Day)* Robinson, Pauline	• Training: *(All-Day)* Dennings, Wendeline	• Jury Duty: *(All-Day)* Polly, Christine	• Business Related: *(All-Day)* Poole, Rebecca

The report contains the following fields:

- **Report Header Information:** Your business name, report title, and the range of dates covered in the report. You can selectively hide these fields using the **Modify Header/Footer** command.

Daily Shift Assignments

The Daily Shift Assignments report displays the employee assignments for each shift, organized by date for each day in the report date range. By default, this report displays all assignments for the current date and sorts the list of employees assigned to each shift by employee position sort order and employee name. Each shift is color coded for easy reference and is displayed in the order of the default shift start time. The Contents pane shows the tree view of the dates covered in this report. Clicking any of the dates will position the report to the section that lists the shifts and shift assignments for that date.

Sample Community Hospital

Daily Shift Assignments

Date Range: 8/28/2009 to 8/28/2009
Filter: (Employee Active Status Is true)
Sort Order: Position Sort Order Ascending, Employee Name Ascending

Friday, August 28, 2009

Shift: Day Shift **Category:** Day
Default Times: 7:00 AM - 3:00 PM **Location:** Cardiac Care Unit

Shift	Employee	Position	Starts	Ends	Reason/Notes
	Gould, Trenton	Head Nurse	7:00 AM	3:00 PM	Extra shift assignment
	Cutter, Natasha	Registered Nurse	7:00 AM	3:00 PM	
	Oren, Claira	Registered Nurse	6:00 AM	2:00 PM	Early start approved by Mary
	Starr, Chuck	Registered Nurse	7:00 AM	3:00 PM	
	Cutter, Ted	LP/LV Nurse	7:00 AM	3:00 PM	
	Gould, Alan	LP/LV Nurse	7:00 AM	3:00 PM	
	Kilroy, Austin	Nurse Aide	7:00 AM	3:00 PM	
	Lewis, Crystal	Nurse Aide	7:00 AM	3:00 PM	
	Einhart, Zack	Technologist	7:00 AM	3:00 PM	
	Crawford, Bruce	Registered Nurse	7:00 AM	3:00 PM	Backup for S. Park
	Guttierez, Benjamin	Nurse Aide	7:00 AM	3:00 PM	

Shift: Swing Shift **Category:** Swing
Default Times: 3:00 PM - 11:00 PM **Location:** Cardiac Care Unit

Shift	Employee	Position	Starts	Ends	Reason/Notes
	Hemsley, Jane	Head Nurse	3:30 PM	11:30 PM	Special shift assignment Approved by Dr. Welby
	Crawford, Robert	Registered Nurse	3:00 PM	11:00 PM	
	Gould, Austin	Registered Nurse	3:00 PM	11:00 PM	
	Thompson, Danica	Registered Nurse	3:00 PM	11:00 PM	Shift swap with Emily Westbrook
	Young, Ashley	Registered Nurse	3:00 PM	11:00 PM	
	Lewis, Genevieve	LP/LV Nurse	4:00 PM	12:00 AM	Late start approved by Mary.
	Stewart, Crystal	LP/LV Nurse	3:00 PM	11:00 PM	
	Shriver, Bryant	Nurse Aide	3:00 PM	11:00 PM	
	Williams, Ann	Nurse Aide	3:00 PM	11:00 PM	
	Hernandez, Ann	Technologist	3:00 PM	11:00 PM	

Shift: Night Shift **Category:** Night
Default Times: 11:00 PM - 7:00 AM **Location:**

Shift	Employee	Position
	Lavelle, Edward	

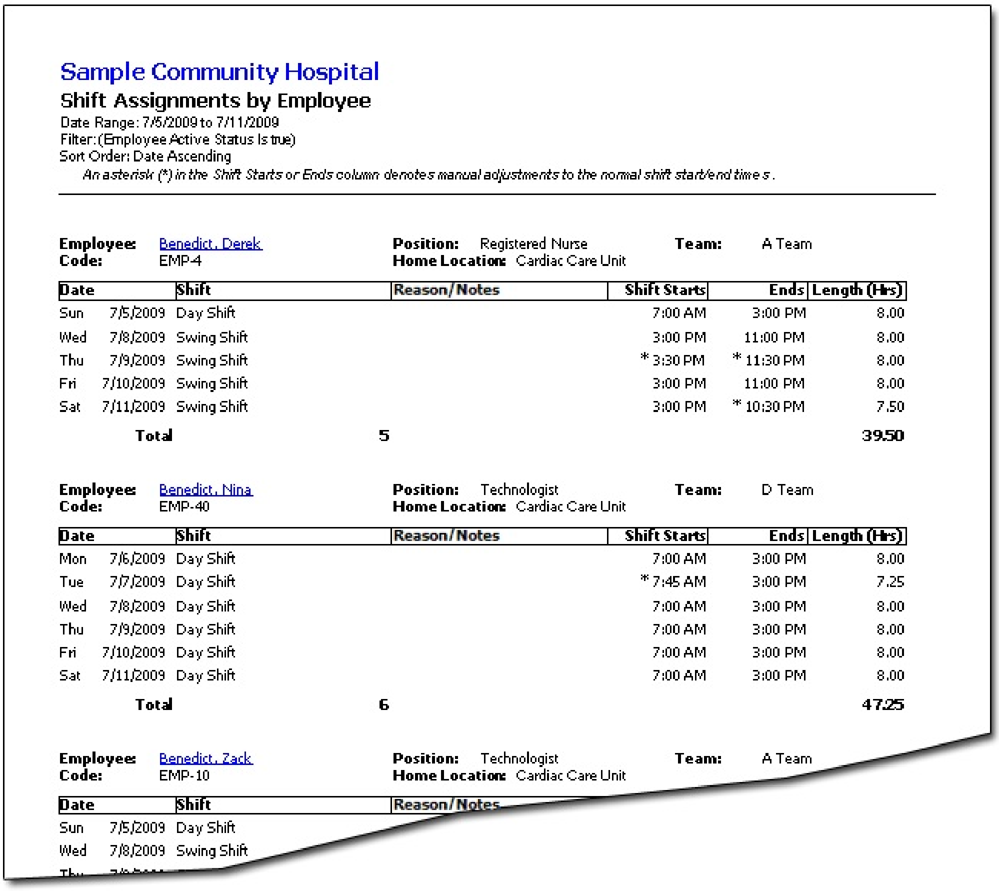
The report contains the following fields:

- **Report Header Information:** Your business name, report title, the range of dates covered in the report, and the sort order. You can selectively hide these fields using the **Modify Header/Footer** command.
- **Shift Header Information:** Information about each shift. The shift header contains the shift description, default start time, default end time, shift category and shift location.
- **Employee:** The employee name as a hyperlink. Clicking this link will bring up the Employee form to let you view and make changes to the employee record.
- **Position:** The employee's job position.
- **Starts:** The employee's shift start time. This may be different than the default shift start time if the employee's shift assignment times have been manually adjusted.
- **End**: The employee's shift end time. This may be different than the default shift end time if the employee's shift assignment times have been manually adjusted.
- **Reason:** Any reason given to the shift assignment.
- **Notes:** Any notes that were entered for the shift assignment.

Shift Assignments by Employee

This report displays shift assignments grouped by employee for a specified report date range. By default, shift assignments for all employees for the current week are displayed. Note that only actual shift assignments are listed. On call shift assignments are not included. The Contents pane shows the tree view of the employees covered in the report. Clicking any of the employee names will position the report to the section that shows the shift assignments for that employee.

For each employee, the shift assignments are listed to show the date assigned, shift description, assignment reason, shift start time, shift end time, and shift length for each shift. A summary row is also provided to show the total number of shifts assigned in the date range and the total shift length in hours.



Sample Community Hospital

Shift Assignments by Employee

Date Range: 7/5/2009 to 7/11/2009
Filter: (Employee Active Status Is true)
Sort Order: Date Ascending

An asterisk (*) in the Shift Starts or Ends column denotes manual adjustments to the normal shift start/end times.

Employee: Benedict, Derek **Position:** Registered Nurse **Team:** A Team
Code: EMP-4 **Home Location:** Cardiac Care Unit

Date		Shift	Reason/Notes	Shift Starts	Ends	Length (Hrs)
Sun	7/5/2009	Day Shift		7:00 AM	3:00 PM	8.00
Wed	7/8/2009	Swing Shift		3:00 PM	11:00 PM	8.00
Thu	7/9/2009	Swing Shift		* 3:30 PM	* 11:30 PM	8.00
Fri	7/10/2009	Swing Shift		3:00 PM	11:00 PM	8.00
Sat	7/11/2009	Swing Shift		3:00 PM	* 10:30 PM	7.50
	Total		5			39.50

Employee: Benedict, Nina **Position:** Technologist **Team:** D Team
Code: EMP-40 **Home Location:** Cardiac Care Unit

Date		Shift	Reason/Notes	Shift Starts	Ends	Length (Hrs)
Mon	7/6/2009	Day Shift		7:00 AM	3:00 PM	8.00
Tue	7/7/2009	Day Shift		* 7:45 AM	3:00 PM	7.25
Wed	7/8/2009	Day Shift		7:00 AM	3:00 PM	8.00
Thu	7/9/2009	Day Shift		7:00 AM	3:00 PM	8.00
Fri	7/10/2009	Day Shift		7:00 AM	3:00 PM	8.00
Sat	7/11/2009	Day Shift		7:00 AM	3:00 PM	8.00
	Total		6			47.25

Employee: Benedict, Zack **Position:** Technologist **Team:** A Team
Code: EMP-10 **Home Location:** Cardiac Care Unit

Date		Shift	Reason/Notes
Sun	7/5/2009	Day Shift	
Wed	7/8/2009	Swing Shift	

The report contains the following fields:

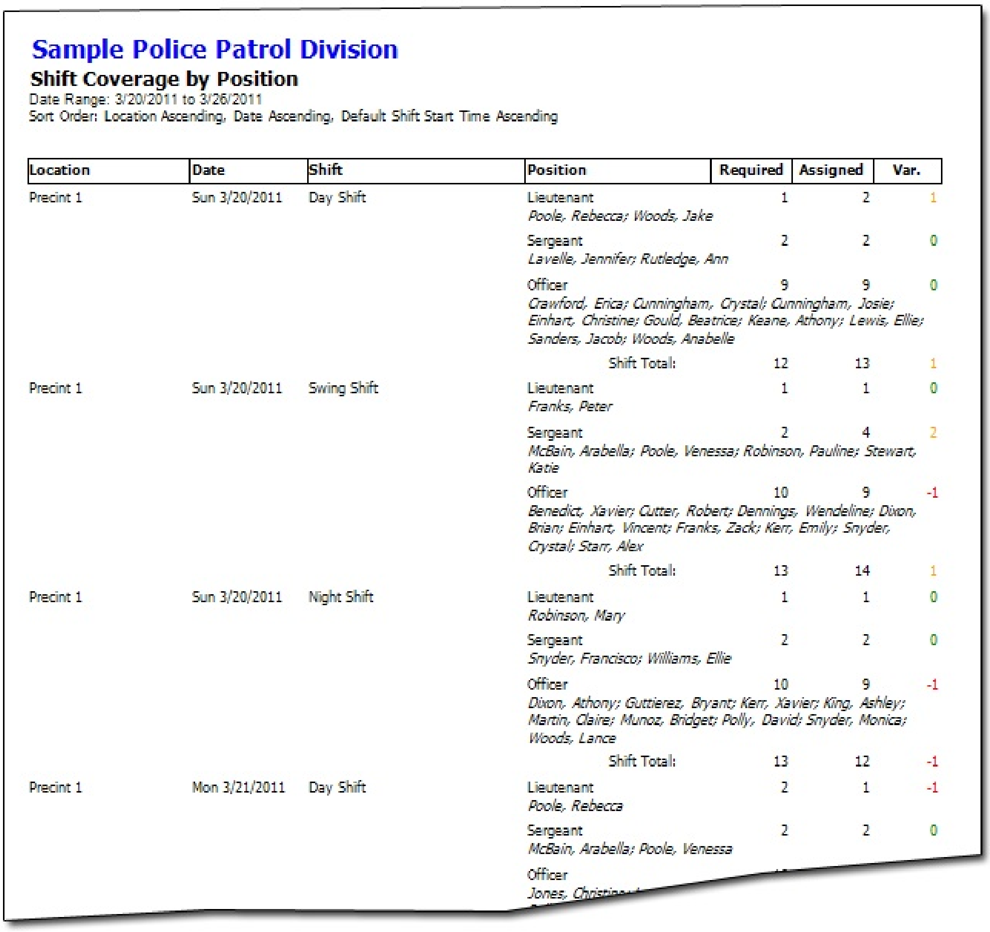
- **Report Header Information:** Your business name, report title, and the range of dates covered in the report. You can selectively hide these fields using the **Modify Header/Footer** command.
- **Employee Header Information:** Information about the employee. Each header contains the employee name, employee code, job position, team, and the employee's home location. Clicking the employee name hyperlink will bring up the Employee form to let you view and make changes to the employee record.
- **Date:** Date when a shift was assigned.
- **Shift:** Description of the shift.
- **Reason:** Shift assignment reason if one was entered for the shift assignment.
- **Shift Starts:** Shift start time. An asterisk in this field indicates the shift start time has been modified and is different from the normal shift start time.
- **Ends:** Shift end time. An asterisk in this field indicates the shift end time has been modified and is different from the normal shift end time.
- **Length (Hrs):** Shift length in hours. This is the time duration from the shift start time to shift end time.

Shift Coverage By Position

The Shift Coverage By Position report displays the number of people required and scheduled by position for each shift, organized by shift location for each day in the report date range. The information presented in this report is similar to the [Shift Coverage Planner](). By default, this report displays shift coverage information for the current week. You can use the **Date range** control to specify any time period to be shown.

Corresponding to each position in a shift, the report shows a three-column coverage profile. The first column (Required) contains the required head counts for each position. The second column (Assigned) shows the numbers of employees assigned for each the position, and the third column (Var) shows the variances in staffing (assigned head count - required head count). For the variance field, red color indicates under-staffing, orange indicates over-staffing, and green indicates the right level of staffing.

Use the **Options** command to show/hide shift description, shift start/end times, employees assigned to each position, shift total, and shifts with the right level of staffing.



Sample Police Patrol Division

Shift Coverage by Position

Date Range: 3/20/2011 to 3/26/2011

Sort Order: Location Ascending, Date Ascending, Default Shift Start Time Ascending

Location	Date	Shift	Position	Required	Assigned	Var.
Precint 1	Sun 3/20/2011	Day Shift	Lieutenant *Poole, Rebecca; Woods, Jake*	1	2	1
			Sergeant *Lavelle, Jennifer; Rutledge, Ann*	2	2	0
			Officer *Crawford, Erica; Cunningham, Crystal; Cunningham, Josie; Einhart, Christine; Gould, Beatrice; Keane, Athony; Lewis, Ellie; Sanders, Jacob; Woods, Anabelle*	9	9	0
			Shift Total:	12	13	1
Precint 1	Sun 3/20/2011	Swing Shift	Lieutenant *Franks, Peter*	1	1	0
			Sergeant *McBain, Arabella; Poole, Venessa; Robinson, Pauline; Stewart, Katie*	2	4	2
			Officer *Benedict, Xavier; Cutter, Robert; Dennings, Wendeline; Dixon, Brian; Einhart, Vincent; Franks, Zack; Kerr, Emily; Snyder, Crystal; Starr, Alex*	10	9	-1
			Shift Total:	13	14	1
Precint 1	Sun 3/20/2011	Night Shift	Lieutenant *Robinson, Mary*	1	1	0
			Sergeant *Snyder, Francisco; Williams, Ellie*	2	2	0
			Officer *Dixon, Athony; Guttierez, Bryant; Kerr, Xavier; King, Ashley; Martin, Claire; Munoz, Bridget; Polly, David; Snyder, Monica; Woods, Lance*	10	9	-1
			Shift Total:	13	12	-1
Precint 1	Mon 3/21/2011	Day Shift	Lieutenant *Poole, Rebecca*	2	1	-1
			Sergeant *McBain, Arabella; Poole, Venessa*	2	2	0
			Officer *Jones, Christina...*			

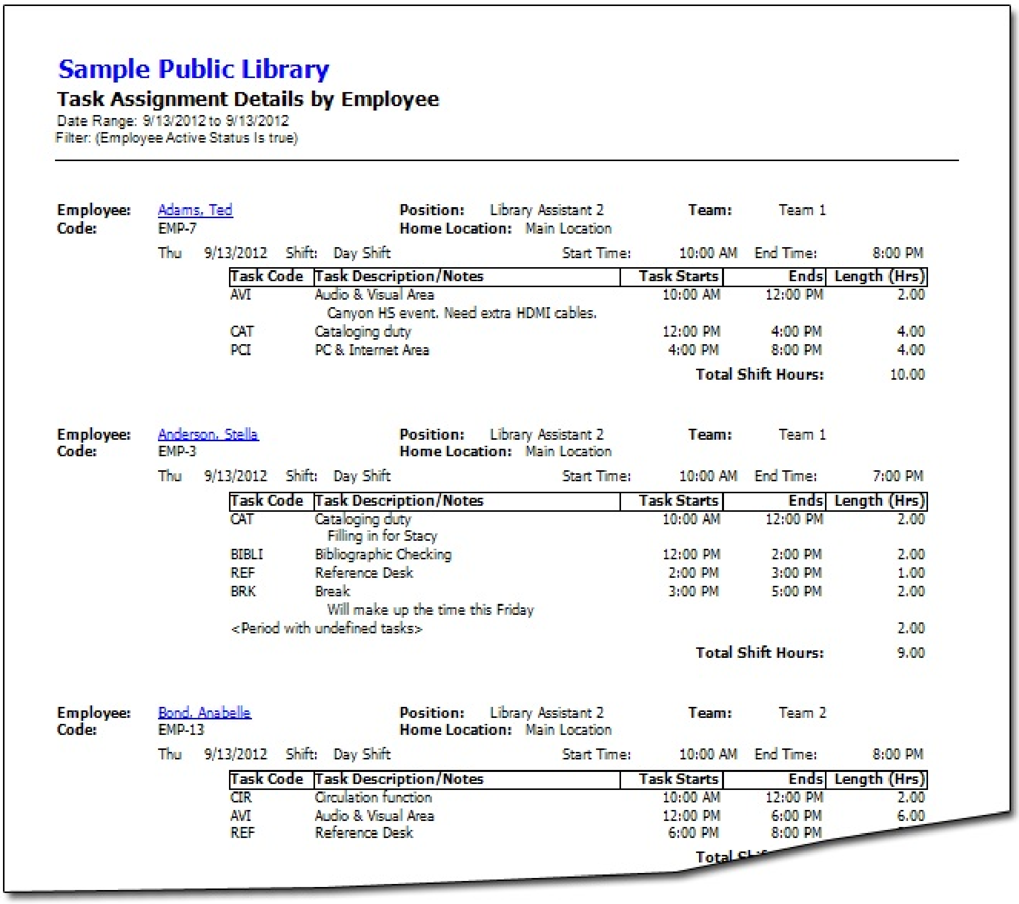
The report contains the following fields:

- **Report Header Information:** Your business name, report title, the range of dates covered in the report, and the sort order. You can selectively hide these fields using the **Modify Header/Footer** command.
- **Position:** Employee job position.
- **Date:** The date when a shift was assigned.
- **Shift:** Description of the shift.
- **Required:** The required head count for the position.
- **Assigned:** The head count of employees assigned to the shift.
- **Var.** The variances in staffing (assigned head count - required head count).
- **Shift Total:** The sums of required and assigned head counts for all positions required for the shift.

Task Assignment Details by Employee

This report displays the tasks assigned to each employee along with task start time, end time, and duration for a specific report date range. By default, all employee task assignments for the current date are displayed, organized by employee, and sorted by date. The Contents pane shows the tree view of the employees covered in the report. Clicking any of the employee names will position the report to the section that shows task assignment details for that employee.

The Task Assignment Details by Employee report provides you with a roster of which employees are working where, doing what, and when. For each employee, this report displays task assignments for each day, grouped by shifts, one task per line. Each line shows the task code, description, start time, end time, and duration in hours.



Sample Public Library
Task Assignment Details by Employee
Date Range: 9/13/2012 to 9/13/2012
Filter: (Employee Active Status Is true)

Employee: Adams, Ted **Position:** Library Assistant 2 **Team:** Team 1
Code: EMP-7 **Home Location:** Main Location
Thu 9/13/2012 Shift: Day Shift Start Time: 10:00 AM End Time: 8:00 PM

Task Code	Task Description/Notes	Task Starts	Ends	Length (Hrs)
AVI	Audio & Visual Area	10:00 AM	12:00 PM	2.00
	Canyon HS event. Need extra HDMI cables.			
CAT	Cataloging duty	12:00 PM	4:00 PM	4.00
PCI	PC & Internet Area	4:00 PM	8:00 PM	4.00
			Total Shift Hours:	10.00

Employee: Anderson, Stella **Position:** Library Assistant 2 **Team:** Team 1
Code: EMP-3 **Home Location:** Main Location
Thu 9/13/2012 Shift: Day Shift Start Time: 10:00 AM End Time: 7:00 PM

Task Code	Task Description/Notes	Task Starts	Ends	Length (Hrs)
CAT	Cataloging duty	10:00 AM	12:00 PM	2.00
	Filling in for Stacy			
BIBLI	Bibliographic Checking	12:00 PM	2:00 PM	2.00
REF	Reference Desk	2:00 PM	3:00 PM	1.00
BRK	Break	3:00 PM	5:00 PM	2.00
	Will make up the time this Friday			
<Period with undefined tasks>				2.00
			Total Shift Hours:	9.00

Employee: Bond, Anabelle **Position:** Library Assistant 2 **Team:** Team 2
Code: EMP-13 **Home Location:** Main Location
Thu 9/13/2012 Shift: Day Shift Start Time: 10:00 AM End Time: 8:00 PM

Task Code	Task Description/Notes	Task Starts	Ends	Length (Hrs)
CIR	Circulation function	10:00 AM	12:00 PM	2.00
AVI	Audio & Visual Area	12:00 PM	6:00 PM	6.00
REF	Reference Desk	6:00 PM	8:00 PM	

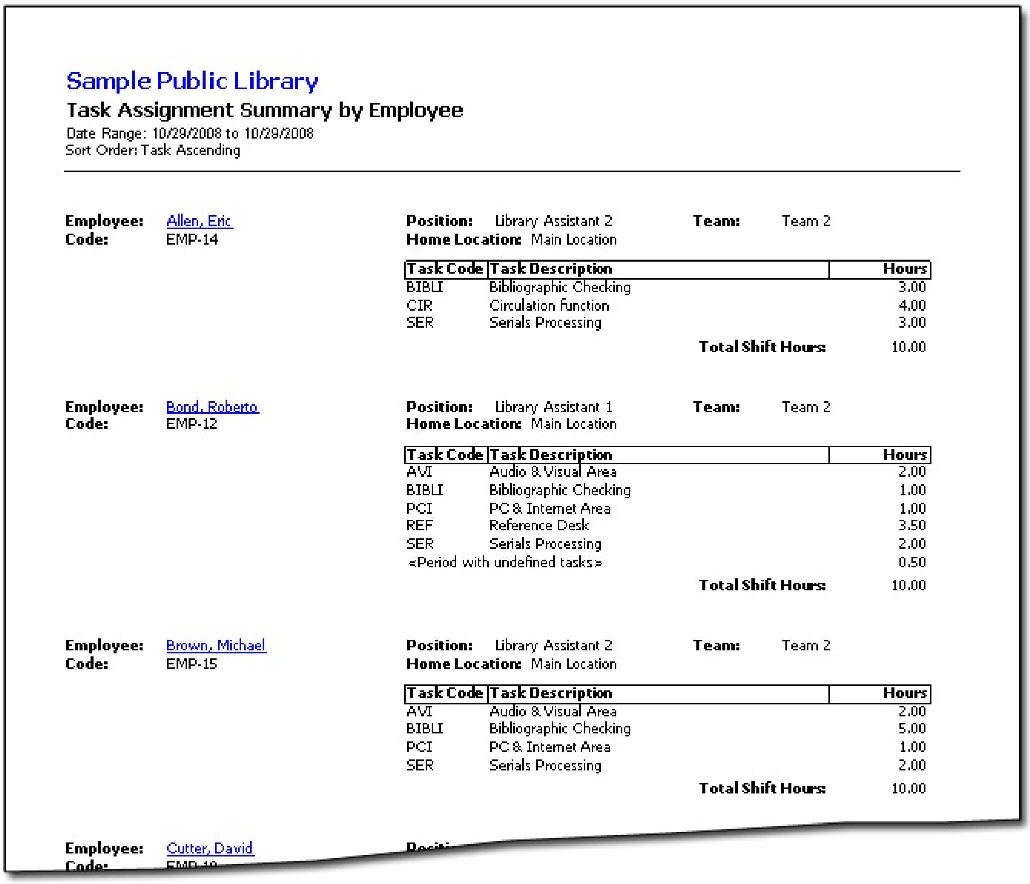
The report contains the following fields:

- **Report Header Information:** Your business name, report title, and the range of dates covered in the report**.** You can selectively hide these fields using the **Modify Header/Footer** command.
- **Employee Header Information:** Information about the employee. Each header contains the employee name, employee code, job position, team, and the employee's home location. Clicking the employee name hyperlink will bring up the Employee form to let you view and make changes to the employee record.
- **Task Code:** Task identification code.
- **Task Description/Notes:** Description of the task and notes. Task notes, when available, will be shown on a separate line.
- **Task Starts:** The time when the task is scheduled to start.
- **Ends:** The time when the task is scheduled to end.
- **Length:** The task duration.
- **Total Shift Hours:** The duration of the shift assignment.

Task Assignment Summary by Employee

This report summarizes the total hours planned for each task by each employee over a specific reporting period. By default, all employee task assignments for the current date are displayed . The Contents pane shows the tree view of the employees covered in the report. Clicking any of the employee names will position the report to the section that shows task assignment summary for that employee.

You can use the Task Assignment Summary By Employee report to obtain the hours planned for each task, by employee, for payroll and accounting purposes. For each employee, this report displays all tasks that are planned for the employee over the selected date range, one task per line. Each line shows the task code, description, and planned hours.



Sample Public Library

Task Assignment Summary by Employee

Date Range: 10/29/2008 to 10/29/2008

Sort Order: Task Ascending

Employee: Allen, Eric **Position:** Library Assistant 2 **Team:** Team 2

Code: EMP-14 **Home Location:** Main Location

Task Code	Task Description	Hours
BIBLI	Bibliographic Checking	3.00
CIR	Circulation Function	4.00
SER	Serials Processing	3.00
	Total Shift Hours:	10.00

Employee: Bond, Roberto **Position:** Library Assistant 1 **Team:** Team 2

Code: EMP-12 **Home Location:** Main Location

Task Code	Task Description	Hours
AVI	Audio & Visual Area	2.00
BIBLI	Bibliographic Checking	1.00
PCI	PC & Internet Area	1.00
REF	Reference Desk	3.50
SER	Serials Processing	2.00
<Period with undefined tasks>		0.50
	Total Shift Hours:	10.00

Employee: Brown, Michael **Position:** Library Assistant 2 **Team:** Team 2

Code: EMP-15 **Home Location:** Main Location

Task Code	Task Description	Hours
AVI	Audio & Visual Area	2.00
BIBLI	Bibliographic Checking	5.00
PCI	PC & Internet Area	1.00
SER	Serials Processing	2.00
	Total Shift Hours:	10.00

Employee: Cutter, David

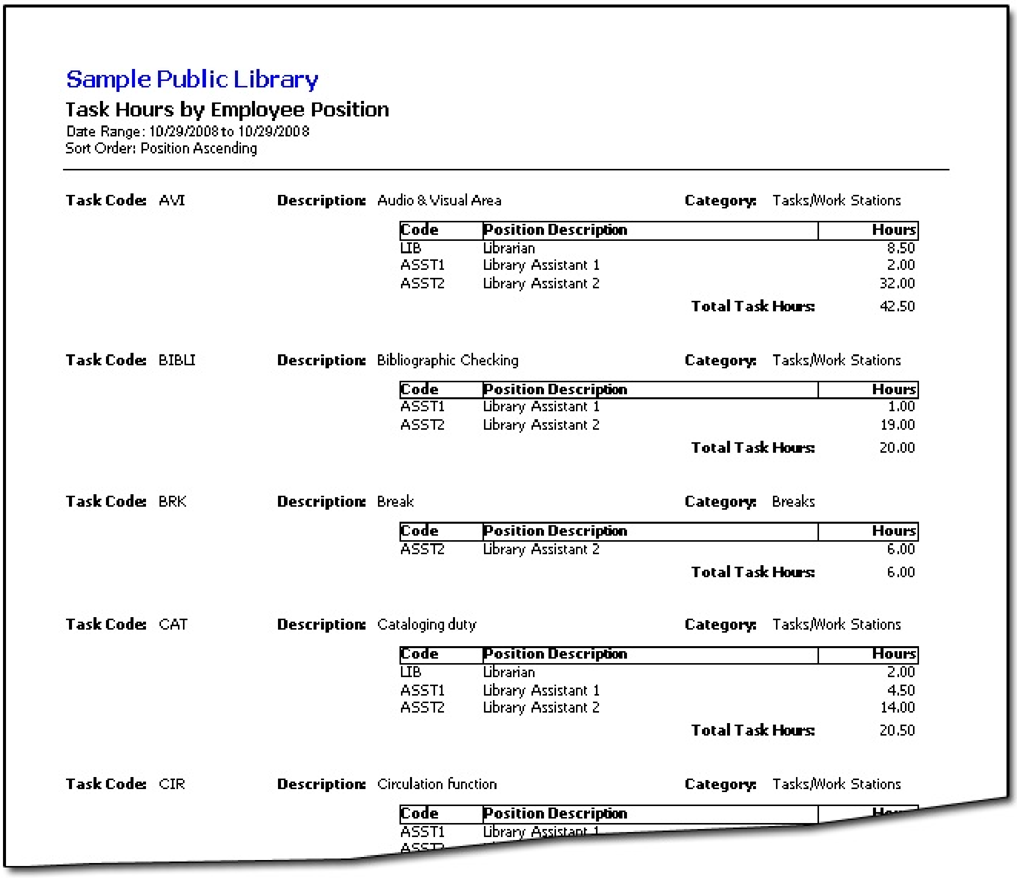
The report contains the following fields:

- **Report Header Information:** Your business name, report title, and the range of dates covered in the report**.** You can selectively hide these fields using the **Modify Header/Footer** command.
- **Employee Header Information:** Information about the employee. Each header contains the employee name, employee code, job position, team, and the employee's home location. Clicking the employee name hyperlink will bring up the Employee form to let you view and make changes to the employee record.
- **Task Code:** Task identification code.
- **Task Description:** Description of the task.
- **Hours:** The amount of time, in hours spent by the employee on this task.
- **Total Shift Hours:** The sum of shift hours over the reporting period. This includes the sum of all task hours and the time periods in which there are no task assignment.

Task Hours by Employee Position

This report shows the employee positions and work hours planned for each task over a specific reporting period. By default, all tasks that have at least one assignment for the current date are displayed . The Contents pane shows the tree view of the tasks covered in the report. Clicking any of the task description will position the report to the section that shows the employee positions working on the task.

You can use the Task Hours by Employee Position report to obtain the number of hours planned for each position, for accounting purposes. For each task, this report displays all positions and the number of hours planned for the selected date range, one position per line. Each line shows the position code, description, and the number of hours planned.


Sample Public Library
Task Hours by Employee Position
Date Range: 10/29/2008 to 10/29/2008
Sort Order: Position Ascending

Task Code: AVI **Description:** Audio & Visual Area **Category:** Tasks/Work Stations

Code	Position Description	Hours
LIB	Librarian	8.50
ASST1	Library Assistant 1	2.00
ASST2	Library Assistant 2	32.00
	Total Task Hours:	42.50

Task Code: BIBLI **Description:** Bibliographic Checking **Category:** Tasks/Work Stations

Code	Position Description	Hours
ASST1	Library Assistant 1	1.00
ASST2	Library Assistant 2	19.00
	Total Task Hours:	20.00

Task Code: BRK **Description:** Break **Category:** Breaks

Code	Position Description	Hours
ASST2	Library Assistant 2	6.00
	Total Task Hours:	6.00

Task Code: CAT **Description:** Cataloging duty **Category:** Tasks/Work Stations

Code	Position Description	Hours
LIB	Librarian	2.00
ASST1	Library Assistant 1	4.50
ASST2	Library Assistant 2	14.00
	Total Task Hours:	20.50

Task Code: CIR **Description:** Circulation function **Category:** Tasks/Work Stations

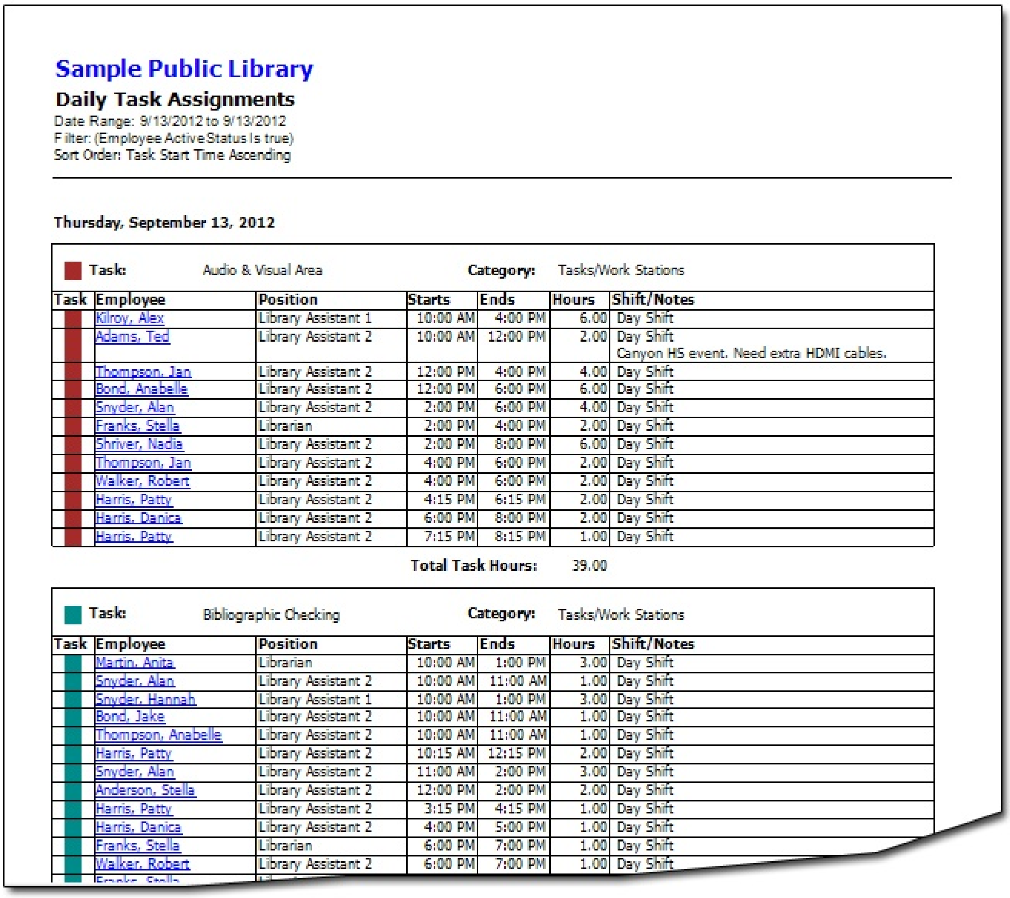
Code	Position Description	Hours
ASST1	Library Assistant 1	

The report contains the following fields:

- **Report Header Information:** Your business name, report title, and the range of dates covered in the report**.** You can selectively hide these fields using the **Modify Header/Footer** command.
- **Task Header Information:** Information about the task. Each header contains the task code, task description, and the task category.
- **Code:** The employee position code.
- **Position Description:** The employee position description.
- **Hours:** The number of hours planned over the selected data range for all employees holding this position.
- **Total Task Hours:** The number of hours planned over the selected data range for all listed positions.

Daily Task Assignments

The Daily Task Assignments report displays the employee task assignments for each task, organized by date for each day in the report date range. By default, this report displays all task assignments for the current date and sorts the list of employees assigned to each task by the task start time. Each task is color coded for easy reference. The Contents pane shows the tree view of the dates covered in this report. Clicking any of the dates will position the report to the section that lists the tasks and task assignments for that date.



Sample Public Library

Daily Task Assignments

Date Range: 9/13/2012 to 9/13/2012
Filter: (Employee Active Status Is true)
Sort Order: Task Start Time Ascending

Thursday, September 13, 2012

Task: Audio & Visual Area **Category:** Tasks/Work Stations

Task	Employee	Position	Starts	Ends	Hours	Shift/Notes
	Kilroy, Alex	Library Assistant 1	10:00 AM	4:00 PM	6.00	Day Shift
	Adams, Ted	Library Assistant 2	10:00 AM	12:00 PM	2.00	Day Shift Canyon HS event. Need extra HDMI cables.
	Thompson, Jan	Library Assistant 2	12:00 PM	4:00 PM	4.00	Day Shift
	Bond, Anabelle	Library Assistant 2	12:00 PM	6:00 PM	6.00	Day Shift
	Snyder, Alan	Library Assistant 2	2:00 PM	6:00 PM	4.00	Day Shift
	Franks, Stella	Librarian	2:00 PM	4:00 PM	2.00	Day Shift
	Shriver, Nadia	Library Assistant 2	2:00 PM	8:00 PM	6.00	Day Shift
	Thompson, Jan	Library Assistant 2	4:00 PM	6:00 PM	2.00	Day Shift
	Walker, Robert	Library Assistant 2	4:00 PM	6:00 PM	2.00	Day Shift
	Harris, Patty	Library Assistant 2	4:15 PM	6:15 PM	2.00	Day Shift
	Harris, Danica	Library Assistant 2	6:00 PM	8:00 PM	2.00	Day Shift
	Harris, Patty	Library Assistant 2	7:15 PM	8:15 PM	1.00	Day Shift

Total Task Hours: 39.00

Task: Bibliographic Checking **Category:** Tasks/Work Stations

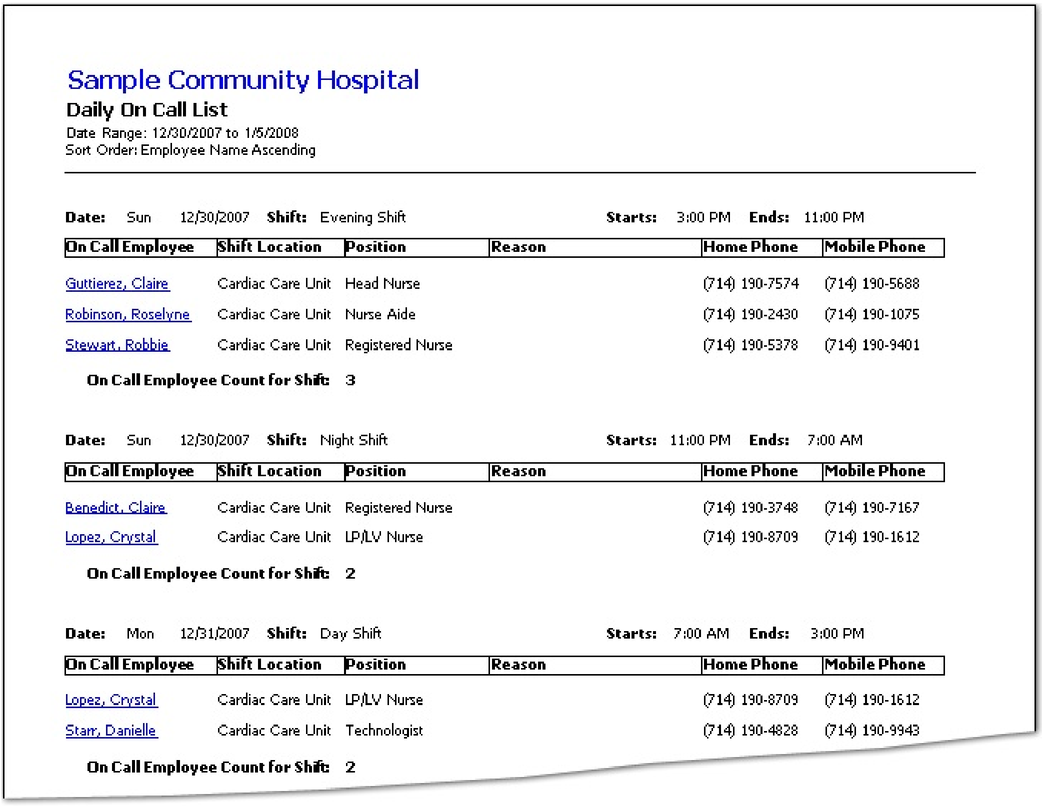
Task	Employee	Position	Starts	Ends	Hours	Shift/Notes
	Martin, Anita	Librarian	10:00 AM	1:00 PM	3.00	Day Shift
	Snyder, Alan	Library Assistant 2	10:00 AM	11:00 AM	1.00	Day Shift
	Snyder, Hannah	Library Assistant 1	10:00 AM	1:00 PM	3.00	Day Shift
	Bond, Jake	Library Assistant 2	10:00 AM	11:00 AM	1.00	Day Shift
	Thompson, Anabelle	Library Assistant 2	10:00 AM	11:00 AM	1.00	Day Shift
	Harris, Patty	Library Assistant 2	10:15 AM	12:15 PM	2.00	Day Shift
	Snyder, Alan	Library Assistant 2	11:00 AM	2:00 PM	3.00	Day Shift
	Anderson, Stella	Library Assistant 2	12:00 PM	2:00 PM	2.00	Day Shift
	Harris, Patty	Library Assistant 2	3:15 PM	4:15 PM	1.00	Day Shift
	Harris, Danica	Library Assistant 2	4:00 PM	5:00 PM	1.00	Day Shift
	Franks, Stella	Librarian	6:00 PM	7:00 PM	1.00	Day Shift
	Walker, Robert	Library Assistant 2	6:00 PM	7:00 PM	1.00	Day Shift

The report contains the following fields:

- **Report Header Information:** Your business name, report title, the range of dates covered in the report, and the sort order. You can selectively hide these fields using the **Modify Header/Footer** command.
- **Task Header Information:** Information about each task. The task header contains the task description and task category.
- **Employee:** The employee name as a hyperlink. Clicking this link will bring up the Employee form to let you view and make changes to the employee record.
- **Position:** The employee's job position.
- **Starts:** The employee's task start time.
- **End**: The employee's task end time.
- **Hours:** The task duration.
- **Shift/Notes:** The shift within it the task is assigned and task notes. Task notes, when available, will be shown on a separate line.

Daily On Call List

This report displays a list of employees who are on call for the specific report date range. By default, this report shows all employees who are on call for the current week, organized by date, and sorted by employee name. The Contents pane shows the tree view of the dates covered in the report. Clicking any of the dates will position the report to the section that lists the employees scheduled to be on call for that date.



Sample Community Hospital

Daily On Call List

Date Range: 12/30/2007 to 1/5/2008

Sort Order: Employee Name Ascending

Date: Sun 12/30/2007 **Shift:** Evening Shift **Starts:** 3:00 PM **Ends:** 11:00 PM

On Call Employee	Shift Location	Position	Reason	Home Phone	Mobile Phone
Guttierez, Claire	Cardiac Care Unit	Head Nurse		(714) 190-7574	(714) 190-5688
Robinson, Roselyne	Cardiac Care Unit	Nurse Aide		(714) 190-2430	(714) 190-1075
Stewart, Robbie	Cardiac Care Unit	Registered Nurse		(714) 190-5378	(714) 190-9401

On Call Employee Count for Shift: 3

Date: Sun 12/30/2007 **Shift:** Night Shift **Starts:** 11:00 PM **Ends:** 7:00 AM

On Call Employee	Shift Location	Position	Reason	Home Phone	Mobile Phone
Benedict, Claire	Cardiac Care Unit	Registered Nurse		(714) 190-3748	(714) 190-7167
Lopez, Crystal	Cardiac Care Unit	LP/LV Nurse		(714) 190-8709	(714) 190-1612

On Call Employee Count for Shift: 2

Date: Mon 12/31/2007 **Shift:** Day Shift **Starts:** 7:00 AM **Ends:** 3:00 PM

On Call Employee	Shift Location	Position	Reason	Home Phone	Mobile Phone
Lopez, Crystal	Cardiac Care Unit	LP/LV Nurse		(714) 190-8709	(714) 190-1612
Starr, Danielle	Cardiac Care Unit	Technologist		(714) 190-4828	(714) 190-9943

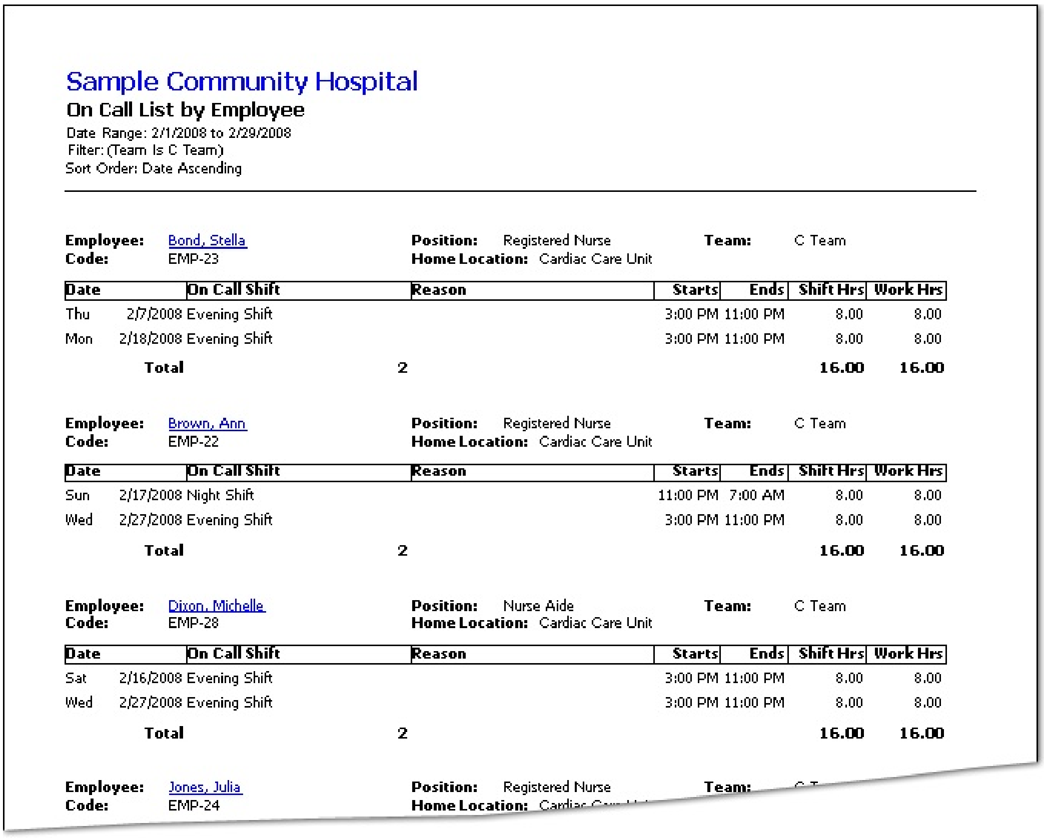
On Call Employee Count for Shift: 2

The report contains the following fields:

- **Header Information:** Your business name, report title, the range of dates covered in the report, and the sort order. You can selectively hide these fields using the **Modify Header/Footer** command.
- **On Call Employee:** The employee name as a hyperlink. Clicking this link will bring up the Employee form to let you view and make changes to the employee record.
- **Shift Location:** The location where the employee is scheduled to be working.
- **Position:** The employee's job position.
- **Reason:** The reason given to the on call shift assignment.
- **Hone Phone:** The employee's home phone number.
- **Mobile Phone:** The employee's mobile phone number.

On Call List By Employee

This report displays a list of on call assignments for the specified report date range. By default, this report shows all on call assignments for the current week, organized by employee, and sorted by date. The Contents pane shows the tree view of the employees covered in the report. Clicking any of the employee names will position the report to the section that lists on call assignments for that employee.



Sample Community Hospital
On Call List by Employee
Date Range: 2/1/2008 to 2/29/2008
Filter: (Team Is C Team)
Sort Order: Date Ascending

Employee: Bond, Stella **Position:** Registered Nurse **Team:** C Team
Code: EMP-23 **Home Location:** Cardiac Care Unit

Date	On Call Shift	Reason	Starts	Ends	Shift Hrs	Work Hrs
Thu 2/7/2008	Evening Shift		3:00 PM	11:00 PM	8.00	8.00
Mon 2/18/2008	Evening Shift		3:00 PM	11:00 PM	8.00	8.00
Total	**2**				**16.00**	**16.00**

Employee: Brown, Ann **Position:** Registered Nurse **Team:** C Team
Code: EMP-22 **Home Location:** Cardiac Care Unit

Date	On Call Shift	Reason	Starts	Ends	Shift Hrs	Work Hrs
Sun 2/17/2008	Night Shift		11:00 PM	7:00 AM	8.00	8.00
Wed 2/27/2008	Evening Shift		3:00 PM	11:00 PM	8.00	8.00
Total	**2**				**16.00**	**16.00**

Employee: Dixon, Michelle **Position:** Nurse Aide **Team:** C Team
Code: EMP-28 **Home Location:** Cardiac Care Unit

Date	On Call Shift	Reason	Starts	Ends	Shift Hrs	Work Hrs
Sat 2/16/2008	Evening Shift		3:00 PM	11:00 PM	8.00	8.00
Wed 2/27/2008	Evening Shift		3:00 PM	11:00 PM	8.00	8.00
Total	**2**				**16.00**	**16.00**

Employee: Jones, Julia **Position:** Registered Nurse **Team:**
Code: EMP-24 **Home Location:**

The report contains the following fields:

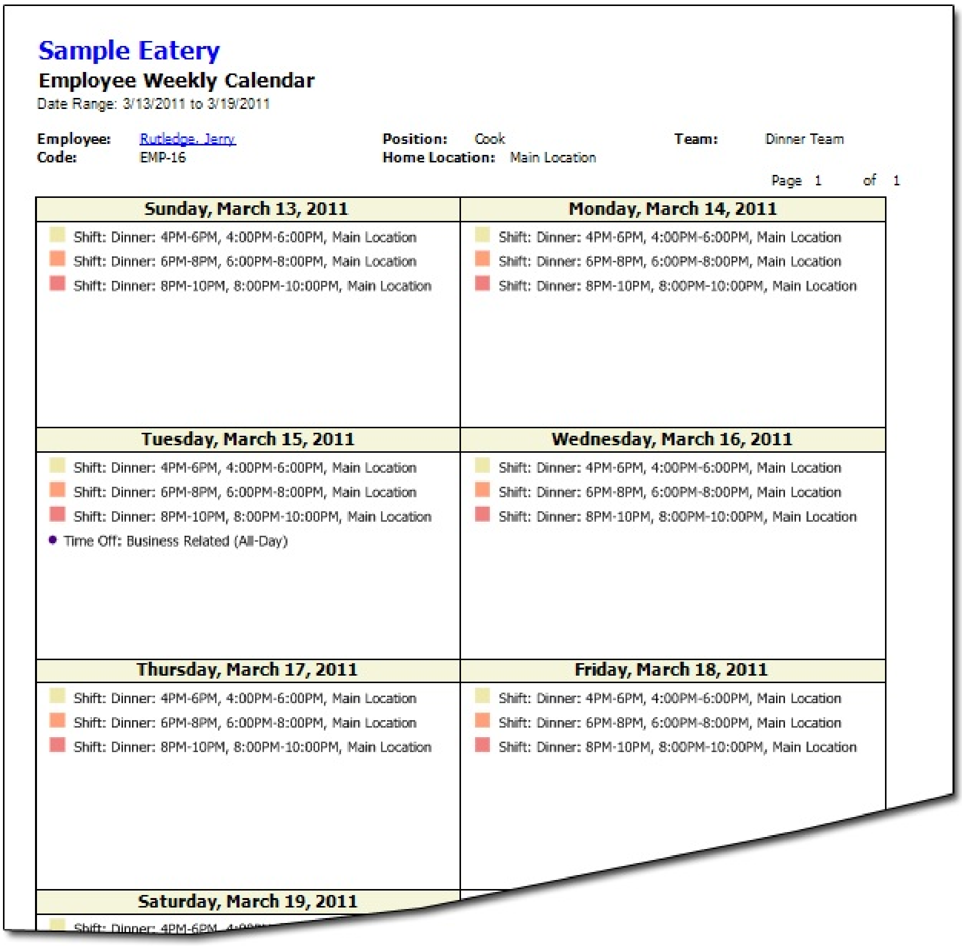
- **Header Information:** Your business name, report title, the range of dates covered in the report, and the sort order**.** You can selectively hide these fields using the **Modify Header/Footer** command.
- **Employee Header Information:** Information about the employee. Each header contains the employee name, employee code, job position, team, and the employee's home location. Clicking the employee name hyperlink will bring up the Employee form to let you view and make changes to the employee record.
- **Date:** Date of the on call assignment.
- **On Call Shift:** Description of the on call shift.
- **Reason:** The reason given to the on call shift assignment.
- **Starts:** Start time of the on call shift.
- **Ends:** End time of the on call shift.
- **Shift Hrs:** Shift length in hours, representing the period from shift start time to shift end time.
- **Work Hrs:** Total work hours for the shift. This equals the shift length minus any unpaid break duration.

Employee Weekly Calendar

This report displays employee weekly calendars for the specified report date range. By default, calendars for all employees for the current week are displayed. The Contents pane shows the tree view of the employees covered in the report. Clicking any of the employee names will position the report to the section that shows the weekly calendar for that employee.

The calendars are always displayed in a seven-day format beginning on the first calendar day of the week. By default, the first calendar day of the week is Sunday but you can set it to be any day of the week using the **Calendar Tab** in the Business Information Form. If the report date range you specified does not begin on the first calendar day of the week and end on the last calendar day of the week, you will see certain days displayed with a light gray background color. These days are shown in order to maintain the calendar display format even though they are just outside of date range you selected. Optionally, you can hide the shift assignments and time off absences for days outside the specified range using the **Options** command.

For each day on the calendar, the shift assignments are listed first in the order of shift start time, followed by any time off assignments. Each shift is displayed with a small square in the color you defined for the shift, then the shift description, start time, end time, and shift location. Each time off is displayed with a small circle in the color you defined for the time off, then the all day indication, time off reason, and time off start/end times.



Sample Eatery
Employee Weekly Calendar
Date Range: 3/13/2011 to 3/19/2011

Employee: Rutledge, Jerry | Position: Cook | Team: Dinner Team
Code: EMP-16 | Home Location: Main Location

Page 1 of 1

Sunday, March 13, 2011	Monday, March 14, 2011
Shift: Dinner: 4PM-6PM, 4:00PM-6:00PM, Main Location Shift: Dinner: 6PM-8PM, 6:00PM-8:00PM, Main Location Shift: Dinner: 8PM-10PM, 8:00PM-10:00PM, Main Location	Shift: Dinner: 4PM-6PM, 4:00PM-6:00PM, Main Location Shift: Dinner: 6PM-8PM, 6:00PM-8:00PM, Main Location Shift: Dinner: 8PM-10PM, 8:00PM-10:00PM, Main Location
Tuesday, March 15, 2011	**Wednesday, March 16, 2011**
Shift: Dinner: 4PM-6PM, 4:00PM-6:00PM, Main Location Shift: Dinner: 6PM-8PM, 6:00PM-8:00PM, Main Location Shift: Dinner: 8PM-10PM, 8:00PM-10:00PM, Main Location Time Off: Business Related (All-Day)	Shift: Dinner: 4PM-6PM, 4:00PM-6:00PM, Main Location Shift: Dinner: 6PM-8PM, 6:00PM-8:00PM, Main Location Shift: Dinner: 8PM-10PM, 8:00PM-10:00PM, Main Location
Thursday, March 17, 2011	**Friday, March 18, 2011**
Shift: Dinner: 4PM-6PM, 4:00PM-6:00PM, Main Location Shift: Dinner: 6PM-8PM, 6:00PM-8:00PM, Main Location Shift: Dinner: 8PM-10PM, 8:00PM-10:00PM, Main Location	Shift: Dinner: 4PM-6PM, 4:00PM-6:00PM, Main Location Shift: Dinner: 6PM-8PM, 6:00PM-8:00PM, Main Location Shift: Dinner: 8PM-10PM, 8:00PM-10:00PM, Main Location
Saturday, March 19, 2011	

The report contains the following fields:

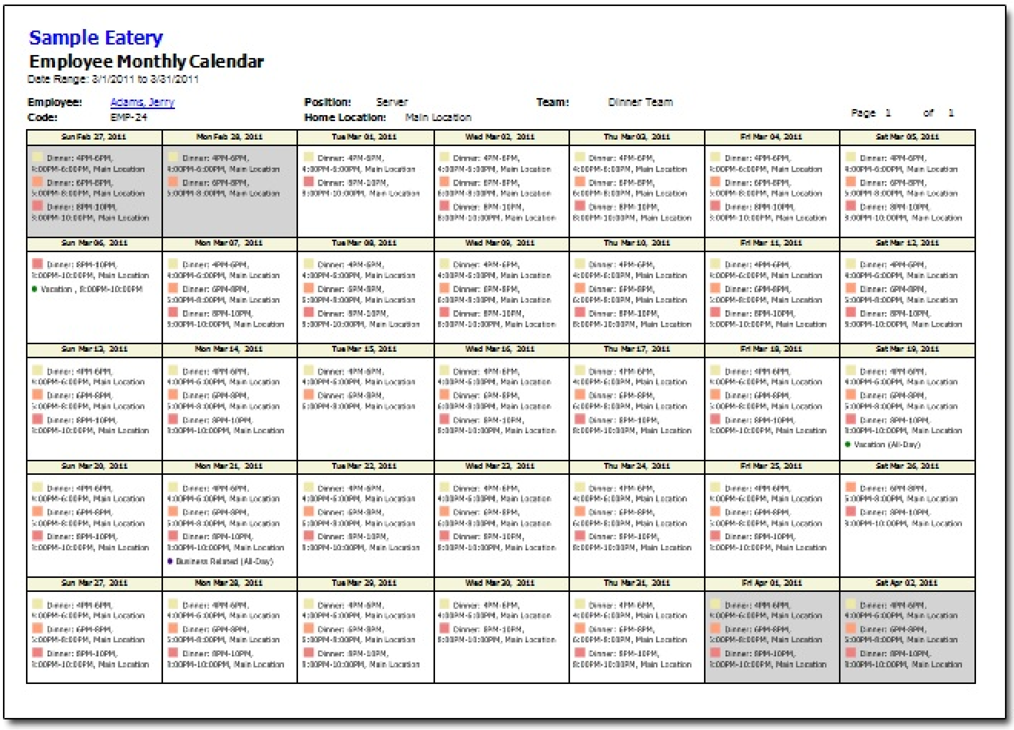
- **Report Header Information:** Your business name, report title, and the range of dates covered in the report. You can selectively hide these fields using the **Modify Header/Footer** command.
- **Employee Header Information:** Information about the employee. Each header contains the employee name, employee code, job position, team, and the employee's home location. Clicking the employee name hyperlink will bring up the Employee form to let you view and make changes to the employee record.

Employee Monthly Calendar

This report displays employee monthly calendars for a specific report date range. By default, calendars for all employees for the current month are displayed. The Contents pane shows the tree view of the employees covered in the report. Clicking any of the employee names will position the report to the section that shows the monthly calendar for that employee.

The calendars are always displayed in consecutive rows of seven days each, with each row beginning on the first calendar day of the week. By default, the first calendar day of the week is Sunday but you can set it to be any day of the week using the **Calendar Tab** in the [Business Information Form](). If the report date range you specified does not begin on the first calendar day of the week and end on the last calendar day of the week, you will see certain days displayed with a light gray background color. These days are shown to maintain the calendar display format even though they are just outside of date range you selected. Optionally, you can hide the shift assignments and time off absences for days outside the specified range using the **Options** command.

For each day on the calendar, the shift assignments are listed first in the order of shift start time, followed by any time off assignments. Each shift is displayed with a small square in the color you specified for the shift, then the shift description, start time, end time, and shift location. Each time off is displayed with a small circle in the color you specified for the time off, then the time off reason, and all day indication or start time and end time,



The report contains the following fields:

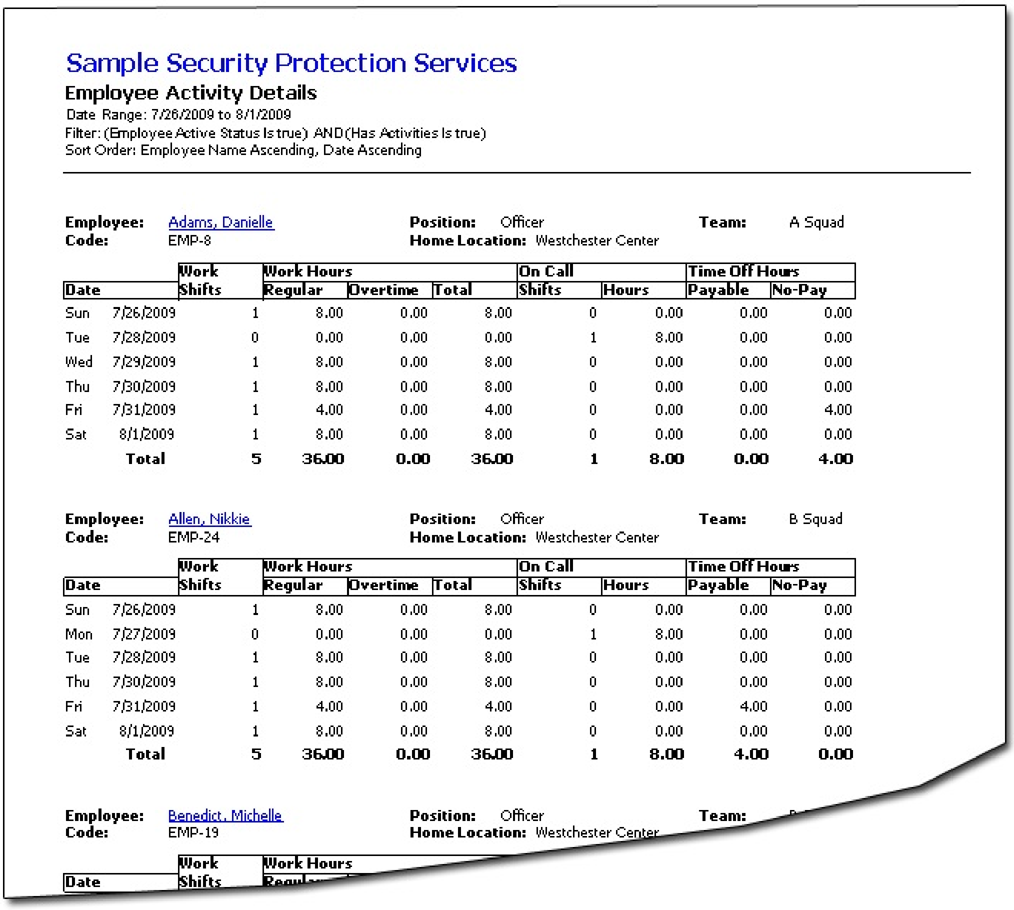
- **Report Header Information:** Your business name, report title, and the range of dates covered in the report**.** You can selectively hide these fields using the **Modify Header/Footer** command.
- **Employee Header Information:** Information about the employee. Each header contains the employee name, employee code, job position, team, and the employee's home location. Clicking the employee name hyperlink will bring up the Employee form to let you view and make changes to the employee record.

Employee Activity Details

This report displays employee daily activity details for a specific report date range. By default, all employee daily activity details for the current week are displayed, organized by employee, and sorted by date. The Contents pane shows the tree view of the employees covered in the report. Clicking any of the employee names will position the report to the section that shows activity details for that employee.

The Employee Activity Details report provides you with the daily employee labor hour breakdown for your planning and budgeting purposes.

For each employee, this report displays a detail line for each day the employee has activity. Each line shows the total number of shift assignments and a break down of regular work hours, overtime hours, on call shifts and hours, payable time off hours, and non-payable time off hours. The overtime hours are calculated based on the assigned shift work hours and the overtime settings you have defined for your business. The on call shifts and hours are computed from shifts that are marked as on call. The payable and non-payable time off hours are calculated based on the time off taken by the employee and the time off reason. You can specify a time off reason as either a paid time off type (vacation, sick leave, etc.) or an unpaid time off type (unpaid personal leave) using the Time Off Reason form.


Sample Security Protection Services

Employee Activity Details

Date Range: 7/26/2009 to 8/1/2009

Filter: (Employee Active Status Is true) AND (Has Activities Is true)

Sort Order: Employee Name Ascending, Date Ascending

Employee: Adams, Danielle **Position:** Officer **Team:** A Squad

Code: EMP-8 **Home Location:** Westchester Center

Date		Work Shifts	Work Hours Regular	Overtime	Total	On Call Shifts	Hours	Time Off Hours Payable	No-Pay
Sun	7/26/2009	1	8.00	0.00	8.00	0	0.00	0.00	0.00
Tue	7/28/2009	0	0.00	0.00	0.00	1	8.00	0.00	0.00
Wed	7/29/2009	1	8.00	0.00	8.00	0	0.00	0.00	0.00
Thu	7/30/2009	1	8.00	0.00	8.00	0	0.00	0.00	0.00
Fri	7/31/2009	1	4.00	0.00	4.00	0	0.00	0.00	4.00
Sat	8/1/2009	1	8.00	0.00	8.00	0	0.00	0.00	0.00
	Total	**5**	**36.00**	**0.00**	**36.00**	**1**	**8.00**	**0.00**	**4.00**

Employee: Allen, Nikkie **Position:** Officer **Team:** B Squad

Code: EMP-24 **Home Location:** Westchester Center

Date		Work Shifts	Work Hours Regular	Overtime	Total	On Call Shifts	Hours	Time Off Hours Payable	No-Pay
Sun	7/26/2009	1	8.00	0.00	8.00	0	0.00	0.00	0.00
Mon	7/27/2009	0	0.00	0.00	0.00	1	8.00	0.00	0.00
Tue	7/28/2009	1	8.00	0.00	8.00	0	0.00	0.00	0.00
Thu	7/30/2009	1	8.00	0.00	8.00	0	0.00	0.00	0.00
Fri	7/31/2009	1	4.00	0.00	4.00	0	0.00	4.00	0.00
Sat	8/1/2009	1	8.00	0.00	8.00	0	0.00	0.00	0.00
	Total	**5**	**36.00**	**0.00**	**36.00**	**1**	**8.00**	**4.00**	**0.00**

Employee: Benedict, Michelle **Position:** Officer **Team:**

Code: EMP-19 **Home Location:** Westchester Center

Date	Work Shifts	Work Hours

The report contains the following fields:

- **Report Header Information:** Your business name, report title, and the range of dates covered in the report. You can selectively hide these fields using the **Modify Header/Footer** command.
- **Employee Header Information:** Information about the employee. Each header contains the employee name, employee code, job position, team, and the employee's home location. Clicking the employee name hyperlink will bring up the Employee form to let you view and make changes to the employee record.
- **Date:** Date when the employee has at least a shift assignment or a time off assignment .
- **Work Shifts:** Number of shifts assigned to the employee for the day. On call shift assignments are not included as they are shown under separate columns.
- **Work Hours - Regular:** The regular work hours (excluding overtime) computed from the shift assignments.
- **Work Hours - Overtime:** Overtime work hours computed from the shift assignments and the overtime settings for your business.
- **Work Hours - Total:** Regular work hours plus overtime work hours.
- **On Call - Shifts:** The number of shifts the employee is on call.
- **On Call - Hours:** The total hours computed from on call assignments.
- **Time Off Hours - Payable:** Total hours from all paid time off taken.
- **Time Off Hours - No Pay:** Total hours from all non-payable time off taken.

Employee Activity Summary

The Employee Activity Summary report provides a summary breakdown of work hours and time off taken for each employee for the specified report date range. By default, this report displays summary data for all employees for the current week, sorted by employee name.

For each employee, this report displays the total number of shifts assignments and a break down of regular work hours, overtime hours, on call shifts and hours, payable time off hours, and non-payable time off hours. The overtime hours are calculated based on the assigned shift work hours and the overtime settings you have defined for your business. The on call shifts and hours are computed from shifts that are marked as on call. The payable and non-payable time off hours are calculated based on the time off taken by the employee and the time off reason. You can specify a time off reason as either a paid time off type (vacation, sick leave, etc.) or an unpaid time off type (unpaid personal leave) using the Time Off Reason form.

Sample Security Protection Services

Employee Activity Summary

Date Range: 7/26/2009 to 8/1/2009
Filter: (Employee Active Status is true) AND (Has Activities is true)
Sort Order: Employee Name Ascending

			Work	Work Hours			On Call		Time Off Hours	
Employee	Home Location	Position	Shifts	Regular	Overtime	Total	Shifts	Hours	Payable	No-Pay
Adams, Danielle	Precint 1	Officer	5	40.00	0.00	40.00	0	8.00	0.00	0.00
Allen, Nikkie	Precint 1	Officer	4	32.00	0.00	32.00	0	16.00	0.00	0.00
Benedict, Michelle	Precint 1	Officer	5	40.00	0.00	40.00	0	0.00	0.00	0.00
Bond, Roberto	Precint 1	Officer	5	40.00	0.00	40.00	1	16.00	0.00	0.00
Crawford, Antonio	Precint 1	Officer	5	40.00	0.00	40.00	0	0.00	0.00	0.00
Crawford, Beatrice	Precint 1	Officer	5	40.00	0.00	40.00	0	0.00	0.00	0.00
Cunningham, Hannah	Precint 1	Lieutenant	5	40.00	0.00	40.00	0	0.00	8.00	0.00
Cutter, Elaine	Precint 1	Officer	5	40.00	0.00	40.00	0	8.00	0.00	0.00
Cutter, Michael	Precint 1	Lieutenant	5	40.00	0.00	40.00	1	8.00	0.00	0.00
Dixon, Athony	Precint 1	Supervisor	6	40.00	8.00	48.00	0	8.00	0.00	0.00
Easton, Josh	Precint 1	Supervisor	5	40.00	0.00	40.00	0	0.00	8.00	0.00
Einhart, Eric	Precint 1	Officer	6	40.00	8.00	48.00	0	0.00	0.00	0.00
Einhart, Monica	Precint 1	Officer	5	40.00	0.00	40.00	0	8.00	0.00	0.00
Einhart, Viola	Precint 1	Officer	5	40.00	0.00	40.00	0	0.00	0.00	0.00
Finton, Francisco	Precint 1	Officer	5	40.00	0.00	40.00	0	8.00	0.00	0.00
Finton, Jackie	Precint 1	Officer	5	40.00	0.00	40.00	0	0.00	0.00	0.00
Finton, Nina	Precint 1	Officer	5	40.00	0.00	40.00	0	0.00	0.00	0.00
Gould, Ashley	Precint 1	Officer	5	40.00	0.00	40.00	0	8.00	0.00	0.00
Hall, Larry	Precint 1	Lieutenant	6	40.00	8.00	48.00	0	0.00	0.00	0.00
Hemsley, Jeff	Precint 1	Officer	5	40.00	0.00	40.00	0	0.00	8.00	0.00
Jackson, Aliza	Precint 1	Officer	6	40.00	8.00	48.00	0	0.00	0.00	0.00
Jackson, Patty	Precint 1	Officer	5	40.00	0.00	40.00	0	8.00	8.00	0.00
Kerr, Jake	Precint 1	Officer	6	40.00	8.00	48.00	0	0.00	0.00	0.00
Kerr, Nancy	Precint 1	Officer	6	40.00	8.00	48.00	0	8.00	0.00	0.00
Kilroy, Daniel	Precint 1	Officer	5	40.00	0.00	40.00	0	8.00	0.00	0.00
Lee, Katie	Precint 1	Officer	5	40.00	0.00	40.00	1	16.00	0.00	0.00
Martin, Stacy	Precint 1	Officer	6	40.00	8.00	48.00	0	8.00	0.00	0.00
Martinez, Alex	Precint 1	Officer	5	40.00	0.00	40.00	0	0.00	0.00	0.00

Employee Activity Summary Page 1

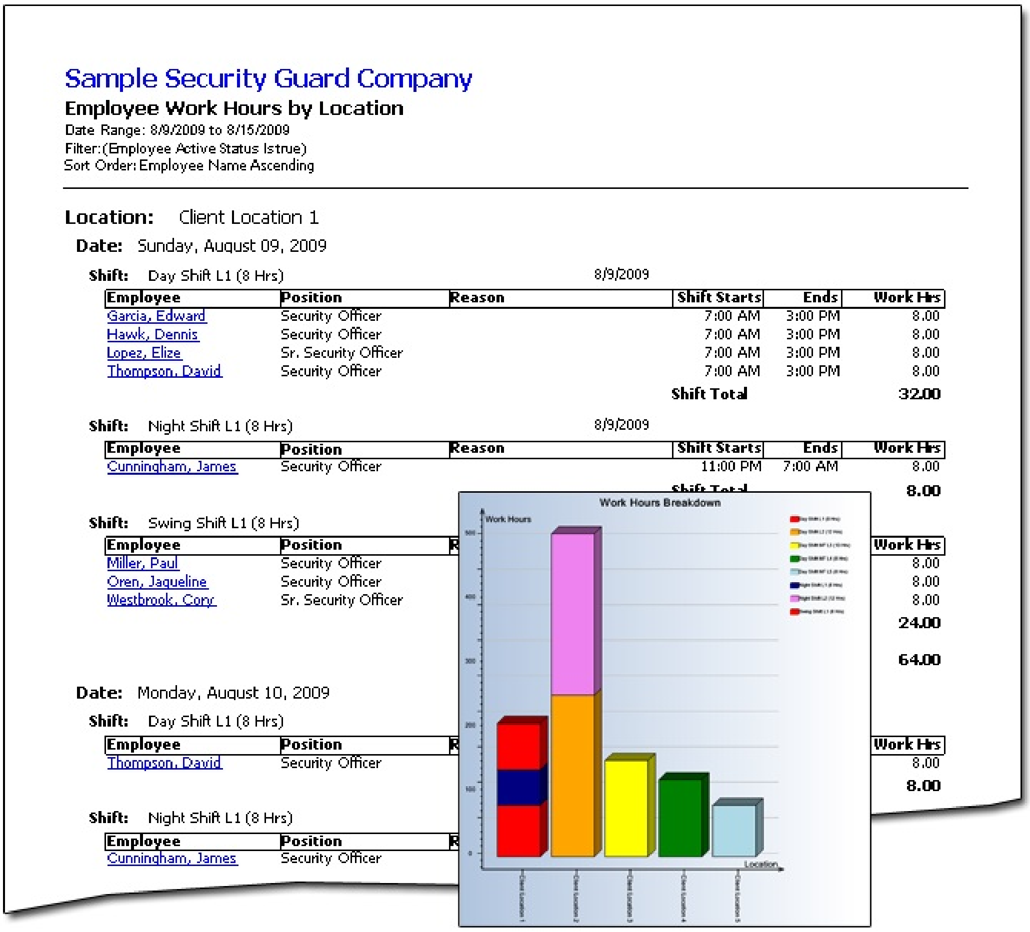
The report contains the following fields:

- **Report Header Information:** Your business name, report title, and the range of dates covered in the report**.** You can selectively hide these fields using the **Modify Header/Footer** command.
- **Employee:** The employee name as a hyperlink. Clicking this link will bring up the Employee form to let you view and make changes to the employee record.
- **Home Location:** Home location of the employee .
- **Position:** The employee's job position.
- **Work Shifts:** The number of shifts the employee is scheduled to work over the report date range. On call shift assignments are not included as they are shown under separate columns.
- **Work Hours - Regular:** The regular work hours (excluding overtime) computed from the shift assignments.
- **Work Hours - Overtime:** Overtime work hours computed from the shift assignments and the overtime settings for your business.
- **Work Hours - Total:** Regular work hours plus overtime work hours.
- **On Call - Shifts:** The number of shifts the employee is on call.
- **On Call - Hours:** The total hours computed from on call assignments.
- **Time Off Hours - Payable:** Total hours from all paid time off taken.
- **Time Off Hours - No Pay:** Total hours from all non-payable time off taken.

Employee Work Hours by Location

This report shows the employees assigned to each shift and their work hours, grouped by location then by shift, over a specific reporting period. Use it in multi-location scheduling to find out who works where, when, and for how many hours.

By default, shift assignments at all locations for the current week are displayed. The Contents pane shows the tree view of the locations covered in the report. Clicking any of the location will position the report to the section that shows the shifts and assigned employees at that location. A Work Hours Breakdown graph displaying total work hours versus locations is shown at the end of the report. You can hide the graph, shift totals, and employee total work hours using the **Options** command.



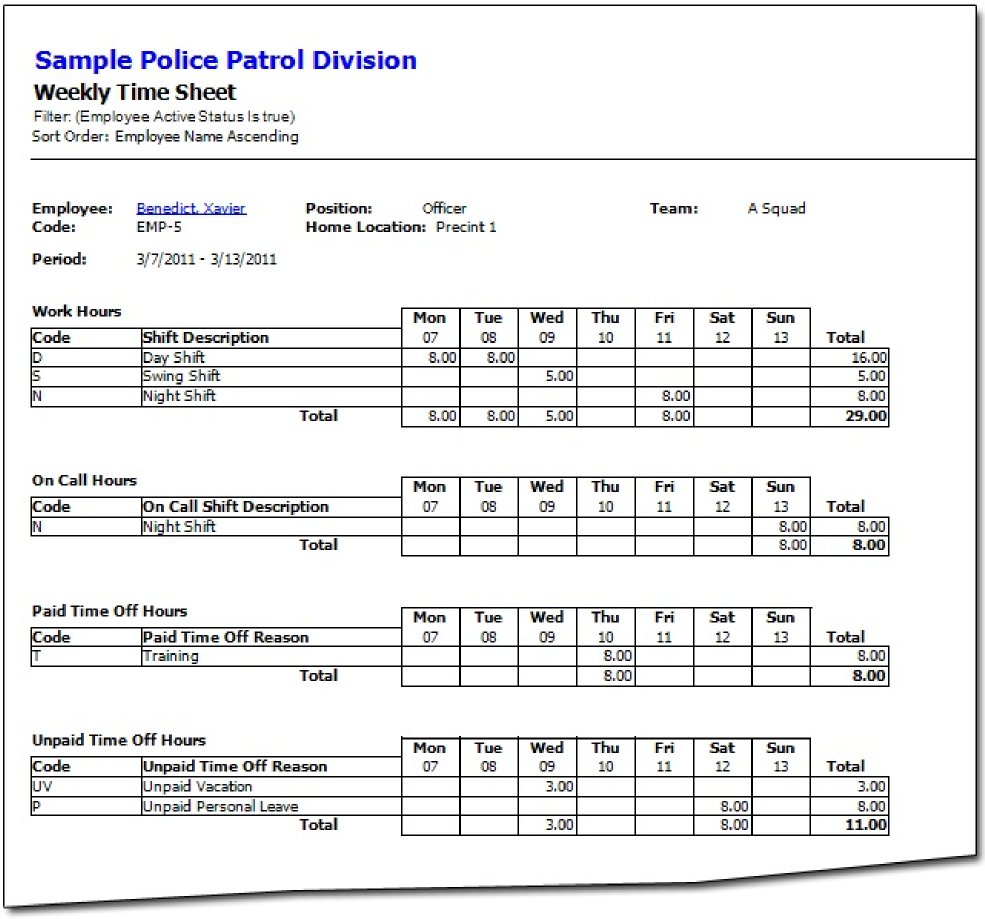
The report contains the following fields:

- **Report Header Information:** Your business name, report title, and the range of dates covered in the report**.** You can selectively hide these fields using the **Modify Header/Footer** command.
- **Location:** Description of the location.
- **Date:** Date when a shift was assigned.
- **Shift:** Description of the shift.
- **Employee:** The employee name as a hyperlink. Clicking this link will bring up the Employee form to let you view and make changes to the employee record.
- **Position:** The employee's job position.
- **Reason:** Shift assignment reason if one was entered for the shift assignment.
- **Shift Starts:** Shift start time.
- **Ends:** Shift end time.
- **Work Hrs:** Shift length in hours. This is the time duration from the shift start time to shift end time.
- **Shift Total:** The total number of work hours planned for the shift.
- **Daily Total:** The total number of work hours planned for the date.
- **Location Total:** The total number of work hours planned for the location.
- **Grand Total:** The total number of hours planned for the selected data range for all listed locations.

Weekly Time Sheet

This report shows the scheduled work hours, on-call hours, paid and un-paid time off hours in a seven-day week for each employee. It can be used to provide time card data for payroll processing. By default, the seven-day week begins with the current date, but you can use the **Start date** control to select any starting date.

The Contents pane shows the tree view of the employees covered in the report. Clicking any of the employees will position the report to the section that shows the time sheet for that employee on a single page. You can use the **Options** command to include a signature line at the bottom of the page for the employee to sign and date the form.



Sample Police Patrol Division

Weekly Time Sheet

Filter: (Employee Active Status Is true)
Sort Order: Employee Name Ascending

Employee: Benedict, Xavier **Position:** Officer **Team:** A Squad
Code: EMP-5 **Home Location:** Precint 1

Period: 3/7/2011 - 3/13/2011

Work Hours

Code	Shift Description	Mon 07	Tue 08	Wed 09	Thu 10	Fri 11	Sat 12	Sun 13	Total
D	Day Shift	8.00	8.00						16.00
S	Swing Shift			5.00					5.00
N	Night Shift					8.00			8.00
	Total	8.00	8.00	5.00		8.00			29.00

On Call Hours

Code	On Call Shift Description	Mon 07	Tue 08	Wed 09	Thu 10	Fri 11	Sat 12	Sun 13	Total
N	Night Shift							8.00	8.00
	Total							8.00	8.00

Paid Time Off Hours

Code	Paid Time Off Reason	Mon 07	Tue 08	Wed 09	Thu 10	Fri 11	Sat 12	Sun 13	Total
T	Training				8.00				8.00
	Total				8.00				8.00

Unpaid Time Off Hours

Code	Unpaid Time Off Reason	Mon 07	Tue 08	Wed 09	Thu 10	Fri 11	Sat 12	Sun 13	Total
UV	Unpaid Vacation			3.00					3.00
P	Unpaid Personal Leave						8.00		8.00
	Total			3.00			8.00		11.00

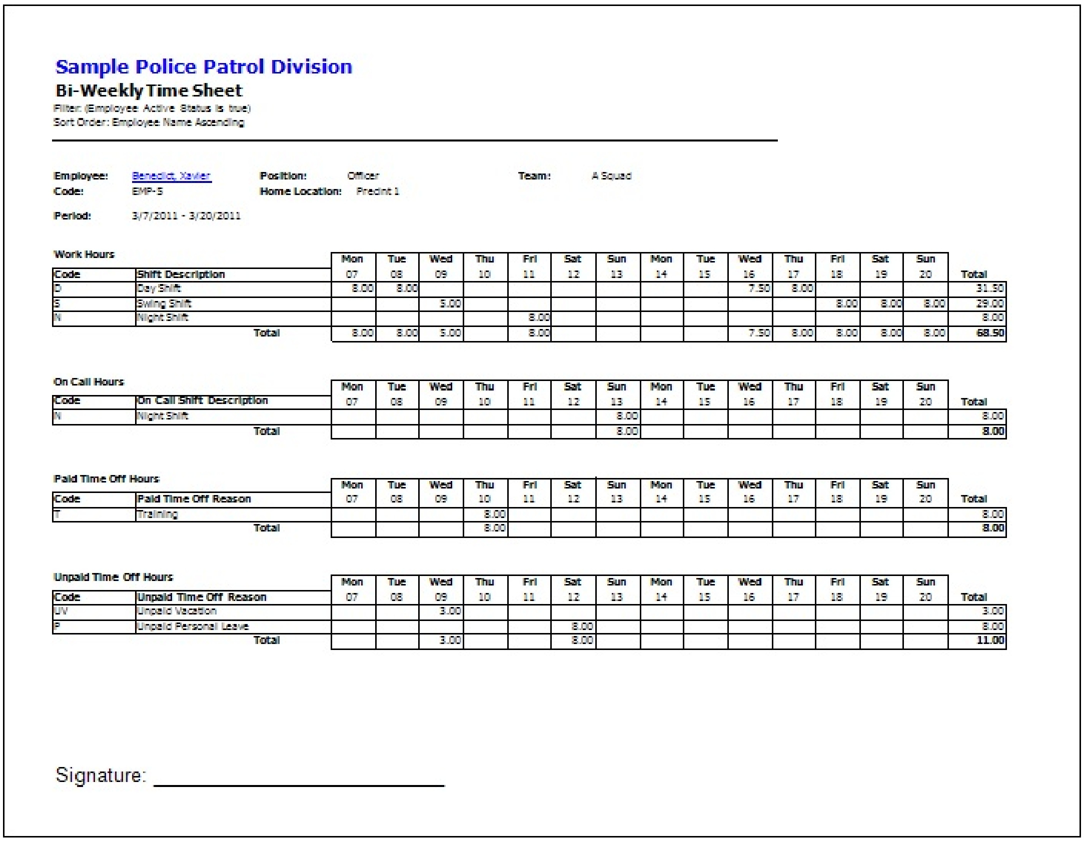
The report contains the following fields:

- **Report Header Information:** Your business name, report title, and the range of dates covered in the report**.** You can selectively hide these fields using the **Modify Header/Footer** command.
- **Employee Header Information:** Information about the employee. Each header contains the employee name, employee code, job position, team, and the employee's home location. Clicking the employee name hyperlink will bring up the Employee form to let you view and make changes to the employee record.
- **Work Hours:** This section shows the daily hours for each shift the employee is scheduled to work in the reporting period.
- **On Call Hours:** This section shows the daily hours for each shift the employee is scheduled to be on call in the reporting period.
- **Paid Time Off Hours:** This section shows the daily hours for each paid time off reason the employee is scheduled to be off work in the reporting period.
- **Unpaid Time Off Hours:** This section shows the daily hours for each unpaid time off reason the employee is scheduled to be off work in the reporting period.

Bi-Weekly Time Sheet

This report shows the scheduled work hours, on-call hours, paid and un-paid time off hours in a fourteen-day work period for each employee. It can be used to provide bi-weekly time card data for payroll processing. By default, the fourteen-day period begins with the current date but you can use the **Start date** control to select any starting date.

The Contents pane shows the tree view of the employees covered in the report. Clicking any of the employees will position the report to the section that shows the time sheet for that employee on a single page. You can use the **Options** command to include a signature line at the bottom of the page for the employee to sign and date the form.



Sample Police Patrol Division

Bi-Weekly Time Sheet

Filter: (Employee Active Status is true)
Sort Order: Employee Name Ascending

Employee: Benedict, Xavier **Position:** Officer **Team:** A Squad
Code: EMP-5 **Home Location:** Precint 1

Period: 3/7/2011 - 3/20/2011

Work Hours

Code	Shift Description	Mon 07	Tue 08	Wed 09	Thu 10	Fri 11	Sat 12	Sun 13	Mon 14	Tue 15	Wed 16	Thu 17	Fri 18	Sat 19	Sun 20	Total
D	Day Shift	8.00	8.00								7.50	8.00				31.50
S	Swing Shift			5.00									8.00	8.00	8.00	29.00
N	Night Shift					8.00										8.00
	Total	8.00	8.00	5.00		8.00					7.50	8.00	8.00	8.00	8.00	68.50

On Call Hours

Code	On Call Shift Description	Mon 07	Tue 08	Wed 09	Thu 10	Fri 11	Sat 12	Sun 13	Mon 14	Tue 15	Wed 16	Thu 17	Fri 18	Sat 19	Sun 20	Total
N	Night Shift							8.00								8.00
	Total							8.00								8.00

Paid Time Off Hours

Code	Paid Time Off Reason	Mon 07	Tue 08	Wed 09	Thu 10	Fri 11	Sat 12	Sun 13	Mon 14	Tue 15	Wed 16	Thu 17	Fri 18	Sat 19	Sun 20	Total
T	Training				8.00											8.00
	Total				8.00											8.00

Unpaid Time Off Hours

Code	Unpaid Time Off Reason	Mon 07	Tue 08	Wed 09	Thu 10	Fri 11	Sat 12	Sun 13	Mon 14	Tue 15	Wed 16	Thu 17	Fri 18	Sat 19	Sun 20	Total
UV	Unpaid Vacation			3.00												3.00
P	Unpaid Personal Leave						8.00									8.00
	Total			3.00			8.00									11.00

Signature: ______________________

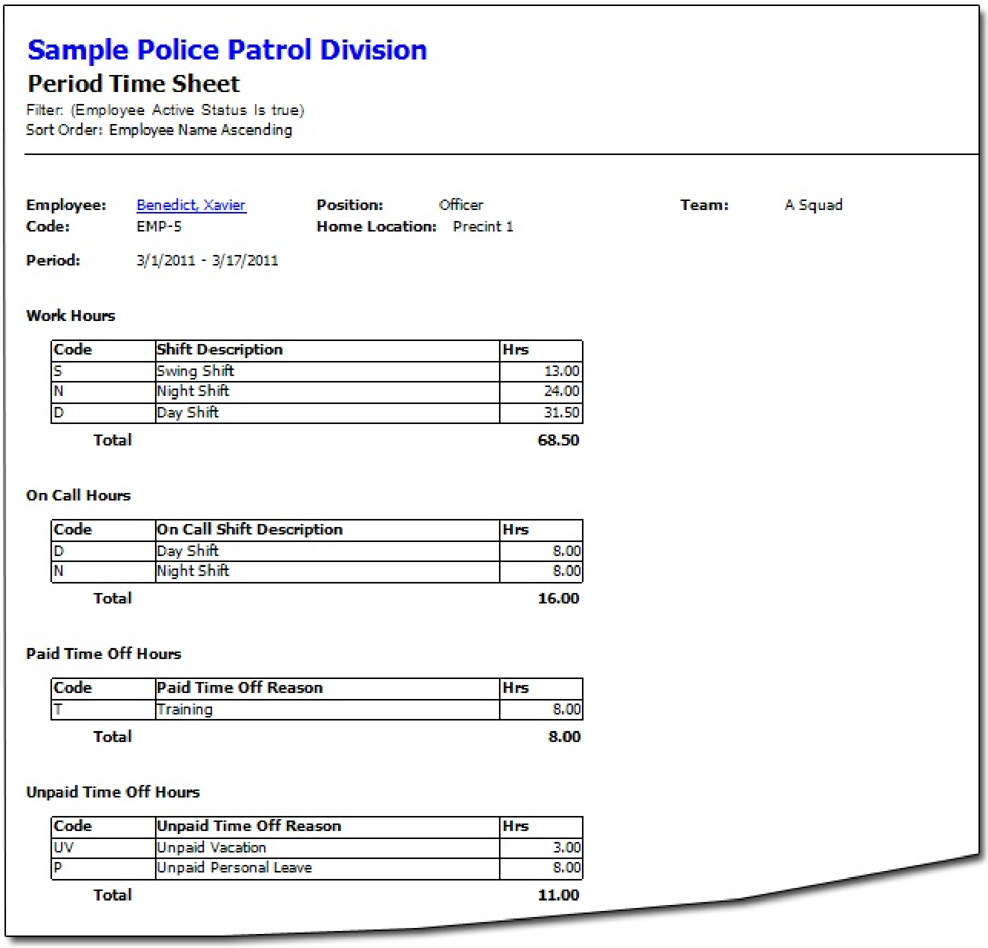
The report contains the following fields:

- **Report Header Information:** Your business name, report title, and the range of dates covered in the report**.** You can selectively hide these fields using the **Modify Header/Footer** command.
- **Employee Header Information:** Information about the employee. Each header contains the employee name, employee code, job position, team, and the employee's home location. Clicking the employee name hyperlink will bring up the Employee form to let you view and make changes to the employee record.
- **Work Hours:** This section shows the daily hours for each shift the employee is scheduled to work in the reporting period.
- **On Call Hours:** This section shows the daily hours for each shift the employee is scheduled to be on call in the reporting period.
- **Paid Time Off Hours:** This section shows the daily hours for each paid time off reason the employee is scheduled to be off work in the reporting period.
- **Unpaid Time Off Hours:** This section shows the daily hours for each unpaid time off reason the employee is scheduled to be off work in the reporting period.

Period Time Sheet

This report shows the scheduled work hours, on-call hours, paid and un-paid time off hours in any user-selectable time period for each employee. By default, the time period is set to the current week but you can use the **Start date** control to select any time period.

The Contents pane shows the tree view of the employees covered in the report. Clicking any of the employees will position the report to the section that shows the time sheet for that employee on a single page. You can use the **Options** command to include a signature line at the bottom of the page for the employee to sign and date the form.



Sample Police Patrol Division

Period Time Sheet

Filter: (Employee Active Status Is true)
Sort Order: Employee Name Ascending

Employee: Benedict, Xavier **Position:** Officer **Team:** A Squad
Code: EMP-5 **Home Location:** Precint 1

Period: 3/1/2011 - 3/17/2011

Work Hours

Code	Shift Description	Hrs
S	Swing Shift	13.00
N	Night Shift	24.00
D	Day Shift	31.50
Total		**68.50**

On Call Hours

Code	On Call Shift Description	Hrs
D	Day Shift	8.00
N	Night Shift	8.00
Total		**16.00**

Paid Time Off Hours

Code	Paid Time Off Reason	Hrs
T	Training	8.00
Total		**8.00**

Unpaid Time Off Hours

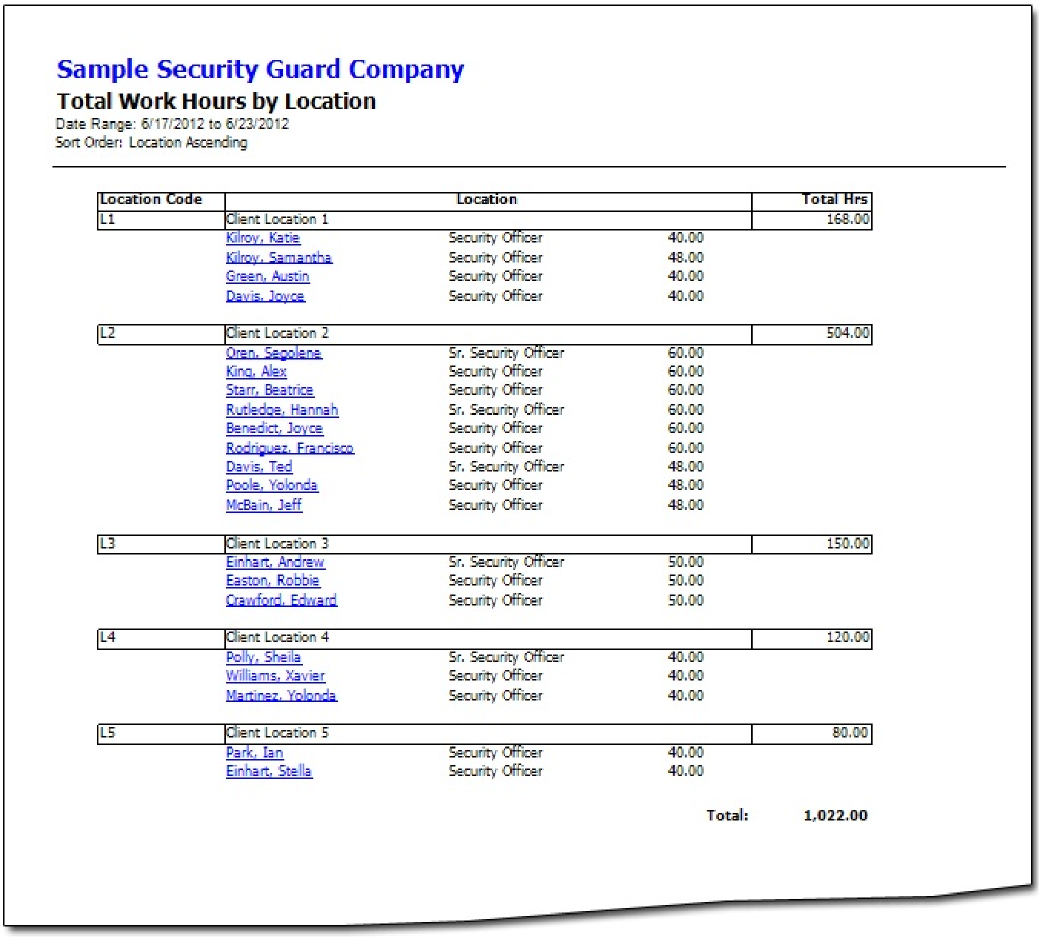
Code	Unpaid Time Off Reason	Hrs
UV	Unpaid Vacation	3.00
P	Unpaid Personal Leave	8.00
Total		**11.00**

The report contains the following fields:

- **Report Header Information:** Your business name, report title, and the range of dates covered in the report. You can selectively hide these fields using the **Modify Header/Footer** command.
- **Employee Header Information:** Information about the employee. Each header contains the employee name, employee code, job position, team, and the employee's home location. Clicking the employee name hyperlink will bring up the Employee form to let you view and make changes to the employee record.
- **Work Hours:** This section shows the daily hours for each shift the employee is scheduled to work in the reporting period.
- **On Call Hours:** This section shows the daily hours for each shift the employee is scheduled to be on call in the reporting period.
- **Paid Time Off Hours:** This section shows the daily hours for each paid time off reason the employee is scheduled to be off work in the reporting period.
- **Unpaid Time Off Hours:** This section shows the daily hours for each unpaid time off reason the employee is scheduled to be off work in the reporting period.

Total Work Hours by Location

This report displays employees' total work hours over a specified data range based on shift start/end times for each shift location. By default, total work hours for the current week are displayed, but you can use the report date range control to specify any time period to be reported,



Sample Security Guard Company

Total Work Hours by Location

Date Range: 6/17/2012 to 6/23/2012

Sort Order: Location Ascending

Location Code	Location			Total Hrs
L1	Client Location 1			168.00
	Kilroy, Katie	Security Officer	40.00	
	Kilroy, Samantha	Security Officer	48.00	
	Green, Austin	Security Officer	40.00	
	Davis, Joyce	Security Officer	40.00	
L2	Client Location 2			504.00
	Oren, Segolene	Sr. Security Officer	60.00	
	King, Alex	Security Officer	60.00	
	Starr, Beatrice	Security Officer	60.00	
	Rutledge, Hannah	Sr. Security Officer	60.00	
	Benedict, Joyce	Security Officer	60.00	
	Rodriguez, Francisco	Security Officer	60.00	
	Davis, Ted	Sr. Security Officer	48.00	
	Poole, Yolonda	Security Officer	48.00	
	McBain, Jeff	Security Officer	48.00	
L3	Client Location 3			150.00
	Einhart, Andrew	Sr. Security Officer	50.00	
	Easton, Robbie	Security Officer	50.00	
	Crawford, Edward	Security Officer	50.00	
L4	Client Location 4			120.00
	Polly, Sheila	Sr. Security Officer	40.00	
	Williams, Xavier	Security Officer	40.00	
	Martinez, Yolonda	Security Officer	40.00	
L5	Client Location 5			80.00
	Park, Ian	Security Officer	40.00	
	Einhart, Stella	Security Officer	40.00	
			Total:	**1,022.00**

The report contains the following fields:

- **Report Header Information:** Your business name, report title, and the range of dates covered in the report**.** You can selectively hide these fields using the **Modify Header/Footer** command.
- **Location Code:** The shift location code.
- **Location:** The shift location description.
- **Employee work hours:** The number of work hours over the selected date range are listed along with the respective employee's name and position. The work hours are computed based on shift start/end times.
- **Total Hours:** The total hours planned for all employees assigned to the location.

Estimated Labor Cost by Employee

The Estimated Labor Cost by Employee report provides a daily breakdown of estimated employee labor cost for the specified report date range. By default, estimated labor cost data for all employees for the current week is displayed. The data is organized by employee and sorted by date. The Contents pane shows the tree view of the employees covered in the report. Clicking any of the employee names will position the report to the section that shows estimated cost breakdown for that employee.

For each employee, this report displays a detail line for each day the employee has activities. Each line shows a break down of regular work hours, overtime work hours, regular work labor cost, shift premium cost, overtime work labor cost, payable time off hours, payable time off cost, and on call pay. The overtime hours and overtime costs are calculated based on the assigned shift work hours and the overtime settings you have defined for your business. The payable time off hours and payable time off costs are calculated based on the time off taken by the employee that is payable. The shift premium cost and on call cost are computed based on applicable shift premium policies. You can show or hide shift premium and on call cost data using the **Options** command.

Sample Security Protection Services

Estimated Labor Cost by Employee

Date Range: 7/26/2009 to 8/1/2009

Filter: (Employee Active Status is true) AND (Total Cost Not Equal To 0)

Sort Order: Employee Name Ascending, Date Ascending

Employee: Adams, Danielle **Position:** Officer **Team:** A Squad
Code: EMP-8 **Home Location:** Precinct 1 **O/T Exempt:** False **Hourly Cost:** $22.25

		Work Hrs			Work Labor Cost				Payable Time Off			
Date		Regular	Overtime	Total	Regular	Premium	Overtime	Total	Hrs	Cost	On Call Pay	Total Cost
Sun	7/26/2009	8.00	0.00	8.00	$178.00	$119.00	$0.00	$297.00	0.00	$0.00	$0.00	$297.00
Tue	7/28/2009	0.00	0.00	0.00	$0.00	$0.00	$0.00	$0.00	0.00	$0.00	$56.00	$56.00
Wed	7/29/2009	8.00	0.00	8.00	$178.00	$0.00	$0.00	$178.00	0.00	$0.00	$0.00	$178.00
Thu	7/30/2009	8.00	0.00	8.00	$178.00	$0.00	$0.00	$178.00	0.00	$0.00	$0.00	$178.00
Fri	7/31/2009	8.00	0.00	8.00	$178.00	$0.00	$0.00	$178.00	0.00	$0.00	$0.00	$178.00
Sat	8/1/2009	8.00	0.00	8.00	$178.00	$119.00	$0.00	$297.00	0.00	$0.00	$0.00	$297.00
	Total	**40.00**	**0.00**	**40.00**	**$890.00**	**$238.00**	**$0.00**	**$1,128.00**	**0.00**	**$0.00**	**$56.00**	**$1,184.00**

Employee: Allen, Nikkie **Position:** Officer **Team:** B Squad
Code: EMP-24 **Home Location:** Precinct 1 **O/T Exempt:** False **Hourly Cost:** $20.75

		Work Hrs			Work Labor Cost				Payable Time Off			
Date		Regular	Overtime	Total	Regular	Premium	Overtime	Total	Hrs	Cost	On Call Pay	Total Cost
Sun	7/26/2009	8.00	0.00	8.00	$166.00	$0.00	$0.00	$166.00	0.00	$0.00	$0.00	$166.00
Mon	7/27/2009	0.00	0.00	0.00	$0.00	$0.00	$0.00	$0.00	0.00	$0.00	$56.00	$56.00
Tue	7/28/2009	8.00	0.00	8.00	$166.00	$0.00	$0.00	$166.00	0.00	$0.00	$0.00	$166.00
Fri	7/31/2009	8.00	0.00	8.00	$166.00	$0.00	$0.00	$166.00	0.00	$0.00	$0.00	$166.00
Sat	8/1/2009	8.00	0.00	8.00	$166.00	$113.00	$0.00	$279.00	0.00	$0.00	$0.00	$279.00
	Total	**32.00**	**0.00**	**32.00**	**$664.00**	**$113.00**	**$0.00**	**$777.00**	**0.00**	**$0.00**	**$56.00**	**$833.00**

Employee: Benedict, Michelle **Position:** Officer **Team:** B Squad
Code: EMP-19 **Home Location:** Precinct 1 **O/T Exempt:** False **Hourly Cost:** $25.50

		Work Hrs			Work Labor Cost				Payable Time Off			
Date		Regular	Overtime	Total	Regular	Premium	Overtime	Total	Hrs	Cost	On Call Pay	Total Cost
Sun	7/26/2009	8.00	0.00	8.00	$204.00	$0.00	$0.00	$204.00	0.00	$0.00	$0.00	$204.00
Mon	7/27/2009	8.00	0.00	8.00	$204.00	$0.00	$0.00	$204.00	0.00	$0.00	$0.00	$204.00

Estimated Labor Cost by Employee Page 1

The report contains the following fields:

- **Report Header Information:** Your business name, report title, and the range of dates covered in the report**.** You can selectively hide these fields using the **Modify Header/Footer** command.
- **Employee Header Information:** Information about the employee. Each header contains the employee name, employee code, job position, team, and the employee's home location. Clicking the employee name hyperlink will bring up the Employee form to let you view and make changes to the employee record.
- **Date:** Date when the employee has at least a shift assignment or a payable time off assignment.
- **Work Hours - Regular:** Regular work hours computed from the shift assignments.
- **Work Hours - Overtime:** Overtime work hours computed from the shift assignments and the overtime settings for your business.
- **Work Hours - Total:** The sum of regular work hours and overtime work hours.
- **Work Labor Cost - Regular:** Regular work labor cost computed as the regular work hours times the employee's hourly cost.
- **Work Labor Cost - Premium[1]:** Shift premium cost computed based on applicable shift premium policies.
- **Work Labor Cost - Overtime:** Overtime work labor cost computed based on the overtime settings for your business.
- **Work Labor Cost - Total:** The sum of regular work labor cost, shift premium cost, and overtime labor cost.
- **Payable Time Off - Hours:** Total hours from all paid time off taken by the employee for the day.
- **Payable Time Off - Cost**: Payable time off cost computed as the payable time off hours times the employee's hourly cost.

- **On Call Pay[2]:** On call compensation cost computed based on applicable shift premium policies.
- **Total Cost**: The sum of regular work labor cost, overtime work labor cost, shift premium cost, on call cost, and payable time off cost.

Notes:

1 This field is displayed only when the **Display shift premium data** option is enabled using the **Option**s command.

2 This field is displayed only when the **Display on call pay data** option is enabled using the **Option**s command.

Estimated Labor Cost Summary

The Estimated Labor Cost Summary report provides a summary breakdown of estimated employee labor cost for the specified report date range. By default, this report displays estimated labor cost data for all employees for the current week, sorted by employee name.

For each employee, this report shows a break down of regular work hours, overtime work hours, regular work labor cost, shift premium cost, overtime work labor cost, payable time off hours, payable time off cost, and on call pay. The overtime hours and overtime costs are calculated based on the assigned shift work hours and the overtime settings you have defined for your business. The payable time off hours and payable time off costs are calculated based on the time off taken by the employee that is payable. The shift premium cost and on call cost are computed based on applicable shift premium policies. You can show or hide shift premium, on call, and detailed employee information using the **Options** command.

Sample Security Protection Services

Estimated Labor Cost Summary

Date Range: 7/26/2009 to 8/1/2009
Filter: (Employee Active Status is true) AND (Total Cost Not Equal To 0)
Sort Order: Employee Name Ascending

	Work Hrs			Work Labor Cost				Payable Time Off			
Employee	Regular	Overtime	Total	Regular	Premium	Overtime	Total	Hrs	Cost	On Call Pay	Total Cost
Adams, Danielle	40.00	0.00	40.00	$890.00	$119.00	$0.00	$1,009.00	8.00	$178.00	$0.00	$1,187.00
Code: EMP-8	O/T Exempt: False	Hourly Cost: $22.25	Position: Officer	Home Location: Precint 1							
Allen, Nikkie	40.00	0.00	40.00	$830.00	$0.00	$0.00	$830.00	0.00	$0.00	$0.00	$830.00
Code: EMP-24	O/T Exempt: False	Hourly Cost: $20.75	Position: Officer	Home Location: Precint 1							
Benedict, Michelle	40.00	0.00	40.00	$1,020.00	$0.00	$0.00	$1,020.00	0.00	$0.00	$0.00	$1,020.00
Code: EMP-19	O/T Exempt: False	Hourly Cost: $25.50	Position: Officer	Home Location: Precint 1							
Bond, Roberto	40.00	0.00	40.00	$1,200.00	$0.00	$0.00	$1,200.00	0.00	$0.00	$0.00	$1,200.00
Code: EMP-29	O/T Exempt: False	Hourly Cost: $30.00	Position: Officer	Home Location: Precint 1							
Crawford, Antonio	40.00	0.00	40.00	$1,200.00	$0.00	$0.00	$1,200.00	0.00	$0.00	$0.00	$1,200.00
Code: EMP-18	O/T Exempt: False	Hourly Cost: $30.00	Position: Officer	Home Location: Precint 1							
Crawford, Beatrice	40.00	0.00	40.00	$960.00	$0.00	$0.00	$960.00	0.00	$0.00	$0.00	$960.00
Code: EMP-21	O/T Exempt: False	Hourly Cost: $24.00	Position: Officer	Home Location: Precint 1							
Cunningham, Hannah	40.00	0.00	40.00	$1,240.80	$0.00	$0.00	$1,240.80	8.00	$248.16	$0.00	$1,488.96
Code: EMP-13	O/T Exempt: False	Hourly Cost: $31.02	Position: Lieutenant	Home Location: Precint 1							
Cutter, Elaine	40.00	0.00	40.00	$360.00	$66.00	$0.00	$426.00	0.00	$0.00	$56.00	$482.00
Code: EMP-11	O/T Exempt: True	Hourly Cost: $9.00	Position: Officer	Home Location: Precint 1							
Cutter, Michael	40.00	0.00	40.00	$1,504.80	$0.00	$0.00	$1,504.80	0.00	$0.00	$0.00	$1,504.80
Code: EMP-25	O/T Exempt: False	Hourly Cost: $37.62	Position: Lieutenant	Home Location: Precint 1							
Dixon, Athony	40.00	8.00	48.00	$1,190.00	$149.00	$580.50	$1,919.50	0.00	$0.00	$0.00	$1,919.50
Code: EMP-38	O/T Exempt: False	Hourly Cost: $29.75	Position: Supervisor	Home Location: Precint 1							
Easton, Josh	40.00	0.00	40.00	$820.00	$112.00	$0.00	$932.00	8.00	$164.00	$0.00	$1,096.00
Code: EMP-3	O/T Exempt: False	Hourly Cost: $20.50	Position: Supervisor	Home Location: Precint 1							
Einhart, Eric	40.00	8.00	48.00	$940.00	$124.00	$468.00	$1,532.00	0.00	$0.00	$0.00	$1,532.00

Estimated Labor Cost Summary Page 1

The report contains the following fields:

- **Report Header Information:** Your business name, report title, and the range of dates covered in the report. You can selectively hide these fields using the **Modify Header/Footer** command.
- **Employee:** The employee name as a hyperlink. Clicking this link will bring up the Employee form to let you view and make changes to the employee record.
- **Code[1]**: Employee's code.
- **O/T Exempt[1]**: Overtime exempt indicator. **Snap Schedule** computes the labor cost for exempt employees at the employee's hourly cost for all hours worked. For non-exempt employees, overtime labor cost is computed based on the overtime settings for your business which you can specify using the Business Information form.
- **Hourly Cost[1]**: Employee's hourly pay rate.
- **Position[1]**: Employee's job position.
- **Home Location[1]**: Employee's home location.
- **Work Hours - Regular:** Regular work hours computed from the shift assignments.
- **Work Hours - Overtime:** Overtime work hours computed from the shift assignments and the overtime settings for your business.
- **Work Hours - Total:** The sum of regular work hours and overtime work hours.
- **Work Labor Cost - Regular:** Regular work labor cost computed as the regular work hours times the employee's hourly cost.
- **Work Labor Cost - Premium[2]:** Shift premium cost computed based on applicable shift premium policies.

- **Work Labor Cost - Overtime:** Overtime work labor cost computed based on the overtime settings for your business.
- **Work Labor Cost - Total:** The sum of regular work labor cost, shift premium cost, and overtime labor cost.
- **Payable Time Off Hrs:** Total hours from all paid time off taken by the employee for the report period.
- **Payable Time Off Cost**: Payable time off cost computed as the payable time off hours times the employee's hourly cost.
- **On Call Pay[3]:** On call compensation cost computed based on applicable shift premium policies.
- **Total Cost**: The sum of regular work labor cost, shift premium, overtime work labor cost, payable time off cost, and on call cost.

Notes:

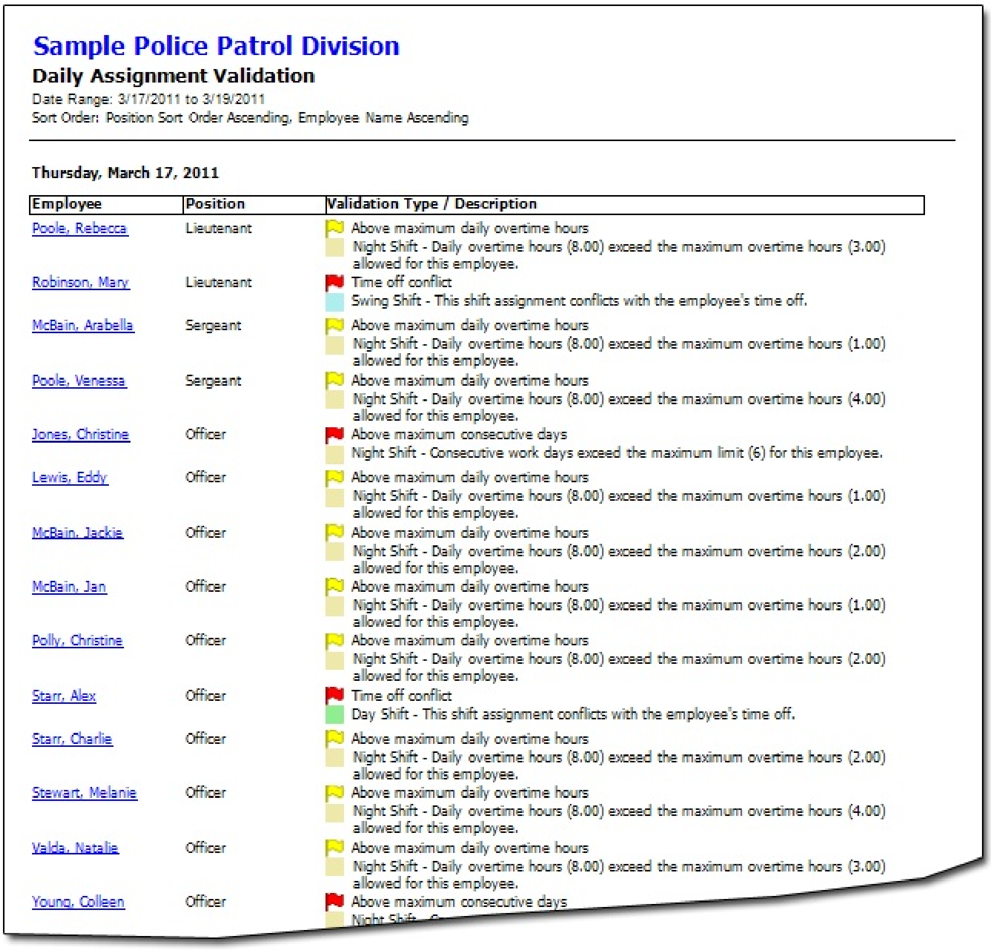
1 This field is displayed only when the **Display detailed employee data** option is enabled using the **Option**s command.

2 This field is displayed only when the **Display shift premium data** option is enabled using the **Option**s command.

3 This field is displayed only when the **Display on call pay data** option is enabled using the **Option**s command.

Daily Assignment Validation

The Daily Assignment Validation report displays results of the extensive validation checks performed by **Snap Schedule** for the shift assignments in the specified report date range. By default, this report displays validation results for each day in the current week. The Contents pane shows the tree view of the days covered in the report. Clicking any of the dates will position the report to the section that shows validation results for that day.



Sample Police Patrol Division

Daily Assignment Validation

Date Range: 3/17/2011 to 3/19/2011

Sort Order: Position Sort Order Ascending, Employee Name Ascending

Thursday, March 17, 2011

Employee	Position	Validation Type / Description
Poole, Rebecca	Lieutenant	Above maximum daily overtime hours Night Shift - Daily overtime hours (8.00) exceed the maximum overtime hours (3.00) allowed for this employee.
Robinson, Mary	Lieutenant	Time off conflict Swing Shift - This shift assignment conflicts with the employee's time off.
McBain, Arabella	Sergeant	Above maximum daily overtime hours Night Shift - Daily overtime hours (8.00) exceed the maximum overtime hours (1.00) allowed for this employee.
Poole, Venessa	Sergeant	Above maximum daily overtime hours Night Shift - Daily overtime hours (8.00) exceed the maximum overtime hours (4.00) allowed for this employee.
Jones, Christine	Officer	Above maximum consecutive days Night Shift - Consecutive work days exceed the maximum limit (6) for this employee.
Lewis, Eddy	Officer	Above maximum daily overtime hours Night Shift - Daily overtime hours (8.00) exceed the maximum overtime hours (1.00) allowed for this employee.
McBain, Jackie	Officer	Above maximum daily overtime hours Night Shift - Daily overtime hours (8.00) exceed the maximum overtime hours (2.00) allowed for this employee.
McBain, Jan	Officer	Above maximum daily overtime hours Night Shift - Daily overtime hours (8.00) exceed the maximum overtime hours (1.00) allowed for this employee.
Polly, Christine	Officer	Above maximum daily overtime hours Night Shift - Daily overtime hours (8.00) exceed the maximum overtime hours (2.00) allowed for this employee.
Starr, Alex	Officer	Time off conflict Day Shift - This shift assignment conflicts with the employee's time off.
Starr, Charlie	Officer	Above maximum daily overtime hours Night Shift - Daily overtime hours (8.00) exceed the maximum overtime hours (2.00) allowed for this employee.
Stewart, Melanie	Officer	Above maximum daily overtime hours Night Shift - Daily overtime hours (8.00) exceed the maximum overtime hours (4.00) allowed for this employee.
Valda, Natalie	Officer	Above maximum daily overtime hours Night Shift - Daily overtime hours (8.00) exceed the maximum overtime hours (3.00) allowed for this employee.
Young, Colleen	Officer	Above maximum consecutive days Night Shift - C...

For each shift assignment, **Snap Schedule** performs a set of validation checks that includes conflict checks and work hour limit checks based on the criteria defined in the Schedule Validation tab in the Business Information and Operational Settings. When a validation check detects an exception, this report displays the validation type and a detailed description of the exception. Depending on the validation type, it also displays a color coded flag for easy visual identification. For the validation checks performed by **Snap Schedule** and how to define the color flags, see the Schedule Validation tab.

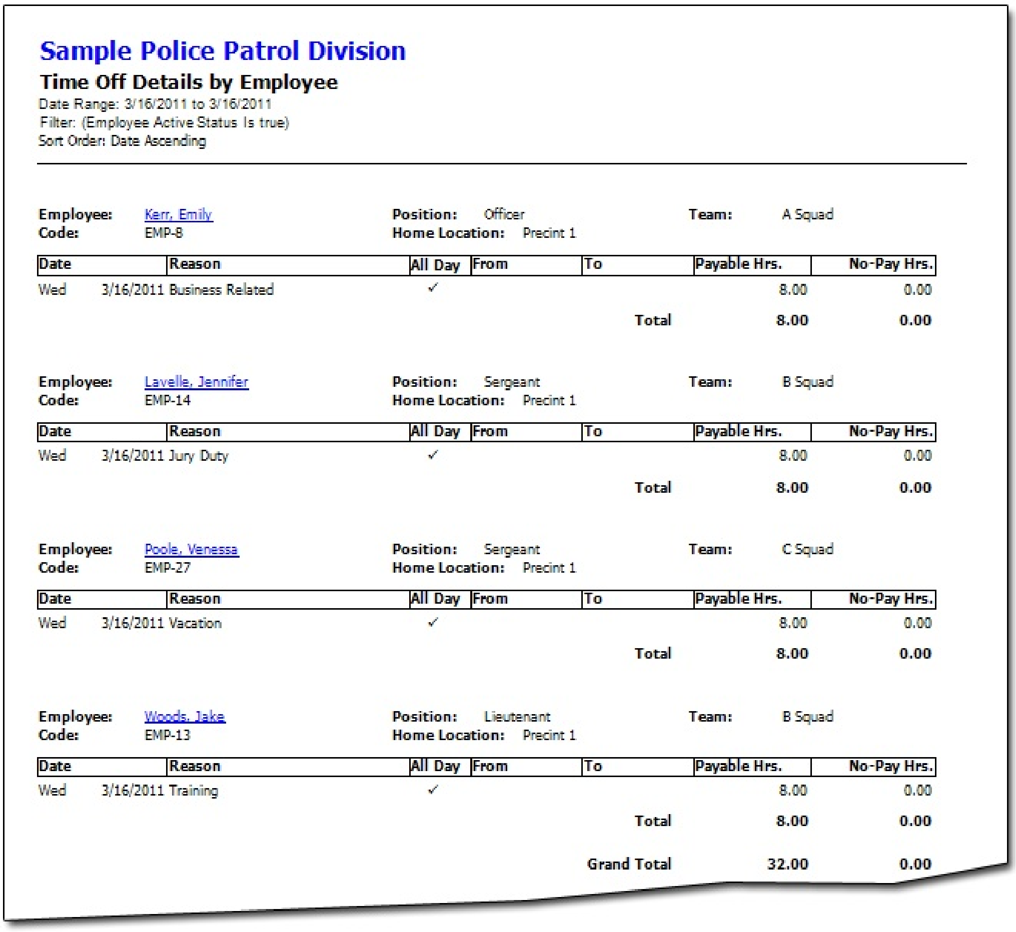
The report contains the following fields:

- **Report Header Information:** Your business name, report title, and the range of dates covered in the report**.** You can selectively hide these fields using the **Modify Header/Footer** command.
- **Employee:** The employee name as a hyperlink. Clicking this link will bring up the Employee form to let you view and make changes to the employee record.
- **Position:** The employee's job position.
- **Validation Type:** The type of the validation check as described above.
- **Description**: Detailed description of the validation check result. When applicable, a small square with the color of a shift is displayed for easy identification of the shift assignment where the exception occurs.

Time Off Details by Employee

This report displays time off assignments grouped by employee for the specified report date range. By default, time off assignments for all employees for the current week are displayed. The Contents pane shows the tree view of the employees covered in the report. Clicking any of the employee names will position the report to the section that shows the time off assignments for that employee.

For each employee, the time off assignments are listed to show the assignment date, time off reason, all day indicator, time off period, payable hours and non-payable hours.



Sample Police Patrol Division

Time Off Details by Employee

Date Range: 3/16/2011 to 3/16/2011
Filter: (Employee Active Status Is true)
Sort Order: Date Ascending

Employee: Kerr, Emily **Position:** Officer **Team:** A Squad
Code: EMP-8 **Home Location:** Precint 1

Date	Reason	All Day	From	To	Payable Hrs.	No-Pay Hrs.
Wed 3/16/2011	Business Related	✓			8.00	0.00
				Total	**8.00**	**0.00**

Employee: Lavelle, Jennifer **Position:** Sergeant **Team:** B Squad
Code: EMP-14 **Home Location:** Precint 1

Date	Reason	All Day	From	To	Payable Hrs.	No-Pay Hrs.
Wed 3/16/2011	Jury Duty	✓			8.00	0.00
				Total	**8.00**	**0.00**

Employee: Poole, Venessa **Position:** Sergeant **Team:** C Squad
Code: EMP-27 **Home Location:** Precint 1

Date	Reason	All Day	From	To	Payable Hrs.	No-Pay Hrs.
Wed 3/16/2011	Vacation	✓			8.00	0.00
				Total	**8.00**	**0.00**

Employee: Woods, Jake **Position:** Lieutenant **Team:** B Squad
Code: EMP-13 **Home Location:** Precint 1

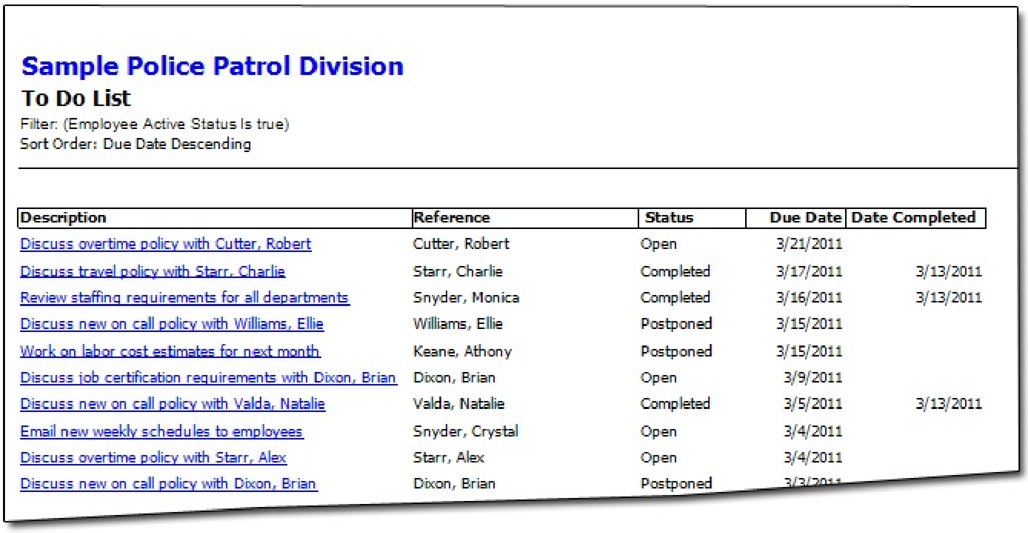
Date	Reason	All Day	From	To	Payable Hrs.	No-Pay Hrs.
Wed 3/16/2011	Training	✓			8.00	0.00
				Total	**8.00**	**0.00**
				Grand Total	**32.00**	**0.00**

The report contains the following fields:

- **Report Header Information:** Your business name, report title, and the range of dates covered in the report**.** You can selectively hide these fields using the **Modify Header/Footer** command.
- **Employee Header Information:** Information about the employee. Each header contains the employee name, employee code, job position, team, and the employee's home location. Clicking the employee name hyperlink will bring up the Employee form to let you view and make changes to the employee record.
- **Date:** Date when a time off was assigned.
- **Reason:** Reason for the time off.
- **All Day:** All day time off indicator. When checked, this indicates the employee is off for the entire day and the **From** and **To** fields are set to blank.
- **From:** The start time for the time off period. This field is blank for all day time off assignments.
- **To:** The end time for the time off period. This field is blank for all day time off assignments.
- **Payable Hrs.:** Payable hours for the time off taken. Depending on your settings for the time off reasons in the schedule file, the employee may or may not receive pay for the time off taken. If the time off reason indicates a paid time off type, the entire time off period is payable to the employee. For all day time off assignments, this field displays the effective all day duration (hours) defined for each time off reason
- **No-Pay Hrs.:** Non payable hours for the time off taken. If the time off reason indicates a no-pay time off type, this field shows the entire time off period which is not payable to the employee. For all day time off assignments, this field displays the effective all day duration (hours) defined for each time off reason

To Do List

The To Do List report displays a list of To Do items that you assigned to yourself to perform. By default, the report displays only To Do items that are active, sorted by due date in descending order.



Sample Police Patrol Division

To Do List

Filter: (Employee Active Status Is true)
Sort Order: Due Date Descending

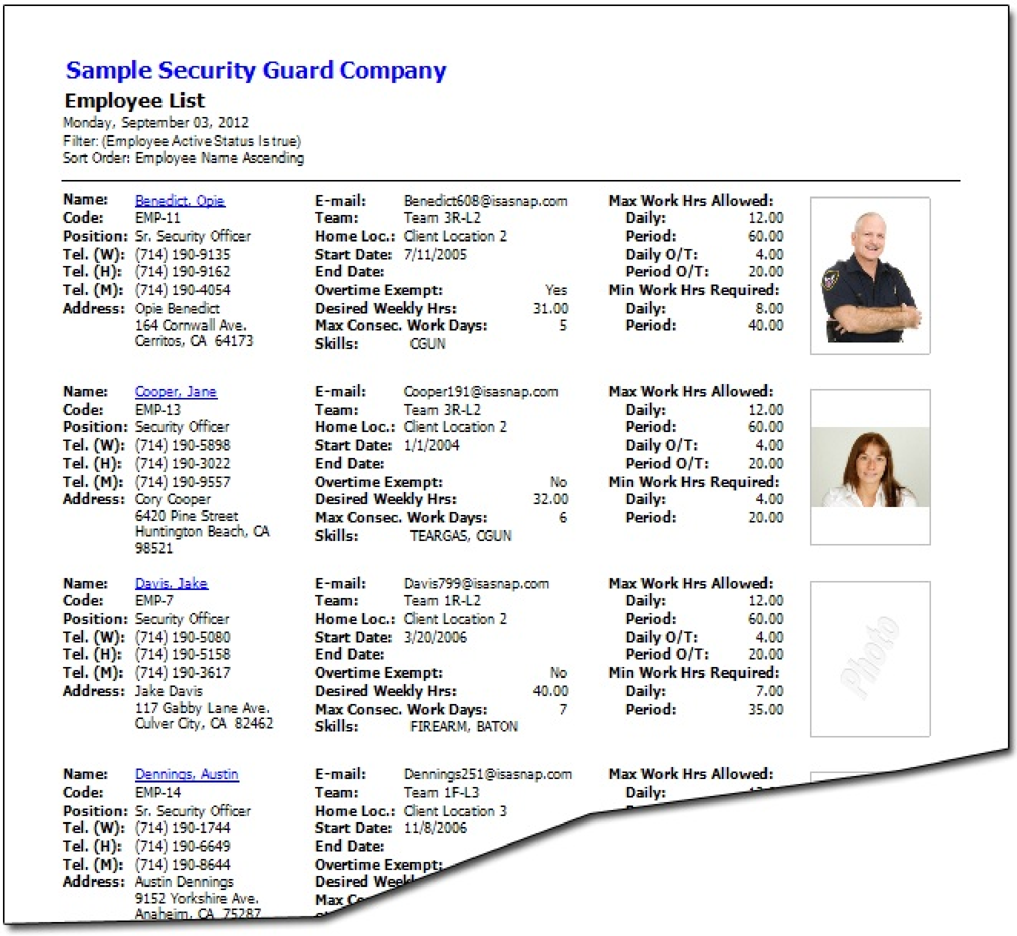
Description	Reference	Status	Due Date	Date Completed
Discuss overtime policy with Cutter, Robert	Cutter, Robert	Open	3/21/2011	
Discuss travel policy with Starr, Charlie	Starr, Charlie	Completed	3/17/2011	3/13/2011
Review staffing requirements for all departments	Snyder, Monica	Completed	3/16/2011	3/13/2011
Discuss new on call policy with Williams, Ellie	Williams, Ellie	Postponed	3/15/2011	
Work on labor cost estimates for next month	Keane, Athony	Postponed	3/15/2011	
Discuss job certification requirements with Dixon, Brian	Dixon, Brian	Open	3/9/2011	
Discuss new on call policy with Valda, Natalie	Valda, Natalie	Completed	3/5/2011	3/13/2011
Email new weekly schedules to employees	Snyder, Crystal	Open	3/4/2011	
Discuss overtime policy with Starr, Alex	Starr, Alex	Open	3/4/2011	
Discuss new on call policy with Dixon, Brian	Dixon, Brian	Postponed	3/3/2011	

The report contains the following fields:

- **Report Header Information:** Your business name and report title. You can selectively hide these fields using the **Modify Header/Footer** command.
- **Description**: Description of the To Do item as a hyperlink. Clicking this link will bring up the To Do Item form to let you view and make changes to the To Do Item record.
- **Active**: Active status of the To Do item. This field is normally used to filter out inactive To Do items that you no longer want to track or display on the report.
- **Reference:** Name of an employee that may be connected with the To Do item.
- **Status**: Current status (Open, Completed, or Postponed) of the To Do item.
- **Due Date**: Due date for the To Do item.
- **Date Completed**: Date the To Do item was completed.

Employee List

The Employee List report displays a list of your employees. By default, this report displays all active employees, sorted by employee name. You can show or hide employees' pictures using the Options command.


Sample Security Guard Company
Employee List
Monday, September 03, 2012
Filter: (Employee Active Status Is true)
Sort Order: Employee Name Ascending

Name: Benedict, Opie
Code: EMP-11
Position: Sr. Security Officer
Tel. (W): (714) 190-9135
Tel. (H): (714) 190-9162
Tel. (M): (714) 190-4054
Address: Opie Benedict
164 Cornwall Ave.
Cerritos, CA 64173
E-mail: Benedict608@isasnap.com
Team: Team 3R-L2
Home Loc.: Client Location 2
Start Date: 7/11/2005
End Date:
Overtime Exempt: Yes
Desired Weekly Hrs: 31.00
Max Consec. Work Days: 5
Skills: CGUN
Max Work Hrs Allowed:
Daily: 12.00
Period: 60.00
Daily O/T: 4.00
Period O/T: 20.00
Min Work Hrs Required:
Daily: 8.00
Period: 40.00

Name: Cooper, Jane
Code: EMP-13
Position: Security Officer
Tel. (W): (714) 190-5898
Tel. (H): (714) 190-3022
Tel. (M): (714) 190-9557
Address: Cory Cooper
6420 Pine Street
Huntington Beach, CA
98521
E-mail: Cooper191@isasnap.com
Team: Team 3R-L2
Home Loc.: Client Location 2
Start Date: 1/1/2004
End Date:
Overtime Exempt: No
Desired Weekly Hrs: 32.00
Max Consec. Work Days: 6
Skills: TEARGAS, CGUN
Max Work Hrs Allowed:
Daily: 12.00
Period: 60.00
Daily O/T: 4.00
Period O/T: 20.00
Min Work Hrs Required:
Daily: 4.00
Period: 20.00

Name: Davis, Jake
Code: EMP-7
Position: Security Officer
Tel. (W): (714) 190-5080
Tel. (H): (714) 190-5158
Tel. (M): (714) 190-3617
Address: Jake Davis
117 Gabby Lane Ave.
Culver City, CA 82462
E-mail: Davis799@isasnap.com
Team: Team 1R-L2
Home Loc.: Client Location 2
Start Date: 3/20/2006
End Date:
Overtime Exempt: No
Desired Weekly Hrs: 40.00
Max Consec. Work Days: 7
Skills: FIREARM, BATON
Max Work Hrs Allowed:
Daily: 12.00
Period: 60.00
Daily O/T: 4.00
Period O/T: 20.00
Min Work Hrs Required:
Daily: 7.00
Period: 35.00
Photo

Name: Dennings, Austin
Code: EMP-14
Position: Sr. Security Officer
Tel. (W): (714) 190-1744
Tel. (H): (714) 190-6649
Tel. (M): (714) 190-8644
Address: Austin Dennings
9152 Yorkshire Ave.
Anaheim, CA 75287
E-mail: Dennings251@isasnap.com
Team: Team 1F-L3
Home Loc.: Client Location 3
Start Date: 11/8/2006
End Date:
Overtime Exempt:
Max Work Hrs Allowed:
Daily:

The report contains the following fields:

- **Report Header Information:** Your business name and report title. You can selectively hide these fields using the **Modify Header/Footer** command.
- **Name:** The employee name as a hyperlink. Clicking this link will bring up the Employee form to let you view and make changes to the employee record.
- **Code:** Employee code.
- **Position:** The employee's job position.
- **Tel. (W):** Work phone number.
- **Tel. (H):** Home phone number.
- **Tel. (M):** Mobile phone number.
- **E-mail:** Employee E-mail address
- **Address:** Employee address
- **Skills:** A list of skills that the employee possesses.
- **Team**: Employee's assigned team.
- **Home Loc.:** Employee's home location.
- **Start Date**: Date employee was first hired.
- **End Date**: Date when employee's employment ends.
- **Hourly Cost**: Employee's hourly pay rate.
- **Overtime Exempt**: Overtime exempt indicator. **Snap Schedule** computes the labor cost for exempt employees at the employee's hourly cost for all hours worked. For non-exempt employees, overtime labor cost is computed at the employee's hourly cost times an overtime pay multiplier. You can set the overtime pay multiplier for your business using the Business Information form.

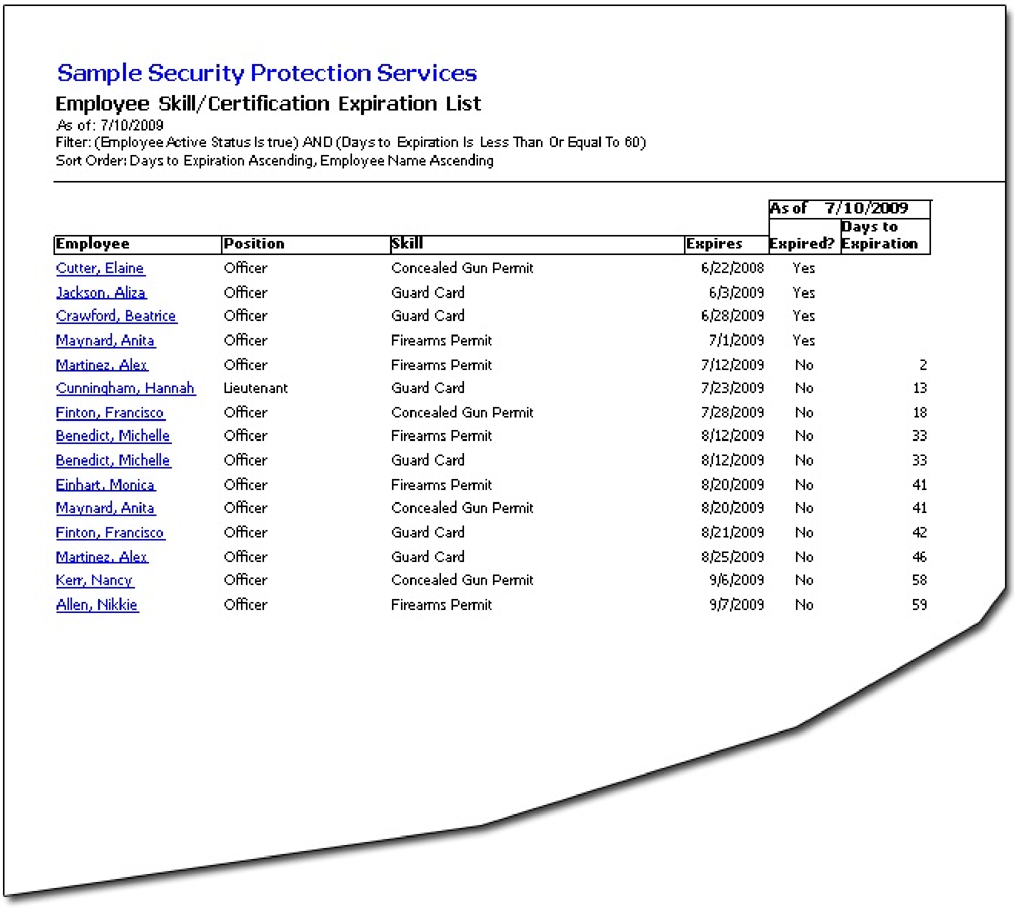
- **Desired Weekly Hrs:** The number of hours the employee desires to work per week.
- **Max Daily Hrs Allowed:** Maximum number of hours the employee can work per day. If this value is zero, no limit is set.
- **Min Daily Hrs Required:** Minimum number of hours the employee must work per day. If this value is zero, no limit is set. **Snap Schedule** will perform the validation check on this requirement only if the employee has at least one shift assignment for the day.
- **Max Weekly Hrs Required:** Maximum number of hours the employee can work per week. If this value is zero, no limit is set.
- **Min Weekly Hrs Required:** Minimum number of hours the employee must work per week. If this value is zero, no limit is set. **Snap Schedule** will perform the validation check on this requirement only if the employee has at least one shift assignment for the week.
- **Max Daily O/T Hrs Allowed**: Maximum number of overtime hours the employee can work per day. If this value is zero, no limit is set.
- **Max Weekly O/T Hrs Allowed**: Maximum number of overtime hours the employee can work per week. If this value is zero, no limit is set.
- **Max Consec. Work Days**: Maximum number of consecutive days the employee can work without taking a day off. A work day is a day when the employee has at least one shift assignment.

Employee Skill/Certification Expiration List

Use this report to get a list of employee skills/certifications that are about to expire or need to be renewed. By default, this report shows employee names, their skills, expiration dates, and expiration statuses as of the current date. You can use the **Report as of** drop-down to get a list of skills/certifications that will expire by a certain date. For example, use the **End of the Quarter** option on the drop-down to find out whose skills will expire by the end of the quarter.

The combination of the **Report as of** drop-down and filters give you total control over whose skills/certifications to be included in the list. For example, to find out whose skills/certifications will expire 60 days from July 10, 2009:

1. On the **Report as of** drop-down, select **Custom** and enter July 10, 2009.
2. Click on the Filter icon and add filter condition Days to Expiration Is Less Than Or Equal to 60.



Sample Security Protection Services

Employee Skill/Certification Expiration List

As of: 7/10/2009

Filter: (Employee Active Status Is true) AND (Days to Expiration Is Less Than Or Equal To 60)

Sort Order: Days to Expiration Ascending, Employee Name Ascending

				As of 7/10/2009	
Employee	Position	Skill	Expires	Expired?	Days to Expiration
Cutter, Elaine	Officer	Concealed Gun Permit	6/22/2008	Yes	
Jackson, Aliza	Officer	Guard Card	6/3/2009	Yes	
Crawford, Beatrice	Officer	Guard Card	6/28/2009	Yes	
Maynard, Anita	Officer	Firearms Permit	7/1/2009	Yes	
Martinez, Alex	Officer	Firearms Permit	7/12/2009	No	2
Cunningham, Hannah	Lieutenant	Guard Card	7/23/2009	No	13
Finton, Francisco	Officer	Concealed Gun Permit	7/28/2009	No	18
Benedict, Michelle	Officer	Firearms Permit	8/12/2009	No	33
Benedict, Michelle	Officer	Guard Card	8/12/2009	No	33
Einhart, Monica	Officer	Firearms Permit	8/20/2009	No	41
Maynard, Anita	Officer	Concealed Gun Permit	8/20/2009	No	41
Finton, Francisco	Officer	Guard Card	8/21/2009	No	42
Martinez, Alex	Officer	Guard Card	8/25/2009	No	46
Kerr, Nancy	Officer	Concealed Gun Permit	9/6/2009	No	58
Allen, Nikkie	Officer	Firearms Permit	9/7/2009	No	59

The report contains the following fields:

- **Report Header Information:** Your business name, report title, and the range of dates covered in the report. You can selectively hide these fields using the **Modify Header/Footer** command.
- **Employee:** The employee name. Clicking the employee name hyperlink will bring up the Employee form to let you view and make changes to the employee record.
- **Position:** The employee's job position.
- **Skill:** The name of the skill attached to the employee.
- **Expires:** Date when a skill is due to expire.
- **Expired:** This field indicates the expiration status as of the date shown on the column header. .
- **Days to expiration:** The number of days until expiration (starting from the date shown on the column header).

About Lists

Lists provide an efficient way to view large amount of data. These lists are read-only, meaning you cannot enter data directly from the list. You can double-click a record to open a data entry form which allows you to view detailed data and make any changes to the record as necessary.

Lists are arranged by columns which can be sorted by ascending or descending order. You can customize the list to select which columns to display, filter data, group data, or search for specific data on the list. Additionally, you can print the list and export the list contents to Microsoft Excel or third party applications.

- Sorting list records
- Customizing a list
- Grouping list records
- Filtering list data
- Finding information on a list
- Editing a list record
- Moving list columns
- Resizing list columns
- Printing list data
- Exporting a list to Excel
- Copying a list to the Clipboard

A list may support addition functions through a context menu which pops up when you right-click on the list.

Restriction on deleting list records: When deleting a record on the list, you should note that **Snap Schedule** does not allow deletion of records that are currently referenced in other records. For example, you cannot delete an employee record if there are shift assignments made for the employee since deleting the employee record would cause the assignments to refer to an employee that no longer exists. In this case, you must delete the referencing assignments first before deleting the employee record. As an alternative, you can edit the employee record and sets its status to inactive. Doing this will not remove the employee record from the database but will make the employee not eligible for future assignments.

Customizing a List

You can customize the lists that appear throughout **Snap Schedule** . Customizable features include the ability to select which columns to display on the list and the ability to rearrange their display order. To customize the current list you are viewing:

1. On the **List** tab, click **Customize List** to open the **Customize List Content** window. This window shows all the columns available for display for the current list.
2. If you want to display a column, check its **Visible** box. Otherwise, un-check to hide it.
3. Use the **Move Up** and **Move Down** buttons to change the display order for the visible columns. The column shown at the top of the grid will be displayed to the leftmost of the list, the column shown at the bottom will be displayed to the rightmost.
4. Click **OK** to save your selections.

Snap Schedule memorizes your customization for each list so the next time you re-start the program, the lists will be displayed based your last customization settings.

Working with the Employee List

The **Employee** list shows all employee records you have defined in the schedule file.

To view the **Employee** list:

1. On the **Manage** tab, in the **Employee Data** group, click **Employees.** The **Employee** list will be displayed.
2. Click the context sensitive **List** tab to show additional commands that are pertinent to the list.

Listed below are some basic tasks you can do while working with the list.

To	Do this
Filter employee records	By default, all active employees are listed. On the **List** tab, click **Filter** to show the filter tool bar and select the appropriate filter from the drop-down list.
Add a new employee	On the **List** tab, click **New Employee** or click the **Create a new Employee** link.
Edit an existing employee record	Right-click the desired employee record and select **Edit Employee** from the menu or select the employee record and click **Edit Employee** on the **List** tab.
Delete an employee record	Right-click the desired employee record and select **Delete Employee** from the menu or select the employee record and click **Delete Employee** on the **List** tab.
Find an employee record	1. On the **List** tab, click **Find**. 2. Enter a keyword or a text string for which to search and select a column title under which to search using the **Look in** drop-down list then click the **Find Now** button to start. 3. Matching records resulted from the search will be displayed. To clear the search results and return to the original list, click the **Clear** button.
Sort the list	Click a column header to switch between ascending and descending sort order. You will see a small arrow indicating the sort order.
Resize column width	Move the mouse pointer around the column divider. When the pointer becomes a column resize pointer , drag the column divider to a new width.
Re-arrange columns	Click the column header and drag it horizontally to a new position.
Print the list	Click the **File** tab and click **Print** to display the print Backstage view. Click the **Print** button to see a preview and click **Print** to print the list contents to a printer.
Export the list to Excel	On the **List** tab, click **Export List to Excel**. You must have Microsoft Excel installed on your computer for this feature to work.

Location List

The **Location** list shows all shift location records you have defined in the schedule file.

To view the **Location** list:

1. On the **Manage** tab, in the **Shift Data** group, click **Locations**. The **Location** list will be displayed.
2. Click the context sensitive **List** tab to show additional commands that are pertinent to the list.

Listed below are some basic tasks you can do while working with the list.

To	Do this
Add a new location	On the **List** tab, click **New Location** or click the **Create a new Shift Location** link.
Edit an existing location record	Right-click the desired location record and select **Edit Location** from the menu or select the record and click **Edit Location** on the **List** tab.
Delete a location record	Right-click the desired location record and select **Delete Location** from the menu or select the record and click **Delete Location** on the **List** tab.
Find a location record	1. On the **List** tab, click **Find**. 2. Enter a keyword or a text string for which to search and select a column title under which to search using the **Look in** drop-down list then click the **Find Now** button to start. 3. Matching records resulted from the search will be displayed. To clear the search results and return to the original list, click the **Clear** button.
Sort the list	Click a column header to switch between ascending and descending sort order. You will see a small arrow indicating the sort order.
Resize column width	Move the mouse pointer around the column divider. When the pointer becomes a column resize pointer , drag the column divider to a new width.
Re-arrange columns	Click the column header and drag it horizontally to a new position.
Print the list	Click the **File** tab and click **Print** to display the print Backstage view. Click the **Print** button to see a preview and click **Print** to print the list contents to a printer.
Export the list to Excel	On the **List** tab, click **Export List to Excel**. You must have Microsoft Excel installed on your computer for this feature to work.

Position List

The **Position** list shows all job position records you have defined in the schedule file.

To view the **Position** list:

1. On the **Manage** tab, in the **Employee Data** group, click **Positions**. The **Position** list will be displayed.
2. Click the context sensitive **List** tab to show additional commands that are pertinent to the list.

Listed below are some basic tasks you can do while working with the list.

To	Do this
Add a new position	On the **List** tab, click **New Position** or click the **Create a new Position** link.
Edit an existing position record	Right-click the desired position record and select **Edit Position** from the menu or select the record and click **Edit Position** on the **List** tab.
Delete a position record	Right-click the desired position record and select **Delete Position** from the menu or select the record and click **Delete Position** on the **List** tab.
Find a position record	1. On the **List** tab, click **Find**. 2. Enter a keyword or a text string for which to search and select a column title under which to search using the **Look in** drop-down list then click the **Find Now** button to start. 3. Matching records resulted from the search will be displayed. To clear the search results and return to the original list, click the **Clear** button.
Sort the list	Click a column header to switch between ascending and descending sort order. You will see a small arrow indicating the sort order.
Resize column width	Move the mouse pointer around the column divider. When the pointer becomes a column resize pointer ✥, drag the column divider to a new width.
Re-arrange columns	Click on the column header and drag it horizontally to a new position.
Print the list	Click the **File** tab and click **Print** to display the print Backstage view. Click the **Print** button to see a preview and click **Print** to print the list contents to a printer.
Export the list to Excel	On the **List** tab, click **Export List to Excel**. You must have Microsoft Excel installed on your computer for this feature to work.

Shift Assignment Reason List

The **Shift Assignment Reason** list shows all shift assignment reason records you have defined in the schedule file.

To view the **Shift Assignment Reason** list:

1. On the **Manage** tab, in the **Shift Data** group, click **Shift Assignment Reasons**. The **Shift Assignment Reason** list will be displayed.
2. Click the context sensitive **List** tab to show additional commands that are pertinent to the list.

Listed below are some basic tasks you can do while working with the list.

To	Do this
Add a new shift assignment reason	On the **List** tab, click **New Shift Assignment Reason** or click the **Create a new Shift Assignment Reason** link.
Edit an existing shift assignment reason record	Right-click the desired shift assignment reason record and select **Edit Shift Assignment Reason** from the menu or select the employee record and click **Edit Shift Assignment Reason** on the **List** tab.
Delete a shift assignment reason record	Right-click the desired shift assignment reason record and select **Delete Shift Assignment Reason** from the menu or select the shift assignment reason record and click **Delete Shift Assignment Reason** on the **List** tab.
Find a shift assignment reason record	1. On the **List** tab, click **Find**. 2. Enter a keyword or a text string for which to search and select a column title under which to search using the **Look in** drop-down list then click the **Find Now** button to start. 3. Matching records resulted from the search will be displayed. To clear the search results and return to the original list, click the **Clear** button.
Sort the list	Click a column header to switch between ascending and descending sort order. You will see a small arrow indicating the sort order.
Resize column width	Move the mouse pointer around the column divider. When the pointer becomes a column resize pointer ↔, drag the column divider to a new width.
Re-arrange columns	Click the column header and drag it horizontally to a new position.
Print the list	Click the **File** tab and click **Print** to display the print Backstage view. Click the **Print** button to see a preview and click **Print** to print the list contents to a printer.
Export the list to Excel	On the **List** tab, click **Export List to Excel**. You must have Microsoft Excel installed on your computer for this feature to work.

Shift Category List

The **Shift Category** list shows all shift category records you have defined in the schedule file.

To view the **Shift Category** list:

1. On the **Manage** tab, in the **Shift Data** group, click **Shift Categories**. The **Shift Category** list will be displayed.
2. Click the context sensitive **List** tab to show additional commands that are pertinent to the list.

Listed below are some basic tasks you can do while working with the list.

To	Do this
Add a new shift category	On the **List** tab, click **New Shift Category** or click the **Create a new Shift Category** link.
Edit an existing shift category record	Right-click the desired shift category record and select **Edit Shift Category** from the menu or select the shift category record and click **Edit Shift Category** on the **List** tab.
Delete a shift category record	Right-click the desired shift category record and select **Delete Shift Category** from the menu or select the shift category record and click **Delete Shift Category** on the **List** tab.
Find a shift category record	1. On the **List** tab, click **Find**. 2. Enter a keyword or a text string for which to search and select a column title under which to search using the **Look in** drop-down list then click the **Find Now** button to start. 3. Matching records resulted from the search will be displayed. To clear the search results and return to the original list, click the **Clear** button.
Sort the list	Click a column header to switch between ascending and descending sort order. You will see a small arrow indicating the sort order.
Resize column width	Move the mouse pointer around the column divider. When the pointer becomes a column resize pointer ↔, drag the column divider to a new width.
Re-arrange columns	Click the column header and drag it horizontally to a new position.
Print the list	Click the **File** tab and click **Print** to display the print Backstage view. Click the **Print** button to see a preview and click **Print** to print the list contents to a printer.
Export the list to Excel	On the **List** tab, click **Export List to Excel**. You must have Microsoft Excel installed on your computer for this feature to work.

Shift List

The **Shift** list shows all shift records you have defined in the schedule file.

To view the **Shift** list:

1. On the **Manage** tab, in the **Shift Data** group, click **Shifts**. The **Shift** list will be displayed.
2. Click the context sensitive **List** tab to show additional commands that are pertinent to the list.

Listed below are some basic tasks you can do while working with the list.

To	Do this
Filter shift records	By default, all active shifts are listed. On the **List** tab, click **Filter** to show the filter tool bar and select the appropriate filter from the drop-down list.
Add a new shift	On the **List** tab, click **New Shift** or click the **Create a new Shift** link.
Edit an existing shift record	Right-click the desired shift record and select **Edit Shift** from the menu or select the shift record and click **Edit Shift** on the **List** tab.
Delete a shift record	Right-click the desired shift record and select **Delete Shift** from the menu or select the shift record and click **Delete Shift** on the **List** tab.
Find an shift record	1. On the **List** tab, click **Find**. 2. Enter a keyword or a text string for which to search and select a column title under which to search using the **Look in** drop-down list then click the **Find Now** button to start. 3. Matching records resulted from the search will be displayed. To clear the search results and return to the original list, click the **Clear** button.
Sort the list	Click a column header to switch between ascending and descending sort order. You will see a small arrow indicating the sort order.
Resize column width	Move the mouse pointer around the column divider. When the pointer becomes a column resize pointer , drag the column divider to a new width.
Re-arrange columns	Click the column header and drag it horizontally to a new position.
Print the list	Click the **File** tab and click **Print** to display the print Backstage view. Click the **Print** button to see a preview and click **Print** to print the list contents to a printer.
Export the list to Excel	On the **List** tab, click **Export List to Excel**. You must have Microsoft Excel installed on your computer for this feature to work.

Shift Premium Policy List

The **Shift Premium Policy** list shows all shift premium policy records you have defined in the schedule file. Shift premium pay is the additional compensation offered to employees who are scheduled to work non-standard, less desirable shifts, or to compensate employees who are being on-call. You can create a shift premium policy record to specify how the additional compensation will be computed, then associate the policy to the shifts that you want to offer the premium pay.

To view the **Shift Premium Policy** list:

1. On the **Manage** tab, in the **Shift Data** group, click **Shift Premium Policies**. The **Shift Premium Policies** list will be displayed.
2. Click the context sensitive **List** tab to show additional commands that are pertinent to the list.

Listed below are some basic tasks you can do while working with the list.

To	Do this
Add a new policy	On the **List** tab, click **New Shift Premium Policy** or click the **Create a new shift premium policy** link.
Edit an existing record	Right-click the desired shift premium record and select **Edit Shift Premium Policy** from the menu or select the record and click **Edit Shift Premium Policy** on the **List** tab.
Delete an existing record	Right-click the desired shift premium record and select **Delete Shift Premium Policy** from the menu or select the record and click **Delete Shift Premium Policy** on the **List** tab.
Find a shift premium policy record	1. On the **List** tab, click **Find**. 2. Enter a keyword or a text string for which to search and select a column title under which to search using the **Look in** drop-down list then click the **Find Now** button to start. 3. Matching records resulted from the search will be displayed. To clear the search results and return to the original list, click the **Clear** button.
Sort the list	Click a column header to switch between ascending and descending sort order. You will see a small arrow indicating the sort order.
Resize column width	Move the mouse pointer around the column divider. When the pointer becomes a column resize pointer ↔, drag the column divider to a new width.
Re-arrange columns	Click the column header and drag it horizontally to a new position.
Print the list	Click the **File** tab and click **Print** to display the print Backstage view. Click the **Print** button to see a preview and click **Print** to print the list contents to a printer.
Export the list to Excel	On the **List** tab, click **Export List to Excel**. You must have Microsoft Excel installed on your computer for this feature to work.

Skill List

The **Skill** list shows all skill records you have defined in the schedule file. You can define skills to keep track of employees' training and certification, expiration dates, and use them as criteria for selecting an employee to fill a shift.

To view the **Skill** list:

1. On the **Manage** tab, in the **Employee Data** group, click **Skills**. The **Skill** list will be displayed.
2. Click the context sensitive **List** tab to show additional commands that are pertinent to the list.

Listed below are some basic tasks you can do while working with the list.

To	Do this
Add a new skill	On the **List** tab, click **New Skill** or click the **Create a new Skill** link.
Edit an existing skill record	Right-click the desired skill record and select **Edit Skill** from the menu or select the skill record and click **Edit Skill** on the **List** tab.
Delete a skill record	Right-click the desired skill record and select **Delete Skill** from the menu or select the skill record and click **Delete Skill** on the **List** tab.
Find a skill record	1. On the **List** tab, click **Find**. 2. Enter a keyword or a text string for which to search and select a column title under which to search using the **Look in** drop-down list then click the **Find Now** button to start. 3. Matching records resulted from the search will be displayed. To clear the search results and return to the original list, click the **Clear** button.
Sort the list	Click a column header to switch between ascending and descending sort order. You will see a small arrow indicating the sort order.
Resize column width	Move the mouse pointer around the column divider. When the pointer becomes a column resize pointer , drag the column divider to a new width.
Re-arrange columns	Click the column header and drag it horizontally to a new position.
Print the list	Click the **File** tab and click **Print** to display the print Backstage view. Click the **Print** button to see a preview and click **Print** to print the list contents to a printer.
Export the list to Excel	On the **List** tab, click **Export List to Excel**. You must have Microsoft Excel installed on your computer for this feature to work.

Team List

The **Team** list shows all team records you have defined in the schedule file.

To view the **Team** list:

1. On the **Manage** tab, in the **Shift Data** group, click **Teams**. The **Team** list will be displayed.
2. Click the context sensitive **List** tab to show additional commands that are pertinent to the list.

Listed below are some basic tasks you can do while working with the list.

To	Do this
Add a new team	On the **List** tab, click **New Team** or click the **Create a new Team** link.
Edit an existing team record	Right-click the desired team record and select **Edit Team** from the menu or select the team record and click **Edit Team** on the **List** tab.
Delete a team record	Right-click the desired team record and select **Delete Team** from the menu or select the record and click **Delete Team** on the **List** tab.
Find a team record	1. On the **List** tab, click **Find**. 2. Enter a keyword or a text string for which to search and select a column title under which to search using the **Look in** drop-down list then click the **Find Now** button to start. 3. Matching records resulted from the search will be displayed. To clear the search results and return to the original list, click the **Clear** button.
Sort the list	Click a column header to switch between ascending and descending sort order. You will see a small arrow indicating the sort order.
Resize column width	Move the mouse pointer around the column divider. When the pointer becomes a column resize pointer , drag the column divider to a new width.
Re-arrange columns	Click the column header and drag it horizontally to a new position.
Print the list	Click the **File** tab and click **Print** to display the print Backstage view. Click the **Print** button to see a preview and click **Print** to print the list contents to a printer.
Export the list to Excel	On the **List** tab, click **Export List to Excel**. You must have Microsoft Excel installed on your computer for this feature to work.

Time Off Reason List

The **Time Off Reason** list shows all time off reason records you have defined in the schedule file.

To view the **Time Off Reason** list:

1. On the **Manage** tab, in the **Employee Data** group, click **Time Off Reasons**. The **Time Off Reason** list will be displayed.
2. Click the context sensitive **List** tab to show additional commands that are pertinent to the list.

Listed below are some basic tasks you can do while working with the list.

To	Do this
Filter time off reason records	By default, all active time off reasons are listed. On the **List** tab, click **Filter** to show the filter tool bar and select the appropriate filter from the drop-down list.
Add a new time off reason	On the **List** tab, click **New Time Off Reason** or click the **Create a new Time Off Reason** link.
Edit an existing time off reason record	Right-click the desired time off reason record and select **Edit Time Off Reason** from the menu or select the time off reason record and click **Edit Time Off Reason** on the **List** tab.
Delete an time off reason record	Right-click the desired time off reason record and select **Delete Time Off Reason** from the menu or select the time off reason record and click **Delete Time Off Reason** on the **List** tab.
Find an time off reason record	1. On the **List** tab, click **Find**. 2. Enter a keyword or a text string for which to search and select a column title under which to search using the **Look in** drop-down list then click the **Find Now** button to start. 3. Matching records resulted from the search will be displayed. To clear the search results and return to the original list, click the **Clear** button.
Sort the list	Click a column header to switch between ascending and descending sort order. You will see a small arrow indicating the sort order.
Resize column width	Move the mouse pointer around the column divider. When the pointer becomes a column resize pointer  , drag the column divider to a new width.
Re-arrange columns	Click the column header and drag it horizontally to a new position.
Print the list	Click the **File** tab and click **Print** to display the print Backstage view. Click the **Print** button to see a preview and click **Print** to print the list contents to a printer.
Export the list to Excel	On the **List** tab, click **Export List to Excel**. You must have Microsoft Excel installed on your computer for this feature to work.

To Do List

The **To Do** list shows all to do items you have defined in the schedule file.

To view the **To Do** list:

1. On the **Manage** tab, in the **Admin** group, click **To Do Items**. The **To Do** list will be displayed.
2. Click the context sensitive **List** tab to show additional commands that are pertinent to the list.

Listed below are some basic tasks you can do while working with the list.

To	Do this
Filter to do item records	By default, all active to do items are listed. On the **List** tab, click **Filter** to show the filter tool bar and select the appropriate filter from the drop-down list.
Add a new to do item	On the **List** tab, click **New To Do Item** or click the **Create a new To Do Item** link.
Edit an existing to do item record	Right-click the desired to do item record and select **Edit To Do Item** from the menu or select the to do item record and click **Edit To Do Item** on the **List** tab.
Delete an to do item record	Right-click the desired to do item record and select **Delete To Do Item** from the menu or select the to do item record and click **Delete To Do Item** on the **List** tab.
Find an to do item record	1. On the **List** tab, click **Find**. 2. Enter a keyword or a text string for which to search and select a column title under which to search using the **Look in** drop-down list then click the **Find Now** button to start. 3. Matching records resulted from the search will be displayed. To clear the search results and return to the original list, click the **Clear** button.
Sort the list	Click a column header to switch between ascending and descending sort order. You will see a small arrow indicating the sort order.
Resize column width	Move the mouse pointer around the column divider. When the pointer becomes a column resize pointer , drag the column divider to a new width.
Re-arrange columns	Click the column header and drag it horizontally to a new position.
Print the list	Click the **File** tab and click **Print** to display the print Backstage view. Click the **Print** button to see a preview and click **Print** to print the list contents to a printer.
Export the list to Excel	On the **List** tab, click **Export List to Excel**. You must have Microsoft Excel installed on your computer for this feature to work.

Task List

The **Task** list shows all task records you have defined in the schedule file.

To view the **Task** list:

1. On the **Manage** tab, in the **Shift Data** group, click **Tasks**. The **Task** list will be displayed.
2. Click the context sensitive **List** tab to show additional commands that are pertinent to the list.

Listed below are some basic things you can do while working with the list.

To	Do this
Filter task records	By default, all active tasks are listed. On the **List** tab, click **Filter** to show the filter tool bar and select the appropriate filter from the drop-down list.
Add a new task	On the **List** tab, click **New Task** or click the **Create a new Task** link.
Edit an existing task record	Right-click the desired task record and select **Edit** Task from the menu or select the task record and click **Edit Task** on the **List** tab.
Delete a task record	Right-click the desired task record and select **Delete Task** from the menu or select the task record and click **Delete Task** on the **List** tab.
Find a task record	1. On the **List** tab, click **Find**. 2. Enter a keyword or a text string for which to search and select a column title under which to search using the **Look in** drop-down list then click the **Find Now** button to start. 3. Matching records resulted from the search will be displayed. To clear the search results and return to the original list, click the **Clear** button.
Sort the list	Click a column header to switch between ascending and descending sort order. You will see a small arrow indicating the sort order.
Resize column width	Move the mouse pointer around the column divider. When the pointer becomes a column resize pointer ✛ , drag the column divider to a new width.
Re-arrange columns	Click the column header and drag it horizontally to a new position.
Print the list	Click the **File** tab and click **Print** to display the print Backstage view. Click the **Print** button to see a preview and click **Print** to print the list contents to a printer.
Export the list to Excel	On the **List** tab, click **Export List to Excel**. You must have Microsoft Excel installed on your computer for this feature to work.

Task Category List

The **Task Category** list shows all task category records you have defined in the schedule file.

To view the **Task Category** list:

1. On the **Manage** tab, in the **Shift Data** group, click **Task Categories**. The **Task Category** list will be displayed.
2. Click the context sensitive **List** tab to show additional commands that are pertinent to the list.

Listed below are some basic tasks you can do while working with the list.

To	Do this
Add a new task category	On the **List** tab, click **New Task Category** or click the **Create a new Task Category** link.
Edit an existing task category record	Right-click the desired task category record and select **Edit Task Category** from the menu or select the task category record and click **Edit Task Category** on the **List** tab.
Delete a task category record	Right-click the desired task category record and select **Delete Task Category** from the menu or select the task category record and click **Delete Task Category** on the **List** tab.
Find a task category record	1. On the **List** tab, click **Find**. 2. Enter a keyword or a text string for which to search and select a column title under which to search using the **Look in** drop-down list then click the **Find Now** button to start. 3. Matching records resulted from the search will be displayed. To clear the search results and return to the original list, click the **Clear** button.
Sort the list	Click a column header to switch between ascending and descending sort order. You will see a small arrow indicating the sort order.
Resize column width	Move the mouse pointer around the column divider. When the pointer becomes a column resize pointer ↔ , drag the column divider to a new width.
Re-arrange columns	Click the column header and drag it horizontally to a new position.
Print the list	Click the **File** tab and click **Print** to display the print Backstage view. Click the **Print** button to see a preview and click **Print** to print the list contents to a printer.
Export the list to Excel	On the **List** tab, click **Export List to Excel**. You must have Microsoft Excel installed on your computer for this feature to work.

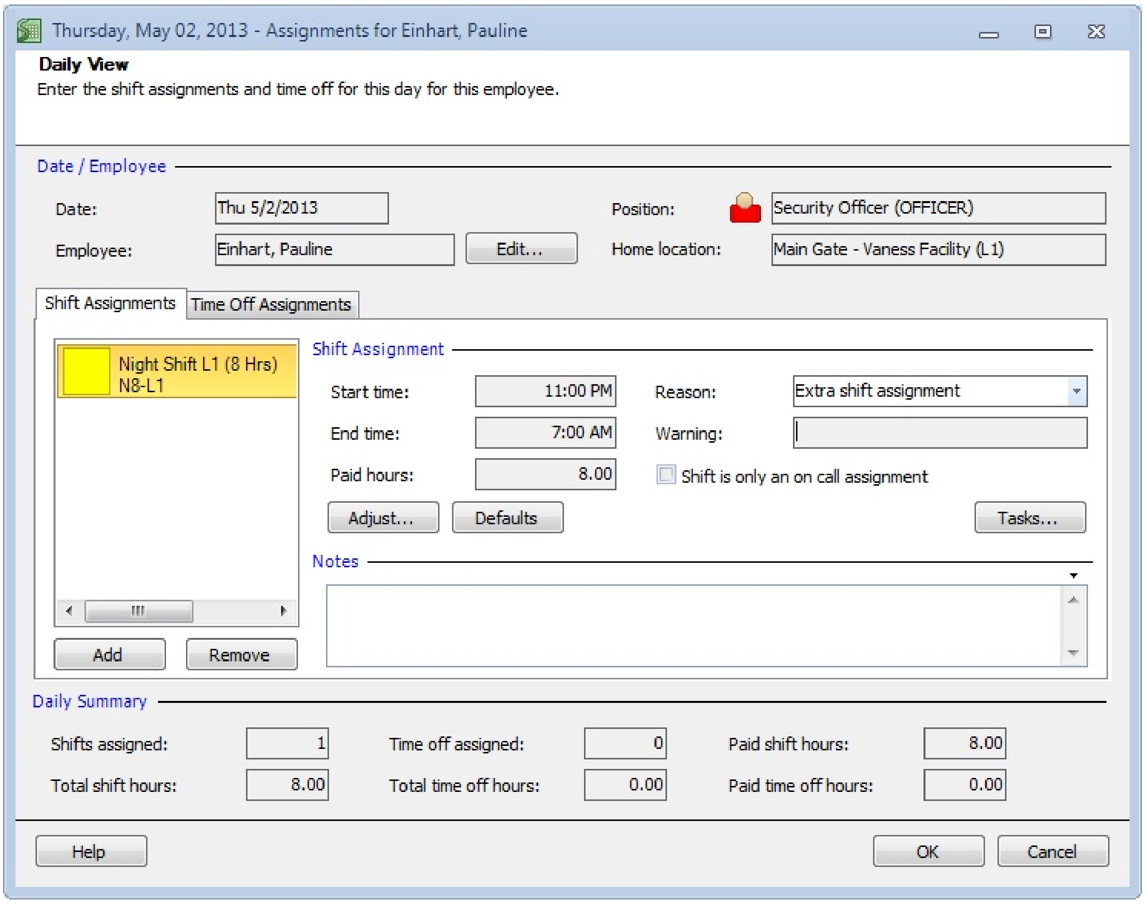
About Forms

Forms provide a way for you to interact with **Snap Schedule**. They are used to display information and to accept your input data into the program. Forms appear as separate windows from the main application.

On each form, you will find different controls such as text fields for displaying and accepting text data, drop-down lists for selecting pre-defined entries, grids for displaying data records in columnar format, and command buttons to perform specific functions and to update data in the database.

Assignments Form

Use this form to assign shifts and time off for an employee for a specific date. You can assign multiple shifts and time off for the same employee. This form is launched from the By Employee Daily view when you double click a cell to edit its content for a given employee on a given date.



Date / Employee Section

Fields in this section are read-only.

- **Date**: Date for which the shift and time off assignments are made.
- **Employee**: Name of the employee. You can click the **Edit** button to view or make changes to the employee record.
- **Position**: Employee's job position and position code. The position code is displayed in parentheses.
- **Home Location**: Employee's home location and location code. The location code is displayed in parentheses.

Shift Assignments Tab

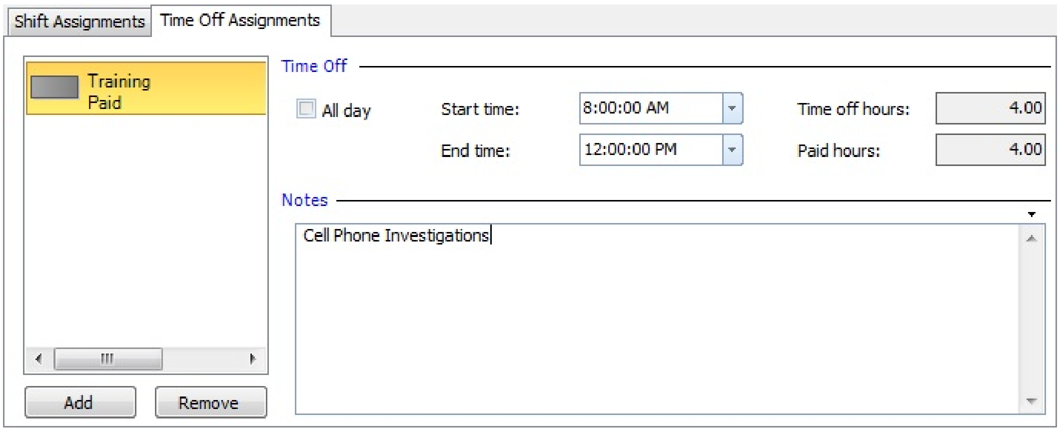
Click on this tab to display all shifts currently assigned to this employee for the selected date. This tab shows all shifts assigned to the employee in a scroll-able grid on the left and the corresponding shift assignment information on the right. From this tab, you can make a new shift assignment by clicking the **Add** button or remove an existing shift assignment by selecting the shift then click the **Remove** button. On call shift assignments or shift assignments with a conflict warning will be so indicated by an on call icon or a color coded flag on this grid.

- **Add**: Click this button to assign a new shift for the employee. After the shift has been added to the grid, you can check the **On Call** checkbox, add a shift assignment reason, or add assignment notes as applicable.
- **Remove**: Click this button to remove the selected (highlighted) shift assignment.
- **Start time**: The time when this shift assignment starts. When you make a shift assignment, this field is set to the default shift start time. You can change the start time to accommodate any deviation from the default shift start time by clicking the **Adjust** button. When this field is different than the default start time, a red asterisk is shown next to the data. To reset the field back to the default shift start time, click the **Defaults** button.
- **End time**: The time when this shift assignment ends. When you make a shift assignment, this field is set to the default shift end time. You can change the end time to accommodate any deviation from the default shift end time by clicking the **Adjust** button. When this field is different than the default end time, a red asterisk is shown next to the data. To reset the field back to the default shift end time, click the **Defaults** button.
- **Paid hours**: This field is automatically computed from the start time, end time, and unpaid duration. It is used for labor cost estimate computations. When you make a shift assignment, the start time, end time, and unpaid duration are set to the default values defined for the shift. You can change these values to accommodate any deviation from the shift default values by clicking the **Adjust** button. A red asterisk next to the data indicates adjustments are made to the default values. To reset the fields back to shift default values, click the **Defaults** button.

- **Adjust**: Click this button to bring up the Adjust Shift Assignment Times form to modify the shift assignment start time, end time, and unpaid duration.
- **Defaults**: Click this button to reset the start time, end time, and unpaid duration to the shift default values.
- **Reason**: Shift assignment reason. From the drop-down list, you can select a shift assignment reason for this employee for this shift or create a new shift assignment reason. You can leave this field blank unless you want to track and report assignments by reason.
- **Warning**: Any warning on shift assignment conflicts. Refer to the Assignment Conflict Flags section for detailed description of the warning messages and color coded warning flags displayed in this field.
- **Shift is only an on call assignment**: When checked, the assignment is only an on call shift assignment.
- **Tasks**: If you are scheduling tasks for this shift assignment, click this button to bring up the Edit Shift Assignment Task form to add or make changes to task assignments.

Time Off Assignments Tab

Click this tab to display all time off assignments scheduled for the employee on the selected date. This tab shows all time off assignments in a scroll-able grid on the left and the corresponding time off information on the right (see below). From this tab, you can schedule a new time off by clicking the **Add** button or remove an existing one by selecting the time off entry then click the **Remove** button.



- **Add**: Click this button to bring up the Select a Time Off Reason form to assign a new time off for the employee. A color coded icon representing the time off reason is also displayed. After the time off reason has been added to the grid, you can enter the time off duration and any applicable notes.
- **Remove**: Click this button to remove the selected (highlighted) time off assignment.
- **All Day**: This checkbox indicates if the time off is an all day event. If this is checked, the employee is off for the entire day and the Start Time and End Time fields are set to blank.
- **Start Time**: Start time of the time off period. This field is blank for all day time off.
- **End Time**: End time of the time off period. This field is blank for all day time off.
- **Notes:** Any notes for this time off assignment. You can enter up to 256 characters in the Notes field.

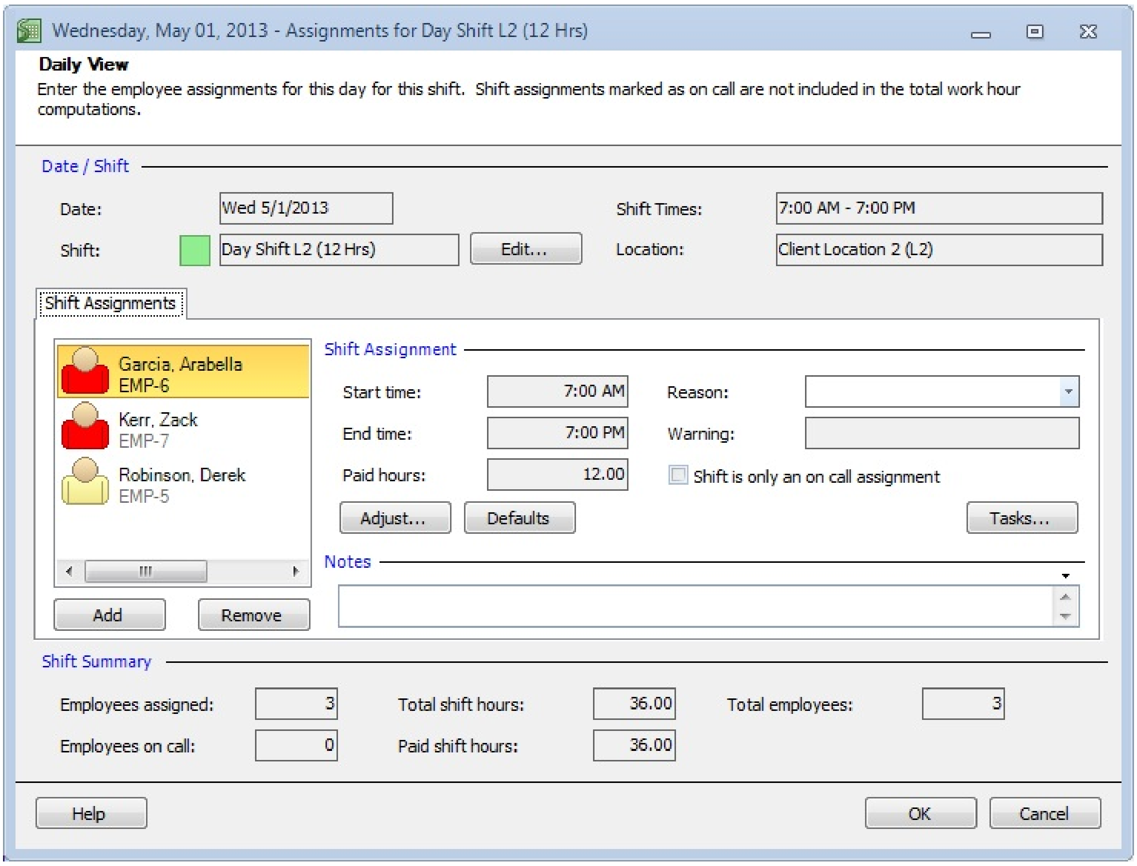
Daily Summary Section

Fields in this section are read-only as they are automatically computed based on shift and time off assignments.

- **Shift assigned**: The number of shifts assigned to the employee on this date.
- **Total shift hours**: The sum of all shift durations.
- **Paid shift hours**: The total hours that the employee will be paid. It is the total shift hours minus any unpaid durations. Note that on-call shifts are unpaid and are excluded from this computation.
- **Time off assigned**: The number of time off assigned to the employee on this date.
- **Total time off hours**: The sum of all time off durations.
- **Paid time off hours**: The total hours that the employee will be paid. It is the total time off hours minus any unpaid durations.

Assignments for Shift Form

Use this form to assign employees to a shift on a specific date. You can assign multiple employees to the same shift. This form is launched from the By Shift Daily view when you double click a cell for a given shift on a given date to edit its content.



Date / Shift Section

Fields in this section are read-only.

- **Date**: Date for which the shift assignments are made.
- **Shift:** Shift description. If you have defined a color to identify the shift, the color will also be shown. Use the Edit button to bring up the Shift form to modify the shift properties.
- **Shift time**: The shift's default start and end times. Note that you can adjust the shift start and end times individually for each employee.
- **Location**: The location associated with the shift.

Shift Assignments Tab

This tab shows all employees assigned to the shift in a scroll-able grid on the left and the corresponding shift assignment information on the right. Select an employee from the list and his/her shift assignment information will be shown on the right. From this tab, you can assign an employee to the shift by clicking the **Add** button or remove an existing employee by selecting the employee then click the **Remove** button. Employees who are on call or whose shift assignment has a conflict warning will be so indicated by an on call icon or a color coded flag on this grid.

- **Add**: Click this button to assign a new employee to the shift. After the employee has been added to the grid, you can adjust the shift start/stop time, set **On Call** status, add a shift assignment reason, or add assignment notes as applicable.
- **Remove**: Click this button to remove the selected (highlighted) employee.
- **Start time**: The time when this shift assignment starts. When you make a shift assignment, this field is set to the default shift start time. You can change the start time to accommodate any deviation from the default shift start time by clicking the **Adjust** button. When this field is different than the default start time, a red asterisk is shown next to the data. To reset the field back to the default shift start time, click the **Defaults** button.
- **End time**: The time when this shift assignment ends. When you make a shift assignment, this field is set to the default shift end time. You can change the end time to accommodate any deviation from the default shift end time by clicking the **Adjust** button. When this field is different from the default end time, a red asterisk is shown next to the data. To reset the field back to the default shift end time, click the **Defaults** button.
- **Paid hours**: This field is automatically computed from the start time, end time, and unpaid duration. It is used for labor cost estimate computations. When you make a shift assignment, the start time, end time, and unpaid duration are set to the default values defined for the shift. You can change these values to accommodate any deviation from the shift default values by clicking the **Adjust** button. A red asterisk next to the data indicates adjustments have been made to the default values. To reset the fields back to the shift default values,

click the **Defaults** button.

- **Adjust**: Click this button to bring up the Adjust Shift Assignment Times form to modify the shift assignment start time, end time, and unpaid duration.
- **Defaults**: Click this button to reset the start time, end time, and unpaid duration to the shift default values.
- **Reason**: Shift assignment reason. From the drop-down list, you can select a shift assignment reason for this employee for this shift or create a new shift assignment reason. You can leave this field blank unless you want to track and report assignments by reason.
- **Warning**: Any warning on shift assignment conflicts. Refer to the Assignment Conflict Flags section for detailed description of the warning messages and color coded warning flags displayed in this field.
- **Shift is only an on call assignment**: When checked, the assignment is only an on call shift assignment.
- **Tasks**: If you are scheduling tasks for this shift assignment, click this button to bring up the Edit Shift Assignment Tasks form to add or make changes to task assignments.

Shift Summary Section

Fields in this section are read-only as they are automatically computed based on shift and time off assignments.

- **Employees assigned**: The number of employees assigned to the shift on this date.
- **Employees on call**: The number of employees who are on call for the shift on this date.
- **Total shift hours**: The sum of all shift durations.
- **Paid shift hours**: The total hours that the employee will be paid. It is the total shift hours minus any unpaid durations. Note that on-call shifts are unpaid and are excluded from this computation.

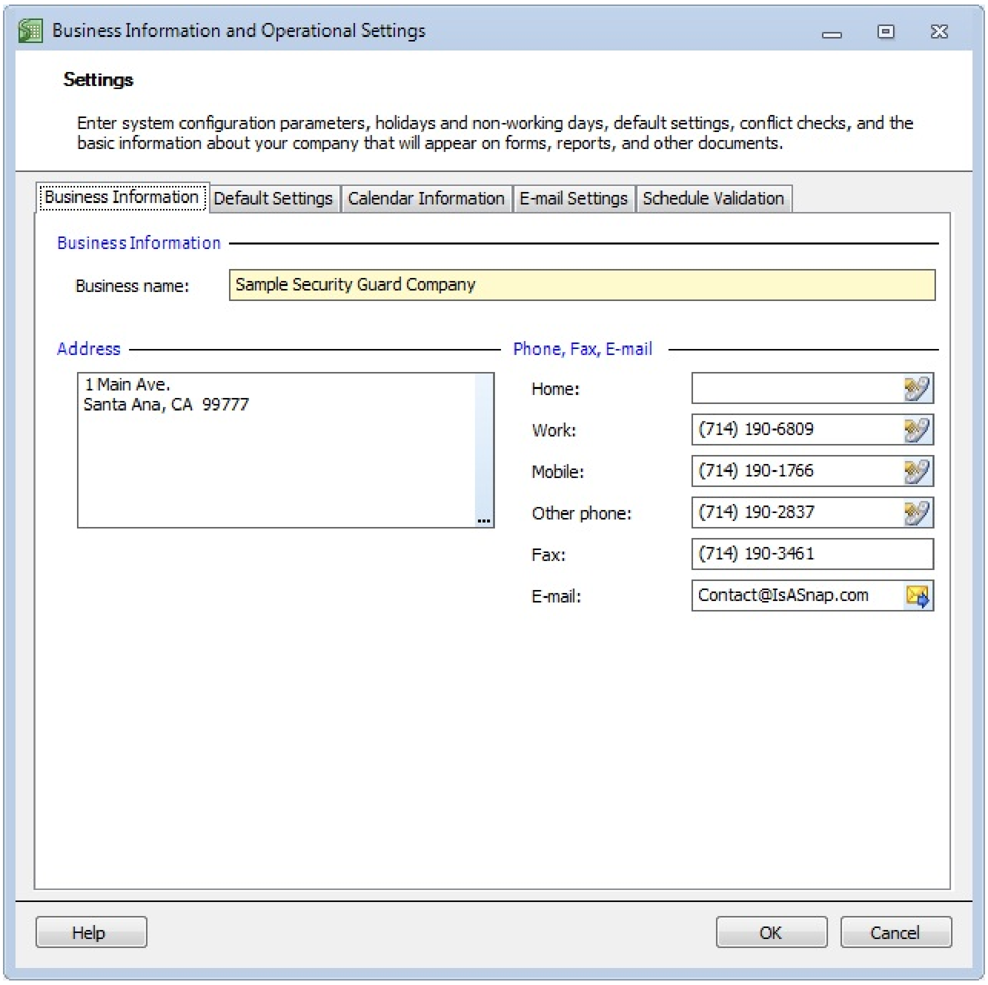
Business Information and Operational Settings Form

Use this form to enter system configuration parameters, holidays and non-working days, overtime pay rules, conflict checks, and the basic information about your company that appears on forms, reports, and other documents. There are four tabbed screens:

1. Business Information
2. Default Settings
3. Calendar Information
4. E-mail Settings
5. Schedule Validation

Business Information Tab

This tab is used to store your business name and contact information.



Business Information Section

- **Business name:** The name of your business. This name is used in the program title and all reports.

Address Section

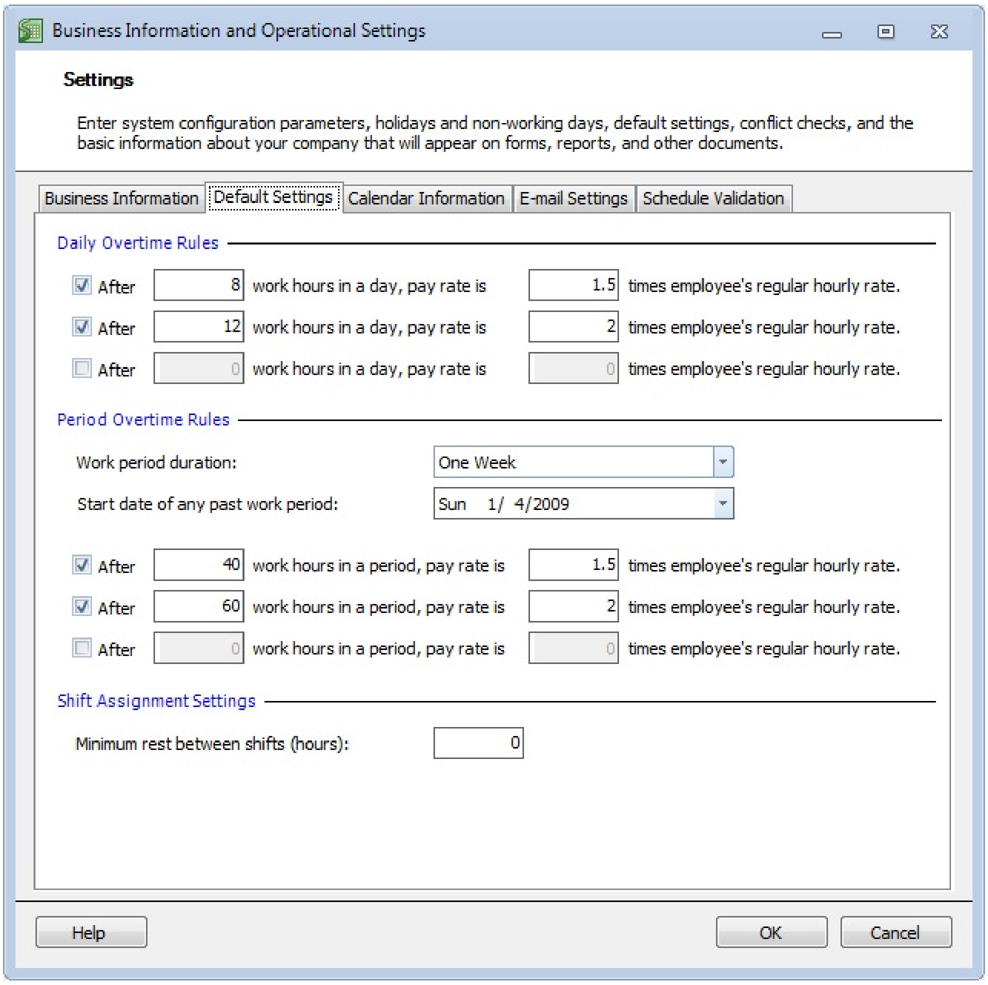
Enter your business mailing address.

Phone, Fax, Email Section

Enter the telephone numbers and e-mail address of your business.

Default Settings Tab

This tab is used to specify the rules for overtime pay computations and the shift assignment settings. In **Snap Schedule**, you can specify how overtime pay is computed for work hours in excess of: (a) certain hours per workday, (b) certain hours per work period, or (c) a combination of both. For additional information on how **Snap Schedule** computes overtime pays, refer to the Calculating Overtime Pay Section.



Daily Overtime Rules

Use the controls in this section to specify how overtime pay is computed for work hours in excess of certain hours per day. Up to three rules (for three overtime thresholds) are provided. You can enable each rule by checking the appropriate checkbox, then specify the values to be used. For example, if you pay one and one-half times the employee's regular rate of pay for hours worked beyond 8 hours a day and double the employee's regular rate of pay for hours worked beyond 12 hours a day, you will set the Daily Overtime Rules as follows:

- After 8 work hours in a day, pay rate is 1.5 times employee's regular hourly rate.
- After 12 work hours in a day, pay rate is 2 times employee's regular hourly rate.

Work Period Overtime Rules

Use the controls in this section to specify how overtime pay is computed for work hours in excess of certain hours per work period. A work period can be One Week, Two Weeks, Semi-Monthly, Four Weeks, One Month, or Six Weeks.

The **Start date of any past work period** field is required for the One Week, Two Weeks, Four Weeks, and Six Weeks work periods. If your work period is One Month, this field is always set to the first day of each month; and if your work period is Semi-Monthly, this field is always set to the first or sixteenth day of each month. You can set this field to the start date of any or your work periods in the past. Snap Schedule will use it as a reference to determine the correct start and end dates of any work period in the future for the purpose of accumulating employee period work hours in overtime calculations. For example, if your work period is Two Weeks starting on a Monday, Snap Schedule will need to know if the current work period starts on the Monday of this week or the Monday of last week. This field provides that information.

Up to three rules (for three overtime thresholds) are provided. You can enable each rule by checking the appropriate checkbox, then specify the values to be used. For example, if your work period is One Week and you pay one and one-half times the employee's regular rate of pay for hours worked beyond 40 hours per week and double the employee's regular rate of pay for hours worked beyond 60 hours per week, you will set the Work Period Overtime Rules as follows:

- Work period duration: One Week
- After 40 work hours in a period, pay rate is 1.5 times employee's regular hourly rate.
- After 48 work hours in a period, pay rate is 2 times employee's regular hourly rate.

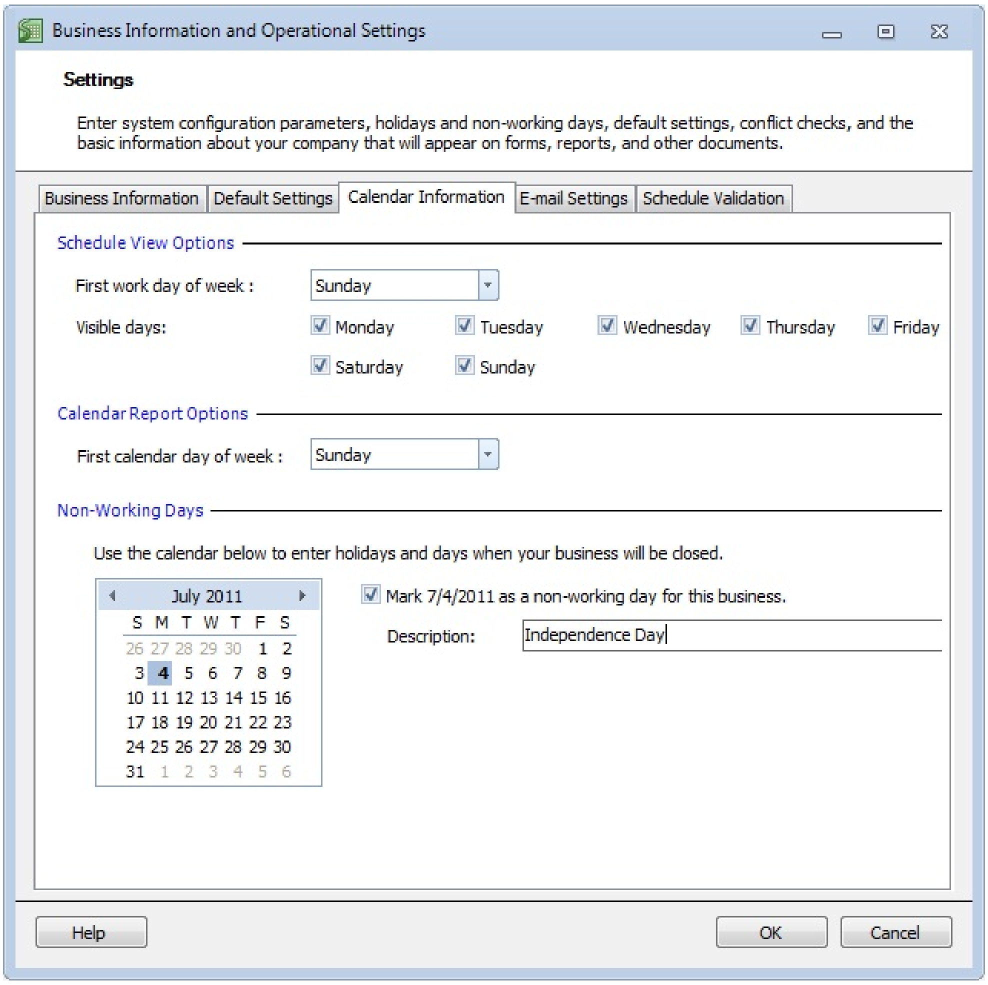
Note that Daily Overtime Rules are evaluated before Work Period Overtime Rules and daily overtime hours will not be counted again in the work period overtime calculations.

Shift Assignment Settings

- **Minimum rest between shifts:** If your operations require a minimum rest period between consecutive shifts performed by the same employee, enter it here then check the box "Not enough rest time between employee's consecutive shift assignments" in the [Schedule Validation tab](). **Snap Schedule** will check for this condition and alert you when there is a conflict.

Calendar Information Tab

This tab is used to set non-working days (business closures, observed holidays, etc.) for your business. When you schedule an employee on a non-working day, a warning flag will be displayed. On the Daily, Shift, or Calendar view, non-working days are shown with a cross-hatched  watermark.



Schedule View Options Section

- **First work day of week:** Select the day of the week that you want to be the start of your work week. On the Daily view, you will see a start of the week vertical line on the day you've selected.
- **Visible days:** Check the boxes corresponding to the days that you want to show on the Daily view. If your business is closed on certain days of the week, you may want to use these check boxes to configure the Daily view so that only working days are displayed.

Calendar Report Options

Use the control in this section to specify the first day of the week on the Calendar view and calendar reports: By default, the first calendar day of the week is Sunday but you can set it to be any day of the week. The Calendar view, the Assignment Calendar reports, and the Employee Calendar reports will show each week starting from the day of the week that you selected.

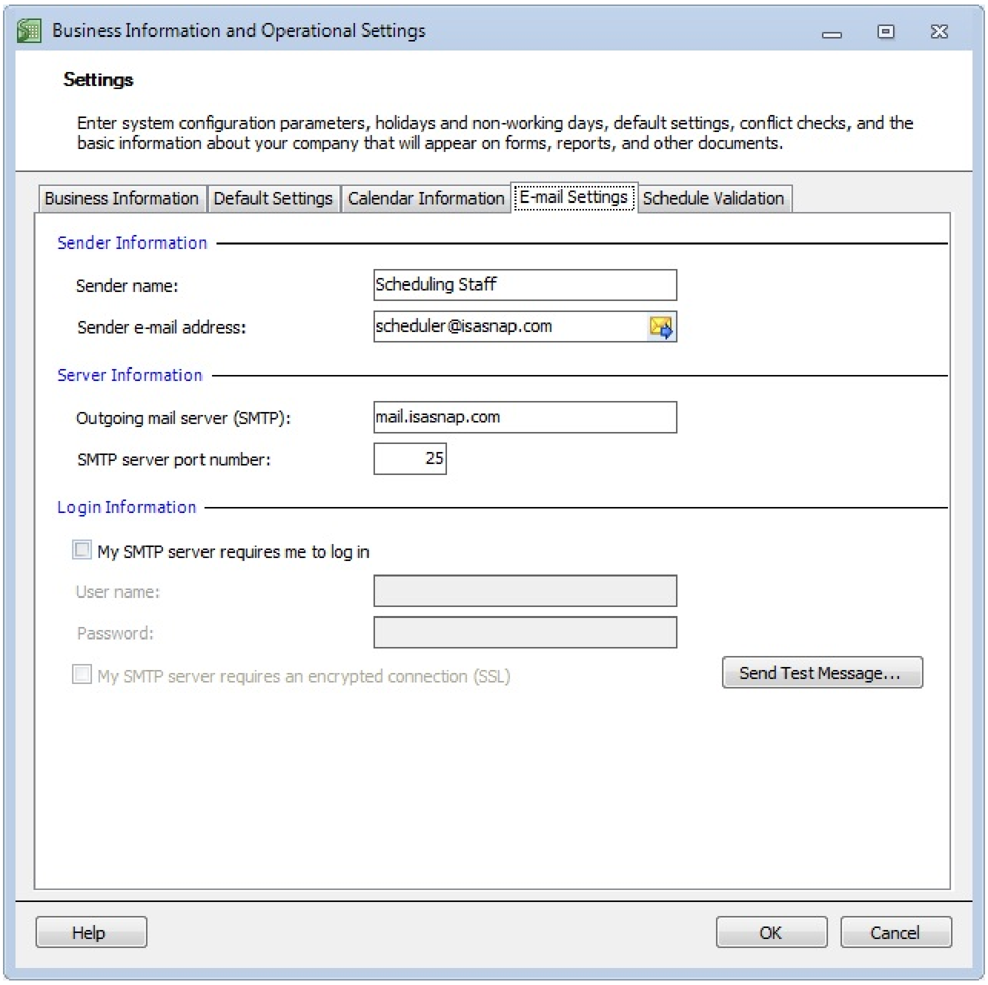
- **First calendar day of week:** Select the day of the week that you want to be the first day of the week on the Calendar view and calendar reports:

Non-Working Days Section

Use the controls in this section to enter non-working days. First, move the calendar to the month of the non-working day then click the desired date to select. Click the check box to mark the date as a non-working day and enter a brief description. Repeat the steps to enter additional days. Note that the date for a non-working day is shown on the calendar in bold lettering.

E-mail Settings Tab

If you plan to use **Snap Schedule** to e-mail schedules to your employees, you will need to configure e-mail delivery using this tab and have access to the Internet when using this feature. **Snap Schedule** uses the Simple Mail Transfer Protocol (SMTP) to send e-mail messages via the Internet to an SMTP server for delivery. It requires the name or the IP address of an SMTP server as part of its configuration. The SMTP mail server that you specify in this tab is the one that delivers the e-mail messages to the recipients. The SMTP server information is normally provided to you by your Internet Service Provider (ISP) or your network administrator.



Sender Information Section

- **Sender name:** The name that you would like to use as the sender of e-mail messages.
- **Sender e-mail address:** The e-mail address that you would like to use when sending out e-mail messages. This address will appear as the From address in the recipient's e-mail message.

Server Information Section

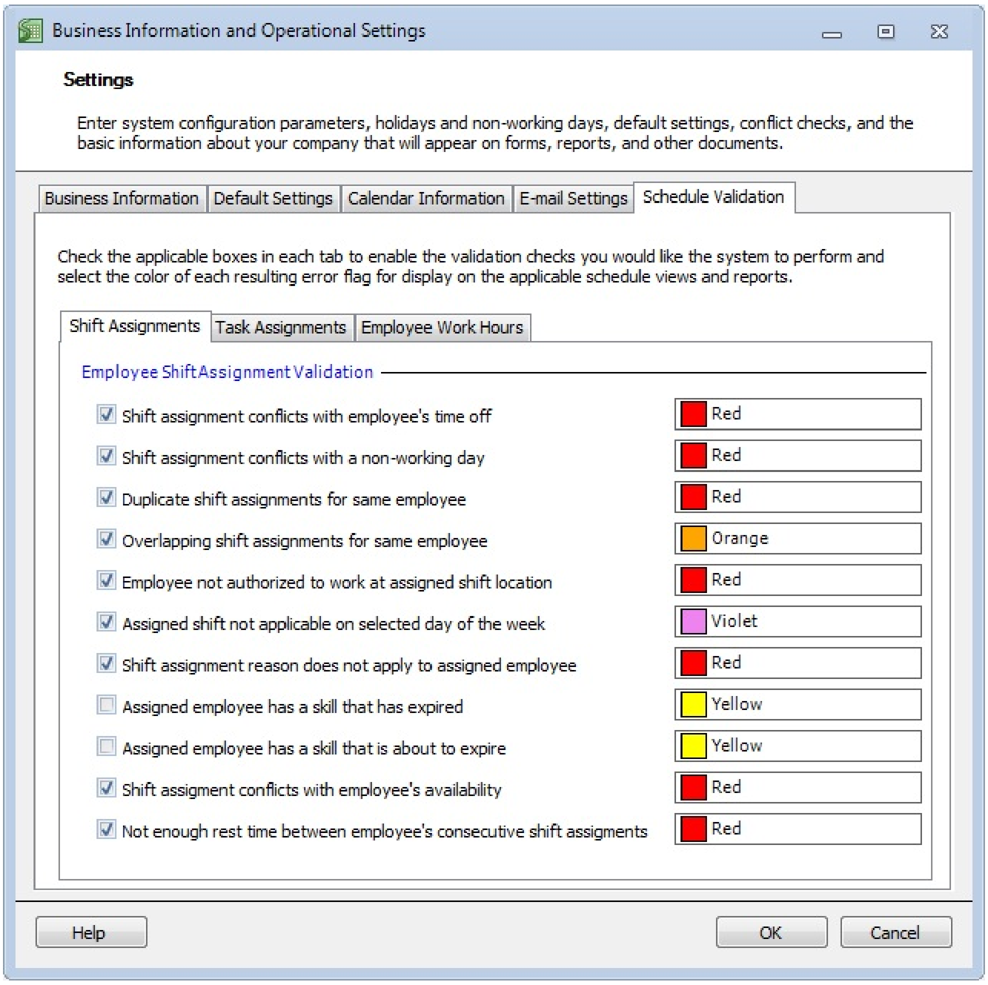
- **Outgoing mail server (SMTP):** The complete name of the server provided by your ISP or mail administrator. Usually, this is smtp. followed by your domain name. For example, smtp.mydomain.com.
- SMTP server port number: The port number used to communicate with the SMTP mail server. The default is port 25. Make sure your firewall is not blocking the specified port number.

Login Information Section

- **My SMTP server requires me to log in:** Check this box if your SMTP mail server requires log in and enter your user name and password. This is almost always required if your ISP allows you to send e-mail messages through your ISP e-mail account. Just as you must use a password to access your e-mail messages, this option requires that you provide a user name and a password to send e-mail messages through the SMTP server. Usually, these are the same user name and password used for getting your e-mails; however, they can be different.
- **My SMTP server requires an encrypted connection (SSL):** Check this box if your SMTP mail server requires a secure (enrypted) connection.
- **Send Test Messages:** Once you have entered all information, click this button to send a test message to the e-mail address specified in **Sender e-maill address**. You should run this test and verify that the test message is successfully sent.

Schedule Validation Tab

Use this tab to specify the validation checks you would like **Snap Schedule** to perform. When a conflict check detects an exception, **Snap Schedule** will display a small flag, e.g. at the lower right corner of the assignment cell in the color specified for the conflict check. You can also run the Daily Assignment Validation report to obtain the results of these conflict checks, organized by date for a specific date range.



Validation checks are grouped under three tabs as described below. Check the applicable boxes in each tab to enable the validation checks you would like the system to perform and select the color of each resulting error flag for display on the applicable schedule views and reports.

- **Shift Assignments:** These checks are performed to determine if an employee shift assignment conflicts with other shift assignments, time off, employee availability, or your business' work schedules.

Validation Check	Description
Shift assignment conflicts with employee's time off	This condition is flagged when a shift assignment conflicts with a time off assignment for the same employee or if there is any overlap between the shift assignment and any of the employee's time off assignments on the same day.
Shift assignment conflicts with a non-working day	This condition is flagged when a shift assignment was made on a day designated as a non-working day for your business.
Duplicate shift assignments for same employee	This condition is flagged when the same shift is assigned to the same employee more than once on the same day.
Overlapping shift assignments for same employee	This condition is flagged when a shift is assigned to an employee who already has another shift assignment that overlaps.
Employee not authorized to work at assigned shift location	This condition is flagged when a shift is assigned to an employee but the employee is not authorized to work at the shift's location. An employee's authorized work locations can be defined using the Employee Form.
Assigned shift not applicable on selected day of the week	This condition is flagged if a shift assignment is made on a day when the shift is not applicable. For example, if a shift is defined in the Shift Form as not applicable on Monday and an assignment for that shift was made on a Monday, this condition will be flagged.

Shift assignment reason does not apply to assigned employee	This condition is flagged when a shift assignment reason is used in a shift assignment but the reason cannot be found on the list of applicable shift assignment reasons defined for the employee.
Assigned employee has a skill that has expired	This condition is flagged when the employee has a skill that has expired. You can set the skill expiration dates in the Skills tab of the Employee Form.
Assigned employee has a skill that is about to expired	This condition is flagged when the employee has a skill that is approaching the expiration date. You can set the skill expiration dates in the Skills tab of the Employee Form and the number of days prior to expiration to issue a warning when you define the skill record.
Shift assignment conflicts with employee's availability	This condition is flagged when a shift is assigned to an employee when the employee is not available for work. Employee availability schedules can be defined using the Employee Form. An employee may not be available to work for the entire day or for multiple periods during the day.
Not enough rest time between employee's consecutive shift assignments	This condition is flagged when there is not enough rest time for an employee between consecutive shifts. You can specify the minimum rest hours required between shifts in the Default Setting tab.

- **Task Assignments:** These checks are performed to determine if an employee task assignment conflicts with other task assignments, conflicts with the shift start/end times,or if the employee is not authorized to perform the task.

Validation Check	Description
Task assignment is outside of allowed time window	This condition is flagged when a task assignment start time or end time is outside of the time window defined by the earliest time the task can start and the latest time the task can end.
Task assignment starts before shift's start time	This condition is flagged when a task assignment start time is earlier than the start time of the shift assignment where the task is scheduled.
Task assignment ends before shift's start time	This condition is flagged when a task assignment end time is later than the end time of the shift assignment where the task is scheduled.
Duplicate task assignment for same employee	This condition is flagged when the employee has already been scheduled the same task for the shift assignment.
Overlapping task assignment for same employee	This condition is flagged when tasks scheduled for the employee under the same shift assignment overlap.
Employee not authorized to perform assigned task	This condition is flagged when the employee is assigned a task that he/she is not authorized to perform.

- **Employee Work Hours:** These checks are performed based on the constraints you defined for your employees' work hours such as limits on the number of hours an employee can work daily or per work period. These constraints can be defined for each employee using the Employee Form. The overtime settings for your business can be defined using the Business Information form.

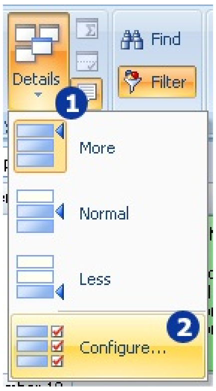
Validation Check	Description
Employee daily work hours exceed maximum limit	This condition is flagged when a shift assignment results in the total work hours, including overtime, for an employee to exceed the maximum work hours per day limit you set for that employee.
Employee daily work hours are below the minimum limit	This condition is flagged when the total work hours computed from all the shifts assigned to an employee in a day fall below the minimum work hours per day for that employee. This check is useful when you want to make sure an employee receives the minimum required work hours in a day either per contract or through an agreement you had with the employee. This check is performed only when there is at least one shift assigned to the employee in a day.

Employee period work hours exceed maximum limit	This condition is flagged when a shift assignment results in the cumulative total work hours, including overtime, for an employee to exceed the maximum work hours per work period limit you set for that employee.
Employee period work hours are below the minimum limit	This condition is flagged when the total work hours computed from all the shifts assigned to an employee in a work period fall below the minimum work hours per work period limit you set for the employee. This check is only performed on the last day of the work period when at least one shift was assigned to the employee during the work period.
Employee daily overtime hours exceed maximum limit	This condition is flagged when a shift assignment results in the total daily overtime hours for an employee to exceed the maximum overtime hours per day limit you set for that employee. For example, if an employee is allowed to work a maximum of 2 overtime hours a day and a shift assignment causes the computed overtime hours for that employee to exceed 2 hours, this condition will be flagged.
Employee period overtime hours exceed maximum limit	This condition is flagged when the cumulative overtime hours for an employee exceeds the maximum overtime work hours per work period limit you set for that employee. **Snap Schedule** tracks cumulative period overtime hours for each employee based on the employee's shift assignments starting from the first day of the work period you defined for your business.
Employee consecutive work days exceed maximum limit	This condition is flagged when the number of consecutive work days for an employee exceeds the maximum consecutive work days you set for that employee. A work day is a day when the employee is assigned at least one work shift.

Configure Schedule Details

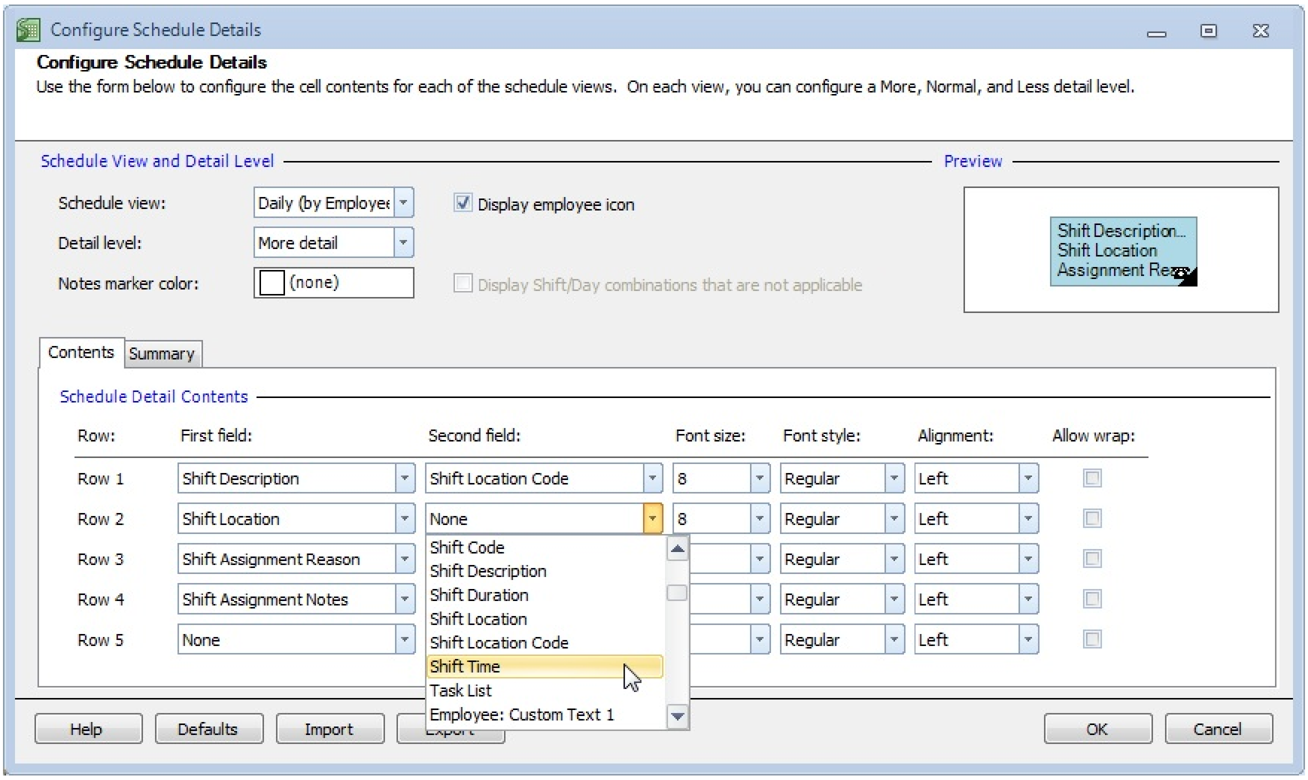
You can control what information to be shown on assignment blocks in the Daily, Shift, Task, and Calendar views and the summary rows and columns in the Daily view using the **Configure** command in the Details drop-down menu. There are three levels of details that you can program in each schedule view: More, Normal, and Less. The settings you configure are specific to the current schedule file. Once configured, you can export the settings to a file for importing into other schedule files.

To configure or change the schedule details:



1. On the Ribbon, click the Details button to show the drop down menu.

2. Select the Configure command on the drop-down menu. The Configure Schedule Details form will be shown. On this form, use the Schedule view drop-down list to select the schedule view, then use the Detail level drop-down list to select which level to configure.



Schedule View and Detail Level Section

- **Schedule view:** Use the drop-down list to select which of the four views you want to configure. By default, the current schedule view is selected.
- **Detail level:** Use the drop-down list to select which of the three levels of details you want to configure. By default, the current detail level is selected.
- **Notes marker color:** Use this control to specify the color of the notes marker displayed on the selected schedule view for shift assignments with notes.

Preview Section

This section shows a sample of how the assignment block will be displayed on the selected schedule view using the selected level of details. Note that the size of the assignment block will vary depending on the size of the schedule view display window.

Contents Tab

- **Row:** Indicate the row order from top to bottom. Depending on the selected view and detail level, up to 5 row of display data may be visible. Each row may contain up to two programmable data fields.

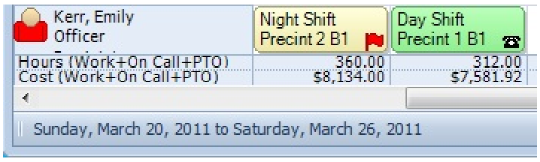
- **First field:** Use the drop-down list to select the first data field to be used. The data field entries shown on the drop-down list will vary depending on the selected schedule view.
- **Second field:** Use the drop-down list to select the second data field to be used. The data field entries shown on the drop-down list will vary depending on the selected schedule view.
- **Font size:** Use the drop-down list to select the font size for the displayed data.
- **Font style:** Use the drop-down list to select the font style.
- **Alignment:** Use the drop-down list to select how the entire row of text will be aligned.
- **Allow wrap:** Check the box if you would like to wrap the text instead of truncating when it does not fit within the line.

Summary Tab

The controls in this section are enabled only when the selected schedule view is Daily View by Employee. Use these controls to enable/disable the display of data in summary rows and columns while in the Daily View by Employee.

- **Display total hour information in summary rows and columns:** When checked, **Snap Schedule** will show a summary row at the bottom and a summary column at the right side of the schedule view. The value in each cell in the summary row is the vertical sum of hours for each day that may include work hours, on-call hours, and paid time off hours depending on the boxes you checked under the **Include the following components in the summary calculations** section. Likewise, the value in each cell in the summary column is the horizontal sum of hours over the display range for each employee.
- **Display total cost information in summary rows and columns:** When checked, **Snap Schedule** will show a summary row at the bottom and a summary column at the right side of the schedule view. The value in each cell in the summary row is the vertical sum of labor costs for each day that may include costs for work hours, on-call hours, and paid time off hours depending on the boxes you checked under the **Include the following components in the summary calculations** section. Likewise, the value in each cell in the summary column is the horizontal sum of labor costs over the display range for each employee.
- **Include the following components in the summary calculations:** Check the appropriate boxes to affect what to be included in the summary calculations.
  - **Work hours (both regular and overtime):** When checked, the total value computations will include both regular and overtime work hours in shift assignments.
  - **On call hours:** When checked, the total value computations will include on-call hours in on call shift assignments.
  - **Paid time off hours:** When checked, the total value computations will include hours from paid time off assignments.

The summary row legend will reflect your selection as shown below.

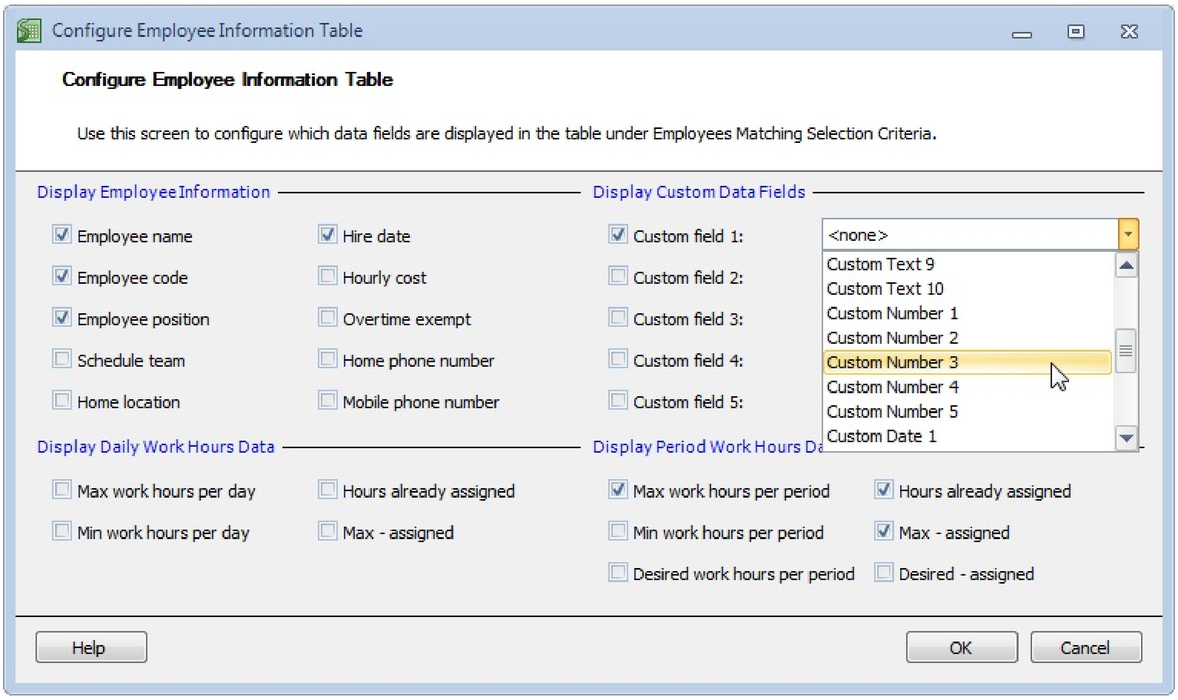


Command Buttons

- **Defaults:** Click this button to restore the configuration to the system default settings.
- **Export:** Click this button to export the settings to a file.
- **Import**: Click this button to import configuration settings from a previously exported file.

Configure Employee Information Table Form

Use this form to configure the data columns shown in the table under the Employees Matching Selection Criteria section, Check on the appropriate box to show the data column. Because the on-screen space is limited, you may want to configure this table to only show pertinent information to help you decide on the best employees to fill a shift. In addition to static data, custom data fields and computed variables are available for selection.



Display Employee Information Section

The data fields in this section are those you entered in the General Tab of the Employee From.

Display Custom Data Fields Section

The data fields in this section are those you entered in the Custom Fields Tab of the Employee From.

Display Daily Work Hours Data Section

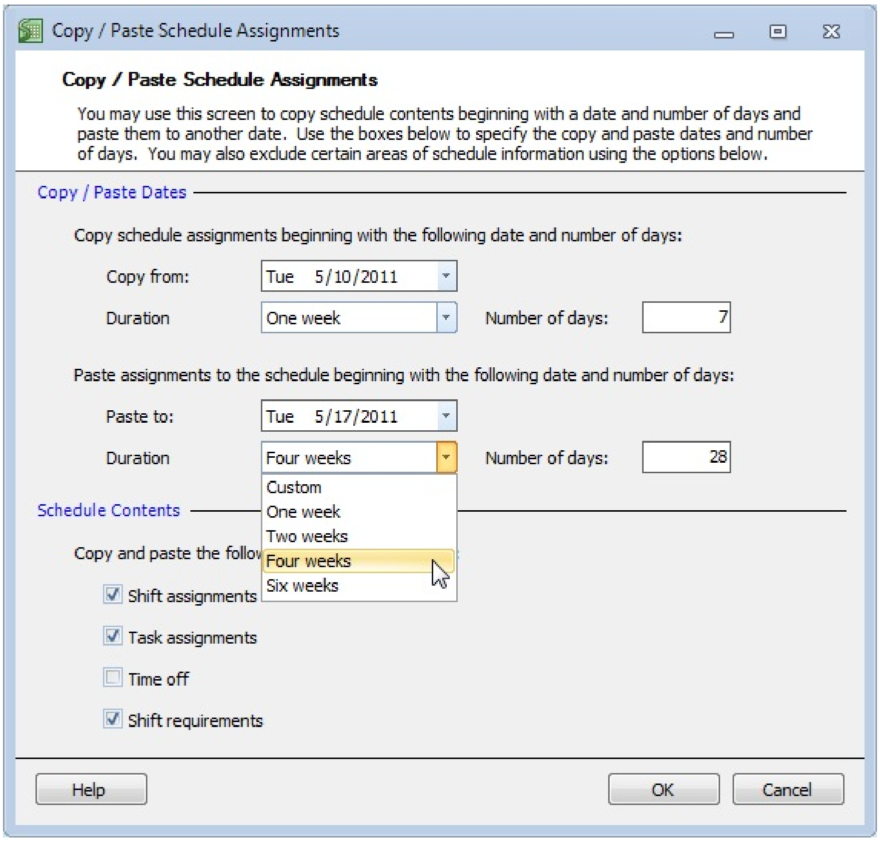
- **Max work hours per day**: The maximum number of hours this employee is allowed to work each day. You entered this value in the Work Schedule tab of the Employee Form.
- **Min work hours per day**: The minimum number of hours this employee must work a day if assigned one or more shifts on that day. You entered this value in the Work Schedule tab of the Employee Form.
- **Hours already assigned:** If you've already scheduled the employee to work on the same day **Snap Schedule** will compute and display the work hours you have assigned.
- **Max - assigned:** The difference between the maximum work hours per day and the number of work hours already assigned.

Display Period Work Hours Data Section

- **Max work hours per period**: The maximum number of hours this employee is allowed to work each work period. The length of your work period (One Week, Two Weeks, One Month, etc.) can be specified using the Business Information and Operational Settings form. You entered this value in the Work Schedule tab of the Employee Form.
- **Min work hours per period**: The minimum number of hours this employee must work during each work period. You entered this value in the Work Schedule tab of the Employee Form.
- **Desired work hours per period**: The number of hours the employee would like to work per work period. You entered this value in the Work Schedule tab of the Employee Form.
- **Hours already assigned:** If you've already scheduled the employee to work in the same work period, **Snap Schedule** will compute and display the work hours you have assigned.
- **Max - assigned:** The difference between the maximum work hours per work period and the number of work hours already assigned for the period.
- **Desired - assigned:** The difference between the desired work hours per work period and the number of work hours already assigned for the period.

Copy / Paste Schedule Assignments

Use this form to copy schedule contents beginning with a date and number of days and paste them to a destination date range. You can selectively copy three types of contents: shift assignments, time off assignments, and shift requirements.



Copy / Paste Dates Section

- **Copy from**: Start date of the schedule period that you want to copy.
- **Duration**: Pre-defined duration periods. Use the drop-down list to select the number of days to copy. Besides the standard 1, 2, 4, and 6 week ranges, you can select **Custom** to specify the exact number of days.
- **Number of days**: Number of days to copy. This field reflects the duration period you selected from the **Duration** drop-down list. You can also enter an exact number of days to copy in this field, in which case the **Duration** drop-down list will be automatically set to Custom.
- **Paste to**: The start date of the calendar period that will receive the copied schedule contents.
- **Duration**: Pre-defined duration periods. Use the drop-down list to select the number of days to paste into. Besides the standard 1, 2, 4, and 6 week ranges, you can select **Custom** to specify the exact number of days. When the paste to duration is longer than the copy from duration, the shifts are repeated to fill up to the number of days. Likewise, when the paste to duration is shorter than the copy from duration, the shifts are truncated to fit the number of days.
- **Number of days**: Number of days to paste into. This field reflects the duration period you selected from the **Duration** drop-down list. You can also enter an exact number of days to copy in this field, in which case the **Duration** drop-down list will be automatically set to Custom.

Schedule Contents Section

Use this section to specify what types of contents to copy from the source to the destination.

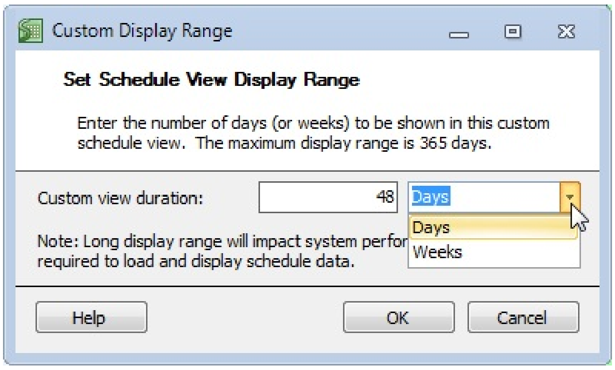
- **Shift assignments**: Check this box to copy shift assignments. If this box is checked, **Snap Schedule** will erase all existing shift assignments in the destination date range before pasting data to it.
- **Task assignments**: Check this box to copy task assignments within each shift . If this box is checked, **Snap Schedule** will erase all existing task assignments in the destination date range before pasting data to it. This box is only enabled if you have checked the **Shift Assignments** box.
- **Time off**: Check this box to copy time off assignments. If this box is checked, **Snap Schedule** will erase all time off assignments in the destination date range before pasting data to it.
- **Shift requirements**: Check this box to copy shift requirements. If this box is checked, **Snap Schedule** will erase all existing shift requirements in the destination date range before pasting data to it.

Custom Display Range

This form is displayed when you click the **Custom** display range  in the Daily or Shift view. Use it to specify the number of days (or weeks) to be shown in the schedule view. Once you have entered a display range, clicking OK will show the schedule view for the selected range.

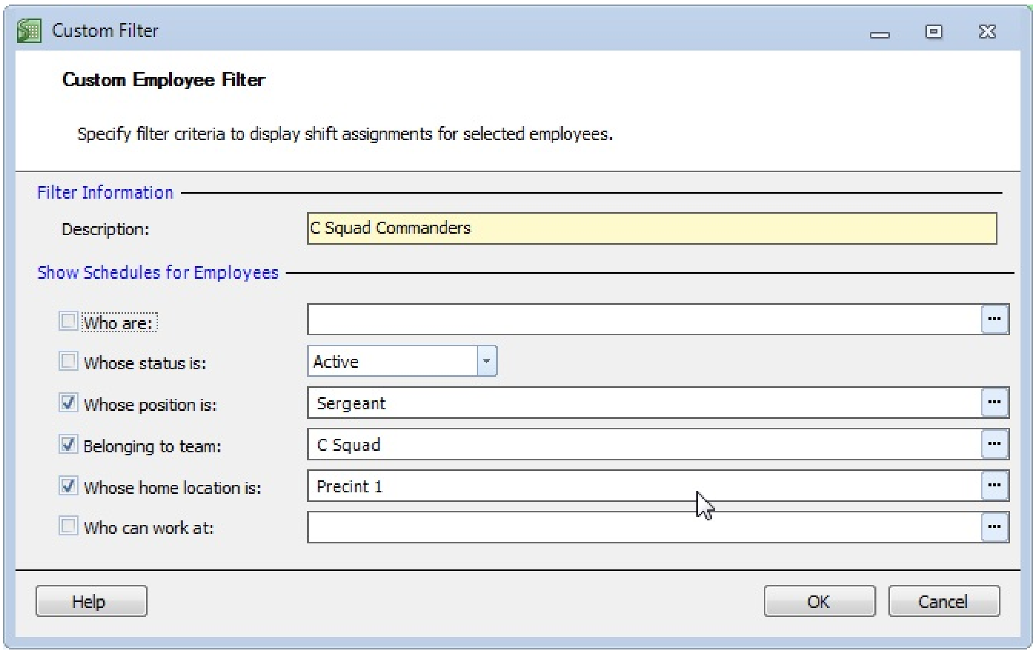
Think of the display range as a moving window over the perpetual scheduling calendar. Each day in the range occupies one column so one or two week ranges may fit entirely on the screen depending on the level of details. A horizontal scroll bar is shown at the bottom of the schedule view when days in the range could not fit in the available space.

Preset display ranges in the Daily view (1, 2, 4, and six weeks) and the Shift view (1 day, 1 week, 2 weeks) are shortcuts to planning periods that are typical for most industries. Use the **Custom** display range when your scheduling period is not one of those preset ranges. Keep in mind that **Snap Schedule** must load and process scheduling data for all days in the display range so the initial response may be slow on long display ranges. You can turn on the schedule view scroll lock  to prevent cursor movements beyond the display range to avoid unnecessary loading of data while scheduling within your scheduling period.



Custom Employee Filter

Use this form to specify filter criteria for displaying employees and their shift / time off assignments in the schedule Daily view. Only employees that meet your filter criteria will be displayed.



Filter Information Section

- **Description:** Enter a unique description for the filter, This description will be shown on the Custom Filter drop-down list in the schedule Daily view so you can quickly select a filter.

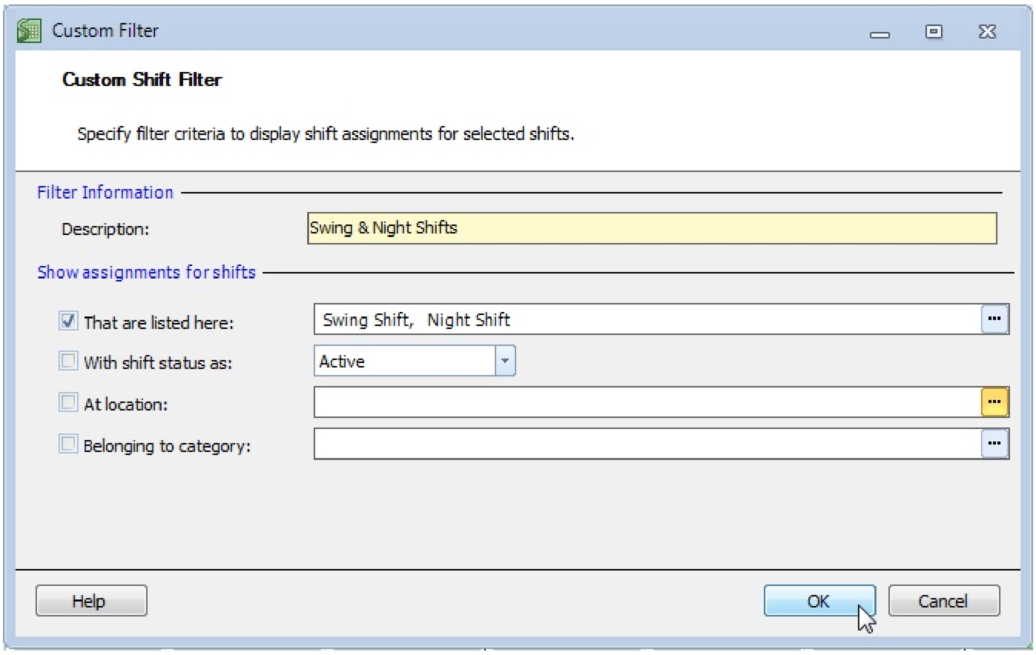
Show Schedules for Employees Section

Use this section to specify the filter criteria. If a filter criterion contains a list of filter items, you can click the  button to bring up the Select Filter Items form for adding or removing list items.

- **Who are**: Check this box to display only employees whose name appears on the list to the right of the checkbox.
- **Whose status is**: Click this box to display only employees whose status is the specified status. You can select the employee status as Active or Inactive using the drop-down list.
- **Whose position is**: Check this box to display only employees whose job position appears on the list to the right of the checkbox.
- **Belonging to team**: Check this box to display only employees whose team appears on the list to the right of the checkbox.
- **Whose home location is**: Check this box to display only employees whose home location appears on the list to the right of the checkbox.
- **Who can work at**: Check this box to display only employees who are authorized to work at any of the listed locations.

Custom Shift Filter

Use this form to specify filter criteria for displaying shift assignments in the Shift schedule view. Only shifts that meet your filter criteria will be displayed.



Filter Information Section

- **Description:** Enter a unique description for the filter. This description will be shown on the Custom Filter drop-down list in the schedule Shift view so you can quickly select a filter.

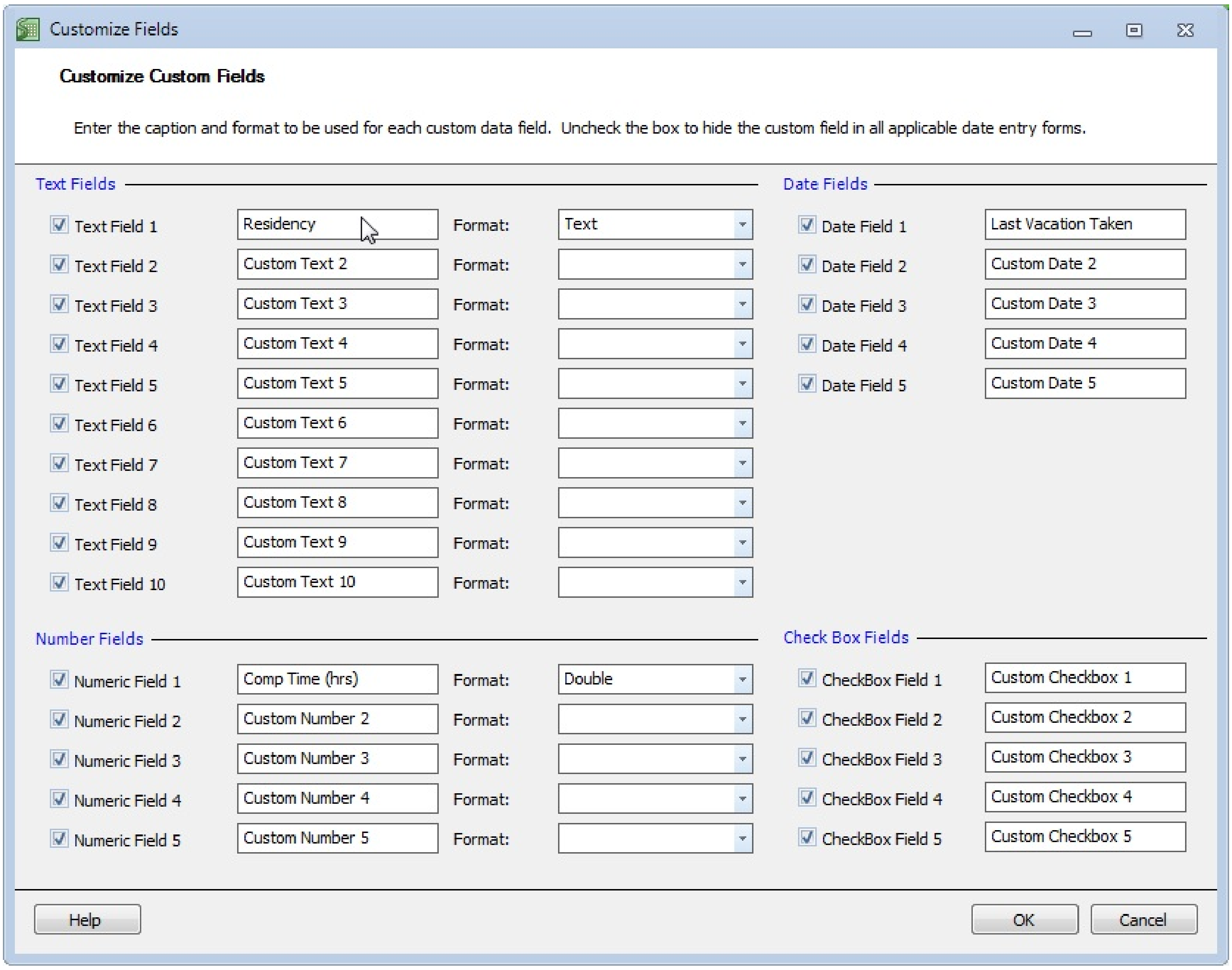
Show Assignments for Shifts Section

Use this section to specify the filter criteria. If a filter criterion contains a list of filter items, you can click the  button to bring up the Select Filter Items form for adding or removing list items.

- **That are listed here**: Check this box to display only shifts whose description appears on the list to the right of the checkbox.
- **With shift status as**: Click this box to display only shifts whose status is the specified status. You can select the shift status as Active or Inactive using the drop-down list.
- **At location**: Check this box to display only shifts whose location appears on the list to the right of the checkbox.
- **Belonging to category**: Check this box to display only shifts whose shift category appears on the list to the right of the checkbox.

Customize Fields Form

Use the **Customize Fields** form to customize text fields, numeric fields, check boxes and date fields to store additional information to fit your business needs. You can define the captions and data formats for the data fields you want to display on the Custom Fields tab of the data entry forms for these records.



Text Fields Section

You can customize up to ten text fields that will be displayed in the Custom Fields tab. To customize a text field:

1. Check the box for the text field you want to display.
2. Enter a caption for the text field. The text field will be referred to by its caption in the Custom Fields tab.
3. Select a display format (E-mail, social security number, phone number, general text, etc.) from the **Format** drop-down list. The format specification allows **Snap Schedule** to display data in your preferred format and helps detect invalid data entries. For example, an error message will be generated if an E-mail address you enter does not include the **@** character.

Date Fields Section

You can customize up to five date fields that will be displayed in the Custom Fields tab. To customize a date field:

1. Check the box for the date field you want to display.
2. Enter a caption for the date field. The date field will be referred to by its caption in the Custom Fields tab.

Number Fields Section

You can customize up to five number fields that will be displayed in the Custom Fields tab. To customize a number field:

1. Check the box for the number field you want to display.
2. Enter a caption for the number field. The field will be referred to by its caption in the Custom Fields tab.
3. Select a display format (double, money, integer, percent) from the **Format** drop-down list. The format specification allows **Snap Schedule** to display data in your preferred format.

Check Box Fields Section

You can customize up to five checkbox fields that will be displayed in the Custom Fields tab. To customize a checkbox field:

1. Check the box for the checkbox field you want to display.
2. Enter a caption for the checkbox field. The checkbox field will be referred to by its caption in the Custom Fields tab.

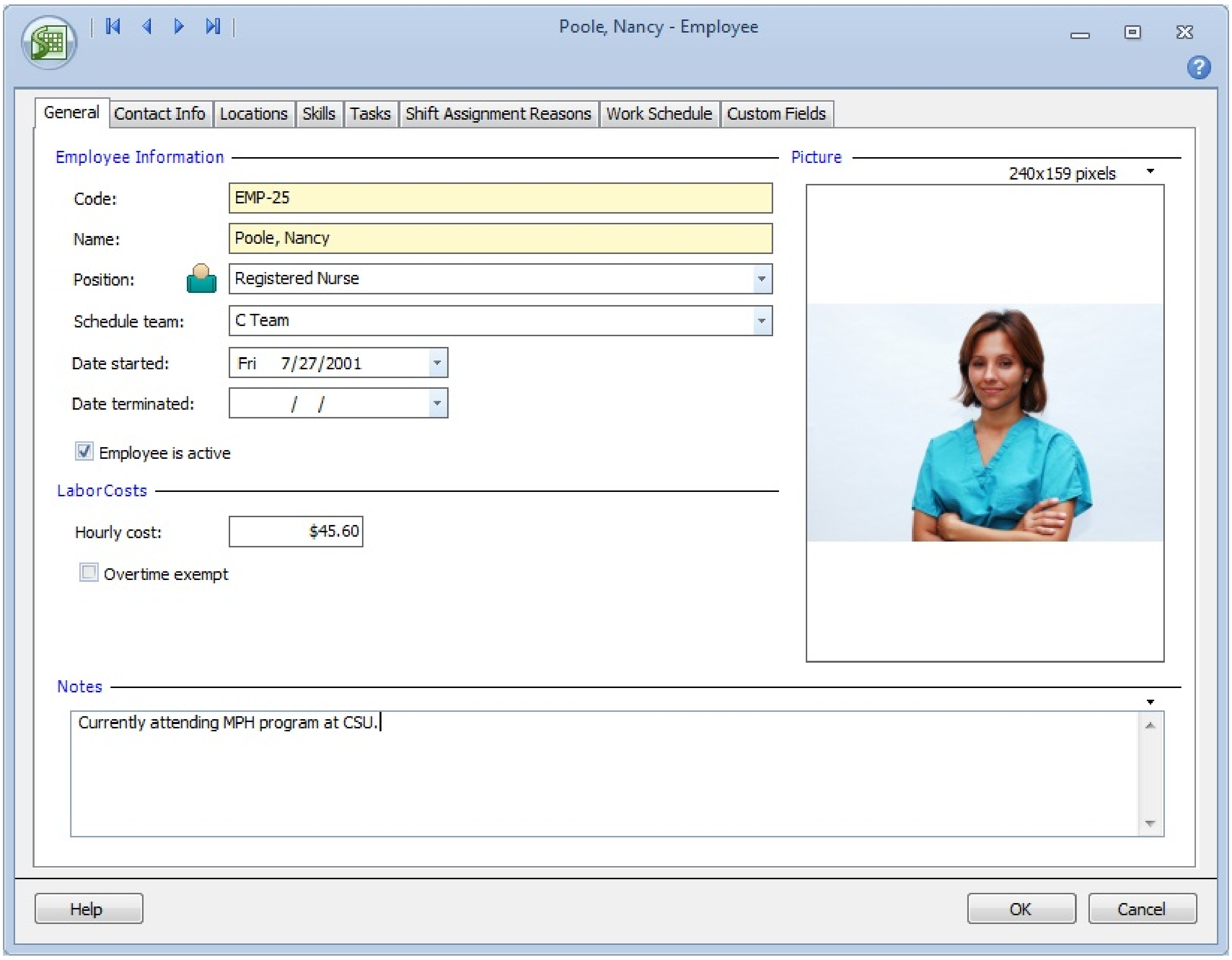
Employee Form

Use the **Employee** form to add a new employee or change an employee's information. The **Employee** form has six tabbed screens, each requiring information to be filled in before the employee can be defined and scheduled. The fields with a yellow colored background are required while those with a white background are optional. The six tabbed screens are:

1. General
2. Contact Info
3. Locations
4. Skills
5. Tasks
6. Shift Assignment Reasons
7. Work Schedule
8. Custom Fields

General Tab

The General tab is used to store general information about each employee in the fields described below.



Employee Information Section

- **Code:** Enter a unique code to identify the employee. This can be a nick name, initials, a number, or an abbreviated code that you can instantly recognize when shown on the schedule cells.
- **Name:** Employee name for scheduling use and display in reports. This name can be different than the first and last names specified in the Contact Info tab. In the United States, the name is usually entered in the form of last name followed by a comma then first name.
- **Position:** The job position assigned to the employee.
- **Schedule team:** If you use teams (employee groups that are all scheduled together by auto-scheduling), use the drop-down list to select a team that the employee belongs to or create a new team.
- **Date started:** The date when the employee was hired.
- **Date terminated:** The date the employee left your employ.

- **Employee is active:** By default, the status is set to active. You can clear this box to set the status to inactive when you release the employee and no longer wish to include the employee in scheduling.

Labor Cost Section

- **Hourly cost:** The employee's hourly wage for use in estimated cost computations.
- **Overtime exempt:** If checked, the employee is exempt from overtime pay. **Snap Schedule** will take this into account when computing estimated costs.

Picture Section

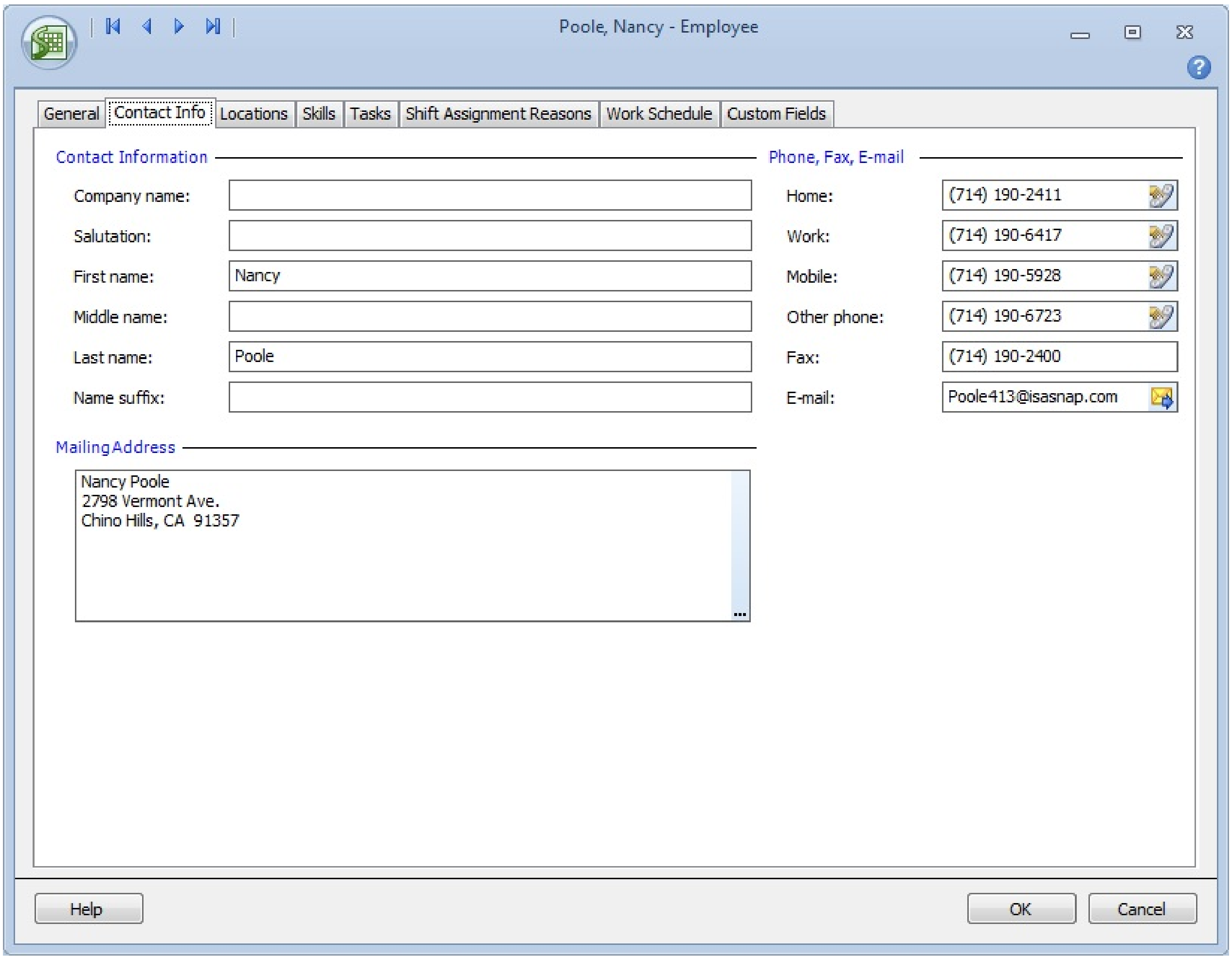
- **Picture:** Use the space provided to display a photo of your employee. To add a photo, click the drop-down icon to access commands to load and manipulate the image. The image file formats supported are GIF, BMP, and JPEG. Note that Snap Schedule automatically reduces the image to 240x160 pixels to conserve storage space before storing it to the database.

Notes Section

- **Notes:** Use this text box to enter free-form notes about the employee. You can use the time stamp feature on the Notes text box to insert the current date or date and time into the text box. This is useful when you want to record time related events like phone call records. To insert a time stamp in the text box, click the icon and select the **Insert date** or **Insert date and time** command as appropriate.

Contact Info Tab

The Contact Info tab is used to store the employee's address and contact information.



Contact Information Section

- **Company name:** The employee's company name if the employee is employed by another business.
- **Salutation** The salutation for the employee (Mr., Mrs., Dr., etc.)
- **First name** The employee's first name.
- **Middle name** The employee's middle name.
- **Last name** The employee's last name.
- **Name suffix** The provider's name suffix, for examples, Jr., Sr., etc.

Mailing Address Section

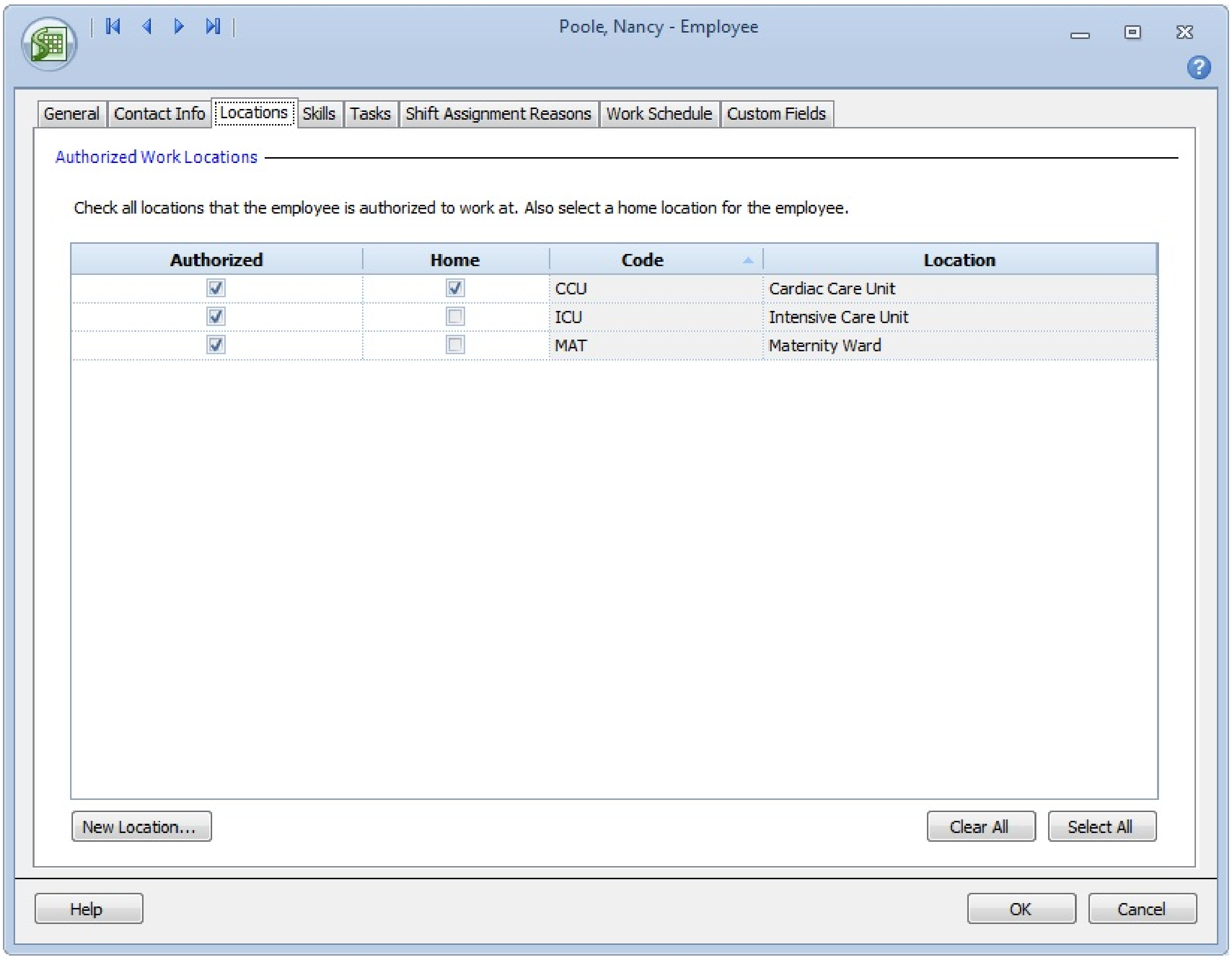
The mailing address for the employee, including the employee's name. By default, as you enter the contact information, the mailing address will be updated automatically to include the employee's name.

Phone, Fax, Email Section

The telephone numbers and e-mail address used to contact the employee. You can enter multiple e-mail addresses in this field using the semicolon (;) separator.

Locations Tab

The Locations tab is used to define the locations where the employee is authorized to work. Location refers to a physical area or facility where employees are scheduled to work like a building, an assembly line, or a patrol route. For each employee, you can specify a home location where the employee is normally scheduled to work and other locations where the employee is authorized to work. **Snap Schedule** will generate a warning when you schedule an employee to work at a place he or she is not allowed to work. When selecting an employee for the shift, you can use location as a criteria to narrow down your list of eligible employees.

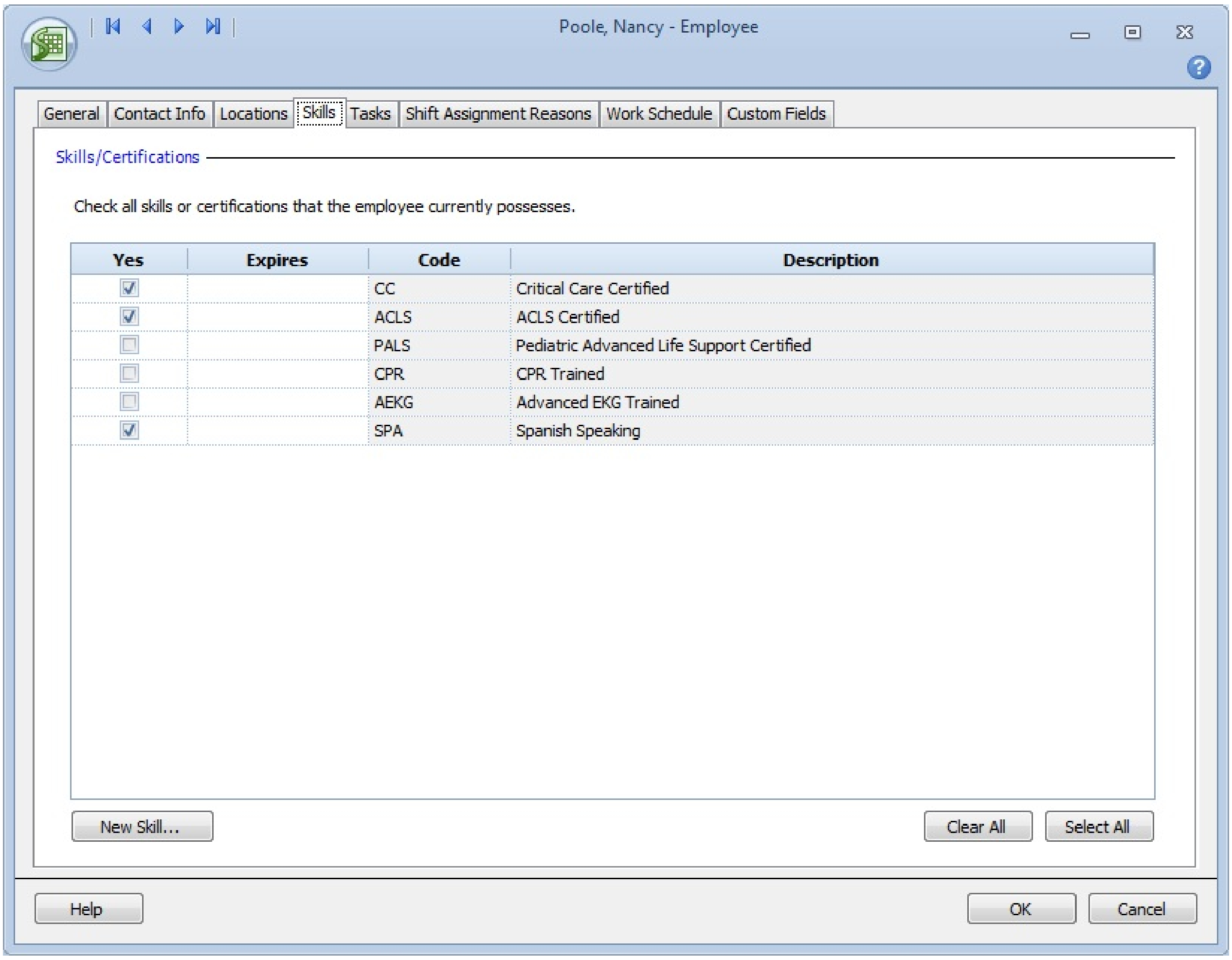


Authorize Work Locations Section

The grid shows all work locations that you have defined. Click **New Location** to add a new location. To select a location as the employee's home location, click the corresponding **Home** check box. The **Authorized** check box will be also be automatically checked.

Skills Tab

The Skills tab is used to define what skills or certifications the employee possesses. You can use the Shift Coverage Planner to define how many people you need by skill and to determine if you have over/under staffed a shift.

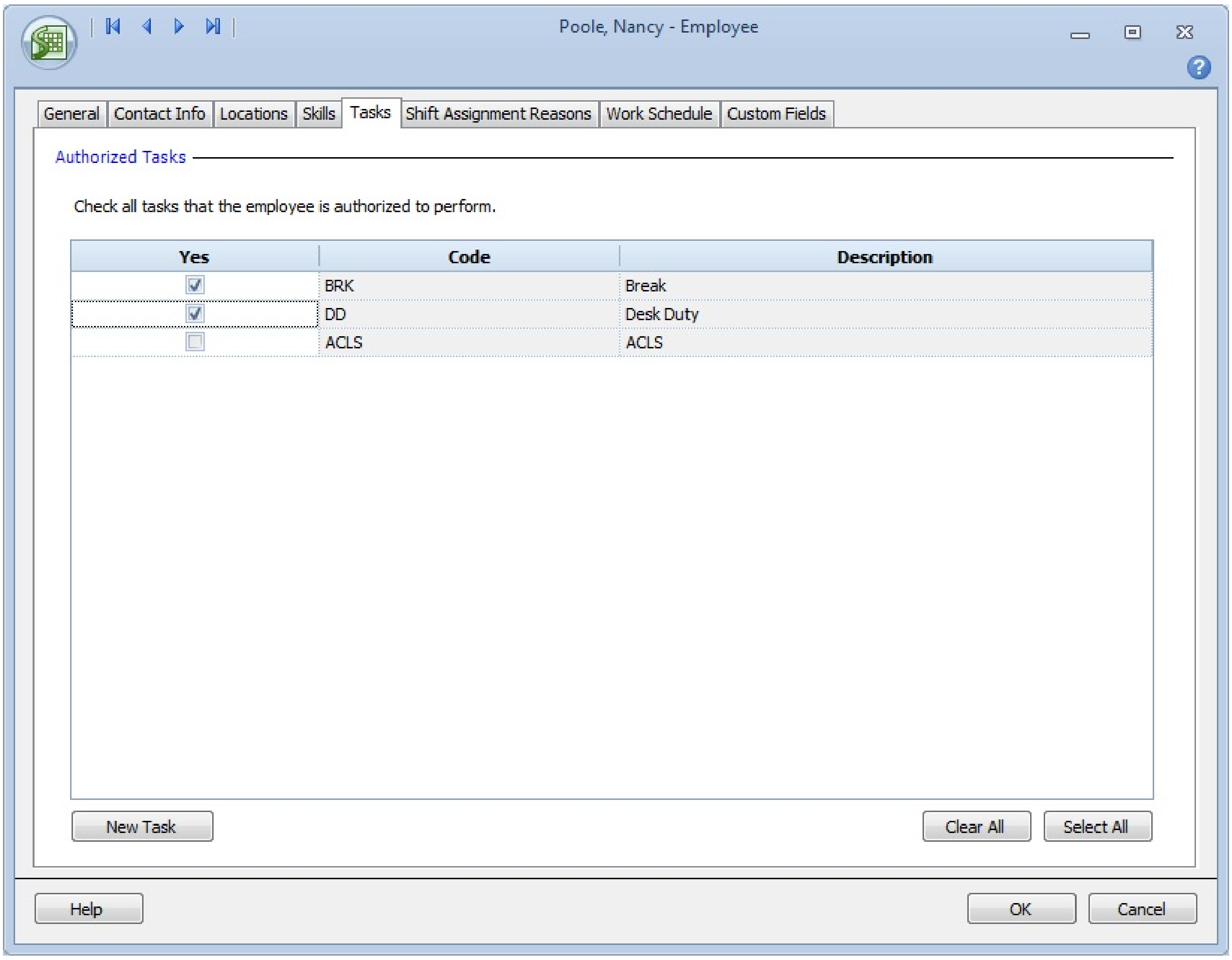


Skills/Certifications Section

The grid shows all skills that you have defined. To assign a skill to the employee, click the corresponding **Yes** check box. Click **New Skill** to add a new skill. When defining a new skill, you have the option to have Snap Schedule display an alert on the Schedule Outlook screen when an employee's skill/certification is within a specified number of days from expiration. If you would like to track expiration dates, enter them in the **Expires** column.

Tasks Tab

The Tasks tab is used to define what tasks the employee is authorized to perform. **Snap Schedule** will generate a warning when you schedule an employee to perform a task that he or she is not allowed to do.

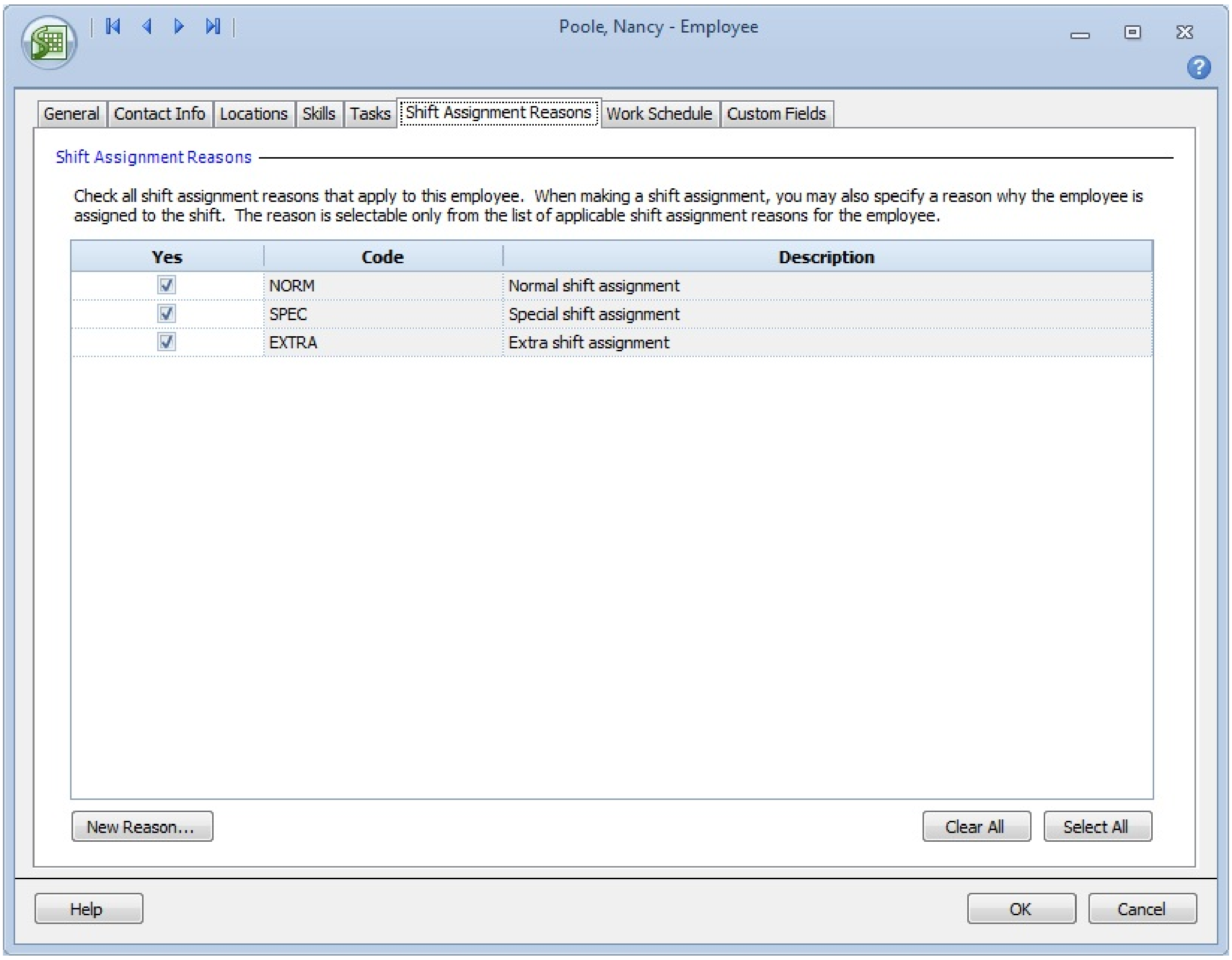


Authorized Tasks Section

The grid shows all tasks that you have defined. To authorize the employee to perform a particular task, click the corresponding **Yes** check box. Click **New Task** to add a new one.

Shift Assignment Reasons Tab

The Shift Assignment Reasons tab allows you to select which shift assignment reasons are applicable to the employee. If a shift assignment reason does not apply to the employee, that shift assignment reason cannot be referenced while making a shift assignment for the employee.

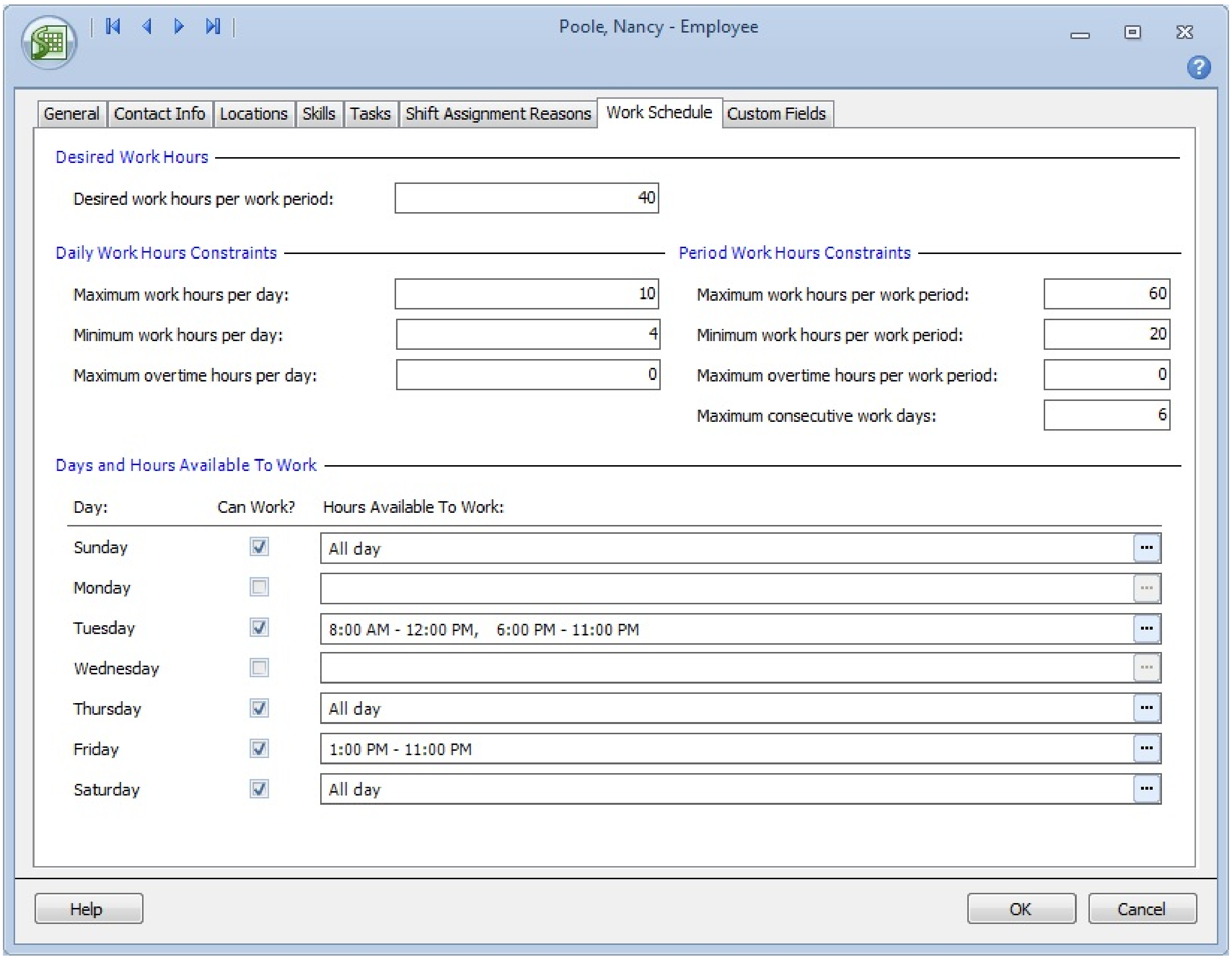


Shift Assignment Reasons Section

Shift Assignment Reasons are used to provide additional details and explanations when making a shift assignment. You can define a list of commonly used reasons and select one from the list when you want to add details to a shift assignment. This way, you save time, and the reasons can be used to group and filter assignments. Only shift assignment reasons applicable to an employee may be selected when making a shift assignment for the employee.

Work Schedule Tab

The Work Schedule tab is used to store the employee's availability information and constraints that will be considered for scheduling. Use this tab to define the employee's desired work hours, days and hours available to work, and working hours restrictions.



Desired Work Hours Section

- **Desired work hours per work period:** The number of hours the employee would like to work per work period. You could use this field to represent the optimum number of hours when making shift assignments. The length of your work period (One Week, Two Weeks, One Month, etc.) can be specified using the Business Information and Operational Settings form.

Daily Work Hours Constraints Section

The entries in this section help control the hours the employee is allowed to work each day. They are used by the validation checks and the Daily Assignment Validation report to determine if a warning should be displayed when you make a shift assignment that violates any of these constraints. When selecting an employee for the shift, you can view and use these constraints to narrow down your list of eligible employees. When an entry in this section is set to zero, **Snap Schedule** will not perform the validation check corresponding to that entry.

Period Work Hours Constraints Section

The entries in this section help control the hours the employee is allowed to work each work period. They are used by the validation checks and the Daily Assignment Validation report to determine if a warning should be displayed when you make a shift assignment that violates any of these constraints. When selecting an employee for the shift, you can view and use these constraints to narrow down your list of eligible employees. When an entry in this section is set to zero, **Snap Schedule** will not perform the validation check corresponding to that entry.

Days and Hours Available To Work Section

Use this section to specify when the employee is available to work. This section is used by **Snap Schedule** to determine if a warning should be shown when you schedule the employee during the time that the employee is not available. For each day that the employee is available, fill in the following fields:

Can Work?: Check the box for the days the employee can be available to work.

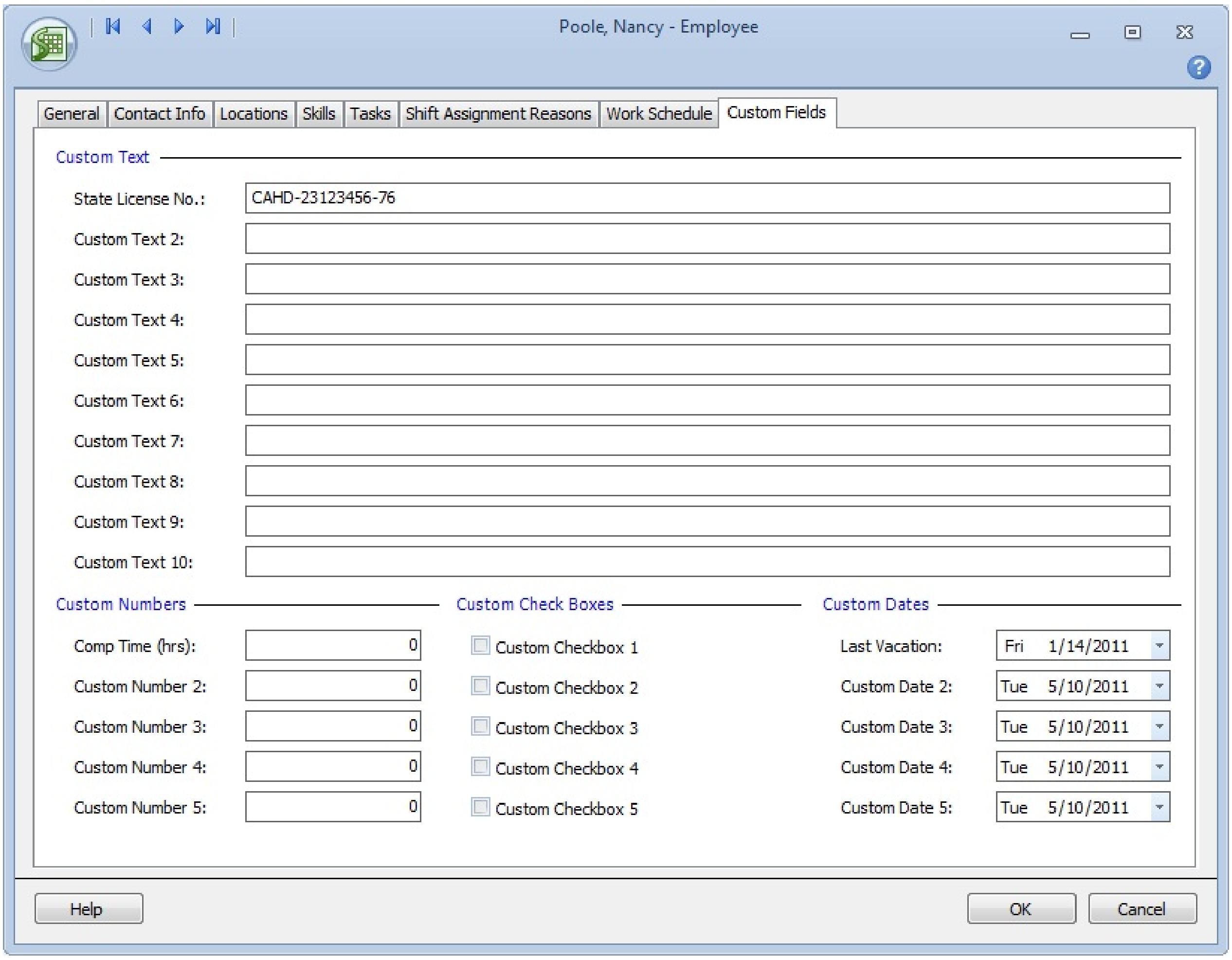
Hours Available To Work: For each day the employee is available to work, click on the  button to bring up the Employee Availability form to enter the available hours. By default, the employee availability is set to all day unless otherwise specified. You can enter multiple time periods in this field.

Custom Field Tab

The Custom Fields tab displays the 25 customizable fields in the employee record. Customizing the form helps you identify and track unique aspects that are important to your particular business.

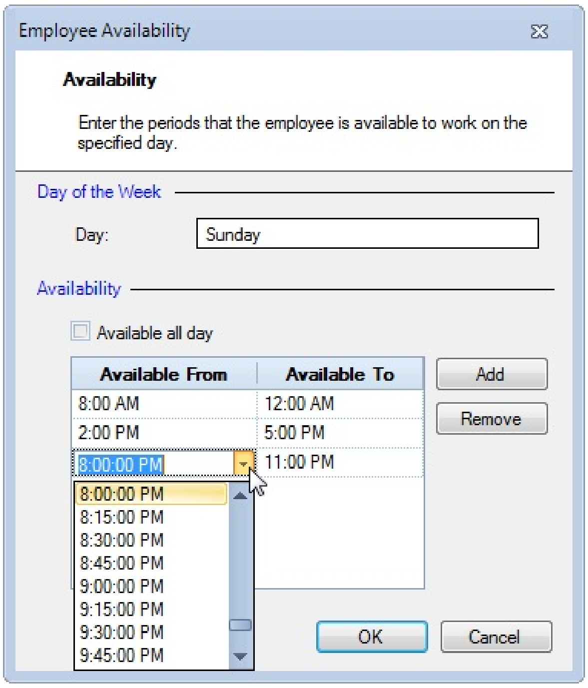
To customize this tab, click the **Menu** button  on this form and select **Customize Fields** to open the Customize Field form. Refer to

Customize Fields Form for more information on how to define custom fields.



Employee Availability Form

Use this form to enter the hours the employee is available to work for the selected day of the week. This form is displayed when you click the  button on the Employee Work Schedule tab.



Day of the Week Section

- **Day**: The day the employee is available to work. You can select this day from the Employee Work Schedule tab.

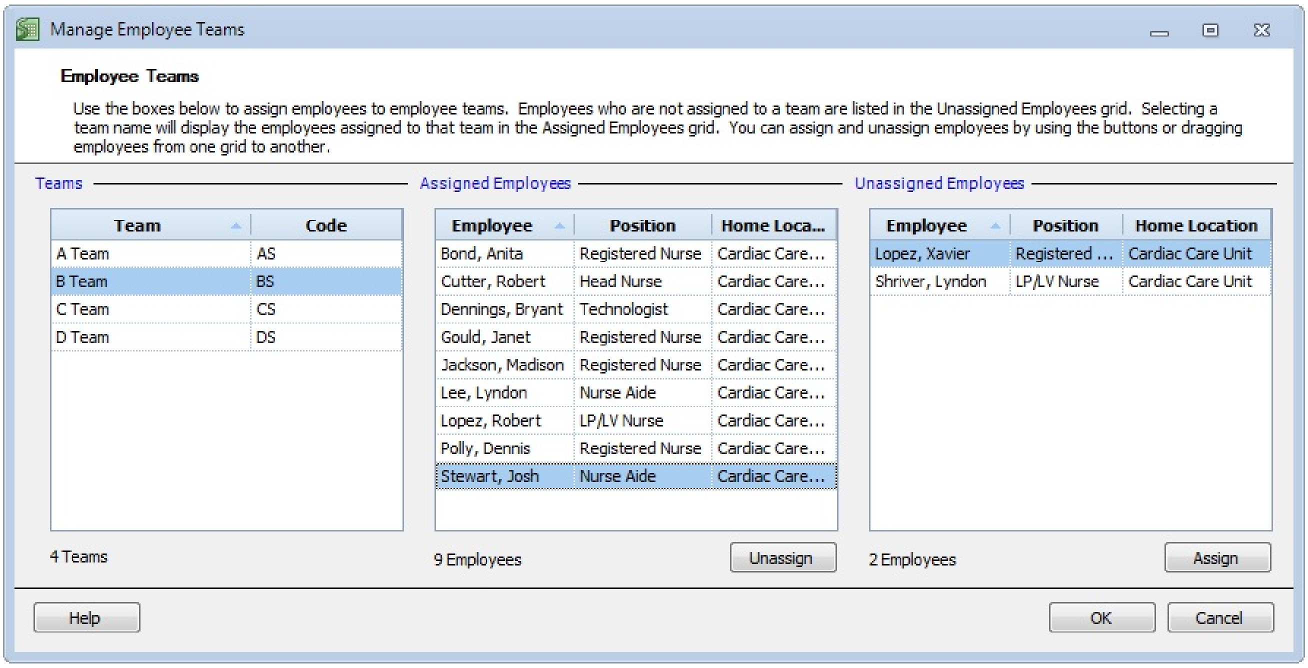
Availability Section

Use the controls in this section to enter the time periods the employee is available to work.

- **Available all day checkbox**: This box is checked by default to indicate the employee is available at any time of the day. Un-check this box to enter the employee's available hours.
- **Available From**: Click this field to enter or change the time the employee will be available from. You can enter the time directly or select one from the time drop-down list.
- **Available To**: Click this field to enter or change the time the employee will be available to.   You can enter the time directly or select one from the time drop-down list.
- **Add**: Click this button to add a new time period. By default, the time period from 8:00 am to 5:00pm is added.
- **Remove:** Click this button to delete the selected time period.

Manage Employee Teams

Use this form to manage assignments of employees to different teams. An employee may belong to only one team, or may not be associated with any team at all. Teams assignments are used to facilitate scheduling of groups of employees; or to filter, sort, and organize employees for display and reporting purposes.



Teams Section

This Section displays a list of teams that you have defined for your business. You cannot add or remove a team directly from this form. Teams can be added or removed only from the Teams list on the Manage tab of the Ribbon.

- **Team**: Description of the team.
- **Code**: Unique code to identify the team.

You can double-click a row on the grid to bring up the Employee Team form for viewing and making changes to the team record.

Assigned Employees Section

As you highlight a new team on the grid of the Teams Section, this Section will be refreshed to show all employees currently assigned to the highlighted team.

- **Employee**: Name of the employee.
- **Position**: Employee's job position.
- **Home Location**: Employee's home position.

To unassign an employee from the team, highlight the employee record and click the **Unassign** button. The highlighted employee will be moved to the Unassigned Employees Section and the employee count for the team will be decremented by one.

Unassigned Employees Section

This Section displays a list of employees that do not have a team assignment.

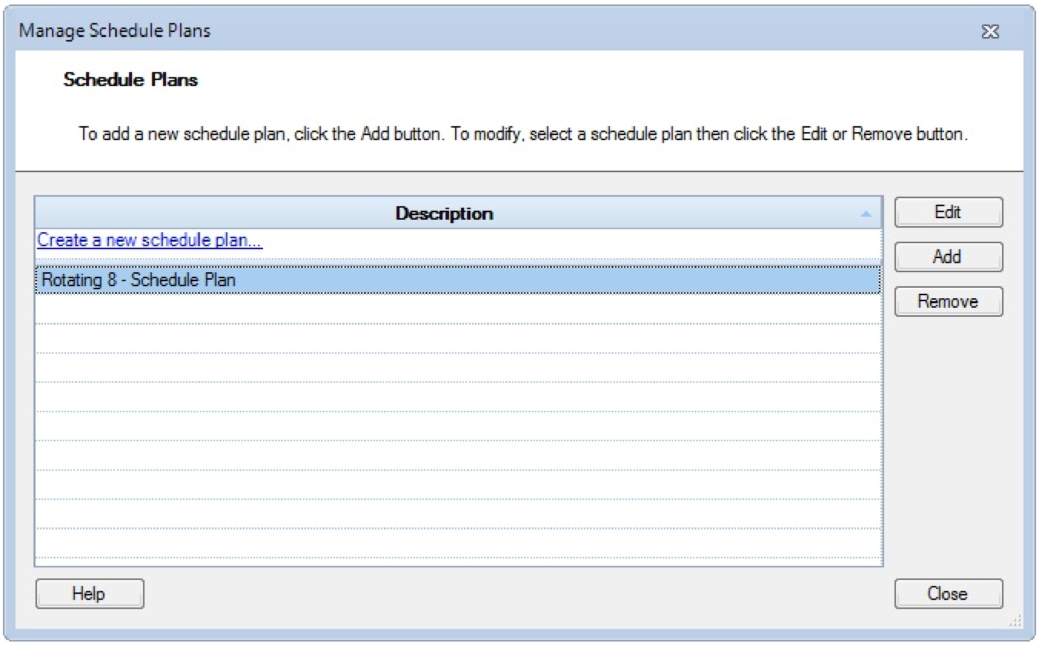
- **Employee**: Name of the employee.
- **Position**: Employee's job position.
- **Home Location**: Employee's home position.

To assign an unassigned employee to a team:

1. Highlight a team in the **Teams** section.
2. Highlight the employee you want to assign to the selected team.
3. Click the **Assign** button. The highlighted employee will be moved from the Unassigned Employees Section to the Assigned Employees Section for the selected team. The employee count for the team will be incremented by one.

Manage Schedule Plans

Use this form to add, edit, or remove schedule plans. The Generate Schedule Wizard uses the information in the schedule plan to generate shift assignments for each team member. You can think of the plan as a blue print from which shift assignments are generated.

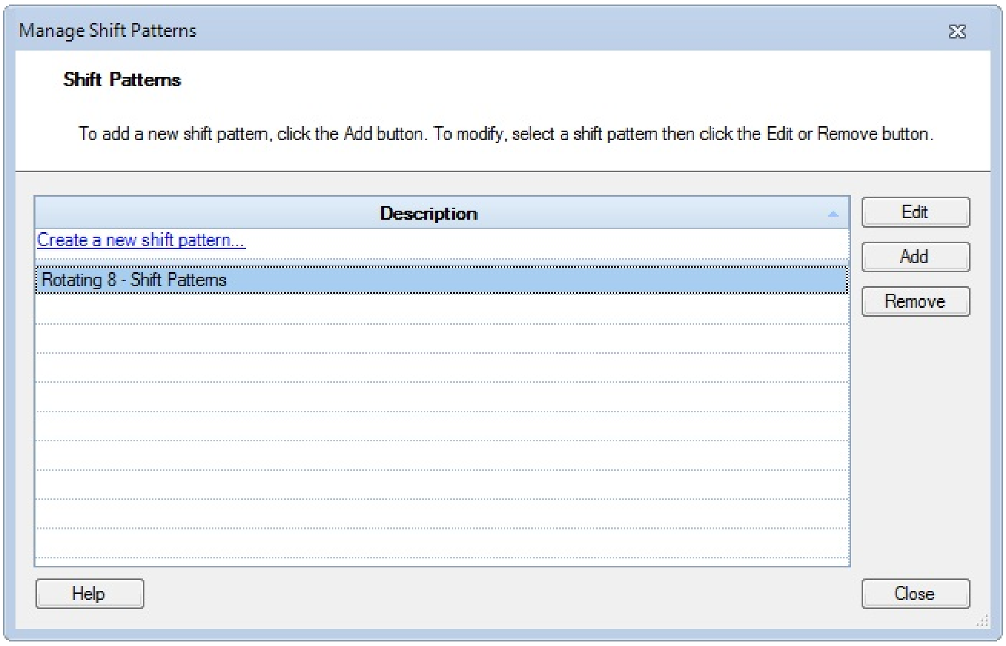


To define and manage schedule plans

1. To add a new schedule plan, click **Add** or **Create a new schedule plan**. The Schedule Plan form will be displayed. Use this form to enter the required information.
2. To edit an existing schedule plan on the list, highlight the desired record then click **Edit** to open the Schedule Plan form. Double-clicking the record will also open the form.
3. To delete an existing schedule plan on the list, highlight the desired record then click **Remove**.

Manage Shift Patterns

Use this form to add, edit, or remove shift pattern tables. A shift pattern table contains one or more shift patterns that specify a sequence of working days and off days over a fixed time period, typically one week. Shift pattern tables are used in schedule plans.

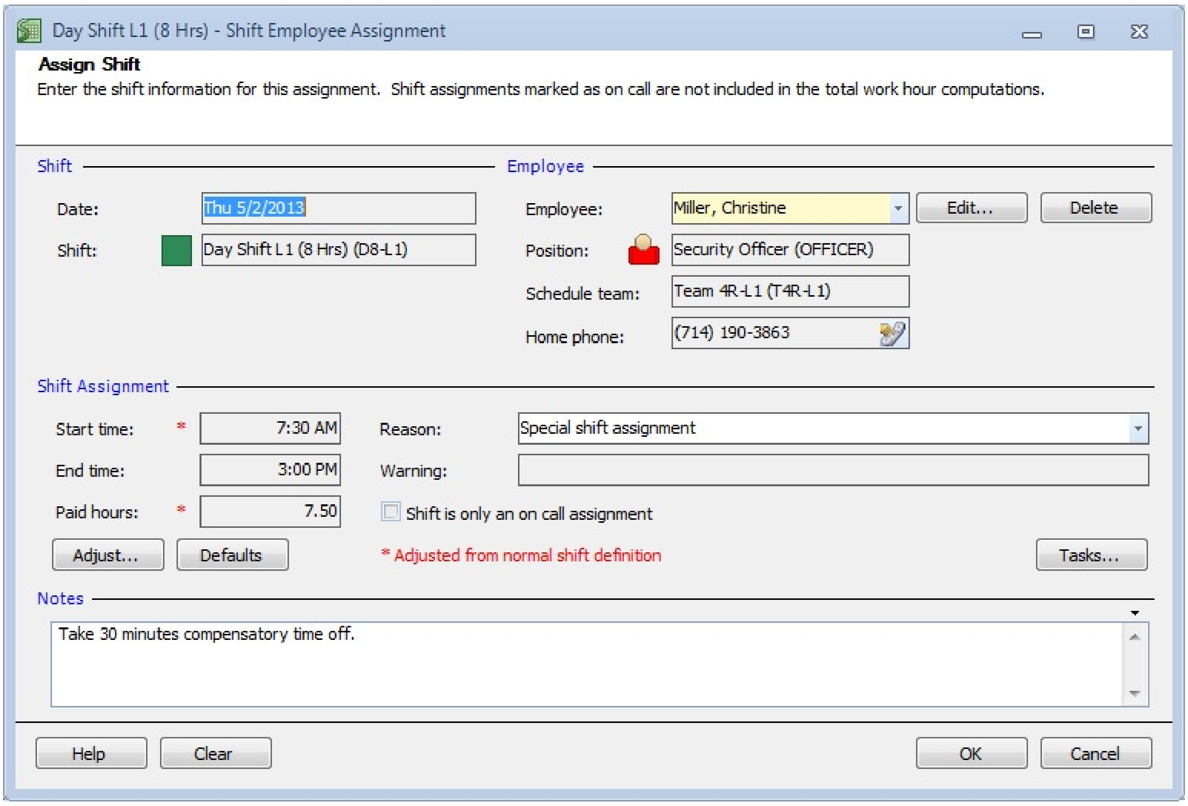


To define and manage shift patterns

1. To add a new shift pattern table, click **Add** or **Create a new shift pattern**. The Shift Pattern Table form will be displayed. Use this form to enter the required information.
2. To edit an existing shift pattern table on the list, highlight the desired record then click **Edit** to open the Shift Pattern Table form. Double-clicking the record will also open the form.
3. To delete an existing shift pattern table on the list, highlight the desired record then click **Remove**.

Shift Employee Assignment Form

Use this form to assign an employee to a selected shift from the Shift schedule view. This form is launched from the Shift schedule view when you double-click a cell to edit its content for a given shift on a given date.



Shift Section

Fields in this section are read-only.

- **Date**: The date this shift is in effect.
- **Shift:** Shift description and shift code. The shift code is shown in parentheses. If you have defined a color to identify the shift, the color will also be shown.

Employee Section

This Section displays information about the employee currently assigned to the shift.

- **Employee**: Name of the assigned employee. You can select another employee from this drop-down list.
- **Edit**: Click this button to bring up the Employee form for viewing or making changes to the currently assigned employee record.
- **Select**: Click this button to bring up the Select an Employee for the Shift form to select an employee from a list of candidate employees for the shift.
- **Position**: Employee's job position and position code. The position code is shown in parentheses.
- **Schedule team**: Employee's team description and team code. The team code is shown in parentheses.
- **Home phone**: Employee's home phone number.

Shift Assignment Section

- **Start time**: The time when this shift assignment starts. When you make a shift assignment, this field is set to the default shift start time. You can change the start time to accommodate any deviation from the default shift start time by clicking the **Adjust** button. When this field is different than the default shift start time, a red asterisk is shown next to the data. To reset the field back to the default shift start time, click the **Defaults** button.
- **End time**: The time when this shift assignment ends. When you make a shift assignment, this field is set to the default shift end time. You can change the end time to accommodate any deviation from the default shift end time by clicking the **Adjust** button. When this field is different than the default shift end time, a red asterisk is shown next to the data. To reset the field back to the default shift end time, click the **Defaults** button.
- **Paid hours**: This field is automatically computed from the start time, end time, and unpaid duration. It is used for labor cost estimate computations. When you make a shift assignment, the start time, end time, and unpaid duration are set to the default values defined for the shift. You can change these values to accommodate any deviation from the shift default values by clicking the **Adjust** button. A red asterisk next to the data indicates adjustments were made to the default values. To reset the field back to the shift default values, click

the **Defaults** button.

- **Adjust**: Click this button to bring up the Adjust Shift Assignment Times form to modify the shift assignment start time, end time, and unpaid duration.
- **Defaults**: Click this button to reset the start time, end time, and unpaid duration to the shift default values.
- **Reason**: Shift assignment reason. From the drop-down list, you can select a shift assignment reason for this employee and this shift, or create a new shift assignment reason. You can leave this field blank unless you want to track and report assignments by reason.
- **Warning**: Any warning on shift assignment conflicts. Refer to the Assignment Conflict Flags section for detailed description of the warning messages and color coded warning flags displayed in this field.
- **Shift is only an on call assignment**: When checked, the assignment is only an on call shift assignment.
- **Tasks**: If you are scheduling tasks for this shift assignment, click this button to bring up the Task Assignments form to add or make changes to task assignments.

Notes Section

- **Notes:** Use this text box to enter notes related to this shift assignment. You can enter up to 256 characters in the Notes field.

Clear Button

- **Clear:** Use this button to delete the shift assignment. Tasks associated with the shift assignment will also be deleted. When you click on this button, **Snap Schedule** will ask you to confirm the deletion before proceeding.

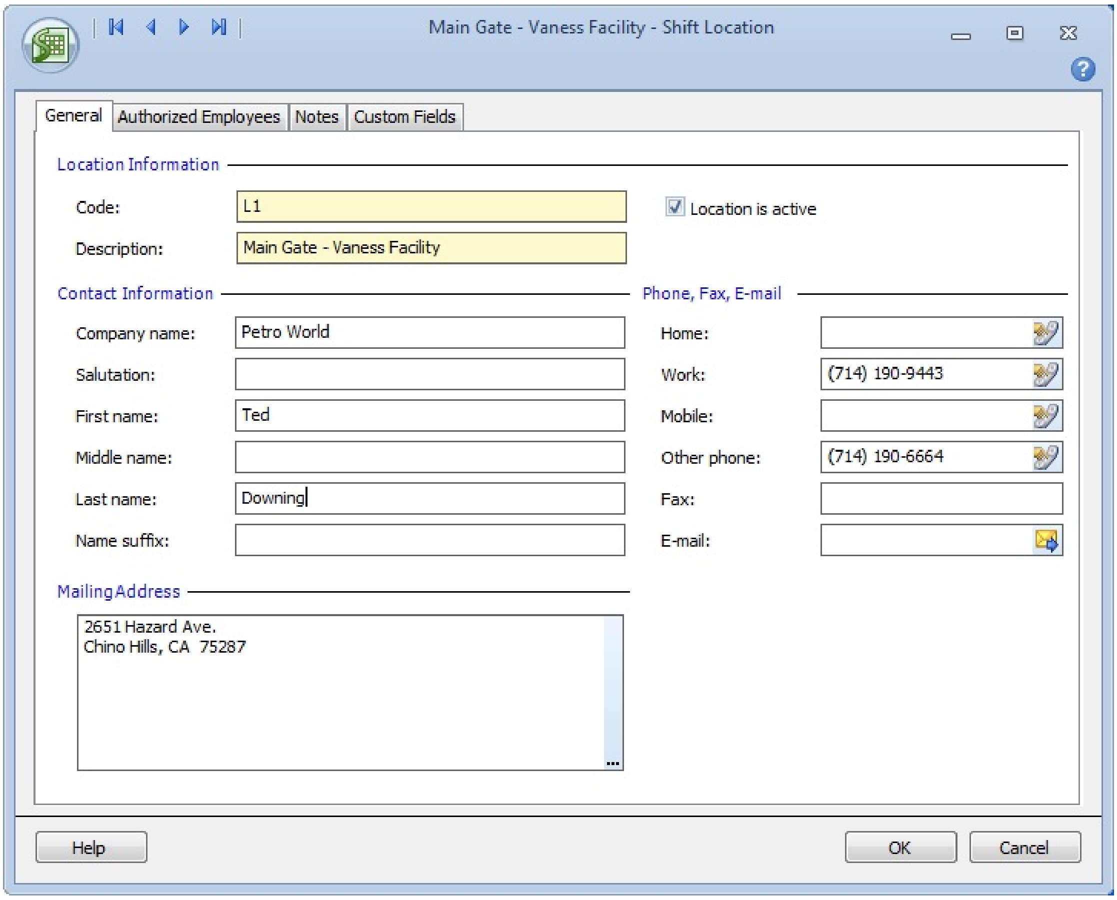
Shift Location Form

Use this form to add a new shift location or to change information about an existing shift location. A shift location is a work site or a place where the shift is performed. Each shift must be assigned a shift location, and more than one shift may have the same location. You can authorize your employees to work at certain locations but not others. When an employee is authorized to work at a location, that employee can work on all shifts performed at that location.

There are two tabbed screens:

1. General
2. Authorized Employees
3. Notes
4. Custom Fields

General Tab



Location Information Section

- **Code**: A unique code to identify the location.
- **Description**: Description of the location or the location name.
- **Location is active:** By default, the status is set to active. You can clear this box to set the status to inactive when you no longer wish to include the location in scheduling. By default, inactive locations will not be displayed in any location list.

Contact Information

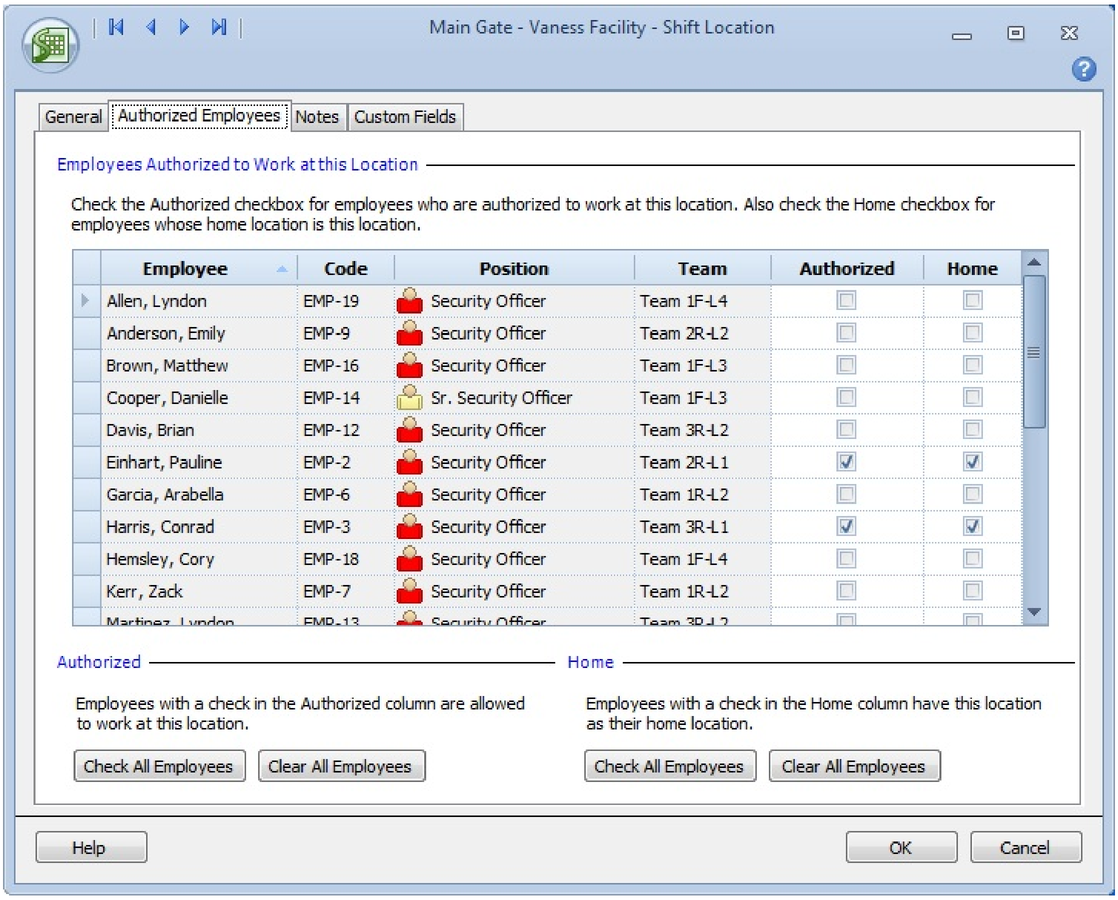
Enter the contact information at this location. For example, if the shift location is a customer work site, you can enter the customer's company name and the name of the customer's representative or contact person. This information is for your reference only and is not used by **Snap Schedule** for any other purpose.

Phone, Fax, Email Section

Enter the telephone numbers and e-mail address of the contact person at the shift location as applicable. You can enter multiple e-mail addresses in this field using the ";" separator.

Authorized Employees Tab

Use this tab to identify the employees who are authorized to work at this location. **Snap Schedule** will alert you when an employee is assigned a shift at a location he or she is not authorized to work at. If you authorize an employee to work at this location, you can also set this location as the employee's home location. A home location is the employee's base location where the employee is normally scheduled to work.



Employees Authorized to Work at this Location Section

This section lists all active employees and their authorization status.

- **Employee**: Employee name.
- **Code**: Employee code.
- **Position:** Employee's job position.
- **Team:** The schedule team to which the employee is currently assigned.
- **Authorized**: Click this box to authorize an employee to work at this location. Note that if you un-check this box, the **Home** checkbox will be automatically un-checked as well since you cannot set an employee's home location to a location where the employee is not authorized to work at.
- **Home**: Check this box to set this location as the employee's home location. Note that when you check this box, the **Authorized** checkbox will be automatically checked as well since by default, an employee is always authorized to work at the employee's home location.

Authorized Section

From this section, you can quickly set or clear the authorization status for all listed employees.

- **Check All Employees**: Click this button to check the **Authorized** checkbox for all listed employees.
- **Clear All Employees**: Click this button to clear the **Authorized** checkbox for all listed employees. Note that clicking this button will also clear the **Home** checkbox for all listed employees.

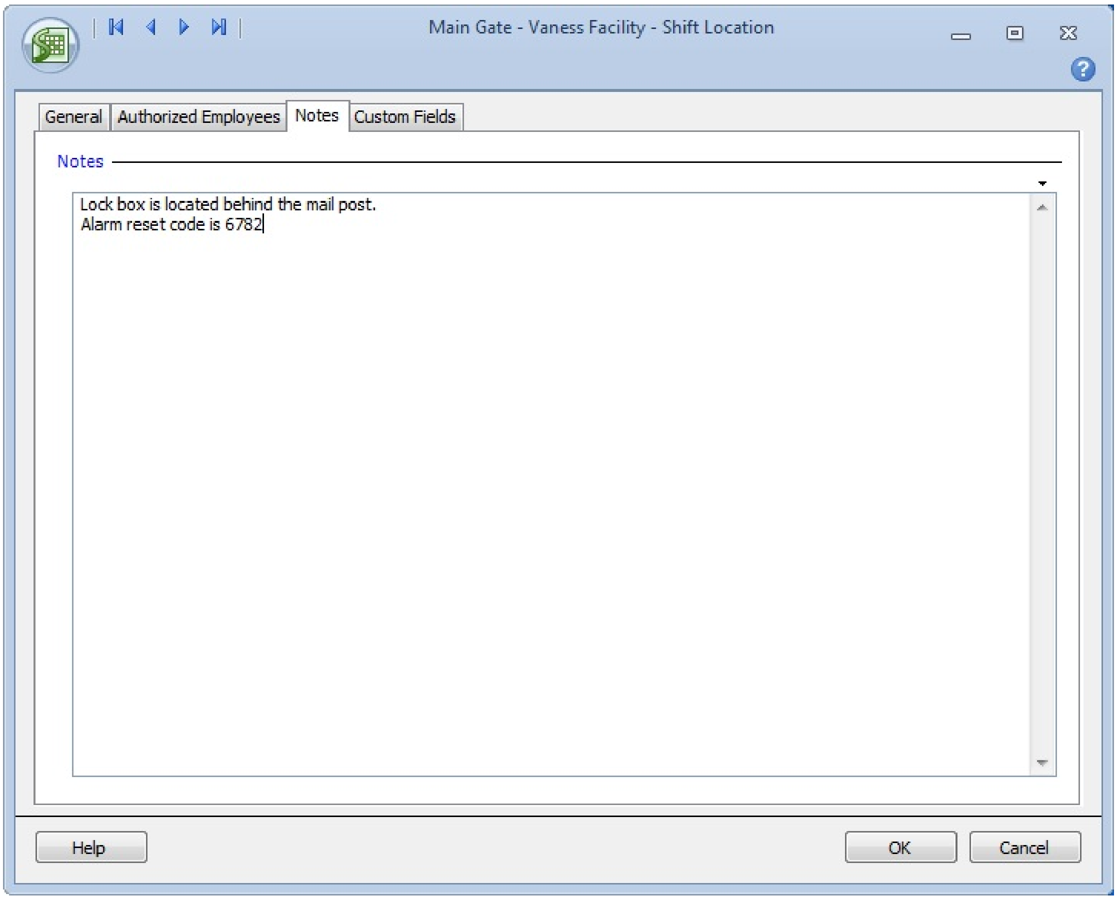
Home Section

From this section, you can quickly set or clear the **Home** checkbox for all listed employees.

- **Check All Employees**: Click this button to check the **Home** checkbox for all listed employees. Note that clicking this button will also check the **Authorized** checkbox for all listed employees.
- **Clear All Employees**: Click this button to clear the **Home** checkbox for all listed employees.

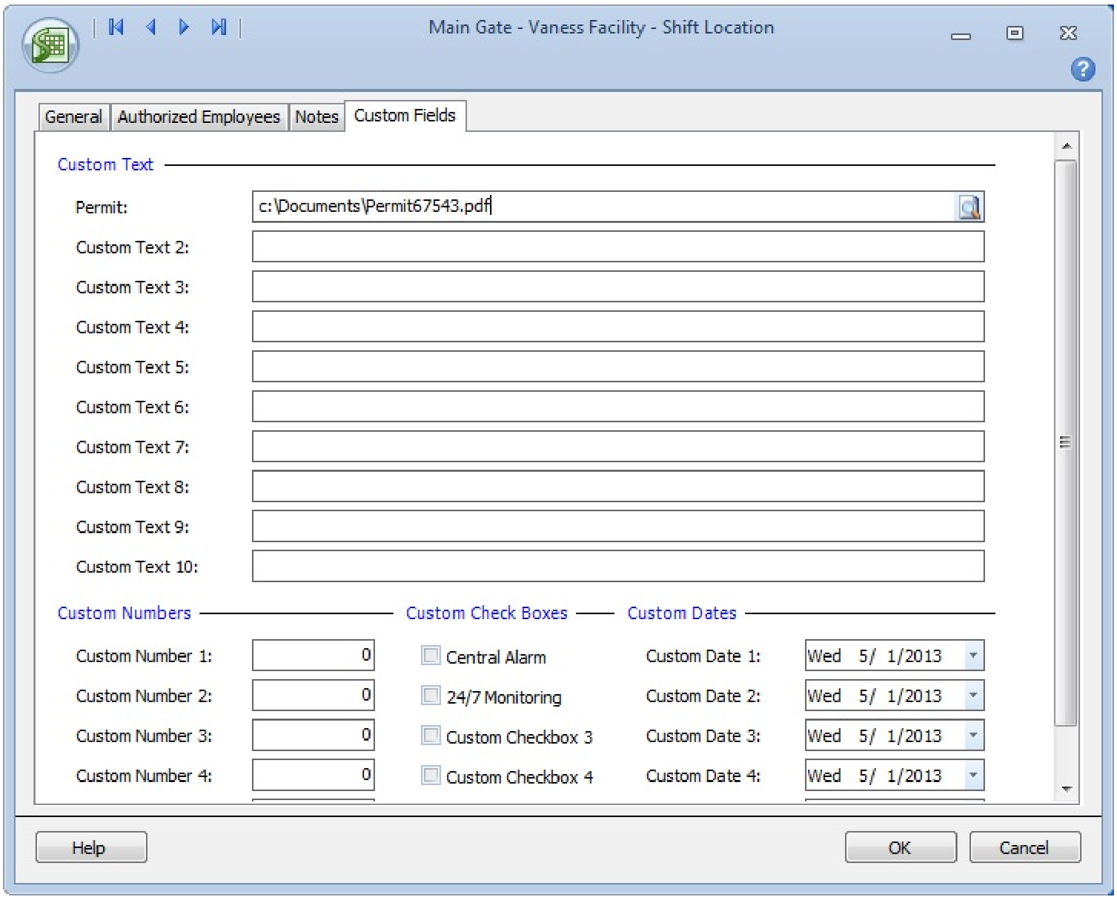
Notes Tab

Use this tab to enter applicable notes such as incident reports, opening and closing instructions, etc.



Custom Field Tab

The Custom Fields tab displays the 25 customizable fields in the shift location record that can be used for anything you like. Customizing the form helps you identify and track unique aspects of the shift location that are important to your particular business.



To customize this tab, click the **Menu** button  on this form and select **Customize Fields** to open the Customize Field form. Refer to the Customize Fields Form for more information on how to define custom fields.

Shift Premium Policy Form

Use this form to add a new shift premium policy or to change information about an existing shift premium policy. Shift premium pay is the additional compensation offered to employees who are scheduled to work on holidays, non-standard. less desirable shifts, or being on-call.

You can create a shift premium policy record to specify how the additional compensation will be computed, then associate the policy to the shifts that you want to offer the premium pay. When computing labor cost estimates, **Snap Schedule** calculates employees' regular pay, then add overtime pay, if any , and shift premium pay for those shifts that have an associated shift premium policy.

Policy Information Section

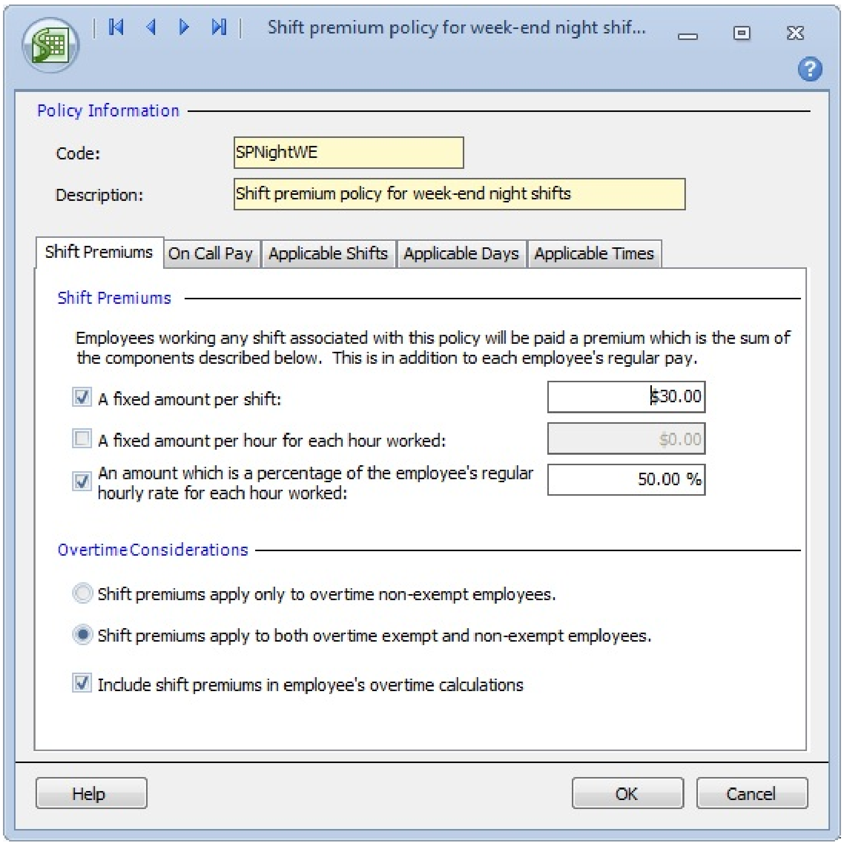
- **Code**: A unique code to identify the shift premium policy.
- **Description**: Description of the shift premium policy.

This form also contains five tabbed screens:

1. Shift Premiums
2. On Call Pay
3. Applicable Shifts
4. Applicable Days
5. Applicable Times

Shift Premiums Tab

Use this tab to specify the rules for shift premium pay computation.



Shift Premiums Section

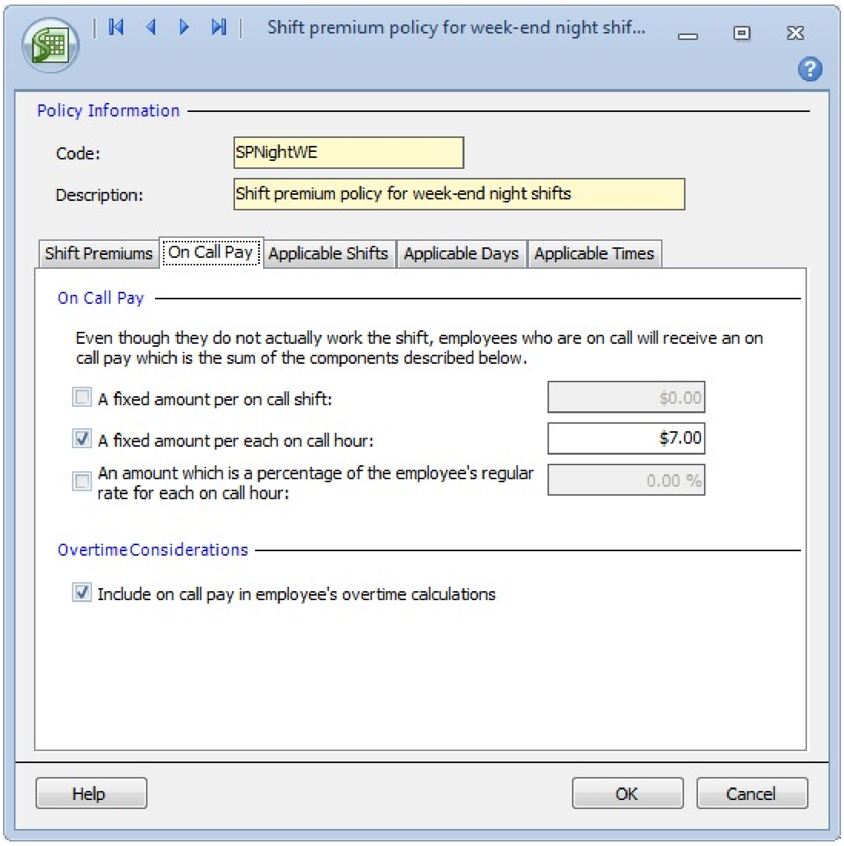
Use the controls in this section to specify how shift premium pay is computed. Up to three rules are provided. You can enable each rule by checking the appropriate checkbox, then specify the value to be used. Note that the rules are additive so if you specify more than one rule, the total shift premium will be the sum of the premium components derived from each rule.

Overtime Considerations Section

Click the appropriate radio button to specify if the shift premium pay applies to exempt and/or non-exempt employees. You can use the check box to specify if the overtime pay should be computed based on the employee's regular rate plus the shift premium pay when the employee's work hours go over the overtime limits while working on shifts associated with the policy,

On Call Pay Tab

This tab allows you to specify the additional pay to employees for being on-call. You can compensate employees for being on-call by a fixed amount per shift, a fixed amount per hour, a percentage of the employee's regular rate, or a combination of the three.



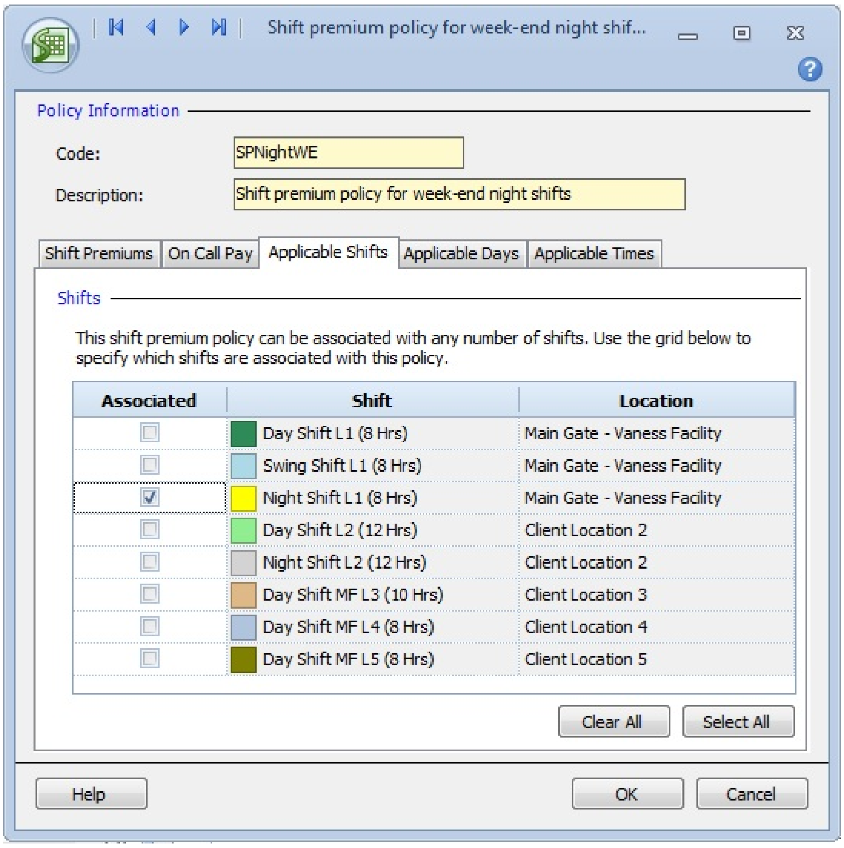
On Call Pay Section

Use the controls in this section to specify how on call pay is computed. Up to three rules are provided. You can enable each rule by checking the appropriate checkbox, then specify the value to be used.

Overtime Considerations Section

You can use the check box to specify if the on-call pay should be included in the computation of the employee's overtime pay.

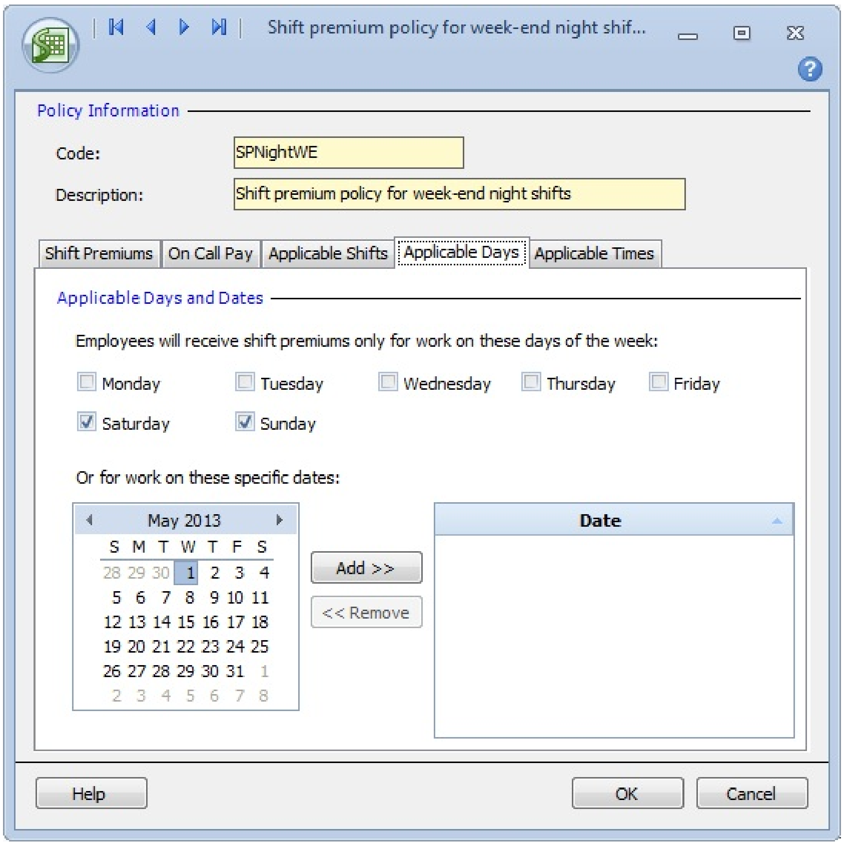
Applicable Shifts Tab



Shifts Section

Here you can use the checkboxes to specify which shifts can be associated with the shift premium policy.

Applicable Days Tab

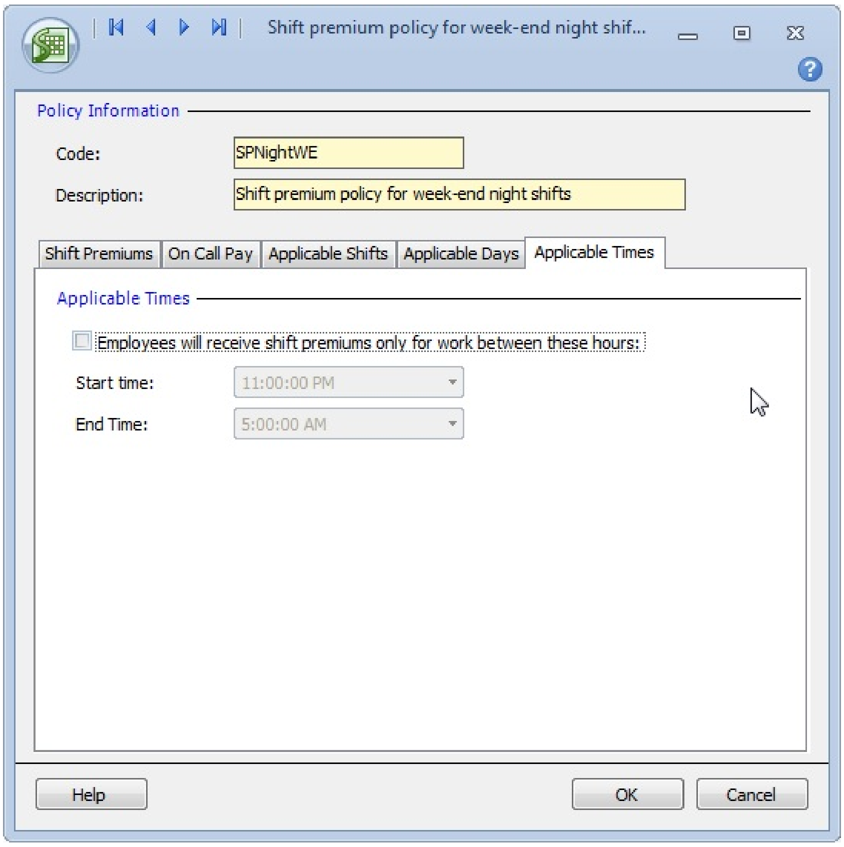


Applicable Days and Dates Section

In this section you can specify the days on which the shift premium policy is applicable. You can make a general command by checking the days of the week it will be applicable, or you can use the date picker to manually input the specific days. By default, the shift premium pay applies to all seven days of the week. Use the check boxes to specify the days of the week that you would like to pay the shift premium. For example, if you pay one and a half times the regular rate for a day shift if it falls on a Saturday, and twice the regular rate for Sunday, you would create two different policies and check the Saturday box for one policy and the Sunday box for the other.

In addition to the days of the week, you can specify the exact dates when a shift premium pay will take effect using the date picker controls.

Applicable Times Tab

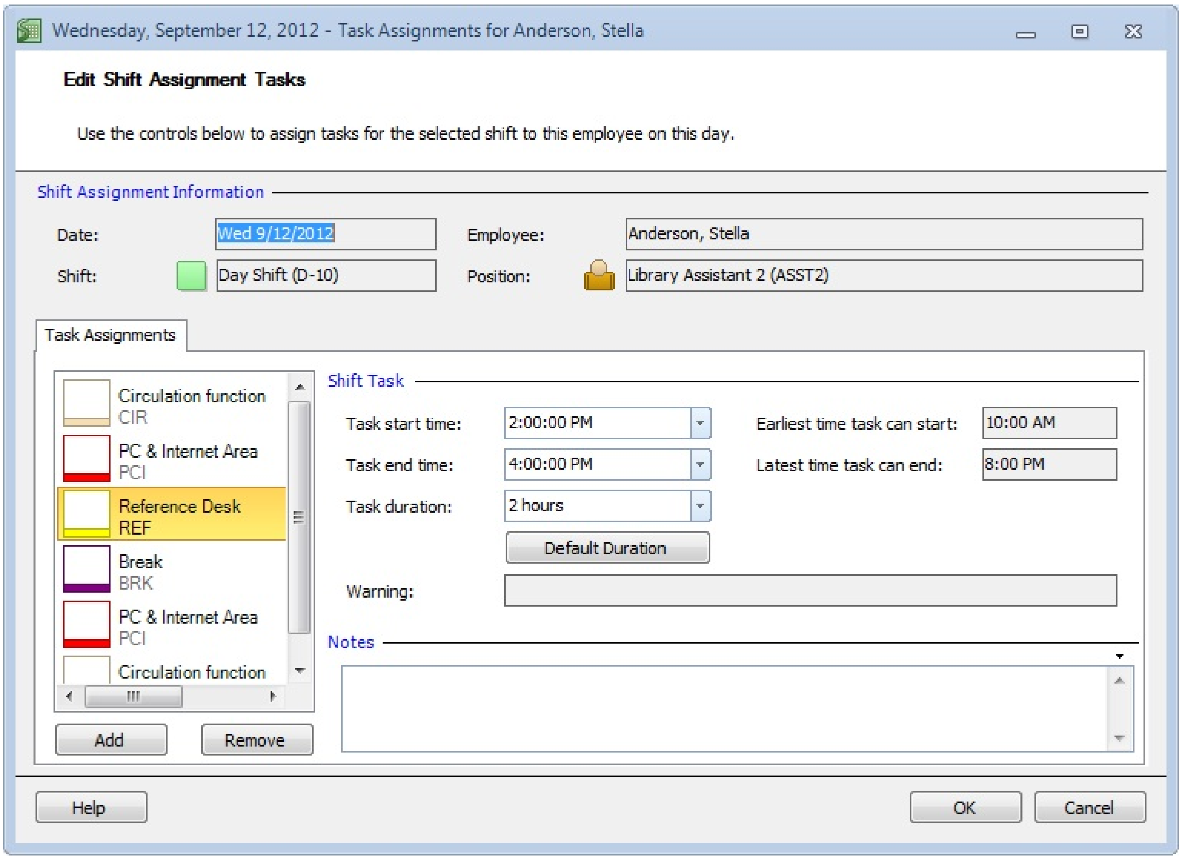


Applicable Times Section

You can further restrict the shift premium pay to apply only to a time window in the applicable days by checking the box and specifying a start time and an end time. The employee will receive the shift premium pay only for those shift work hours that fall within the specified time window and not on the total shift duration.

Task Assignments Form

Use this form to assign tasks to an employee within a specific shift assignment. You can assign multiple tasks to the same employee during the shift, and tasks are allowed to overlap. This form is launched from the schedule Task view when you double click a cell to edit its content for a given employee on a given shift.



Shift Assignment Information Section

Fields in this section are read-only.

- **Date**: Date for which the task assignments are made.
- **Employee**: Name of the employee.
- **Shift**: The shift during which tasks are assigned. The shift code is displayed in parentheses and the shift color is also shown.
- **Position**: Employee's job position and position code. The position code is displayed in parentheses.

Task Assignments Tab

This tab shows all tasks assigned to the employee in a scroll-able grid on the left and the corresponding task assignment information on the right. From this tab, you can make a new task assignment by clicking the **Add** button, or remove an existing task assignment by selecting the task then click the **Remove** button.

- **Add**: Click this button to assign a new task for the employee. After the task has been added to the grid, you can modify the task start time and task duration.
- **Remove**: Click this button to remove the selected (highlighted) task assignment.
- **Task start time**: The time when this task assignment starts. When you make a task assignment, this field is set to the earliest time the task can start by default. You can change the start time using the drop-down list.
- **Task end time**: The time when this task assignment ends. This field is always equal to the Task start time plus the Task duration. If you change this field, **Snap Schedule** will adjust the Task duration field accordingly.
- **Task duration**: The duration for this task assignment. When you make a new task assignment, this field is set to the default task duration. You can change the task duration to accommodate any deviation from the default duration. To reset the field back to the default duration, click the **Defaults** button. This field is always equal to the Task end time minus the Task start time. If you change this field, **Snap Schedule** will adjust the Task end time field accordingly.
- **Warning**: Any warning on task assignment conflicts. Refer to the Task Validation Checks section for detailed description of the warning messages and color coded warning flags displayed in this field.
- **Earliest time task can start:** For reference, this read-only field displays the earliest time the task is allowed to start. You specified this time when you defined the task. **Snap Schedule** will display a warning and set an alert flag when you attempt to schedule this task to start before the earliest allowable start time.

- **Latest time task must complete:** For reference, this read-only field displays the latest time the task must end. You specified this time when you defined the task. **Snap Schedule** will display a warning and set an alert flag when you attempt to schedule this task to end after the latest allowable end time.

- **Notes:** Use this text box to enter free-form notes about the employee. You can use the time stamp feature on the Notes text box to insert the current date or date and time into the text box. This is useful when you want to record time related events like phone call records. To insert a time stamp in the text box, click the icon and select the **Insert date** or **Insert date and time** command as appropriate.

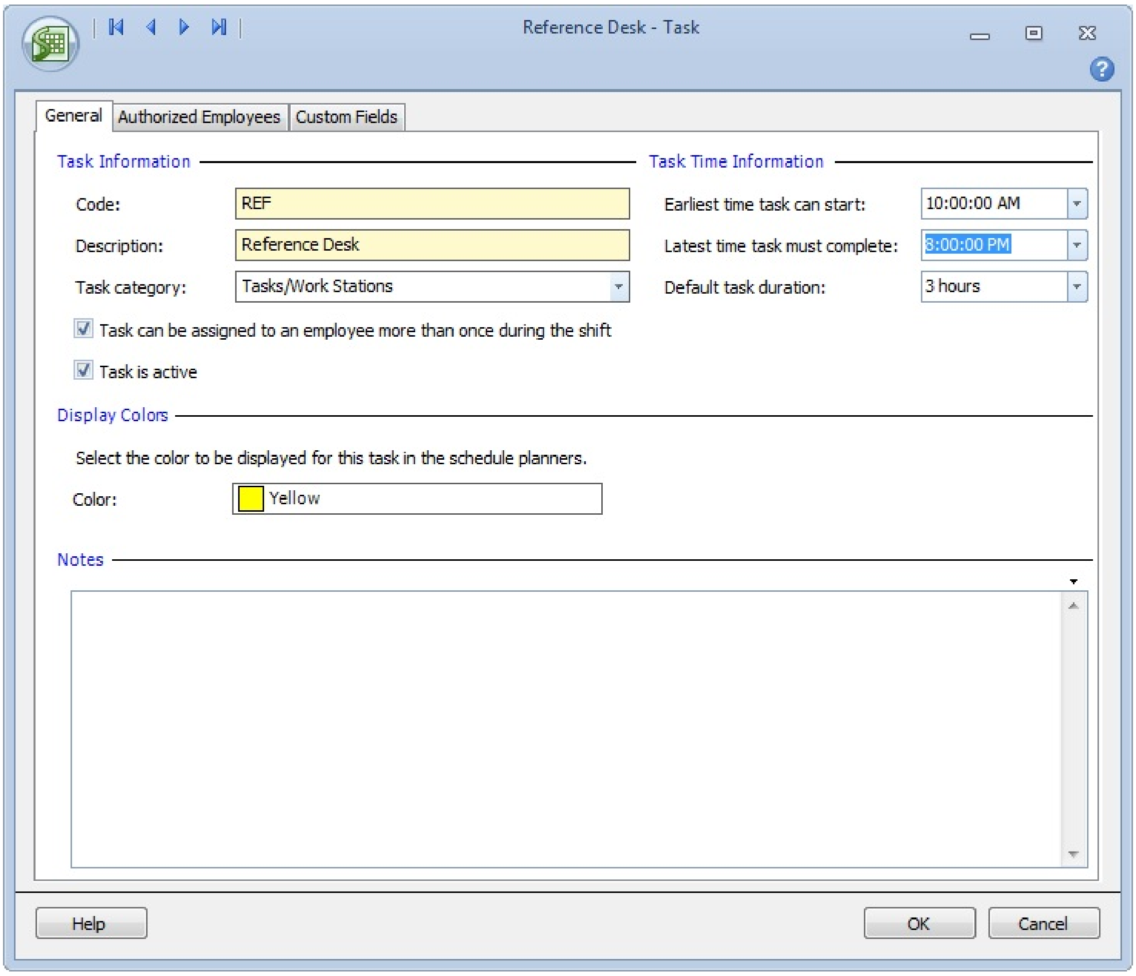
Task Form

Use the **Task** form to add a new task or change a task's information. The **Task** form has three tabbed screens; the first two screens require information to be filled in before the task can be scheduled. The fields with a yellow colored background are required while those with a white background are optional. The three two tabbed screens are:

1. General
2. Authorized Employees
3. Custom Fields

General Tab

The General tab is used to store general information about each task in the fields described below.



Task Information Section

- **Code:** Enter a unique code to identify the task. This can be a number or an abbreviated code that you can instantly recognize when shown on schedule cells.
- **Description:** A short description of the task.
- **Task category:** Select or create a category under which this task should be grouped.
- **Task can be assigned to an employee more than once during the shift:** Select this check box if you allow multiple task assignments in a shift. If this box is unchecked, **Snap Schedule** will set an alert flag when you attempt to make multiple assignments of the same task to an employee in a shift
- **Task is active:** By default, the status is set to active. You can clear this box to set the status to inactive when you no longer wish to include the task in scheduling.

Task Time Information Section

- **Earliest time task can start:** Specify the earliest time of the day this task can start. **Snap Schedule** will set an alert flag when you attempt to schedule this task to start before the specified time.
- **Latest time task must complete:** Specify the latest time of the day this task must be completed. **Snap Schedule** will set an alert flag when you attempt to schedule this task to end after the specified time.
- **Default task duration:** Use the drop-down list to specify the default duration for this task. When you schedule this task, **Snap Schedule** will use this value as the default task duration. Note that you can change the task duration anytime after it has been

scheduled.

Display Colors Section

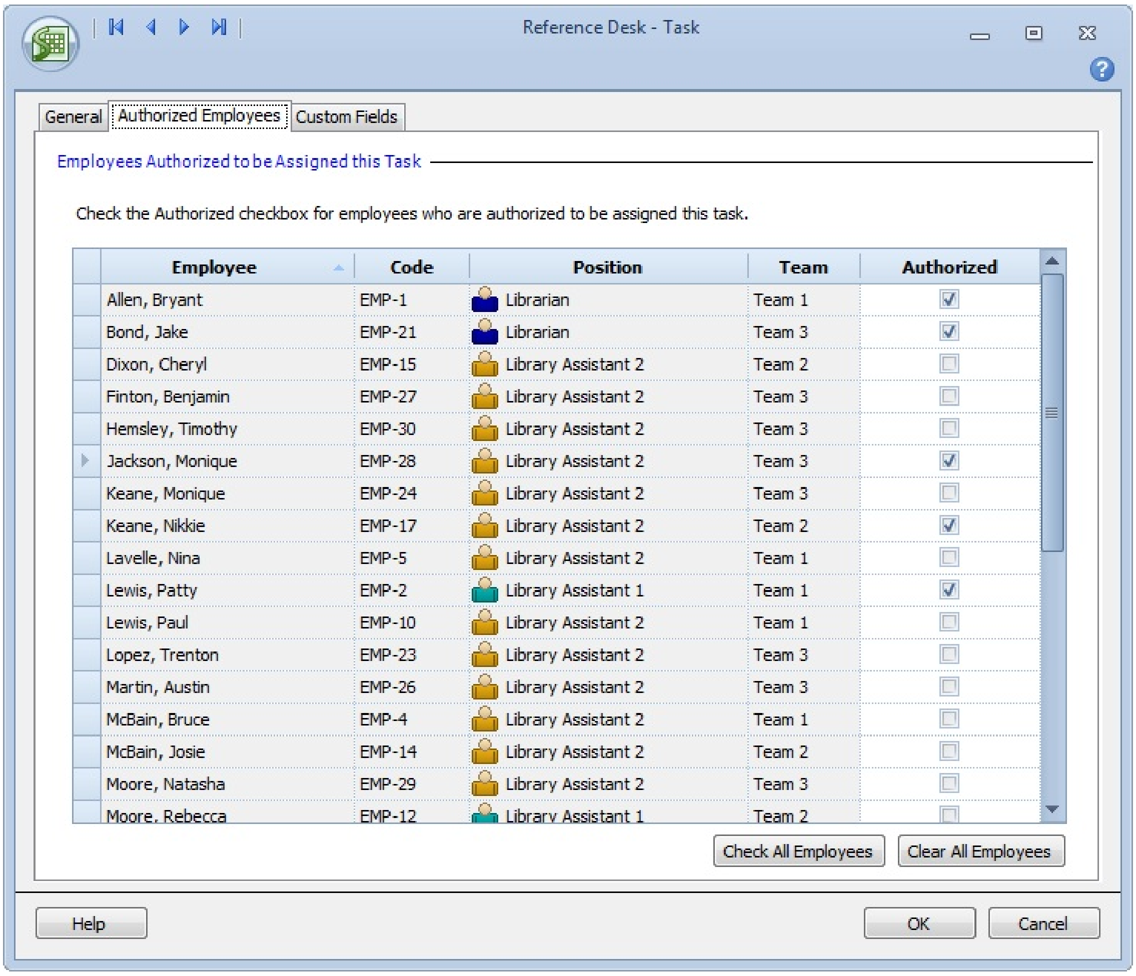
- **Color:** Specify the color to be used when drawing the task on the schedule view.

Notes Section

- **Notes:** Use this text box to enter free-form notes about the task. You can use the time stamp feature on the Notes text box to insert the current date or date and time into the text box. This is useful when you want to record time related events like phone call records. To insert a time stamp in the text box, click the icon and select the **Insert date** or **Insert date and time** command as appropriate.

Authorized Employees Tab

The Authorized Employees tab displays a list of active employees and lets you define who are authorized to perform this task. **Snap Schedule** will alert you when an employee is assigned a task he or she is not authorized to perform.



Employee Authorized to be Assigned this Task Section

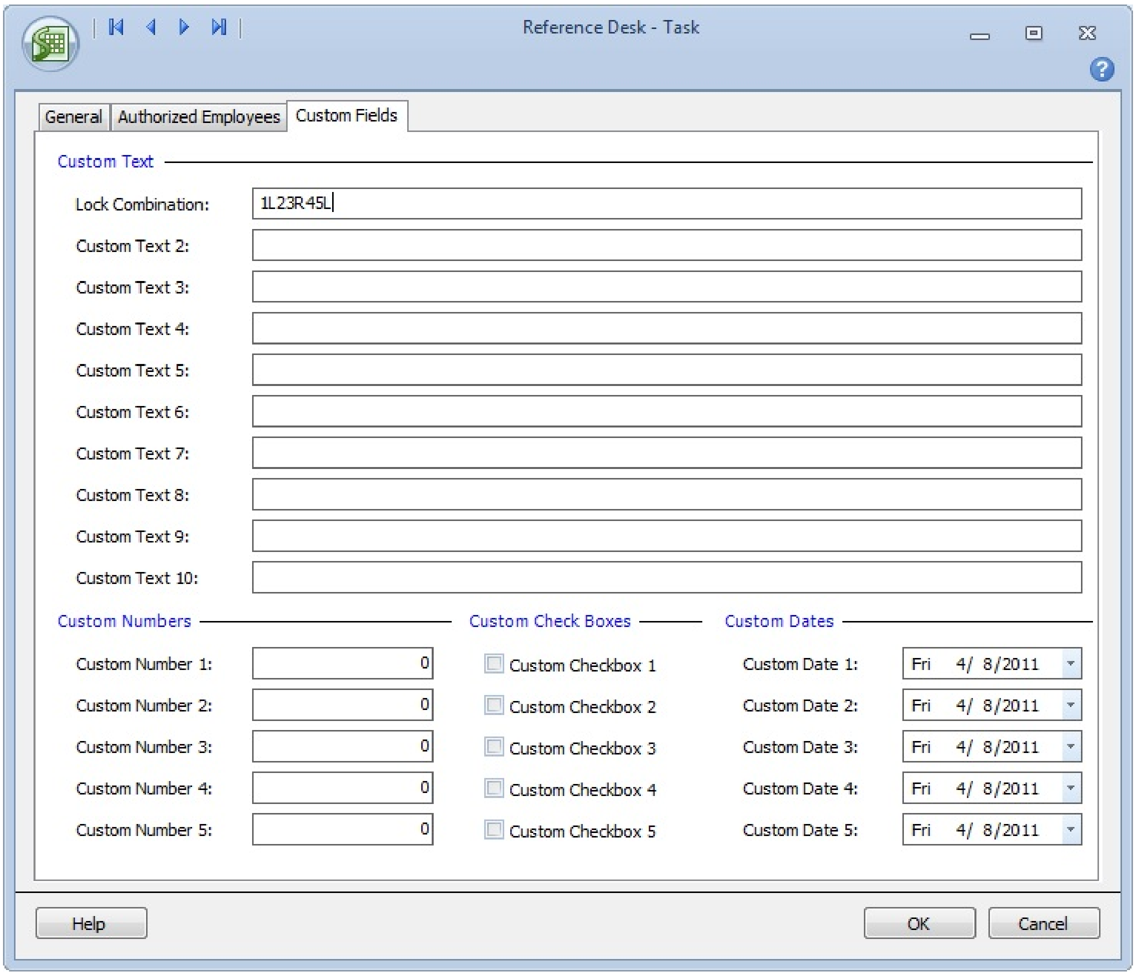
Use the controls on this grid to select which employees can be assigned to this task. Note that employees that are marked inactive will not be displayed on this list.

- **Authorized:** Check this box if the employee can be assigned this task.
- **Check All Employees:** Click this button to set the Authorized checkbox for all listed employees.
- **Clear All Employees:** Click this button to clear the Authorized checkbox for all listed employees.

Custom Field Tab

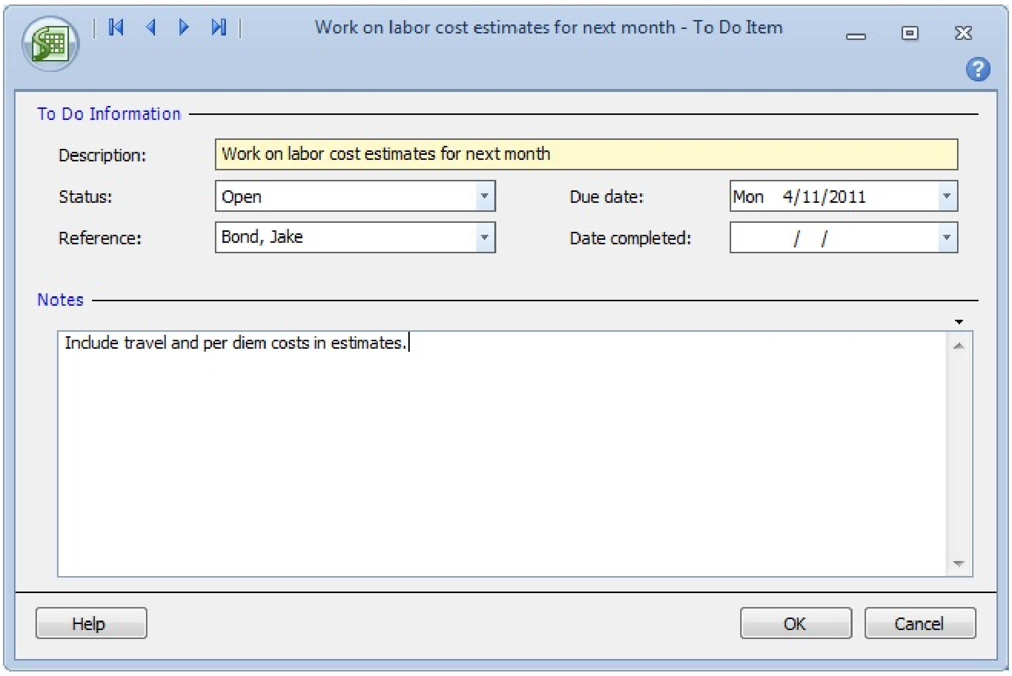
The Custom Fields tab displays the 25 customizable fields in the task record that can be used for anything you like. Customizing the form helps you identify and track unique aspects of the task that are important to your particular business.

To customize this tab, click the **Menu** button on this form and select **Customize Fields** to open the Customize Field form. Refer to the Customize Fields Form for more information on how to define custom fields.


Reference Desk - Task
General
Authorized Employees
Custom Fields
Custom Text
Lock Combination:
1L23R45L
Custom Text 2:
Custom Text 3:
Custom Text 4:
Custom Text 5:
Custom Text 6:
Custom Text 7:
Custom Text 8:
Custom Text 9:
Custom Text 10:
Custom Numbers
Custom Number 1: 0
Custom Number 2: 0
Custom Number 3: 0
Custom Number 4: 0
Custom Number 5: 0
Custom Check Boxes
Custom Checkbox 1
Custom Checkbox 2
Custom Checkbox 3
Custom Checkbox 4
Custom Checkbox 5
Custom Dates
Custom Date 1: Fri 4/ 8/2011
Custom Date 2: Fri 4/ 8/2011
Custom Date 3: Fri 4/ 8/2011
Custom Date 4: Fri 4/ 8/2011
Custom Date 5: Fri 4/ 8/2011
Help
OK
Cancel

To Do Item Form

Use this form to add or edit To Do items. You can add or remove To Do items from the To Do Items List.



To Do Information Section

- **Description**: A short description of the To Do item.
- **Status**: Use the status field to indicate if the item is completed, postponed, or open. Only open items will be shown on the Schedule Outlook view.
- **Due Date**: The date when the To Do item is to be completed.
- **Reference**: If the To Do item is related to an employee, select the employee name from the drop-down list. You can then use this field as a filter in the To Do List report.
- **Date completed:** The date when the To Do item is completed.

Notes Section

Use the text box to enter any relevant notes.