GRANDMASTER SUITE

User's Guide to Schedule

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INTRODUCTION

Welcome to Can-Pay's Grand Master Suite **Schedule Module**. The Schedule Module is a Windows/OS2 program, and uses the standard Windows features which make it simple to learn and use. The Schedule Module meets all your scheduling needs by providing the facilities to schedule employee work time and employee leave time such as vacation time, sick time, time off in lieu, training time and other leave time.

Schedule Module

The Schedule Module uses organization chart structures to prepare schedules. The organization chart positions must be marked as schedulable in order to be used by the Schedule Module.

The organization chart must be used to describe departments for the “auto” schedule functions. The organization chart provides the facilities to describe the positions to fill, and the time and qualification requirements for those positions.

The Schedule Module provides the ability to assign the following attributes to a scheduled time segment:

Field	Description
Date	The date that the time segment starts.
Start Time	The starting time for the segment.
Stop Time	The stopping time for the segment.
Shift	Indicates the shift code for the segment (shifts provide a standard start and stop time, and break times).
Premium	Indicates the special premium codes for a segment.
Position	Indicates the position code for the segment.
Reason	Indicates the optional reason for the time segment.
G/L Distribution	Optional general ledger labour distribution for the segment (GMSUITE).
Department	Indicates the department code (GMII).
Account	Indicates the account code (GMII).
Sub Account	Indicates the sub account (GMII).
Area	Indicates the work area (JOBCOST).
Sub Area	Indicates the work sub area (JOBCOST).
Activity	Indicates the work activity (JOBCOST).
Sub Activity	Indicates the work sub activity (JOBCOST).

Employee Data

Standard Data

The Standard Employee Data recording functions are:

- Name and address data.
- Leave Time - inclusive vacation, sick time, training, time off in lieu, and other time off.
- Incidents - includes accidents,union grievances, labour board disputes, and other incidents.
- Availability - time available for work.
- Skills - records skills and certifications.
- Equipment Assignments - includes tool kits, safety equipment, and other company owned equipment.
- Automotive - includes parking spaces, and company vehicle assignments
- Company Plans - includes profit sharing, share purchase, and saving bond plans.
- Position Assignments - employee job assignments.
- Evaluations - employee performance evaluations.

User Defined Employee Data

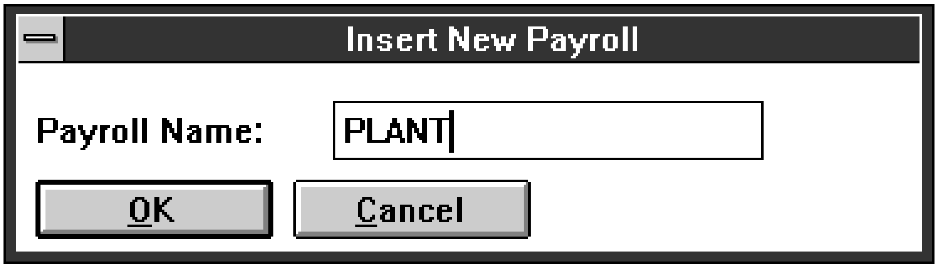
The Schedule Module provides the facilities to define any number of additional data categories for employees. Each data category may contain up to 100 data fields.

Each defined data category has an individual update screen.

Additional screens may be defined that incorporate data from several data categories including system defined data categories.

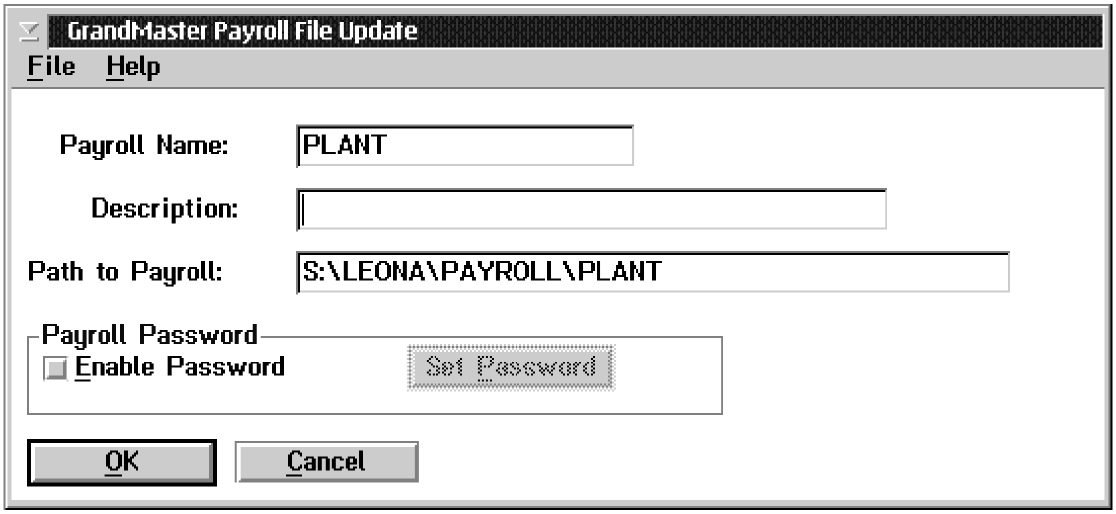
Inserting a New Payroll

The **Insert** option from the select payroll program will allow you to create a new payroll. The following dialog box appears:



Type in the name of the new payroll and select the OK button.

The GrandMaster payroll file update dialog box will appear as follows:

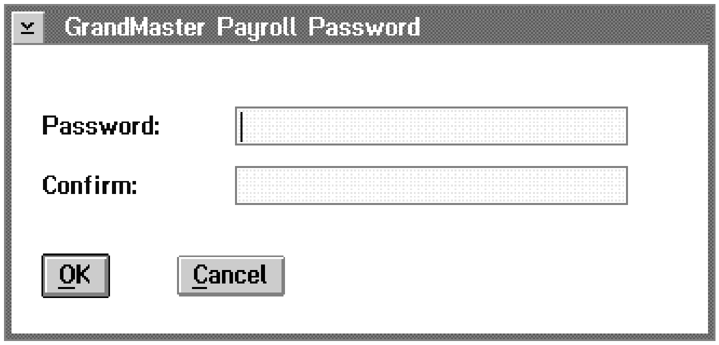


Type in the payroll name, description, and path to the payroll and select OK from the file menu.

Click on the box to the left of the enable password if you wish to password protect the payroll.

Passwords

If you have selected ENABLE password the following dialog will appear:



Enter your desired password and then retype the password again in the confirm field.

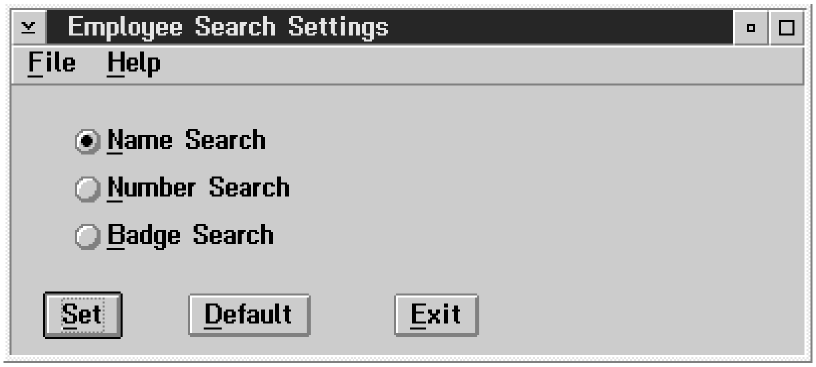
☞ The password will be shown as *'s on the screen as you are typing for security reasons.

Please refer to the Administration manual for additional information concerning passwords, security and entitlements.

Set Search Technique

Once you have chosen the payroll that you wish to work with you may prefer to set an alternate search technique for accessing employees within the selected payroll. The system default search technique is alphabetic surname search.

If the **Set Search Technique** option is selected from the File menu, then the following screen will appear:



Employees on the system may be accessed through three different techniques:

- **Employee Name** - The employee name or a portion of the employee name may be entered. The system will provide a list of the names that match the portion entered. The name matching process requires that the last name be entered first, given name last. When a name is entered the name must be preceded by the "%" character, or the system option for employee search must be set for employee name search.
- **Badge Number** - The employee badge number may be used to locate an employee. The badge number is a left justified 10 character alphanumeric field. When a badge number is entered the number must be preceded by the "@" character or the system option for employee search must be set for badge number search.
- **Employee Number** - The employee number may be used to locate an employee. The employee number search may only be used when a payroll has been selected. When an employee number is entered the number must be preceded by the "#" character or the system option set for employee search must be set for employee number search.

☞ When employee group is in effect the search for an employee is restricted to the selection group.

Each user may save their preference for a search technique.

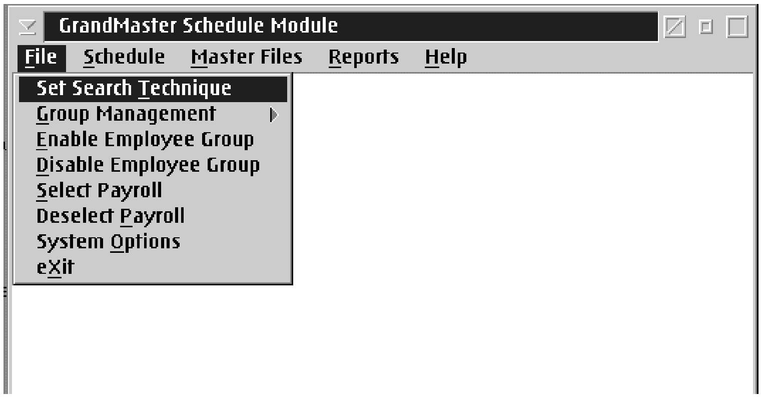
☞ When the preferred search is employee number the system will require the selection of a payroll to search for employees.

When a function offers a **next employee** or **prior employee** option the order of presentation for the employees will depend on the search technique in effect.

MANAGING EMPLOYEE GROUPS

The Main Human Resource menu provides facilities that operate on a group of employees. The group may be all employees known to the system, all employees in a particular payroll, or an employee selection group.

All operations regarding the management of employee groups are available in the Group Management menu from the main menu bar. The **Group Management** menu appears as follows:



The options available to the user are:

- define and maintain employee selection groups
- enable/disable an employee group for scheduling use

Selection Groups

A selection group is a list of employees that may be used to control processing in the Payroll, Human Resources, Scheduling, and Time Keeping modules.

A selection group is created through the **Group Management** option.

A selection group may be a **dynamic** or a **fixed** group.

Dynamic Groups

A dynamic group is defined by a set of conditions that determine the employees that are members of the group.

Each time the group is loaded the load process scans the employee data to determine the eligibility. Once loaded the group of employees is static until the group is refreshed or loaded again.

When a dynamic group is saved only the data conditions for the list are stored.

One dynamic group definition utility is provided:

- **Payroll Data Conditions** - The Payroll Data Condition is used to define a selection group within a particular payroll. The definition uses a fixed set of payroll data fields to determine membership in the group.

Fixed Groups

A fixed group is defined as a list of specific employees.

When the group is loaded the list is loaded from the storage area.

Fixed group definitions are determined by selecting employees from a list of eligible employees. The list of employees may be from an existing group selection, all employees, or employees in a particular payroll.

Defining Employee Selection Groups

Employee Selection Groups may be defined in two ways:

1. Picking employees from a list of all employees known to a single payroll on the system.
2. Selection of employees from a single payroll by setting conditions that payroll data items for the employees must match.

The first type of selection group is a **fixed** list, thus a list must be maintained by the user. A maximum of 1000 employees may be present in a fixed list. The last type of selection group is a dynamic list, therefore each time the list is loaded the employee data is compared to the conditions that define the selection. A **dynamic** list may contain any number of employees.

The system provides for saving and loading any number of the selection group types. Only one selection group may be active at a time.

Selection Group Restrictions

A user ID may be restricted to the use of a single selection group. The restriction and name of the selection group are set through the **System Administration** functions.

The selection group restriction feature allows the **System Administrator** to control any user's access to employees or to an arbitrary sub-set of employees on the system.

When a user ID is restricted to a particular selection group only the employees in that selection group are visible to the user. When restricted, the user ID does not have access to the functions that allow maintenance of the selection group definitions.

The user may remove employees from the selection group but this modification is discarded the next time the user refreshes the selection group or logs off the system.

Selection Group Processing

System functions that process more than one employee at a time will use the current selection group (loaded and enabled) to determine the employee to process.

When a screen offers a **next employee** option, the next employee is always provided in the order of the current selection group. The sort order of the current selection group may be changed through the **sort selection** option.

When a report is generated by the report writer or any other reporting function the employees included in the report are restricted to the current selection group (loaded and enabled). This feature allows for easy production of sub-set reports.

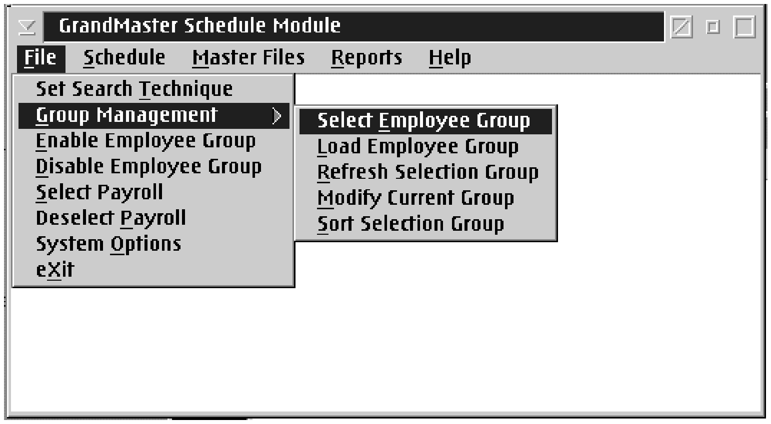
Data Conditions for Selection Groups

A dynamic selection group definition is composed of three parts:

- Include Conditions - these conditions describe the data values that the employee must have to be considered in the selection group.
- Exclusive Conditions - these conditions describe the data values that will result in the employee being dropped from the selection group if the included conditions are satisfied.
- Sort Order - these data fields are used to provide the initial sort order of the selection group.

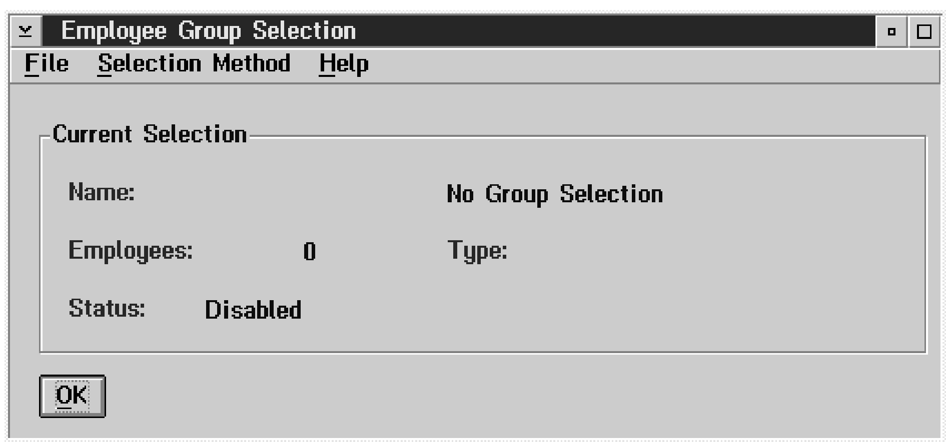
Employee Group Management

When the **Group Management** option is selected the following submenu will appear:

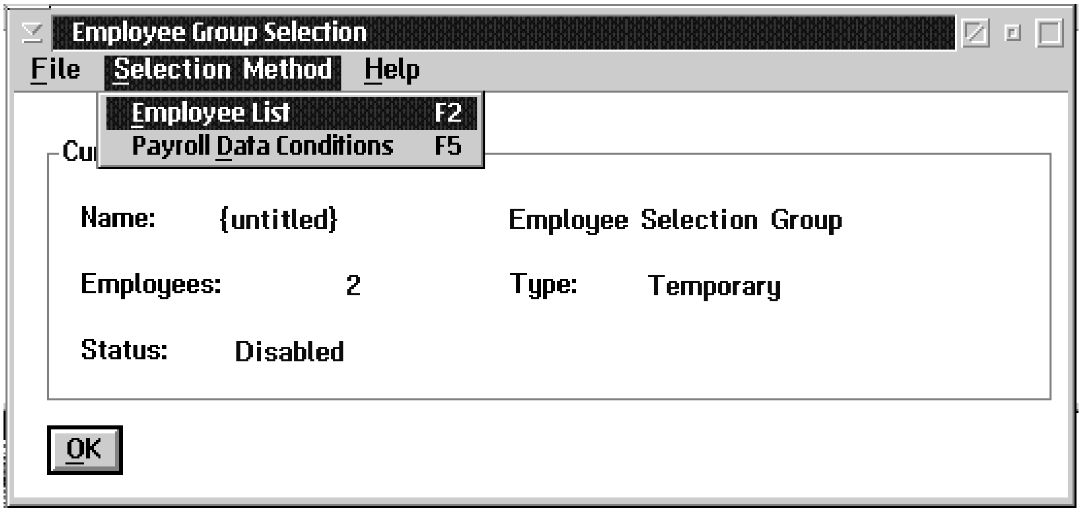


Selecting an Employee Group

This menu option will start up the Employee Group Selection Screen. This screen provides the user with the facilities to define and maintain Employee Groups. The following dialog box will appear.



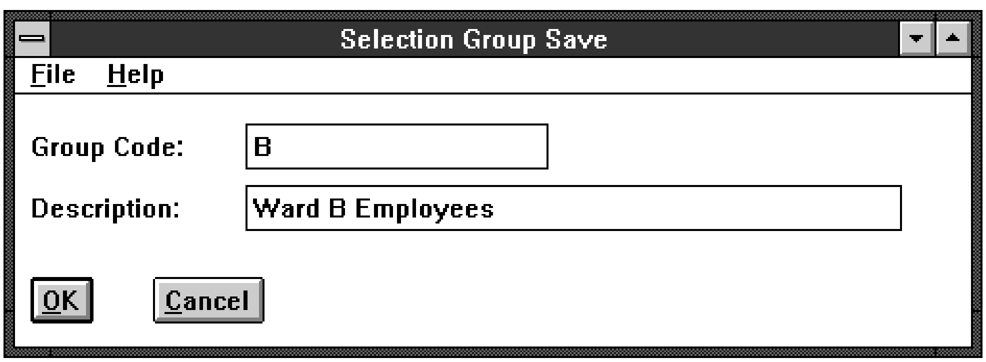
Once the Employee Group Selection dialog box appears choose the method of selection by clicking on the Selection Method option in the menu bar the following box will appear.



After this has been done an employee selection list will appear. The employees that are contained in the list will depend on the method of selection chosen (see section on selection lists below).

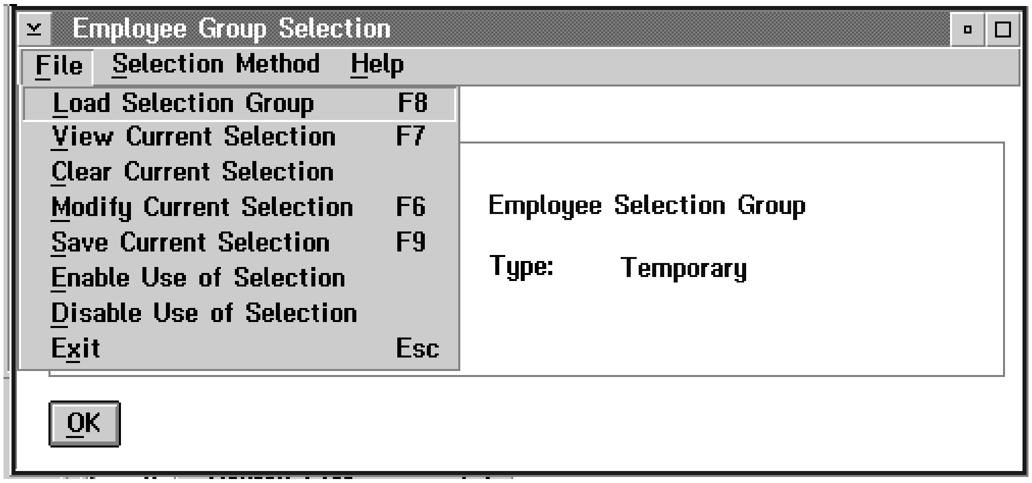
Select all the employees to be in the new selection group and press the OK button.

Next, select the **Save Current Selection** option from the File menu. The following dialog box will appear:

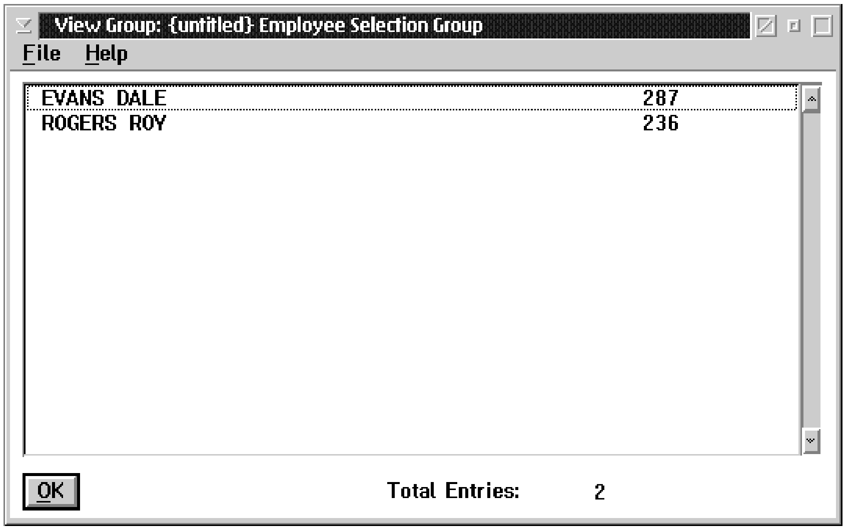


Both the group code and the description must be entered into the fields to save the group . Then select the OK button.

When you are defining and maintaining Employee Group the following pull down menu is available from the File option in the menu bar to view, clear, modify, and save employee group. The following dialog box will appear:



View - to view the employee in the current group select the view current selection from the File menu. The following box dialog box will appear:



Clear - to clear the current group select CLEAR CURRENT SELECTION from the File menu. The employee group selection screen will now show no current groups.

Modify - to add or delete an employee from you current group select MODIFY CURRENT SELECTION from the File menu.

Employee Selection List

The employee selection list screen is presented when the selection of an employee is required. The employees that appear in the list are subject to a number of conditions.

- Current Selection Group in Effect - When a selection group is loaded and enabled only those employees in the selection group may appear in the list.
- Current Payroll Selected - When a payroll is selected only those employees that are assigned to that payroll may appear in the list.

☞ When both a selection group is present and a payroll is selected only the employees that are present in both the selection group and the payroll may appear in the list.

The order of the employees in the list is dependent on the search technique in effect for the user.

- Search by name will present the employees in alphabetic sequence by surname and given name.
- Search by employee number will present the employees in employee number sequence.
- Search by badge will present the employees in badge number sequence

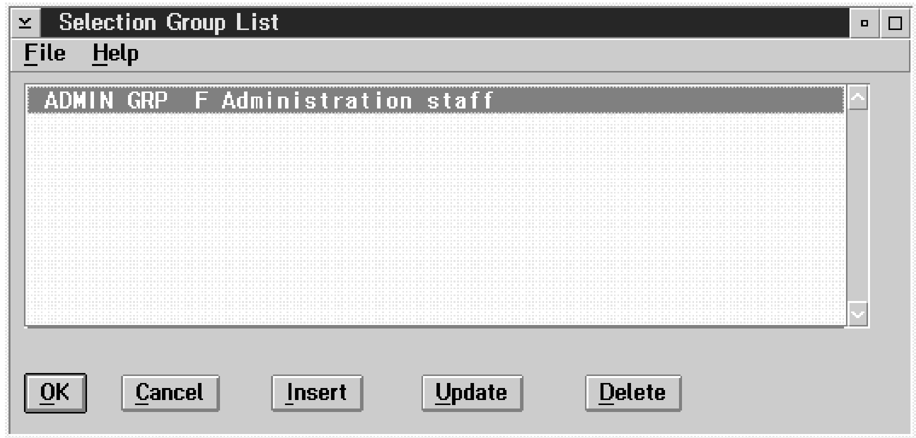
☞ The employees without a badge number will not appear in the list when the search by badge technique is in effect.

The employees in the list are restricted by the value entered to search for an employee.

- Name Search will restrict the list to those employees whose last name corresponds to the last name portion entered for the search.
- Employee Number will restrict the list to those employees whose employee number is equal to or greater than the employee number entered for the search.
- Badge Number will restrict the list to those employees whose badge number corresponds to the badge number portion entered for the search.

Loading an Employee Group

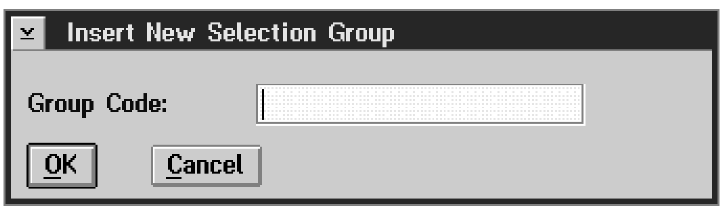
The **Load Employee Group** menu option will display a list of the Employee Groups available to the user. One of these groups may be selected for further operations. The list will appear as follows:



By double clicking on the name of a group the user can load the group.

Inserting a new group

If the INSERT button is selected a new dialog box will appear that allows the user to define a new employee selection group. The dialog box appears as follows:



Removing a group

Selecting the DELETE button will remove the highlighted employee group from the list.

Refresh Selection Group

The **Refresh Selection Group** option reloads the last selection group loaded. This option is used when the selection group has been modified and the user wants to reload the group to eliminate any modifications.

To refresh a selection group the user simply selects the **Refresh Selection Group** option in the Group Management sub menu under the File menu.

Modifying the Current Group

An existing employee selection group may be temporarily modified by adding or deleting employees in the group.

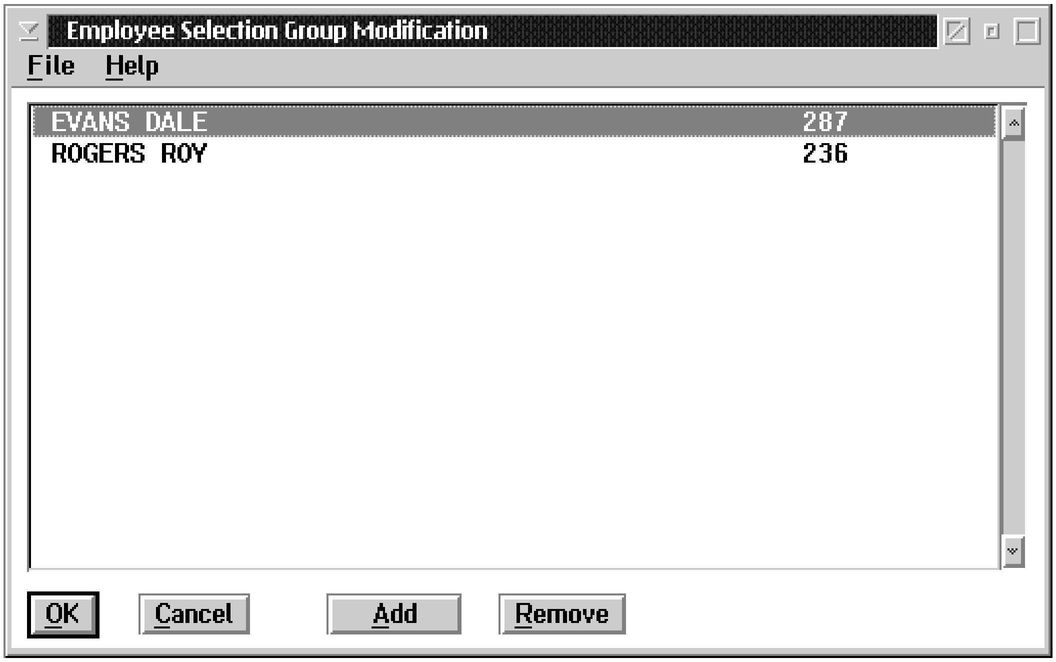
When the initial group is a dynamic group the modifications will be retained until the group is loaded again or refreshed.

The **Modify Current Group** option will bring up the Employee Selection Group Modification dialog box. This option can be found on two different menus but the results are the same.

The option is available in the File menu under the Group Management sub menu.

It is also available if the user selects the **Select Employee Group** option under the Group Management sub menu, and in the Employee Group Selection dialog box the user pulls down the File menu.

The screen will appear as follows when either option is selected.



The dialog box contains a list of the employees in the currently selected employee group.

To delete an employee, select that employee by clicking on it once with the mouse then select the REMOVE button.

To insert an employee into the list select the ADD button, a new dialog box will appear that asks for the name of the employee. Type in the last name of the employee and select OK.

If the user does not know the last name of the employee to be added then the user can:

- select the NEXT button to go to the following employee in the employee group list, or
- select the PREVIOUS button to go to the previous employee on the employee selection list, or
- select the **List** option from the File menu which will create a list of all the employees in the current employee group, from which the user can select an employee.

Enabling an Employee Group

The **Enable Employee Group** option will turn on the current employee selection group for processing. If the group is not enabled the system will not use the group for processing.

When the selection group is enabled the system will limit access to the employees in the selection group. This limit applies to both update functions and report functions.

The **Enable Employee Group** option is available in two different menus and this can be done either way. The user only needs to select the option to enable the current selection group.

This option is available in the File menu under the Group Management sub menu.

It is also available if the user selects the **Select Employee Group** option under the Group Management sub menu, and in the Employee Group Selection dialog box the user pulls down the File menu.

Disabling an Employee Group

The **Disable Employee Group** option in the File menu will turn off the current employee selection group. User ID's that are forced to use a selection group cannot access this menu choice.

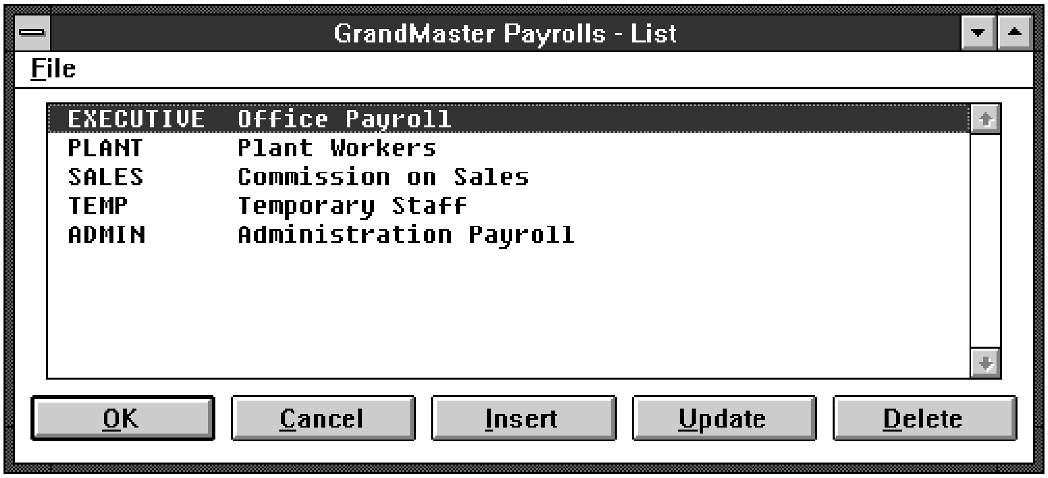
The **Disable Employee Group** option is available in two different menus and this can be done either way. The user only needs to select the option to disable the current selection group.

The option is available in the File menu under the Group Management sub menu.

It is also available if the user selects the **Select Employee Group** option under the Group Management sub menu, and in the Employee Group Selection dialog box the user pulls down the File menu.

Selecting/De-selecting a Payroll

The **Select Payroll** option from the File menu is used to select the payroll for processing. Selecting this will result in a dialog box which displays a list of all the available payrolls:



One of these payrolls must be selected for scheduling. The payroll is selected by placing the cursor over the payroll and clicking the left-hand mouse button. The payroll selected will appear in the main menu screen.

The **De-select Payroll** option from the File menu is used to de-select the currently selected payroll. Selecting this will result in no payrolls being selected.

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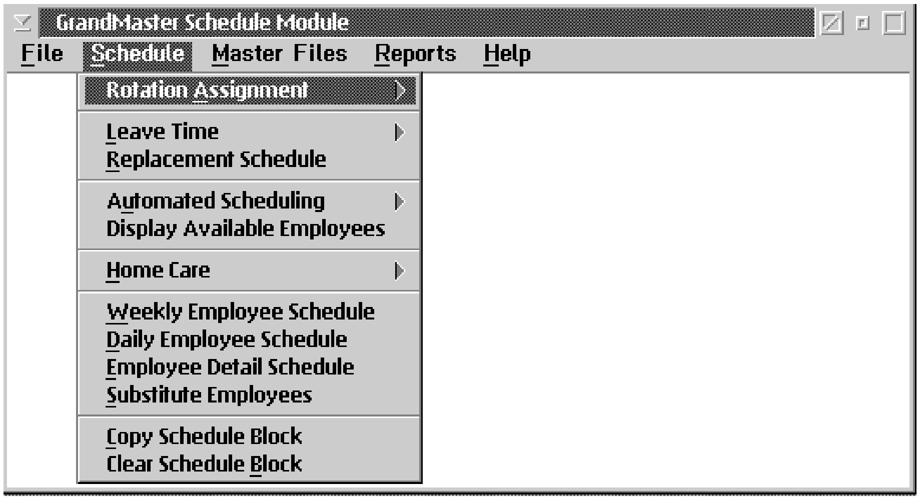
SCHEDULE

The **Schedule** menu choice from the main menu bar is used to select functions that prepare and process the GrandMaster Suite Schedule.

The **Schedule** menu appears as follows:

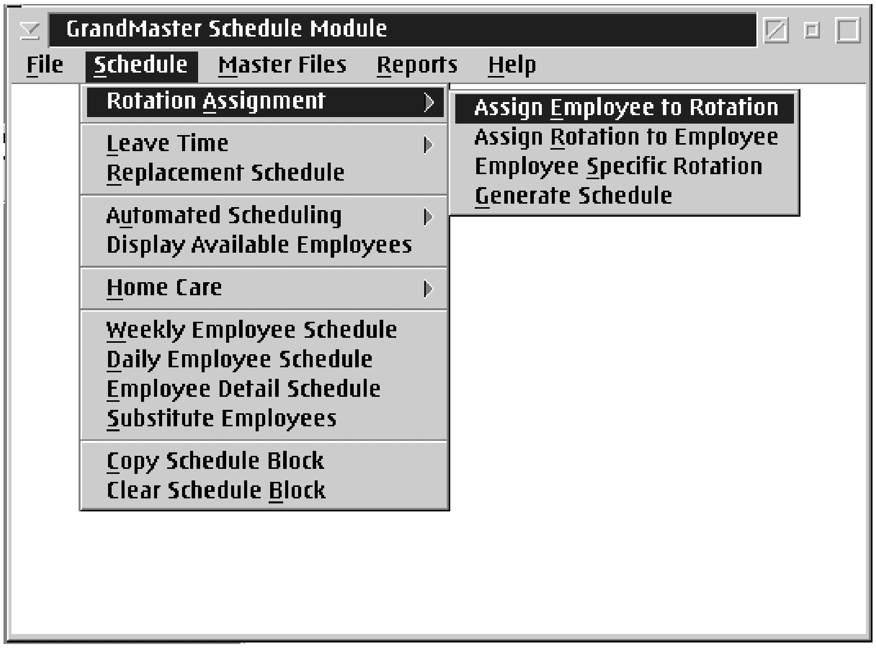


The options in the Schedule menu are used for creating rotation assignments (page 28) as well as scheduling leave time (page 44) and replacements (page 74) for those employees on leave. This menu also allows the user to schedule positions (page 78) and equipment to employees.

Schedules can be made through the Generate Schedule (page 78), Scheduling a Date Range (page 81) or Copying a Schedule Block (page 109) options.

Rotation Assignments

The **Rotation Assignment** sub-menu appears as follows:



The **Rotation Assignment** option allows the user to create rotation assignments in three different ways:

- by assigning an employee to a rotation pattern
- by assigning a rotation pattern to an employee
- make an employee specific rotation

The employee rotation assignments are used to generate a schedule for the employees. The schedule generated may be modified through the detail scheduling option.

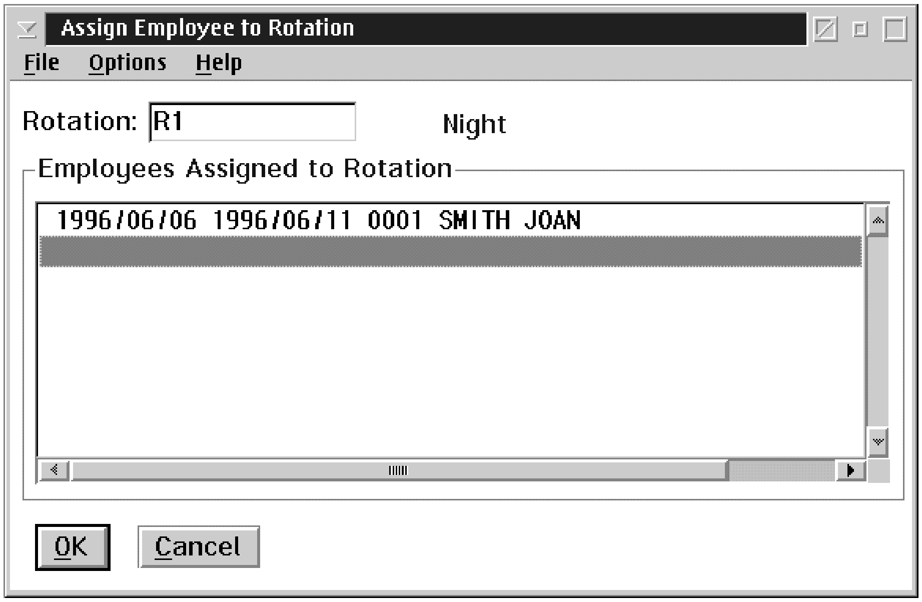
Assign an Employee to a Rotation

The **Assign Employee to Rotation** option is used to assign a list of employees to a user defined rotation pattern.

The rotation pattern is defined using the Rotation Update choice in the Master Files Menu selection in the Main Screen Menu.

Rotation Patterns must be defined prior to any scheduling of employees.

When the user selects this option, the following dialog box will appear:



The screen contains the following data fields:

Field	Description
Rotation	This field is used to enter the code for the Rotation Pattern that will be used for scheduling. The rotation description will be displayed to the right of the code.
Rotation Employee List	This list shows the employees assigned to the rotation selected. The list includes from left to right: Start Date for the Rotation, End Date for the Rotation, and the Start Day for the Rotation and Employee Name.

OK

When the OK button is pressed the changes to the Rotation Employee assignments are updated to the Schedule Data Tables. The **Save** option in the File menu gives the same result as the OK button.

CANCEL

When the CANCEL button is pressed the function exits without updating the Schedule Data Tables. The **Exit** (or the ESC key) option in the File menu gives the same result as the CANCEL button.

These functions are available from the File menu:

F8 (list) To display a list of the rotations previously defined, place the cursor in the rotation field and press the F8 key, or the **List** option from the File menu.

Save To save any changes made in the employee rotation assignments to the Schedule Data Tables select OK button, or the **Save** option from the File menu will give the same result.

Esc (exit) The ESC key will exit the screen without saving any changes made in the assignments. The CANCEL button, or the **Exit** option from the File menu will give the same result.

These features are available in the Options menu:

Display Fields When the Display Fields function in the Options menu is selected the Employee Assignment screen will automatically be displayed when one of the list entries is highlighted. This allows for the employee assignment to be changed.

To activate the Display Fields simply select it from the Options menu so that a check mark appears to the left. To turn it off select it again so that the check mark is no longer to the left of the option.

If the Display Fields function is turned off the user gets the same results by double clicking on the appropriate list entry. The Display Fields function saves the user the action of pressing the ENTER key.

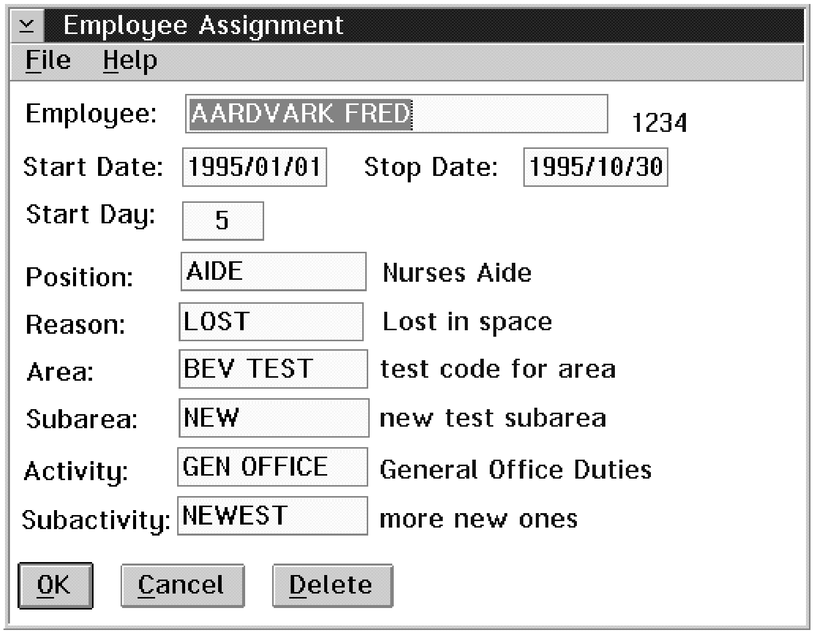
☞ Selecting a blank list entry allows the insertion of a new employee assignment.

Scroll Table When the Scroll Table function in the Options menu is turned on, if there is a rotation in the rotation field that any employees were assigned to previously, the listed data will be displayed automatically. If the Scroll Table is turned off the ENTER key must be pressed to display the list.

To activate the Scroll Table function simply select it from the Options menu so that a check mark appears to the left. To turn it off, select it again so that the check mark is no longer to the left of the option.

Selecting an Employee from the List

When the user selects one of the list entries the “Employee Assignments” screen will appear as follows:



The screen requests the entry of the following data fields:

Field	Description
Employee	The Employee field is used to specify the employees name of the rotation pattern. To the right of the name the badge number will appear. If a payroll is selected the employee number will appear instead of the badge number.
Start Date	The Start Date field is the date that the employee is to start the rotation pattern. This date and the start day field determine the first shift worked by the employee.
Stop Date	The Stop Date field is the date that the employee stops working the rotation pattern.
Start Day	The Start Day field is used to determine the employee's starting day in the rotation pattern.
Position	The Position field is used to specify the position the employee will work.
Reason	This field is used to specify the reason for the assignment and may be used to indicate a reason outside of the normal assignment such as relief work.
Area	The Area field is used to specify the area code for the rotation pattern.
Sub Area	The Sub Area field is used to specify the subarea code for the rotation pattern assignment.

Field	Description
Activity	The Activity field is used to specify the activity code for the rotation pattern assignment.
Sub Activity	The Sub Activity field is used to specify the subactivity for the rotation pattern assignment.

F8 (list) When the F8 key, or the **List** option from the File menu is pressed a list of the options for the field where the cursor is placed will appear. This function will list start date, stop date, or start day.

Save To update the Employee Rotation List press the F10 key, the OK button, or the **Save** option from the File menu. The changes will not be saved until you press the OK button or the F10 key on the list screen.

Esc (exit) To exit the screen without saving any changes press the ESC key. The CANCEL button, or the **Exit** option from the File menu will have the same effect.

Assign a Rotation to an Employee

The **Assign Rotation to Employee** option is used to assign a list of rotation patterns to an employee.

The Rotation Pattern is defined using the **Rotation Table** option in the Master Files menu on the main menu bar.

☞ Rotation Patterns must be defined prior to any scheduling of employees.

When the user selects the **Assign Rotation to Employee** option, the following dialog box will appear:

This screen contains the following data fields:

Field	Description
Employee	This field is used to enter the name of the Employee that will be scheduled.
Rotation Pattern Assigned.	This list shows the rotations assigned to the employee selected. The list includes: Rotation Code, Rotation Name, Start Date for the Rotation, and End Date for the Rotation.

OK When this button is pressed the changes to the Rotation Employee assignments are updated to the Schedule Data Tables. The **Save** option in the File menu gives the same result as the OK button.

CANCEL When this button is pressed the function exits without updating the Schedule Data Tables. The **Exit** (or the ESC key) option in the File menu gives the same result as the CANCEL button.

These functions are available from the File menu:

F8 (list) When the cursor is placed in the employee field, pressing the F8 key, or the **List** option in the File menu will display a list of the employees.

Save The OK button, or the **Save** option in the File menu will save any changes made in the assignments to the employee.

Esc (exit) The ESC key will exit the screen without saving any changes to the screen. The CANCEL button, or the **Exit** option from the File menu will do the same function.

These functions are available from the Options menu:

Display Detail When the Display Detail function in the Options menu is selected the Rotation Assignment screen will automatically be displayed when one of the list entries is highlighted. This allows for the rotation assignment to be changed.

To activate the Display Detail simply select it from the Options menu so that a check mark appears to the left. To turn it off select it again so that the check mark is no longer to the left of the option.

If the Display Detail function is turned off the user gets the same results by double clicking on the appropriate list entry. The Display Detail function saves the user the action of pressing the ENTER key.

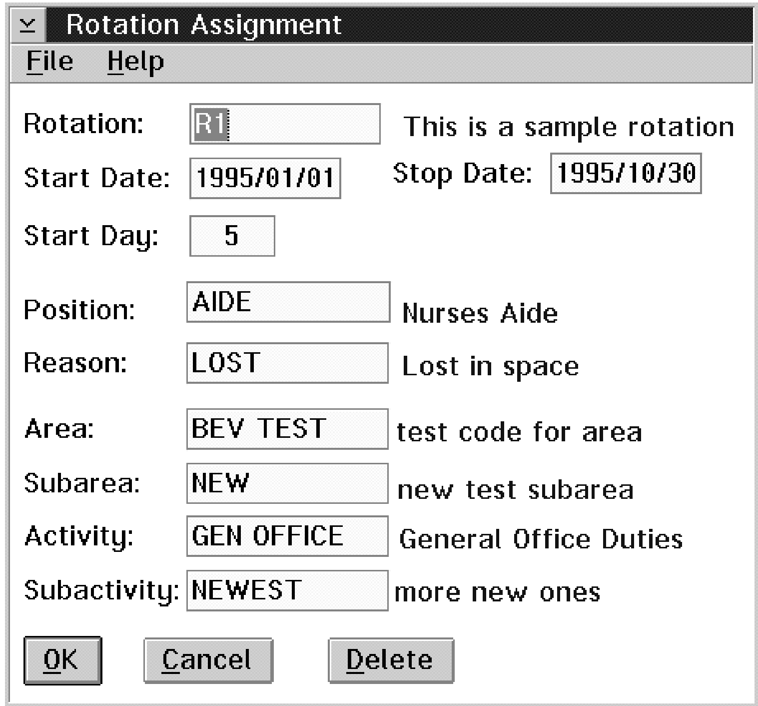
☞ Selecting a blank list entry allows the insertion of a new rotation assignment.

Scroll Table When the Scroll Table function in the Options menu is turned on, if there is an employee in the employee field that was assigned rotations previously, the listed data will be displayed automatically. If the Scroll Table is turned off the ENTER key must be pressed to display the list.

To activate the Scroll Table function simply select it from the Options menu so that a check mark appears to the left. To turn it off, select it again so that the check mark is no longer to the left of the option.

Selecting a Rotation from the List

When the user selects one of the list entries the Rotation Assignment screen will appears as follows:



This screen requests the entry of the following data fields:

Field	Description
Rotation	This field is used to specify the rotation code for the rotation pattern.
Start Date	This is the date that the employee is assigned to the rotation pattern. This date and the starting day field determine the first shift worked by the employee.
Stop Date	This is the day that the employee stops working the rotation pattern.
Start Day	This field is used to determine the employee's starting day in the rotation pattern.
Position	This field is used to specify the position the employee will work.
Reason	This field is used to specify the reason for the assignment and may be used to indicate a reason outside of the normal assignemnt such as relief work.
Area	This field is used to specify the area code for the rotation pattern.
Sub Area	This field is used to specify the subarea code for the rotation pattern assignment.
Activity	This field is used to specify the activity code for the rotation pattern assignment.
Sub Activity	This field is used to specify the subactivity for the rotation pattern assignment.

F8 (list)

When the F8 key, or the **List** option from the File menu is selected a list of the options for the field where the cursor is placed will appear. This function will list start date, stop date, start day, department, account, or sub account.

Save

The OK button, or the **Save** option from the File menu will save any changes made in the screen.

Esc (exit)

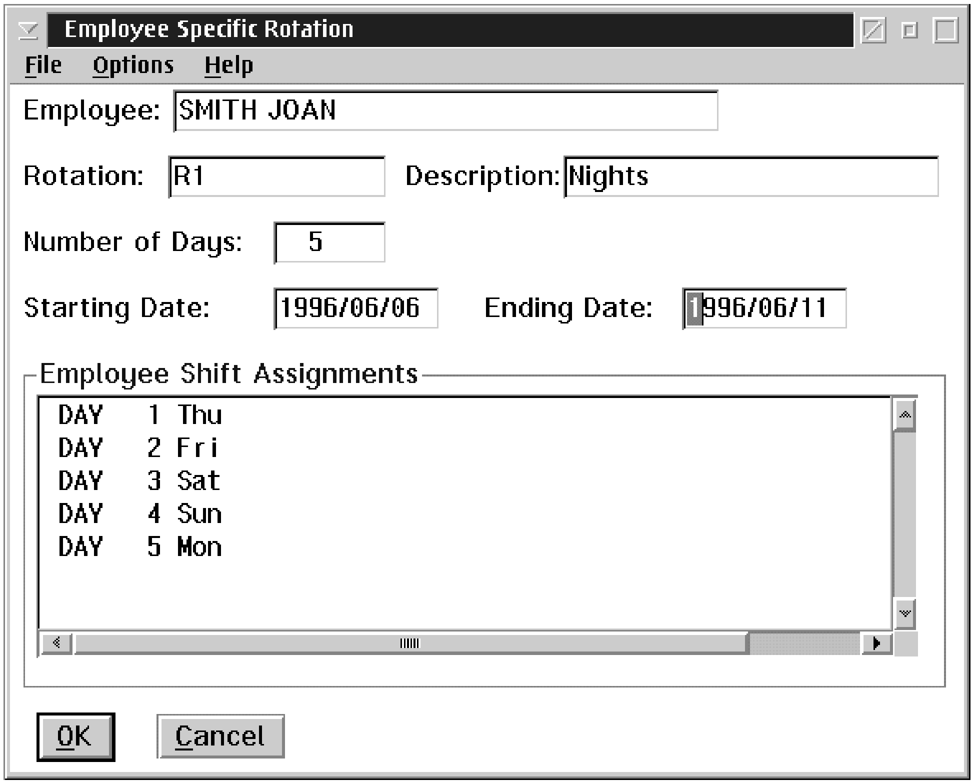
The ESC key will exit the screen without saving any changes to the screen. The CANCEL button, or the **Exit** option from the File menu will do the same function.

Employee Specific Rotations

The **Employee Specific Rotation** option is used to create a rotation and shift pattern that is unique for a specific employee. The Employee Specific Rotation allows up to five shifts in each work day with a separate start and stop time assigned to each shift.

You can have a maximum of 100 days per specific employee rotation.

When this option is selected, the following dialog box will appear:



This screen provides the following data entry fields:

Field	Description
Rotation	This field is used to specify a rotation code for the rotation pattern. The rotation pattern codes must be unique for an employee. The same code may be used for different employees.
Description	This field is used for a description of the rotation pattern.
Number of Days	This field is used to set the number of days for the rotation pattern. There is a maximum of 100 days possible.
Starting Date	This field is used for the starting date of the rotation pattern.
Ending Date	This field is used for the ending date of the rotation pattern.

Field	Description
Shift List	This list contains an entry for each day of the rotation pattern. Selection of a particular day allows the entry of the shifts to be worked on that day. The Shift List contains the following information from left to right: day number, day of the week, and up to five shift types.

OK This button is used to update the rotation pattern to the schedule data tables.

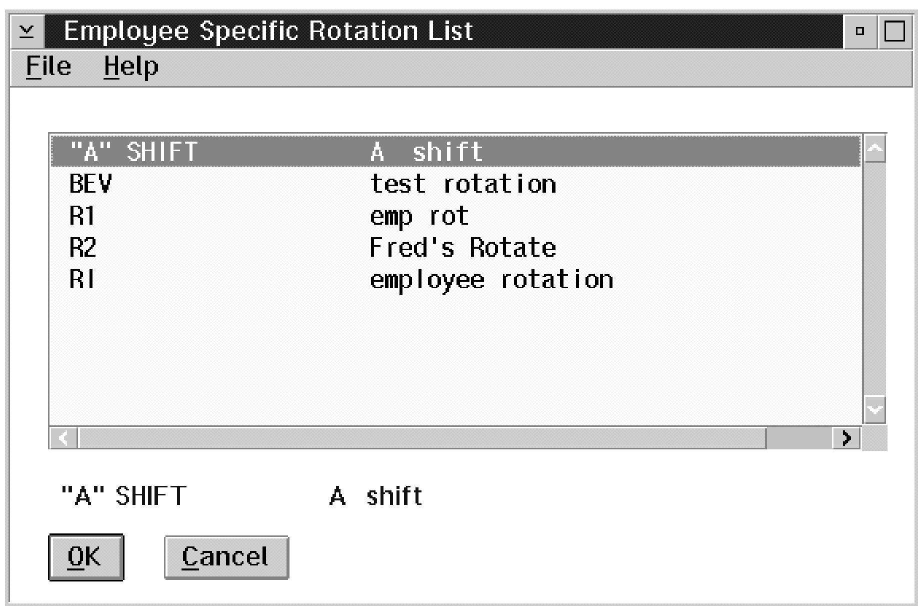
CANCEL This button is used to exit from the function without updating the schedule data tables.

The functions available from the File menu are:

Next Employee The **Next Employee** option in the File menu will bring up the next employee in the employee list. This key only moves to the next employee if a valid rotation has been entered for the current employee.

F8 (list) The F8 key, or the **List** option from the File menu will list the available data for either the employee or rotation fields depending in which field the cursor is placed.

When the user calls up a list of the rotations for the employee the following dialog box will appear:



This dialog box allows the user to select a rotation for the employee by double clicking on the list entry or moving the selection bar to the desired entry and pressing the OK button.

The CANCEL button or the **Exit** option from the File menu will exit the screen without making a selection.

Delete The **Delete** option in the File menu will delete the current rotation for the current employee only.

Save The **Save** option in the File menu, or the OK button will save any changes made to the screen.

Esc (exit) The ESC key, or the **Exit** option from the File menu will exit the screen without saving any changes. The CANCEL button will also exit without saving any changes.

The functions available from the Options menu are:

Display Fields When the Display Fields function in the Options menu is selected the Shift Selections screen will automatically be displayed when one of the list entries is highlighted. This allows for the shifts to be changed.

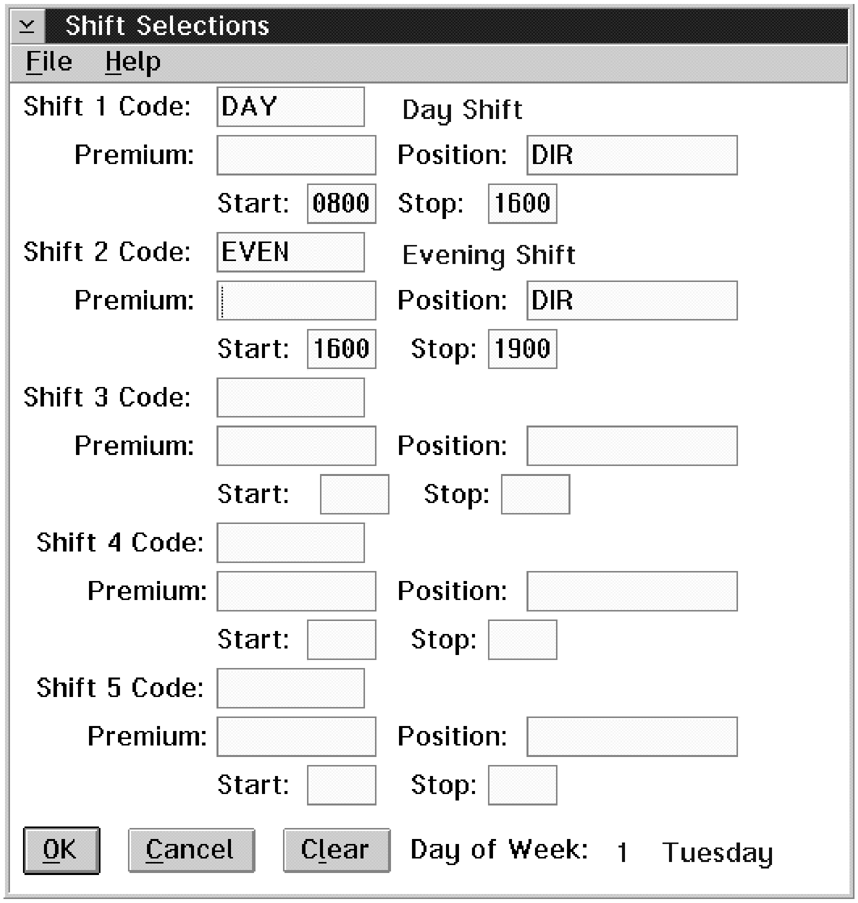
To activate the Display Fields simply select it from the Options menu so that a check mark appears to the left. To turn it off select it again so that the check mark is no longer to the left of the option.

If the Display Fields function is turned off the user gets the same results by double clicking on the appropriate list entry. The Display Fields function saves the user the action of pressing the ENTER key.

Selecting a Shift Assignment from the List

When a particular day in the Shift List is selected a new dialog box will appear which allows the user to enter the shifts that will be worked by an employee on a particular work day.

The dialog box appears as follows:



Up to five (5) shifts may be specified for a single work day. Each shift has a start and stop time. When the base shift used for the schedule has unpaid breaks set, these breaks will be deducted from the total working hours only if the breaks fall within the start and stop times set.

The dialog box contains the following data entry fields for each shift segment:

Field	Description
Shift Code	This field contains the code for the shift to be worked. The shift name will appear, for display only, to the right when a shift code has been selected.
Premium	The premium codes (up to 10) are entered into this field.
Position	This field contains the position for the shift segment.
Start	This field is used to enter the starting time for the shift segment.
Stop	The stopping time for the shift segment is entered into this field.

OK	This button is used to temporarily save the shift segments in the current shift list to the employee specific rotation screen. A permanent save is done when the OK button is selected on the employee specific rotation screen. The shift selections screen will not be closed by this action. It can only be closed by selecting the close option from the system menu in the upper left hand corner.
Esc (exit)	The ESC key, the CANCEL button, or the **Exit** option from the File menu are used to go back to the employee specific rotation screen without changing the current shift list. The shift selections screen will not be closed by this action. It can only be closed by selecting the close option from the system menu in the upper left hand corner.
CLEAR	This button is used to clear all the fields on the screen.
F8 (list)	The F8 key will list either the shift code or the position depending in which field the cursor is placed.

Generating a Schedule

The generation of schedules from rotation patterns is done through the **Generate Schedule** menu choice on the Rotation Assignment sub menu in the Schedule menu of the Schedule Module main menu screen.

The **Generate Schedule** option is used to create Employee Schedule Items from the Rotation Assignments for the employees. This option scans the Rotation Assignments in the Schedule Tables and creates individual Employee Schedule Items.

This option requires the input of a start date and end date to control the generation process. Schedule items are generated only for those dates in the date range specified.

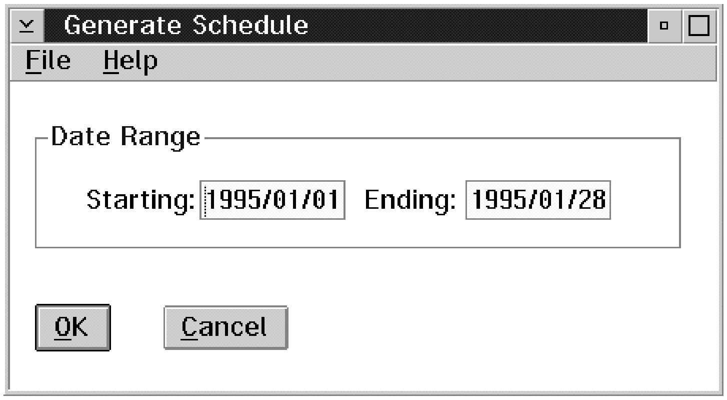
When a schedule has been previously generated for dates in the range, the option will overwrite these items with the new schedule unless the schedule items have been processed through the Time Keeping module.

After the schedule items have been generated the schedule generation option will use the leave schedule entries to overlay the work time segments with the scheduled leave time.

☞ Schedule Items for an employee will not be created when an individual item for a particular date already appears in the Schedule Item table.

☞ The employees included in the schedule generation process are governed by the selection group currently in force.

When the **Generate Schedule** option is chosen the following dialog box will appear:



The Generate Schedule screen contains the following data entry fields:

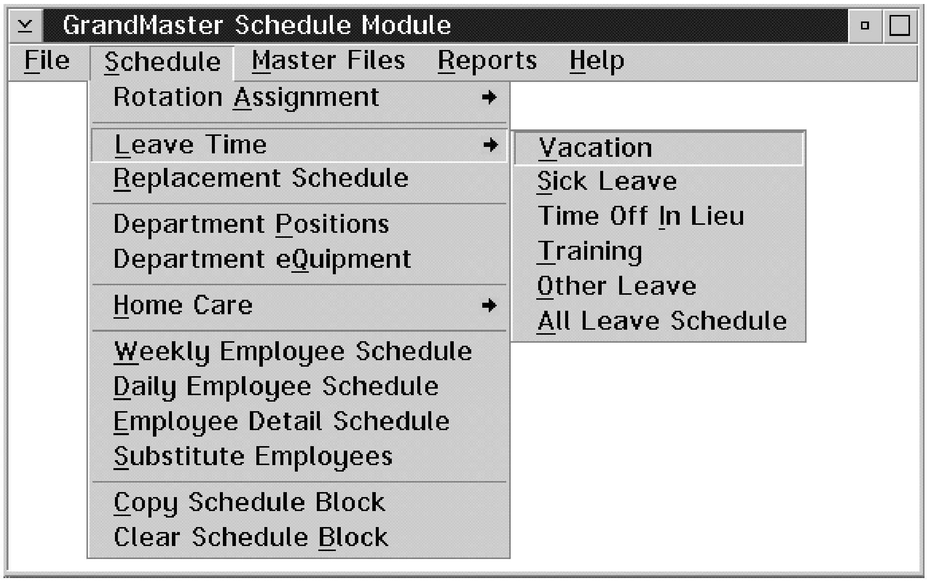
Field	Description
Starting Date	This field contains the start date for the schedule generation. The date is automatically set to the day following the last generated schedule.
Ending Date	This field contains the ending date for the schedule generation. The date is automatically set to starting plus the number of days in the Control Data Update entry field of Days to Schedule.

OK The OK button is pressed to generate the schedule for the date range entered in the Starting Date and Ending Date fields.

CANCEL The CANCEL button is pressed to exit from the function without generating any schedule items.

Leave Time

The following sub menu includes the options available under **Leave Time**:



The **Leave Time** option supports five major divisions of leave time:

- vacation
- sick leave
- time off in lieu
- training
- other leave
- all leave

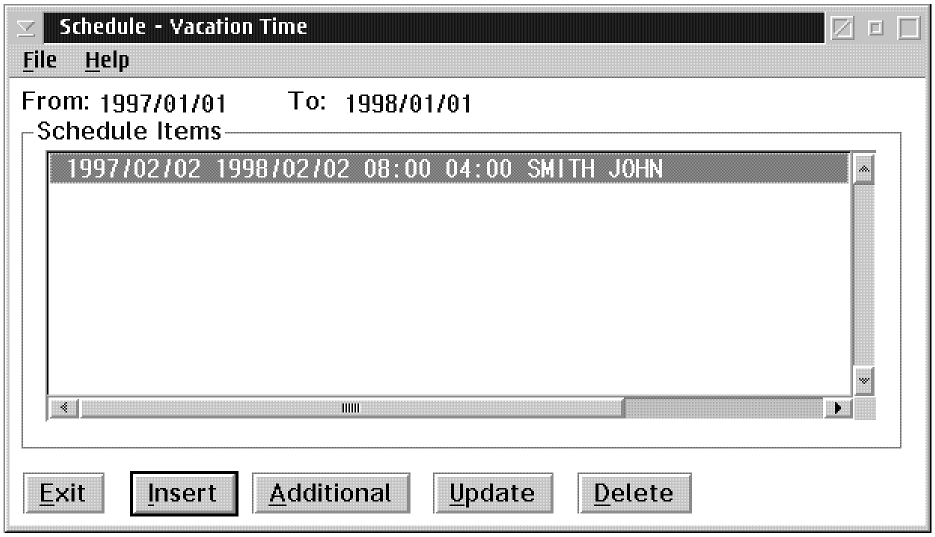
Each major type of leave time has an associated set of **reason codes**. The reason codes are used to describe the purpose for the leave time. The system user may define any number of reason codes for each type of leave.

Each major type of leave may have an associated **payroll earning code** that is used to allocate the time granted for the leave. This earning code is normally associated with a payroll accumulator that is used to track the employee's entitlement for the leave time.

When leave time is scheduled for an employee that is assigned to a standard shift rotation, the standard shift assignments in the date range scheduled for leave for that employee are replaced by the system defined shift code for the leave type.

Vacation Leave

When the **Vacation** option from the Leave Time sub menu is selected the following screen will appear:



The Schedule - Vacation Time dialog box contains the following data fields:

Field	Description
From	The starting date of the date range is displayed in this field.
To	The ending date of the date range is displayed in this field.
Schedule Leave List	The list contains all the vacation leaves that have been scheduled within the date range. From left to right the list contains: starting date, ending date, starting time, ending time, and the employee.

Set Date Range The **Set Date Range** option from the File menu will allow the user to change the date range.

Insert The INSERT button, or the **Insert Item** option from the File menu is the option used to add a new item to the list.

Additional The ADDITIONAL button, or the **Additional for Employee** option from the File menu will allow the user to enter another entry for the same employee selected by the selection bar. This saves the user the step of selecting the employee again.

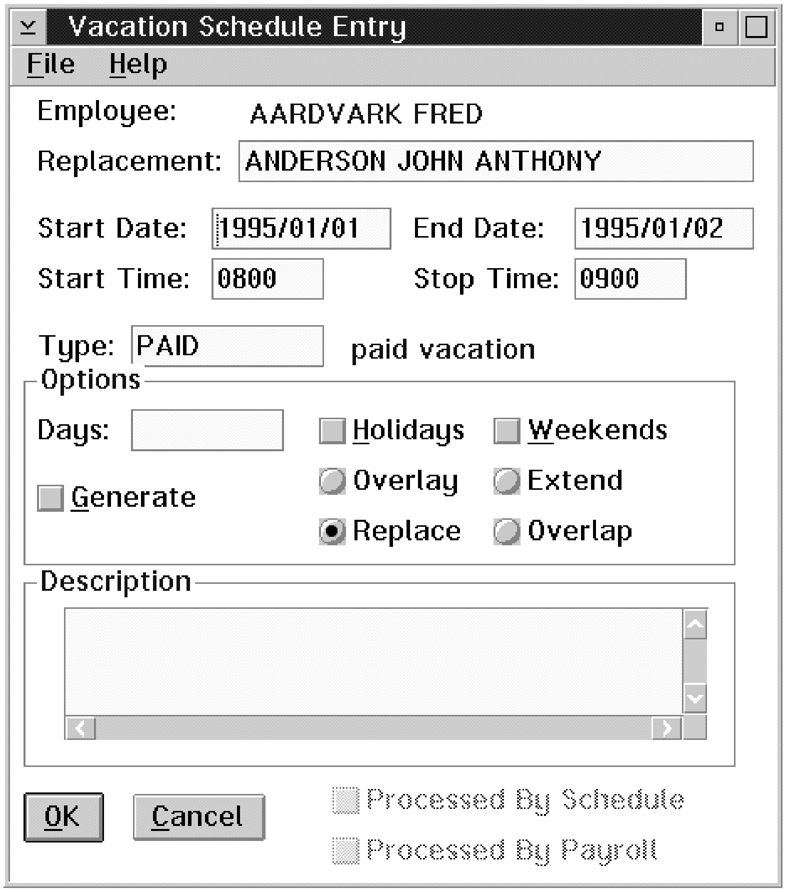
Update The UPDATE button, or the **Update Entry** option from the File menu will call up the item selected by the selection bar so that changes can be made to the current information.

Delete The DELETE button, or the **Delete Entry** option from the File menu will delete the item of the list which is selected by the selection bar.

Esc (exit) The ESC key, EXIT button, or the **Exit** option from the File menu will exit the function.

Vacation Leave Entry

When a vacation leave item is inserted or updated the following dialog box will appear:



The following table contains descriptions of the fields within the Vacation Schedule Entry dialog box:

Field	Description
Employee	This field contains the employee currently being scheduled for leave. This field is for display only.
Replacement	The employee that will replace the employee on leave is entered into this data field.
Start Date	This field contains the starting date for the leave entry date range.

Field	Description
End Date	This field contains the ending date for the leave entry date range. When this field is not entered it is assumed to be identical to the start date.
Start Time	The starting time for the leave entry time range is entered into this field. When 'overlay processing only' is in effect this field may be zero.
Stop Time	The stopping time for the leave entry time range is entered into this field. When the 'overlay processing only' is in effect this field may be zero.
Type	This field is used to enter the user defined type code. A list of the defined codes can be generated by selecting the F8 key. The description of the type code will appear to the right of this field after a type has been selected.
Days	This field contains the days of the week that the leave entry may affect. This field is ignored for a one day date range.
Generate	The Generate check box turns on the segment generation option.
Holidays	The Holidays check box determines if the leave entry generation option is in effect for holidays registered in the system calendar.
Overlay	The Overlay check box turns on the overlay segment processing option.
Replace	The Replace check box turns on the replace segment processing option.
Weekends	The Weekends check box determines if the leave entry generation option is in effect for weekend days.
Extend	The Extend check box turns on the extend segment processing option.
Overlap	The Overlap check box turns on the overlap processing option.
Description	This field is a free form multi-line text field that may be used for additional descriptive information.

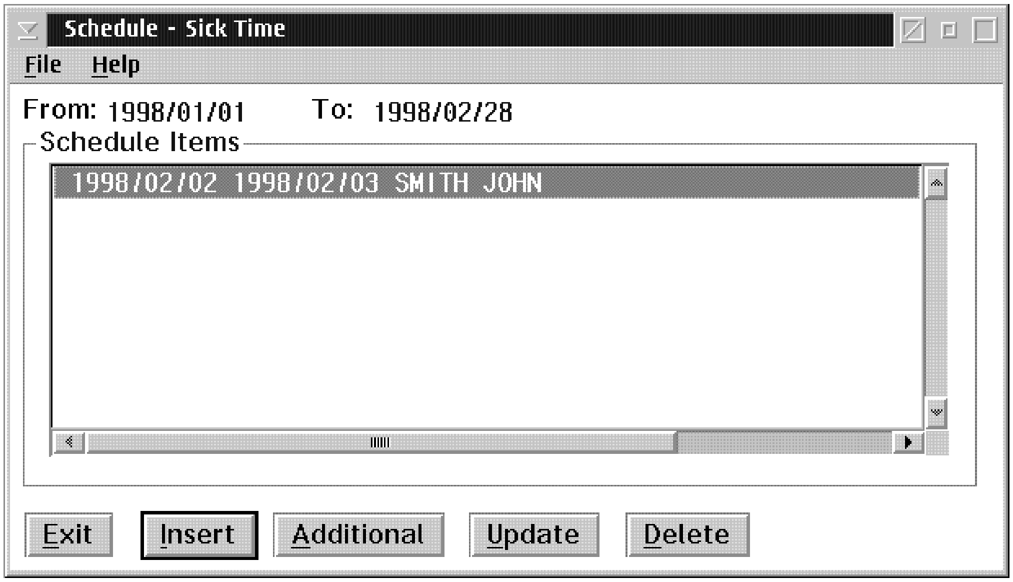
F8 (list) The F8 key, or the **List** option in the File menu will bring up a list of available options relating to the field in which the cursor is placed. The only fields which will contain a list are: replacement and type.

Save The OK button, or the **Save** option in the File menu will save any changes made in the dialog box.

Esc (exit) The ESC key, the CANCEL button, or the **Exit** option from the File menu will exit the dialog box without saving any changes.

Sick Leave

When the **Sick Leave** option from the Leave Time sub menu is selected the following screen will appear:



The Schedule - Sick Time dialog box contains the following data fields:

Field	Description
From	The starting date of the date range is displayed in this field.
To	The ending date of the date range is displayed in this field.
Schedule Items List	The list contains sick times that have been scheduled within the date range. From left to right the list contains: starting date, ending date, starting time, ending time, and the employee.

Set Date Range

The **Set Date Range** option from the File menu will allow the user to change the date range.

Insert

The INSERT button, or the **Insert Item** option from the File menu is the option used to add a new item to the list.

Additional

The ADDITIONAL button, or the **Additional for Employee** option from the File menu will allow the user to enter another entry for the same employee selected by the selection bar. This saves the user the step of selecting the employee again.

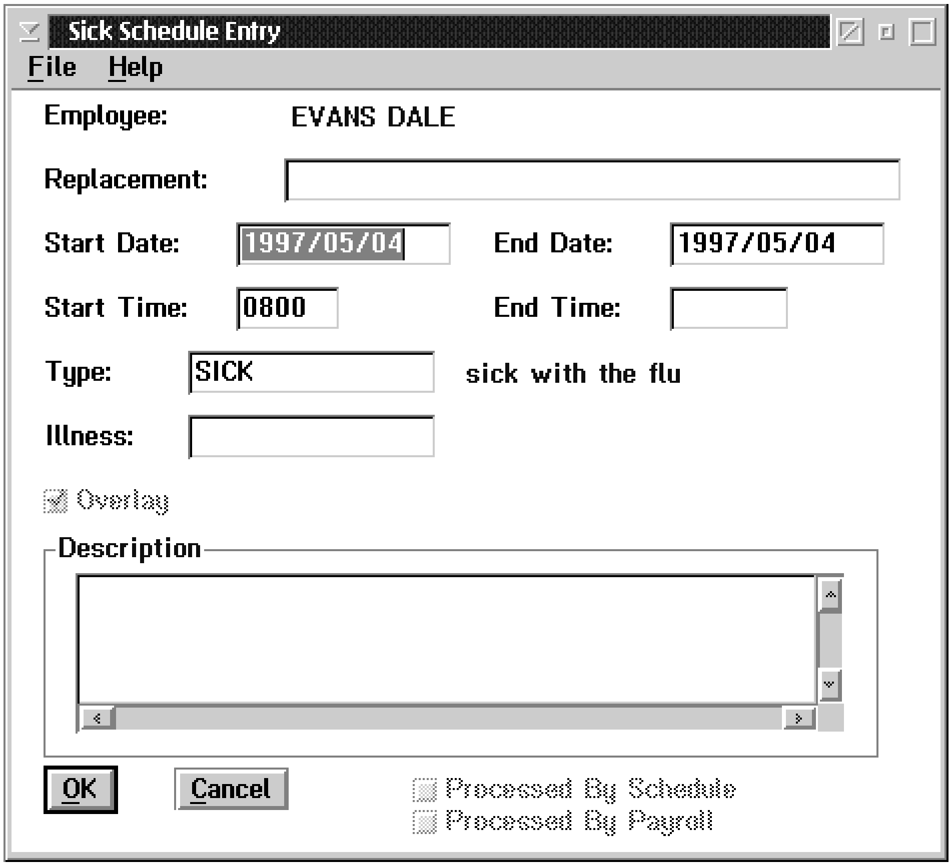
Update The UPDATE button, or the **Update Entry** option from the File menu will call up the item selected by the selection bar so that changes can be made to the current information.

Delete The DELETE button, or the **Delete Entry** option from the File menu will delete the item of the list which is selected by the selection bar.

Esc (exit) The ESC key, EXIT button, or the **Exit** option from the File menu will exit the function.

Sick Leave Entry

When a sick leave item is inserted or updated the following dialog box will appear:



The following table contains descriptions of the fields within the Sick Schedule Entry dialog box:

Field	Description
Employee	This field contains the employee currently being scheduled for leave. This field is for display only.

Field	Description
Replacement	The employee that will replace the employee on leave is entered into this data field.
Start Date	This field contains the starting date for the leave entry date range.
End Date	This field contains the ending date for the leave entry date range. When this field is not entered it is assumed to be identical to the start date.
Start Time	The starting time for the leave entry time range is entered into this field. When 'overlay processing only' is in effect this field may be zero.
Stop Time	The stopping time for the leave entry time range is entered into this field. When the 'overlay processing only' is in effect this field may be zero.
Type	This field is used to enter the user defined type code. A list of the defined codes can be generated by selecting the F8 key. The description of the type code will appear to the right of this field after a type has been selected.
Illness	This field is used to enter the user defined illness code. A list of the defined codes can be generated by selecting the F8 key. The description of the illness code will appear to the right of this field after an illness has been selected.
Description	This field is a free form multi-line text field that may be used for additional descriptive information.

F8 (list)

The F8 key, or the **List** option in the File menu will bring up a list of available options relating to the field in which the cursor is placed. The only fields which will contain lists are: replacement, type and illness.

Save

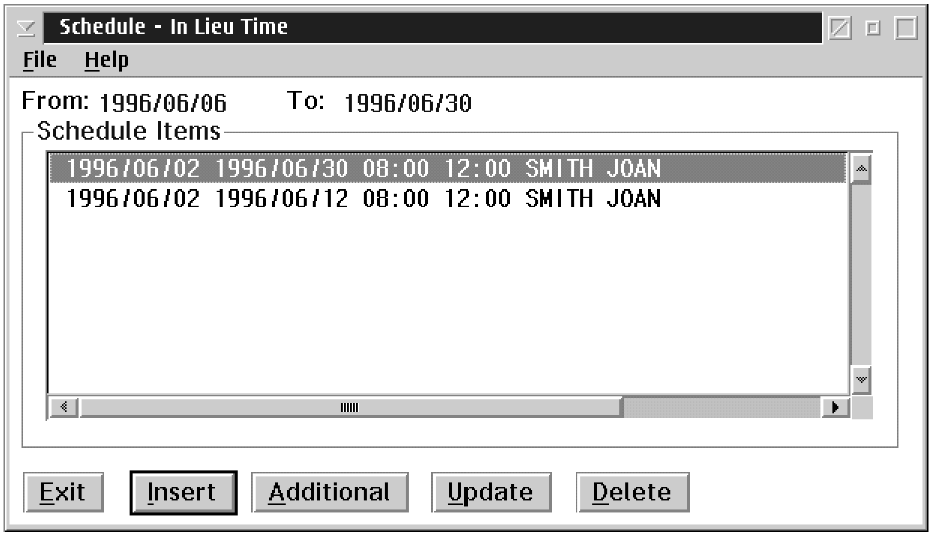
The OK button, or the **Save** option in the File menu will save any changes made in the dialog box.

Esc (exit)

The ESC key, the CANCEL button, or the **Exit** option from the File menu will exit the dialog box without saving any changes.

Time Off in Lieu

When the **Time Off in Lieu** option from the Leave Time sub menu is selected the following screen will appear:



The Schedule - In Lieu Time dialog box contains the following data fields:

Field	Description
From	The starting date of the date range is displayed in this field.
To	The ending date of the date range is displayed in this field.
Schedule Items List	The list contains in lieu times that have been scheduled within the date range. From left to right the list contains: starting date, ending date, starting time, ending time, and the employee.

Set Date Range The **Set Date Range** option from the File menu will allow the user to change the date range.

Insert The INSERT button, or the **Insert Item** option from the File menu is the option used to add a new item to the list.

Additional The ADDITIONAL button, or the **Additional for Employee** option from the File menu will allow the user to enter another entry for the same employee selected by the selection bar. This saves the user the step of selecting the employee again.

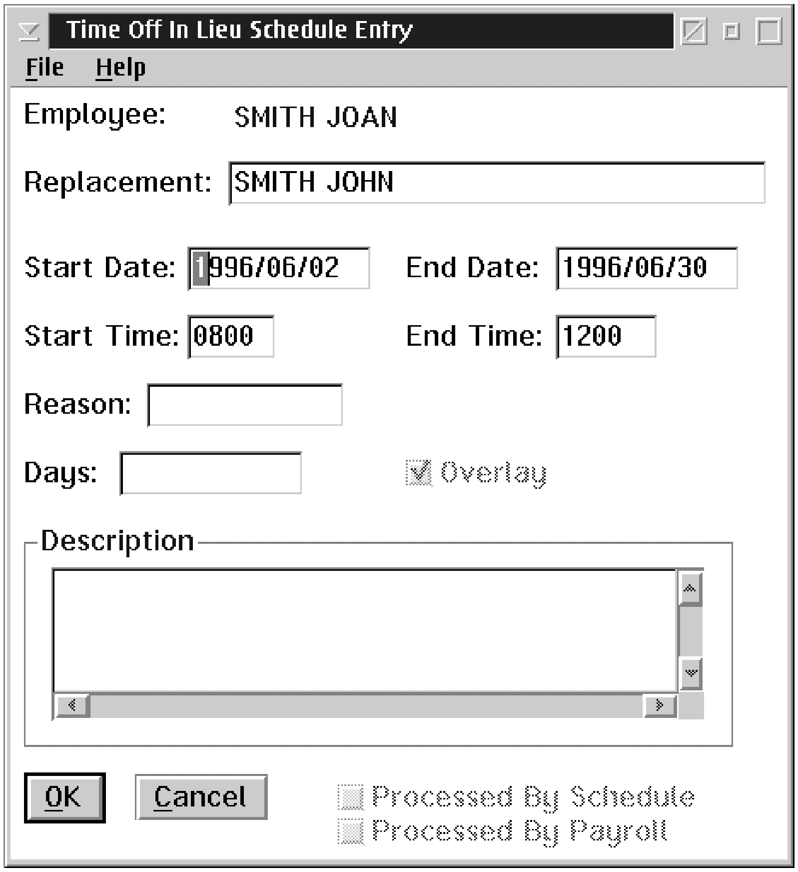
Update The UPDATE button, or the **Update Entry** option from the File menu will call up the item selected by the selection bar so that changes can be made to the current information.

Delete The DELETE button, or the **Delete Entry** option from the File menu will delete the item of the list which is selected by the selection bar.

Esc (exit) The ESC key, EXIT button, or the **Exit** option from the File menu will exit the function.

Time Off in Lieu Leave Entry

When a time off in lieu leave item is inserted or updated the following dialog box will appear:



The following table contains descriptions of the fields within the Time Off in Lieu Schedule Entry dialog box:

Field	Description
Employee	This field contains the employee currently being scheduled for leave. This field is for display only.
Replacement	The employee that will replace the employee on leave is entered into this data field.
Start Date	This field contains the starting date for the leave entry date range.
End Date	This field contains the ending date for the leave entry date range. When this field is not entered it is assumed to be identical to the start date.
Start Time	The starting time for the leave entry time range is entered into this field. When 'overlay processing only' is in effect this field may be zero.
Stop Time	The stopping time for the leave entry time range is entered into this field. When the 'overlay processing only' is in effect this field may be zero.
Reason	This field is a validated code entry from a reason table for the leave type.
Days	This field contains the days of the week that the leave entry may affect. This field is ignored for a one day date range.
Description	This field is a free form multi-line text field that may be used for additional descriptive information.

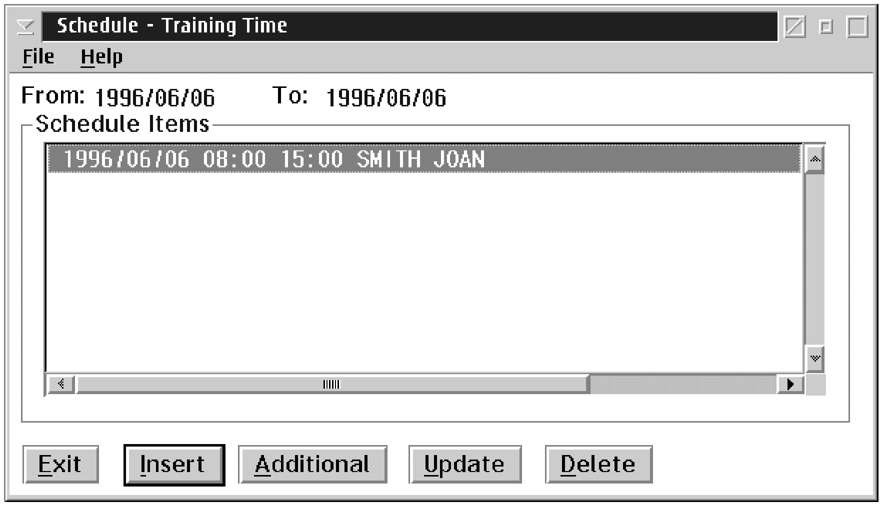
F8 (list) The F8 key, or the **List** option in the File menu will bring up a list of available options relating to the field in which the cursor is placed. The only fields which will contain a list are: replacement and reason.

Save The OK button, or the **Save** option in the File menu will save any changes made in the dialog box.

Esc (exit) The ESC key, the CANCEL button, or the **Exit** option from the File menu will exit the dialog box without saving any changes.

Training

When the **Training** option from the Leave Time sub menu is selected the following screen will appear:



The Schedule - Training Time dialog box contains the following data fields:

Field	Description
From	The starting date of the date range is displayed in this field.
To	The ending date of the date range is displayed in this field.
Schedule Items List	The list contains training times that have been scheduled within the date range. From left to right the list contains: starting date, ending date, starting time, ending time, and the employee.

Set Date Range

The **Set Date Range** option from the File menu will allow the user to change the date range.

Insert

The INSERT button, or the **Insert Item** option from the File menu is the option used to add a new item to the list.

Additional

The ADDITIONAL button, or the **Additional for Employee** option from the File menu will allow the user to enter another entry for the same employee selected by the selection bar. This saves the user the step of selecting the employee again.

Update

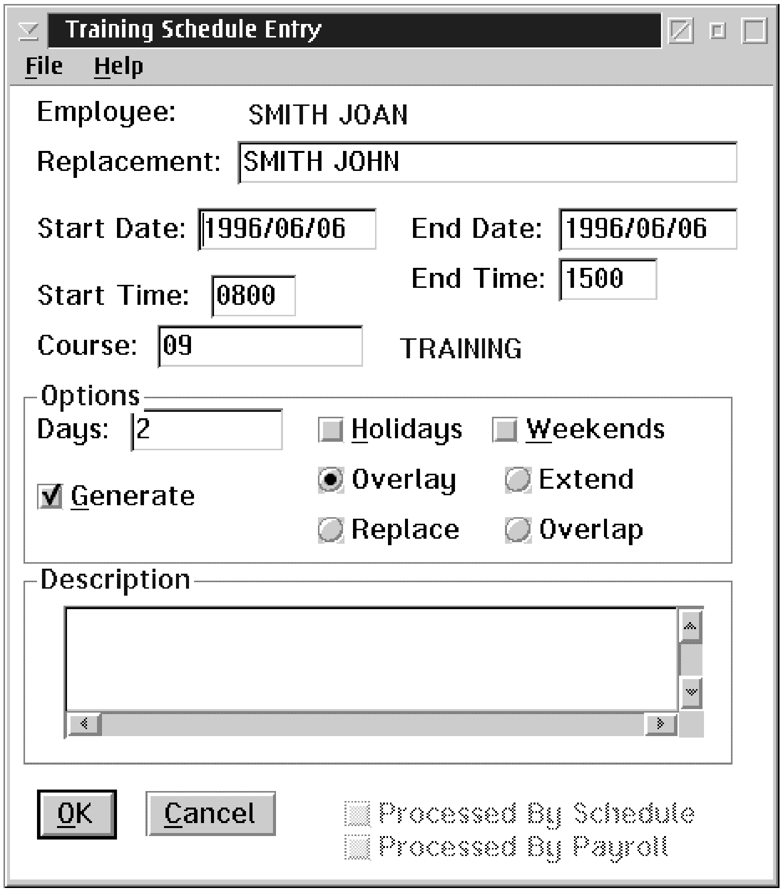
The UPDATE button, or the **Update Entry** option from the File menu will call up the item selected by the selection bar so that changes can be made to the current information.

Delete The DELETE button, or the **Delete Entry** option from the File menu will delete the item of the list which is selected by the selection bar.

Esc (exit) The ESC key, EXIT button, or the **Exit** option from the File menu will exit the function.

Training Leave Entry

When a training leave item is inserted or updated the following dialog box will appear:



The following table contains descriptions of the fields within the Training Schedule Entry dialog box:

Field	Description
Employee	This field contains the employee currently being scheduled for leave. This field is for display only.
Replacement	The employee that will replace the employee on leave is entered into this data field.
Start Date	This field contains the starting date for the leave entry date range.

Field	Description
End Date	This field contains the ending date for the leave entry date range. When this field is not entered it is assumed to be identical to the start date.
Start Time	The starting time for the leave entry time range is entered into this field. When 'overlay processing only' is in effect this field may be zero.
Stop Time	The stopping time for the leave entry time range is entered into this field. When the 'overlay processing only' is in effect this field may be zero.
Course	This field is used to enter the user defined course code. A list of the defined codes can be generated by selecting the F8 key. The description of the course code will appear to the right of this field after a course has been selected.
Days	This field contains the days of the week that the leave entry may affect. This field is ignored for a one day date range.
Generate	The Generate check box turns on the segment generation option.
Holidays	The Holidays check box determines if the leave entry generation option is in effect for holidays registered in the system calendar.
Overlay	The Overlay check box turns on the overlay segment processing option.
Replace	The Replace check box turns on the replace segment processing option.
Weekends	The Weekends check box determines if the leave entry generation option is in effect for weekend days.
Extend	The Extend check box turns on the extend segment processing option.
Overlap	The Overlap check box turns on the overlap processing option.
Description	This field is a free form multi-line text field that may be used for additional descriptive information.

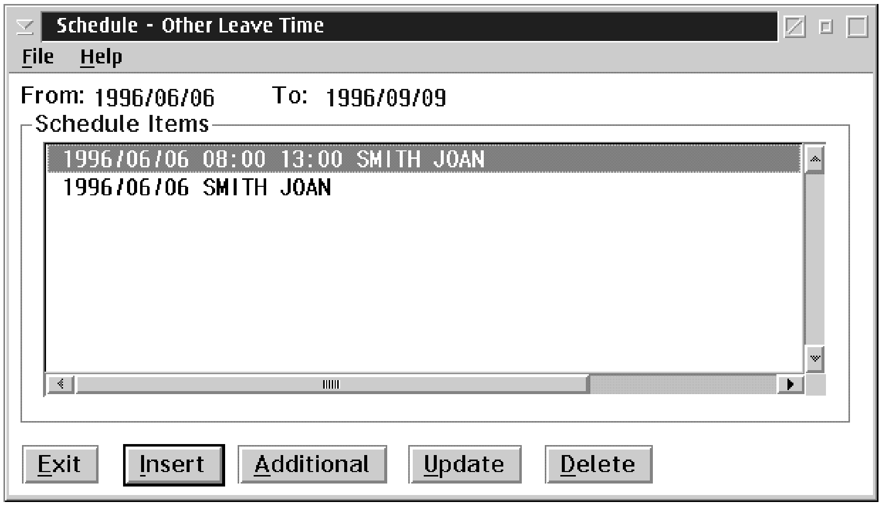
F8 (list) The F8 key, or the **List** option in the File menu will bring up a list of available options relating to the field in which the cursor is placed. The only fields which will contain a list are: replacement and course.

Save The OK button, or the **Save** option in the File menu will save any changes made in the dialog box.

Esc (exit) The ESC key, the CANCEL button, or the **Exit** option from the File menu will exit the dialog box without saving any changes.

Other Leave

When the **Other Leave** option from the Leave Time sub menu is selected the following screen will appear:



The Schedule - Other Leave Time dialog box contains the following data fields:

Field	Description
From	The starting date of the date range is displayed in this field.
To	The ending date of the date range is displayed in this field.
Schedule Items List	The list contains other leaves that have been scheduled within the date range. From left to right the list contains: starting date, ending date, starting time, ending time, and the employee.

Set Date Range The **Set Date Range** option from the File menu will allow the user to change the date range.

Insert The INSERT button, or the **Insert Item** option from the File menu is the option used to add a new item to the list.

Additional The ADDITIONAL button, or the **Additional for Employee** option from the File menu will allow the user to enter another entry for the same employee selected by the selection bar. This saves the user the step of selecting the employee again.

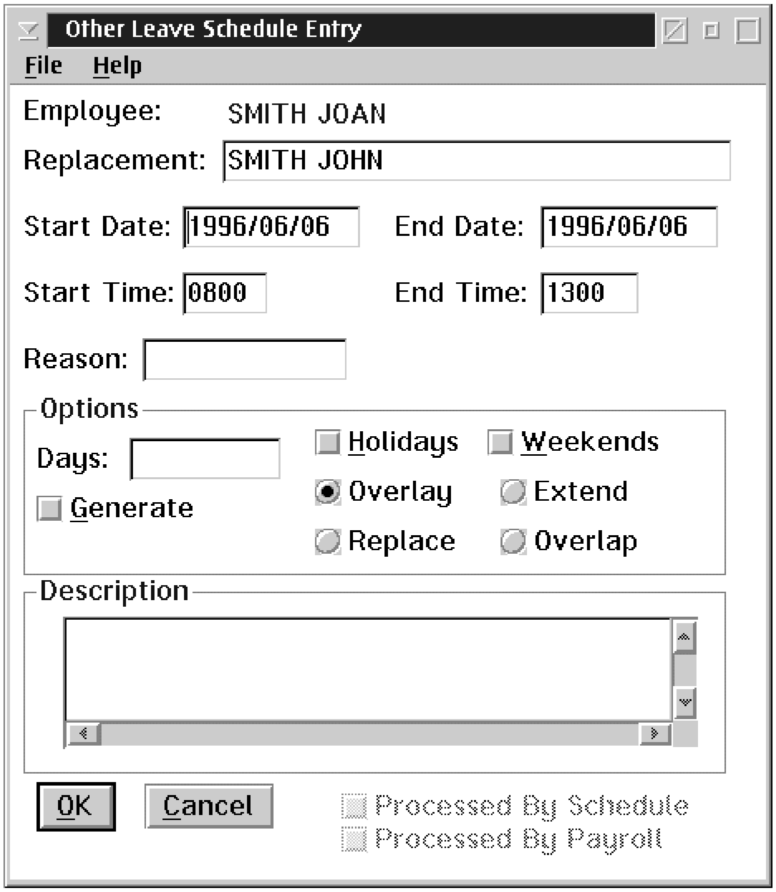
Update The UPDATE button, or the **Update Entry** option from the File menu will call up the item selected by the selection bar so that changes can be made to the current information.

Delete The DELETE button, or the **Delete Entry** option from the File menu will delete the item of the list which is selected by the selection bar.

Esc (exit) The ESC key, EXIT button, or the **Exit** option from the File menu will exit the function.

Other Leave Entry

When an other leave item is inserted or updated the following dialog box will appear:



The following table contains descriptions of the fields within the Other Leave Schedule Entry dialog box:

Field	Description
Employee	This field contains the employee currently being scheduled for leave. This field is for display only.
Replacement	The employee that will replace the employee on leave is entered into this data field.
Start Date	This field contains the starting date for the leave entry date range.

Field	Description
End Date	This field contains the ending date for the leave entry date range. When this field is not entered it is assumed to be identical to the start date.
Start Time	The starting time for the leave entry time range is entered into this field. When 'overlay processing only' is in effect this field may be zero.
Stop Time	The stopping time for the leave entry time range is entered into this field. When the 'overlay processing only' is in effect this field may be zero.
Reason	This field is used to enter the user defined reason code. A list of the defined codes can be generated by selecting the F8 key. The description of the reason code will appear to the right of this field after a reason has been selected.
Days	This field contains the days of the week that the leave entry may affect. This field is ignored for a one day date range.
Generate	The Generate check box turns on the segment generation option.
Holidays	The Holidays check box determines if the leave entry generation option is in effect for holidays registered in the system calendar.
Overlay	The Overlay check box turns on the overlay segment processing option.
Replace	The Replace check box turns on the replace segment processing option.
Weekends	The Weekends check box determines if the leave entry generation option is in effect for weekend days.
Extend	The Extend check box turns on the extend segment processing option.
Overlap	The Overlap check box turns on the overlap processing option.
Description	This field is a free form multi-line text field that may be used for additional descriptive information.

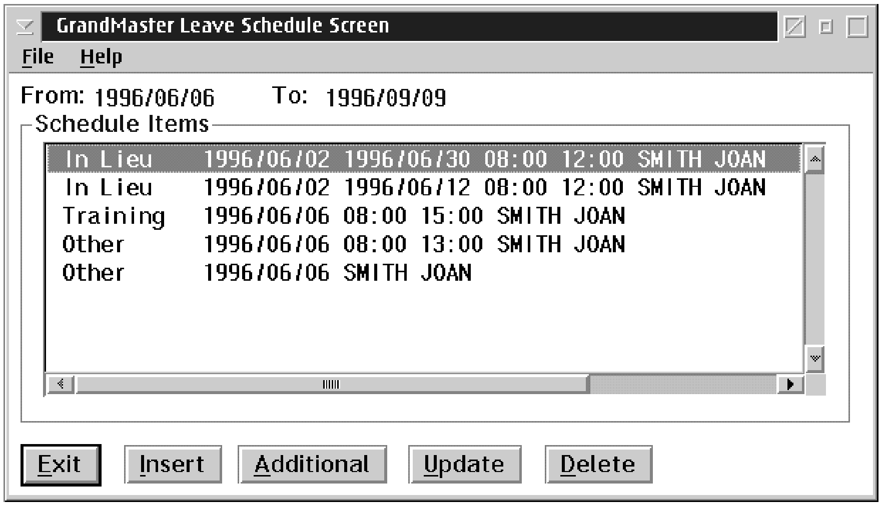
F8 (list) The F8 key, or the **List** option in the File menu will bring up a list of available options relating to the field in which the cursor is placed. The only fields which will contain a list are: replacement and reason.

Save The OK button, or the **Save** option in the File menu will save any changes made in the dialog box.

Esc (exit) The ESC key, the CANCEL button, or the **Exit** option from the File menu will exit the dialog box without saving any changes.

All Leave Schedule

When the **All Leave Schedule** option from the Leave Time sub menu is selected the following dialog box will appear:



The GrandMaster Leave Schedule dialog box contains the following data fields:

Field	Description
From	The starting date of the date range is displayed in this field.
To	The ending date of the date range is displayed in this field.
Schedule Items List	The list contains all types of leaves that have been scheduled within the date range. From left to right the list contains: type of leave, starting date, ending date, starting time, ending time, and the employee.

Set Date Range The **Set Date Range** option from the File menu will allow the user to change the date range.

Insert The INSERT button, or the **Insert Item** option from the File menu is the option used to add a new item to the list.

Additional The ADDITIONAL button, or the **Additional for Employee** option from the File menu will allow the user to enter another entry for the same employee selected by the selection bar. This saves the user the step of selecting the employee again.

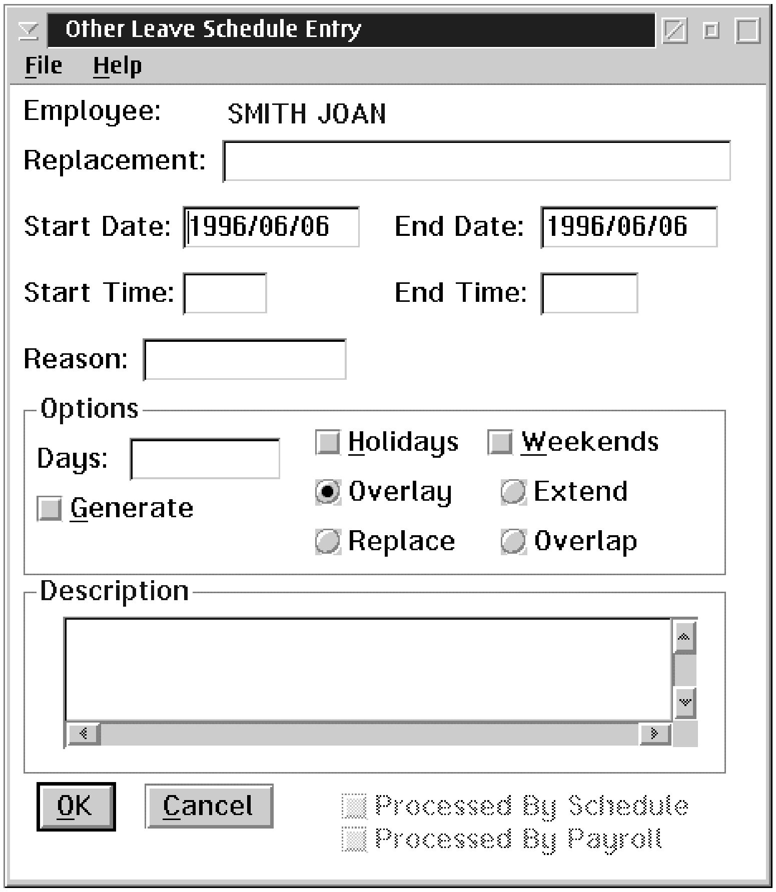
Update The UPDATE button, or the **Update Entry** option from the File menu will call up the item selected by the selection bar so that changes can be made to the current information.

Delete The DELETE button, or the **Delete Entry** option from the File menu will delete the item of the list which is selected by the selection bar.

Esc (exit) The ESC key, EXIT button, or the **Exit** option from the File menu will exit the function.

All Leave Entry

When a new all leave item is inserted the following dialog box will appear:



The following table contains descriptions of the fields within the All Leave Schedule Entry dialog box:

Field	Description
Employee	This field contains the employee currently being scheduled for leave. This field is for display only.
Replacement	The employee that will replace the employee on leave is entered into this data field.
Start Date	This field contains the starting date for the leave entry date range.
End Date	This field contains the ending date for the leave entry date range. When this field is not entered it is assumed to be identical to the start date.
Start Time	The starting time for the leave entry time range is entered into this field. When 'overlay processing only' is in effect this field may be zero.

Field	Description
Stop Time	The stopping time for the leave entry time range is entered into this field. When the 'overlay processing only' is in effect this field may be zero.
Type	The type of leave is selected for this field. The field contains a pull down list from which to select the type of leave to be entered.
Reason	This field is used to enter the user defined reason code. A list of the defined codes can be generated by selecting the F8 key. The description of the reason code will appear to the right of this field after a reason has been selected.
Description	This field is a free form multi-line text field that may be used for additional descriptive information.

F8 (list) The F8 key, or the **List** option in the File menu will bring up a list of available options relating to the field in which the cursor is placed. The only fields which will contain a list are: replacement and reason.

Save The OK button, or the **Save** option in the File menu will save any changes made in the dialog box.

Esc (exit) The ESC key, the CANCEL button, or the **Exit** option from the File menu will exit the dialog box without saving any changes.

In the Leave Schedule Entry dialog box only the information common to every type of leave can be entered. To enter any data that is unique to the type of leave, i.e., the 'course' field is unique to training leave, once the leave has been inserted the user must then select the new item from the Schedule Items List (in the GrandMaster Leave Schedule screen) and select the UPDATE button to bring up the leave entry screen specific for the type.

When an existing all leave item is updated the dialog box that will appear depends on the leave type of the item. See the appropriate section of leave type in this chapter for information about the dialog box, e.g., if the leave type of the item selected is training, see the section on training leave.

Leave Time Processing

When **Leave Time** is entered for an employee that is scheduled, the system will update the work time segments to reflect the Leave Time Entry. Leave Time Entries provide several processing options. These options control the way that the Leave Time Entry segments substitute for existing work segments.

- **Generate** - This option causes the Leave Time Entry to generate new Leave segments on days that do not have an existing work segment. The new segment uses the Leave Entry start and stop times.
- **Overlay** - This option causes the Leave Time Entry to overlay only existing work time segments using the work segment start and stop times.
- **Replace** - This option causes the Leave Time Entry to replace work segments with a leave segment that uses the Leave Entry start and stop times.
- **Extend** - This option causes the Leave Time Entry to extend existing work segments to the Leave Entry start and stop times. Overlapping time periods are overlaid with the Leave Entry.
- **Overlap** - This option causes the time entry generation to insert new segments that overlap existing work segments. The existing work segment is not affected by the new segment.

The **Generate** option may be combined with any one of the other four options.

The **Overlay**, **Replace**, **Overlap**, and **Extend** options are mutually exclusive

The default for Leave Processing is the **Overlay** option.

☞ For the standard shift assignments to be replaced by the system defined shift code it is required that no start and stop times are assigned for the leave schedule.

Example: Fred Johns works the following rotation:

Jan 1	2	3	4	5	6	7	8	9	10	11
DAY	DAY	DAY			NIGHT	NIGHT	NIGHT			EVENIN G

When vacation is scheduled for Jan. 2 through Jan. 7 inclusive, the six days vacation time span would have an affect on only the four standard work days in the date range requested for vacation therefore the shift assignments would become:

Jan 1	2	3	4	5	6	7	8	9	10	11
DAY	$VAC	$VAC			$VAC	$VAC	NIGHT			EVENIN G

All leave types may have a date range and a start and stop time. When the date range contains more than one day the same start and stop time are assigned for each day.

Example: **Time off in lieu** - July 4 through July 7
Start Time - 13:00 **Stop Time** - 17:00
would result in 4 hours time off allocated for each of the days in the range for a total of 16 hours.

Leave scheduled with a start and stop time will partially replace work shift assignments. When a work shift assignment is not present for a date in the range no leave time assignment is made for that day.

When leave time is scheduled for an employee who does not work a scheduled position the payroll system uses the scheduled date range to assign vacation days in place the employee's standard work days.

Example: Sharon Silver works Monday thru Friday each week except
Statutory holidays.
Vacation days - June 26, 1995 thru July 14, 1995
Statutory holiday - July 3, 1995
This results in 14 days vacation taken and 1 statutory holiday.

☞ Overlay Only

If the Leave Time Entry specifies a date range, the same starting time will be used for each day in the date range.
A Leave Time Entry may optionally overlay existing work with leave time segments.

Example:

Original Work Segments	1995/05/04	8:00	16:00
	1995/05/05	8:00	16:00
	1995/05/06	8:00	16:00
	1995/05/07	8:00	16:00
In Lieu Entry	1995/05/04 to 1995/05/06	12:00	18:00

Will result in:

Work	1995/05/04	8:00	12:00
In Lieu	1995/05/04	12:00	18:00
Work	1995/05/05	8:00	12:00
In Lieu	1995/05/05	12:00	18:00
Work	1995/05/06	8:00	12:00
In Lieu	1995/05/06	12:00	18:00
Work	1995/05/07	8:00	16:00

☞ Generate and Overlay

A Sick Time Entry may optionally generate new sick time segments for days without existing work segments.
When the Leave Time Entry is a portion of a work time segment will be split into two or three segments to reflect the Leave Time Entry. If the Leave Time Entry is subsequently modified the work segment split will be restored to the original.

Example:

Original:

Original Work Segment	1995/05/04	8:00	16:00
Sick Leave Entry with Generate Option	1995/05/05	12:00	14:00

Will result in:

Work Segment	1995/05/04	8:00	12:00
Sick Segment	1995/05/04	12:00	14:00
Work Segment	1995/05/04	14:00	16:00
Sick Segment	1995/05/05	12:00	14:00

☞ Overlay Only - No Ending Time

When an In Lieu Time Entry is made with only a starting time specified the system will replace all work time segments after that time with Leave Time segments. If the Leave Time Entry specifies a date range, the same starting time will be used for each day in the date range.

Example:

Original Work Segments	1995/05/04	8:00	16:00
	1995/05/05	8:00	16:00
	1995/05/06	8:00	16:00
In Lieu Entry	1995/05/04 to 1995/05/06	12:00	16:00

Will result in:

Work	1995/05/04	8:00	12:00
In Lieu	1995/05/04	12:00	16:00
Work	1995/05/05	8:00	12:00
In Lieu	1995/05/05	12:00	16:00
Work	1995/05/06	8:00	12:00
In Lieu	1995/05/06	12:00	

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☞ Overlay Only - No Starting Time

When an In Lieu Time Entry is made with only an ending time specified the system will replace all work time segments before that time with Leave Time segments. If the Leave Time Entry specifies a date range, the same ending time will be used for each day in the date range.

Example:

Original Work Segments	1995/05/04	8:00	16:00
	1995/05/05	8:00	16:00
	1995/05/06	8:00	16:00
In Lieu Entry	1995/05/04 to 1995/05/06		12:00

Will result in:

In Lieu	1995/05/04	8:00	12:00
Work	1995/05/04	12:00	16:00
In Lieu	1995/05/05	8:00	12:00
Work	1995/05/05	12:00	16:00
In Lieu	1995/05/06	8:00	12:00
Work	1995/05/06	12:00	16:00

☞ Replace Only

A Training Entry may optionally replace existing work segments with a Training segment. The Leave Time segment will use the start and stop time for Leave Time Entry only, rather than overlaying a portion of the work time segment.

Example:

Original Work Segments	1995/05/15	8:00	16:00
	1995/05/17	8:00	16:00
Training Entry	1995/05/14 to 1995/05/18	9:00	15:00

Will result in:

Training	1995/05/15	8:00	15:00
	1995/05/17	9:00	15:00

☞ Generate and Replace

A Leave Time Entry may optionally generate new training segments for days without existing work segments and replace existing work segments entries. The Leave Time segment will use the start and stop time for Leave Time Entry only, rather than overlaying a portion of the work time segment.

Example:

Original Work Segments	1995/05/08	8:00	16:00
	1995/05/10	8:00	16:00
Training Entry with Generate Option	1995/05/08 to 1995/05/11	8:30	15:00

Will result in:

Training	1995/05/08	8:30	15:00
	1995/05/09	8:30	15:00
	1995/05/10	8:30	15:00
	1995/05/11	8:30	15:00

☞ Extend Only

A Leave Time Entry may optionally extend existing work time segments. The work time segments will be extended to the Leave Time entry start and stop time with any overlap being overlaid with the Leave Time.

Example:

Original Work Segments	1995/05/23	8:30	16:30
	1995/05/25	8:30	16:30
Leave Time Entry	1995/05/23 to 1995/05/26	13:00	17:30

This will result in:

Work Segment	1995/05/23	8:30	13:00
Leave Segment	1995/05/23	13:00	17:30
Work Segment	1995/05/25	8:30	13:00
Leave Segment	1995/05/25	13:00	17:30

☞ Generate and Extend

A Leave Time Entry may optionally generate new Leave Time segments for days without existing work segments and extend existing work time segments. The new time segments will use the Leave Entry start and end time. The existing work segments will be extended to the Leave Time entry start and end time with any overlap being overlaid with the Leave Time.

Example:

Original Work Segments	1995/05/18	7:30	15:30
	1995/05/19	11:00	14:00
	1995/05/20	12:00	20:00
Leave Time Entry with Generate Option	1995/05/18 to 1995/05/21	8:30	15:00

The result will be:

Work Segment	1995/05/18	7:30	8:30
Leave Segment	1995/05/18	8:30	15:00
Work Segment	1995/05/18	15:00	15:30
Leave Segment	1995/05/19	8:30	15:00
Leave Segment	1995/05/20	8:30	15:00
Work Segment	1995/05/20	15:00	20:00
Leave Segment	1995/05/21	8:30	15:00

☞ Overlap Only

A Leave Time Entry may optionally insert overlap time segments for days with existing work time segments.
The existing work segments will not be affected by the new segments. The new segments will use the Leave Entry start and end time.

Example:

Original Work Segments	1995/05/21	8:00	16:00
	1995/05/23	8:00	16:00
Leave Entry	1995/05/20 to 1995/05/24	11:00	14:00

This will result in:

Work Segment	1995/05/21	8:00	16:00
Leave Segment	1995/05/21	11:00	14:00
Work Segment	1995/05/23	8:00	16:00
Leave Segment	1995/05/23	11:00	14:00

☞ Generate and Overlap

A Leave Time Entry may optionally generate new leave time segments for days without existing work segments and insert overlap time segments for days with existing work segments.
The existing work segments will not be affected by the new segments. The new segments will use the Leave Entry start and end time.

Example:

Original Work Segment	1995/05/21	8:00	16:00
	1995/05/23	8:00	16:00
Leave Segment with Generate Option	1995/05/20 to 1995/05/23	11:00	14:00

This will result in:

Leave Segment	1995/05/20	11:00	14:00
Work Segment	1995/05/21	8:00	16:00
Leave Segment	1995/05/21	11:00	14:00
Leave Segment	1995/05/22	11:00	14:00
Work Segment	1995/05/23	8:00	16:00
Leave Segment	1995/05/23	11:00	14:00

Replacement Schedule

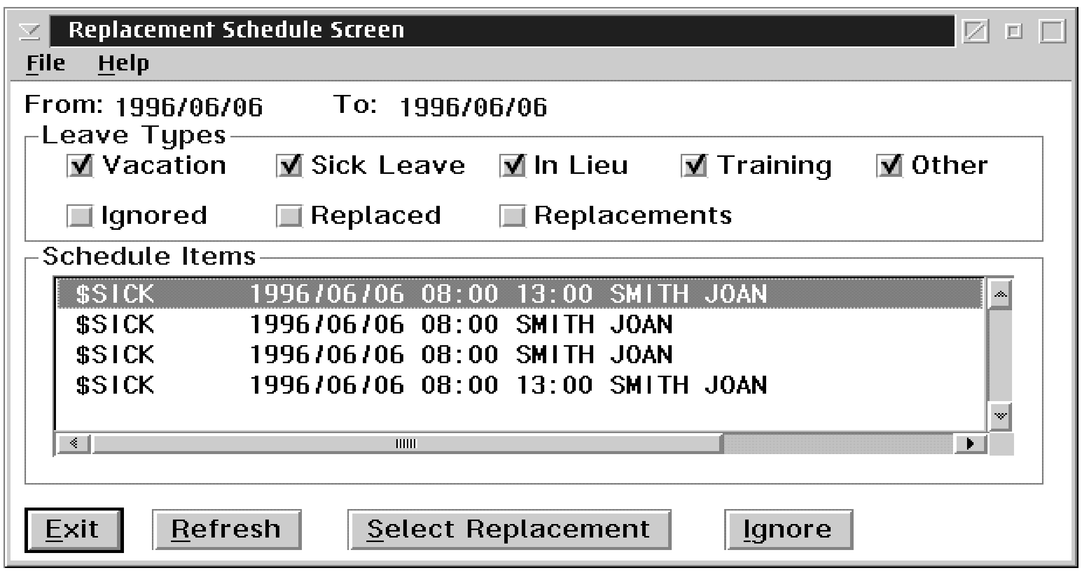
When a leave schedule entry updates the employee work time segments the Schedule Module may present the time segment replaced by the leave time as a segment requiring a replacement or relief employee.

The Schedule Module provides a facility for presenting the work time segments requiring replacement or relief workers.

The schedule relief work function will present the work time segments that were substituted by leave time segments and allow the user to choose replacement employees for the time segments.

The schedule relief work function allows the input of a date range to be scanned for work segments requiring replacements and the type of leave to find replacement employees.

When the **Schedule Replacement** option is chosen the following dialog box will appear:



After the data is entered for the date range and leave types, the Schedule Items List shows the work segments requiring replacements.

The functions are restricted to showing work segments that were assigned to employees belonging to the current employee group.

The dialog box contains the following data entry fields:

Field	Description
Start Date	This field is used to enter the starting date of a date range to scan for work segments requiring replacement employees. Default value is the current system date.
End Date	This field is used to enter the ending date of a date range to scan for work segments requiring replacement employees. Default value is the starting date plus seven days.
Leave Types vacation, sick, training, in lieu, other	This set of check boxes is used to indicate the types of leave to find replacement employees for.
Ignored	This check box controls the display of schedule items marked as ignored. When the box is checked items marked ignored are displayed. The letter "I" precedes the item in the list box.
Replaced	This check box controls the display of schedule items that have replacement entries. When the box is checked items with replacement items are displayed. The letter "R" precedes the item in the list box.
Replacements	This check box is used to switch the display to the replacement work time segments rather than the time segments that require replacement. The refresh button must be pressed after the check box is changed to alter the display contents.

Set Date Range The **Set Date Range** option in the File menu will allow the user to change the date range for replacing employees on leave.

Refresh When the leave types check boxes are changed the user must click on the REFRESH button, or the **Refresh Screen** option in the File menu to view the items requested.

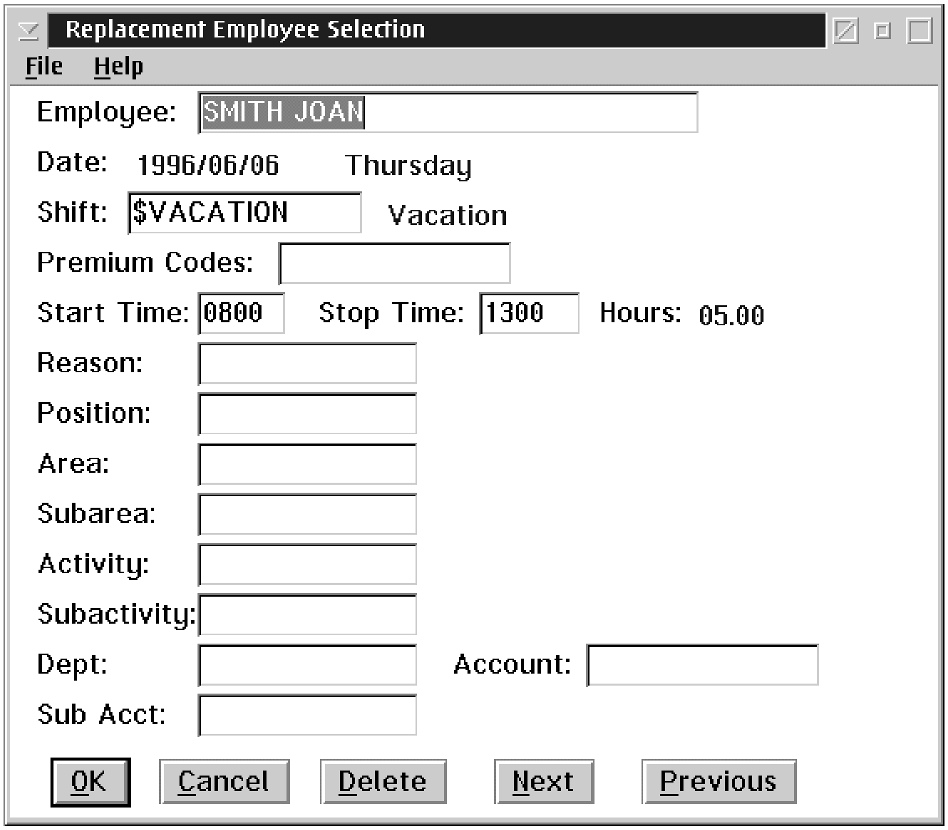
Select Replacement The user may select an employee to fill each of the required work segments. Place the selection bar on the desired item in the Schedule Items List and either select the SELECT REPLACEMENT button, or the **Replace Entry** option in the File menu.

Ignore A work segment may also be flagged as not requiring a replacement. This will prevent the work segment from appearing in a later scan of the date range the work segment appears in. The function may optionally show both flagged and regular segments. Place the selection bar on the desired item in the Schedule Items List and either select the IGNORE button, or the **Ignore Entry** option from the File menu.

Esc (exit) The ESC key, the EXIT button, or the **Exit** option from the File menu will exit the screen without saving any changes.

The screen that requests the employee for the replacement shift requires the same data that is requested for work segment scheduling.

The screen appears as follows:



The following data fields are available for input:

Field	Description
Employee	This field is used to enter the name of the replacement employee. After an employee is selected the badge number will appear to the right of the name. However, if a payroll is select the employee number will appear in place of the badge number. The number that appears is for display only.
Date	This field displays the date of the work segment. The date may not be changed.
Shift	This field displays the original shift of the work segment that requires a replacement employee.
Premium	This field displays the premium codes assigned to the original work segment.
Start Time	This field displays the starting time of the work segment that requires a replacement employee.
Stop Time	This field displays the stopping time of the work segment that requires a replacement employee.
Hours	The hours field contains the number of hours calculated by stop time minus the start time. This field is for display only.

Field	Description
Reason	This field displays the reason code assigned to the original work segment.
Position	This field displays the position code assigned to the original work segment.
Area	This field displays the area code assigned to the original work segment.
Sub Area	This field displays the sub area code assigned to the original work segment.
Activity	This field displays the activity code assigned to the original work segment.
Sub Activity	This field displays the sub activity code assigned to the original work segment.
Department	This field displays the department code assigned to the original work segment.
Account	This field displays the account code assigned to the original work segment.
Sub Account	This field displays the sub account code assigned to the original work segment.

Next Employee The NEXT button, or the **Next Employee** option in the File menu will advance to the next employee in the current group.

Previous Employee The PREVIOUS button, or the **Previous Employee** option in the File menu will return to the previous employee in the current group.

F8 (list) The F8 key, or the **List** option from the File menu will bring up a list of available options relating to the field in which the cursor is placed. The fields which will contain a list are: employee, shift, reason, position, area, sub area, activity, and sub activity.

F10 (save) The F10 key, the OK button, or the **Save** option in the File menu will save any changes made in the dialog box.

Delete The DELETE button, or the **Delete** option in the File menu is used to delete the replacement work segment. The original work segment requiring a replacement is reset and becomes an outstanding segment requiring a replacement.

Esc (exit) The ESC key, the CANCEL button, or the **Exit** option in the File menu will exit the dialog box without saving any changes.

Department Positions

The SCHEDULE MODULE provides a facility for scheduling employees for positions defined by a structure by the ORGANIZATION CHART MODULE.

This function scans an organization chart structure searching for positions marked as “able to schedule”. The positions found are displayed for a one week period. The facility allows the user to move back and forward in time by one week periods.

When employees that have been scheduled are not in the current group, the facility will not present the data for these employees except as part of the total hours scheduled for the position.

An organization chart structure may contain both “able to schedule” and “not able to schedule” positions. Only those positions marked as “able to schedule” will appear in the schedule by department function.

Defining an Organization Chart Structure

The organization chart definition facility allows the user to define a tree structure for a department. The root of the tree must be an organization chart object. The “able to schedule” positions must be nodes that descend from the root object.

Example: The following is an example of an organization chart structure that may be used for scheduling:

Root Object	
Group =	$Department
Code =	Ward 1

Descendants		
Node 1	Position =	Nurse
	Days of Week =	23456
	Start Time =	08:00
	End Time =	24:00
	Hours/Day =	48.0
Node 2	Position =	Nurse
	Days of Week =	17
	Start Time =	08:00
	End Time =	16:00
	Hours/Day =	16.0
Node 3	Position =	Aide
	Days of Week =	1234567
	Start Time =	08:00
	End Time =	24:00
	Hours/Day =	32.0

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The structure defines a department containing three “able to schedule” positions.

The first node requires employees that can fill the requirements for the position nurse. The position must be filled Monday through Friday and requires 48.0 person hours per day between 8:00 am and midnight.

The person hour requirement would translate to 6 people working 8 hour shifts each day the position is required.

The second node requires employees that can fill the requirements for the position nurse. The position must be filled Saturday and Sunday and requires 16.0 person hours per day between 8:00 am and 4:00 pm.

The person hour requirement would translate to 2 people working 8 hour shifts each day the position is required.

The third node requires employees that can fill the requirements for the position aide. The position must be filled Sunday through Saturday and requires 32.0 person hours per day between 8:00 am and midnight.

The person hour requirement would translate to 4 people working 8 hour shifts each day the position is required.

The translation of hours/day to the number of persons assumes that the hours/day requirement is evenly distributed between the start time and the end time specified for the node. If the hours/day requirement is not evenly distributed additional nodes must be defined.

The structure could be defined such that a node exists for each employee shift that must be filled.

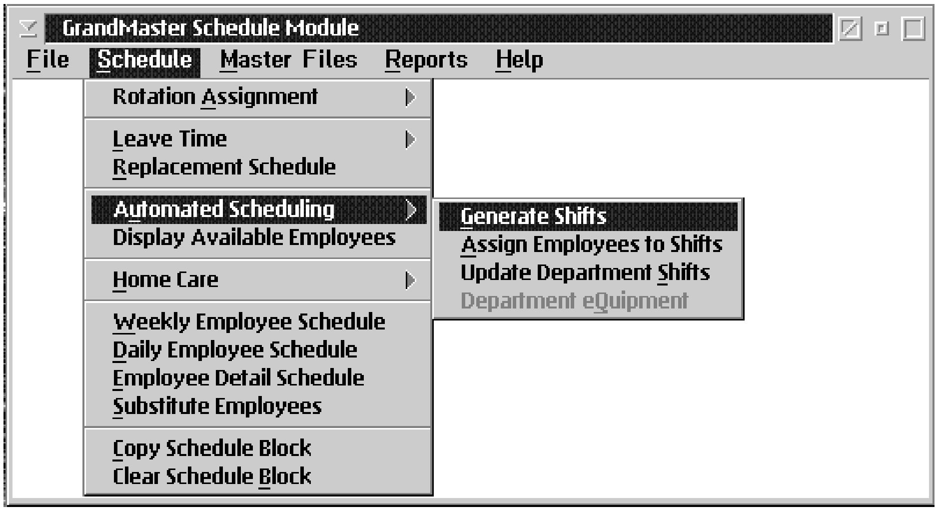
Node Position Requirements

When a node is defined the requirements for the position are always required for selecting employees to schedule for the node. When the requirements for the position are changed those changes will affect the selections for the node.

The node may have additional requirements that are unique to the node. These requirements are used in addition to the position requirements when selecting employees to schedule for the node.

Automated Scheduling

When the user selects the Automated Scheduling sub menu from the Schedule menu the following screen will appear:



The following options are available to the user:

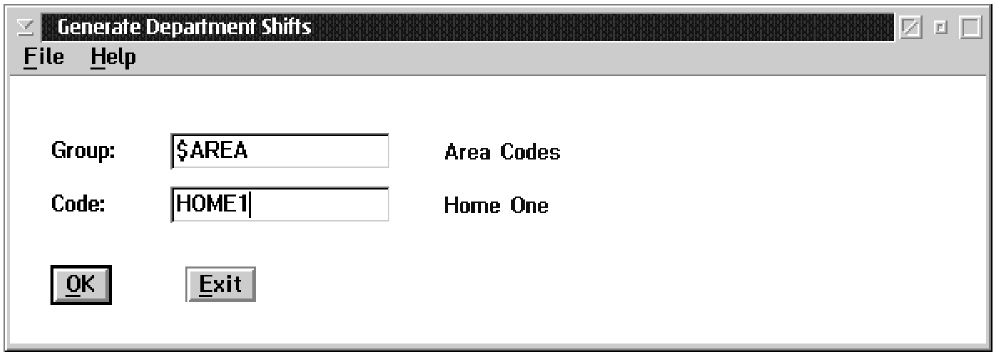
- Generate Shifts
- Assign Employees to Shifts
- Update Department Shifts

Generate Shifts

The Generate shifts function uses a man hour requirements data structure from the resource planning module to create work shifts. This structure is identified by the combination of the group and code values.

The function scans the position and man hour requirements in the structure and creates work shifts to satisfy those requirements.

When the user selects the **Generate Shifts** option from the Automated Scheduling sub-menu the following screen will appear:

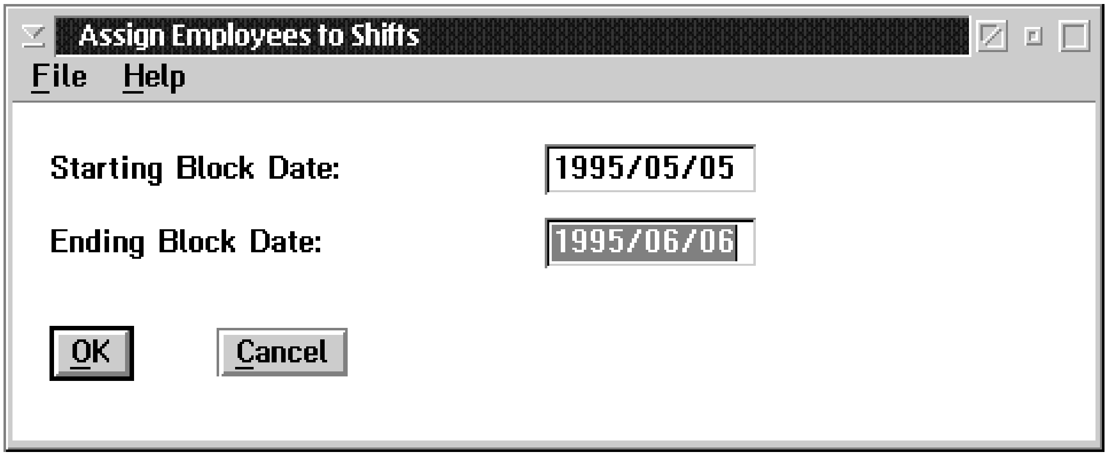


The dialog box contains the following data fields:

Field	Description
Group	This value is used to identify the resource planning group.
Code	This value is used to identify the resource planning code.

Assign Employee to Shifts

When the user selects the **Assign Employee to Shifts** option from the Automated Scheduling sub-menu the following screen will appear:



The dialog box contains the following data fields:

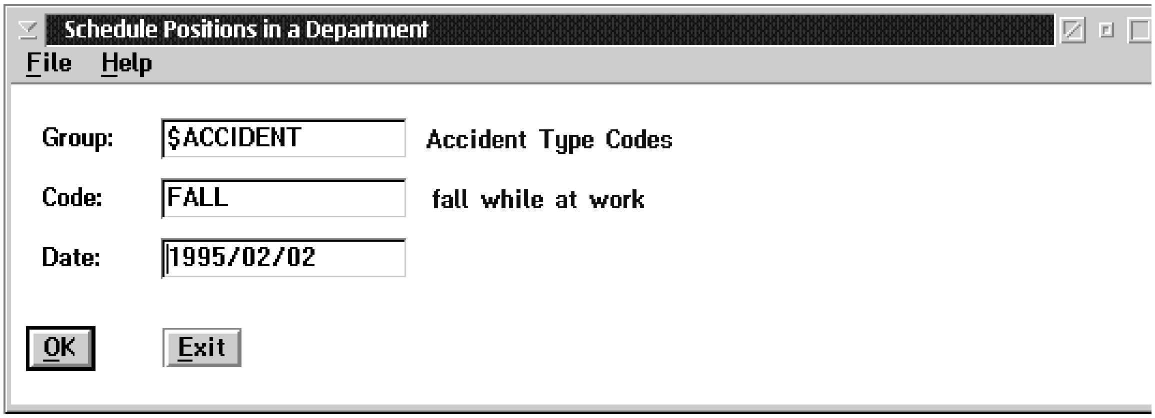
Field	Description
Starting Block Date	This field contains the starting date for the shift.
Ending Block Date	This field obtains the ending date for the shift.

Update Department Shifts

The update department shifts function allows the user to extract and update the work shifts that have been generated for a particular resource planning man hour requirements data structure.

The function will display the work shifts for a single day at a time.

When the user selects the **Update Department Shifts** option from the Automated Scheduling sub-menu the following screen will appear:

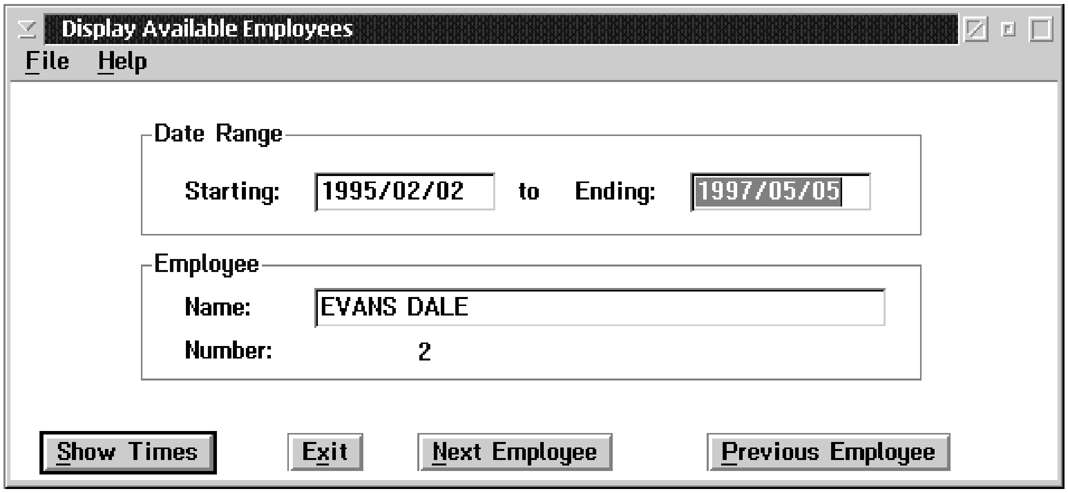


The dialog box contains the following data fields:

Field	Description
Group	The value used to identify the resource planning group.
Code	The value used to identify the resource planning code.
Date	This field contains the date for the work shifts to update.

Display Available Employees

When the user selects **Display Available Employees** option from the Schedule menu the following screen will appear:



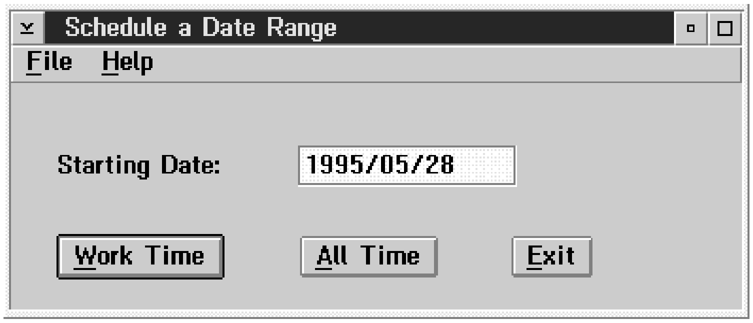
The following table gives a description of the screen:

Field	Description
Starting	This field contains the starting date of the employee.
Ending	This field contains the enind date of the employee.
Name	This field contains the employees name.
Number	This field contains the employees badge number.

Weekly Employee Schedule

The Weekly Schedule function for the current employee group is for a one week period. The function allows the user to mark employees as sick or leave and select a replacement for the shift.

The function displays a screen that allows the entry of the starting date for the week to display. The screen will appear as follows:



The “Schedule a Date Range” dialog box only requires the user to enter the desired starting date for the date range. The date must be entered in ending format.

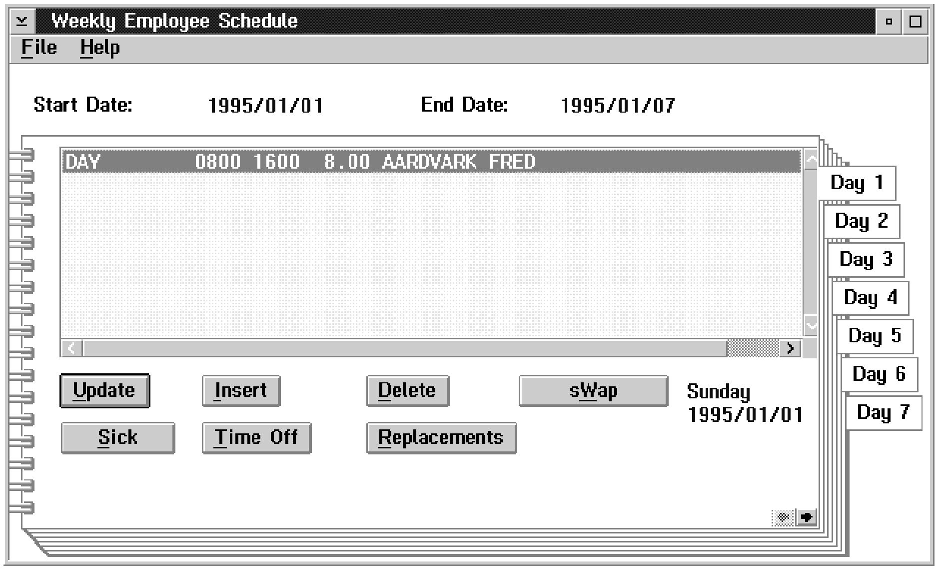
WORK TIME The WORK SCHEDULE button, or the **Schedule Work** option from the File menu extracts and displays only the shift assignments that are actual work time.

ALL TIME The ALL TIME button, or the **Full Schedule** option from the File menu extracts and displays all time segments including work time, vacation, sick time, etc.

Esc (exit) The ESC key, the EXIT button, or the **Exit** option from the File menu will exit the function.

Schedule Notebook

The weeks schedule is displayed in notebook format. Each page of the notebook contains a single days schedule. The notebook will appear as follows:



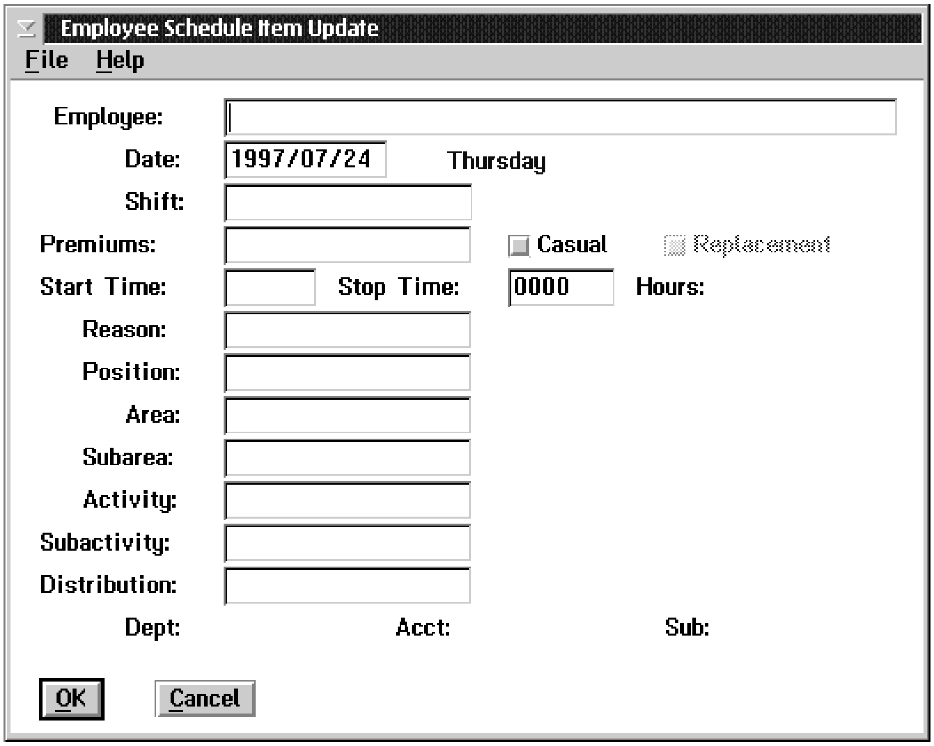
Each notebook page contains the following data fields:

Field	Description
Start Date	This field contains the starting date of the week. This field is for display only.
End Date	This field contains the ending date of the week. This field is for display only.
List	The list shows (from left to right) the shift code, start time, stop time, gross hours, employee name, and position code for each time segment of the day.
Current Date	The date of the day currently on the screen will be displayed in the lower right hand corner of the screen.

Update

The UPDATE button allows the user to update all time segments for the employee that has a time segment selected (selection bar highlighting the schedule entry).

The dialog box will appear as follows:



Change the appropriate information and select the OK button.

Insert

The INSERT button allows the user to insert a new employee in the days schedule. A dialog box similar to the Employee Schedule Item Update, seen above, will appear. Fill in the data fields and select the OK button.

Delete

The DELETE button is used to delete the selected schedule item from the days schedule.

Swap

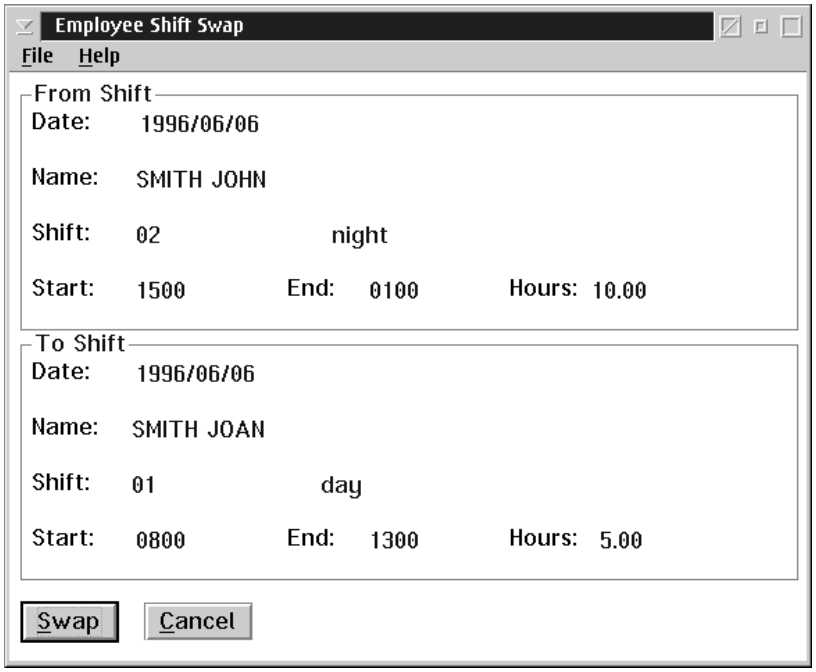
The SWAP button allows the user to swap the shifts between two existing scheduled shifts. There must be at least two existing shifts in order to swap.
To perform a swap do the following:

1. Move the selection bar to one of the shifts to be swapped and pressing the SWAP button.

The SWAP button will change to the SWAP TO button.

2. Move the selection bar to the other shift to be swapped and press the SWAP TO button.

The following screen will appear:

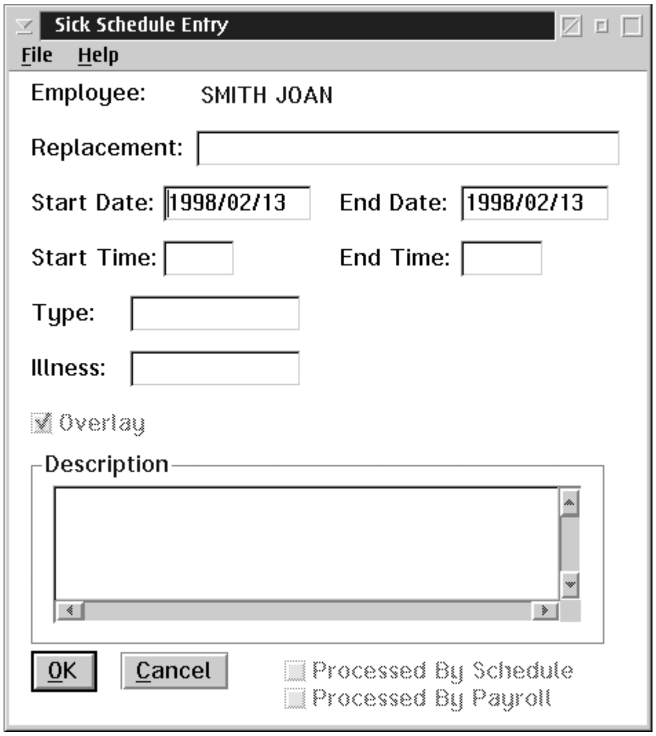


3. Confirm the swap by selecting the SWAP button.

Sick

The SICK button allows the user to mark the selected scheduled employee as sick, and schedule a replacement. The “Sick Schedule Entry” screen is displayed when this button is selected.

The dialog box appears as follows:

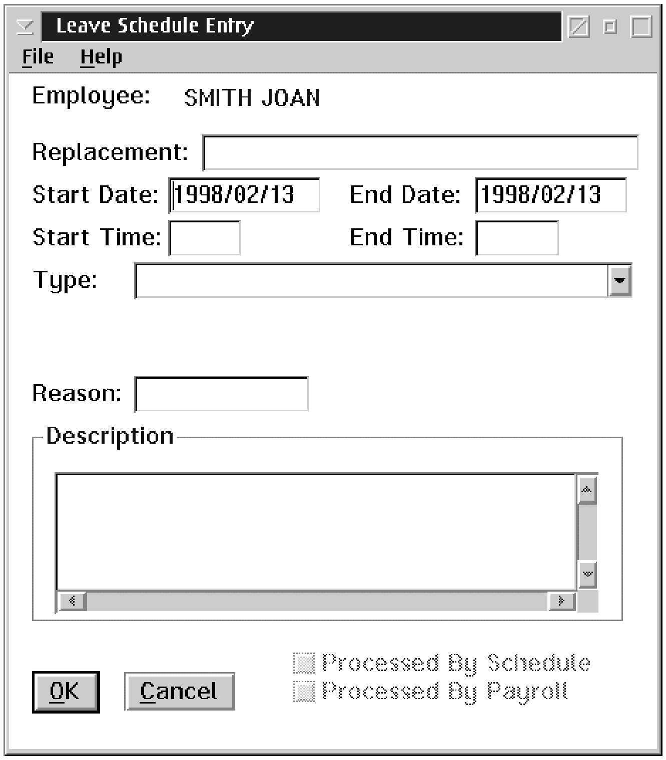


Enter the appropriate information and select the OK button to replace the employee on sick leave.

Time Off

The TIME OFF button allows the user to mark the selected scheduled employee as taking time off and schedule a replacement. The “Leave Schedule Entry” screen is displayed when this button is selected.

The dialog box appears as follows:



Enter the appropriate information and select the OK button to replace the employee taking time off.

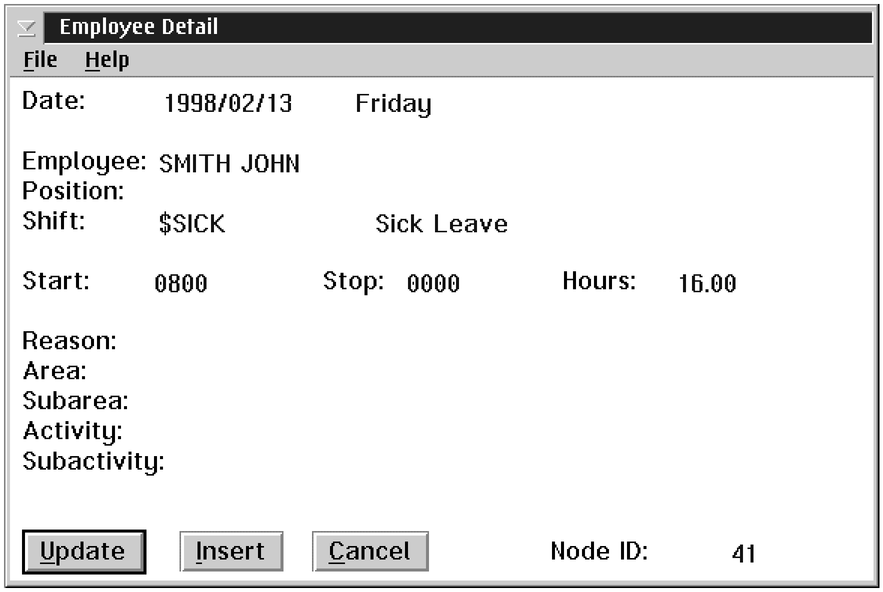
Replacements

The REPLACEMENT button displays the “Replacement Schedule” screen. Any time segments requiring replacements are listed in the screen. See the section on Replacement Schedule for further information on replacing employees.

Show Detail

The **Show Detail** option from the File menu will bring up a screen that will contain all of the employee detail.

The following screen will appear:



The Employee Detail screen allows the user to update or insert as you would in the notebook pages.

All Time

The ALL TIME button, or the **Full Schedule** option in the File menu extracts and displays all time segments including work time, vacation, sick time, etc.

Work Time

The WORK TIME button, or the **Schedule Work** option in the File menu extracts and displays only the shift assignments that are actual work time.

Pg. Up (prior week)

The PAGE UP key, or the **Prior Week** option in the File menu will change the starting and ending dates to correspond with the prior week and bring up those files.

Pg. Down (next week)

The PAGE DOWN key, or the **Next Week** option in the File menu will change the starting and ending dates to correspond with the next week and bring up those files.

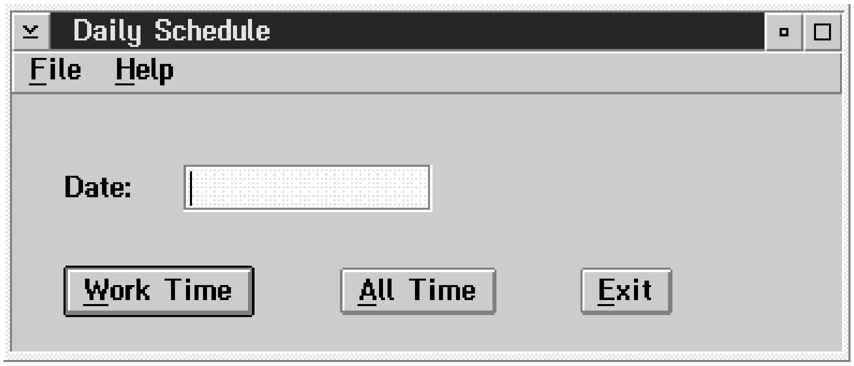
Esc (exit)

The ESC key, or the **Exit** option in the File menu will exit the screen.

Daily Employee Schedule

The Daily Schedule function for the current employee group is for a one day period. This function allows the user to mark employees as sick or on leave and select a replacement for the shift.

This function displays a screen that allows the entry of the starting date for the day to display. The screen will appear as follows:



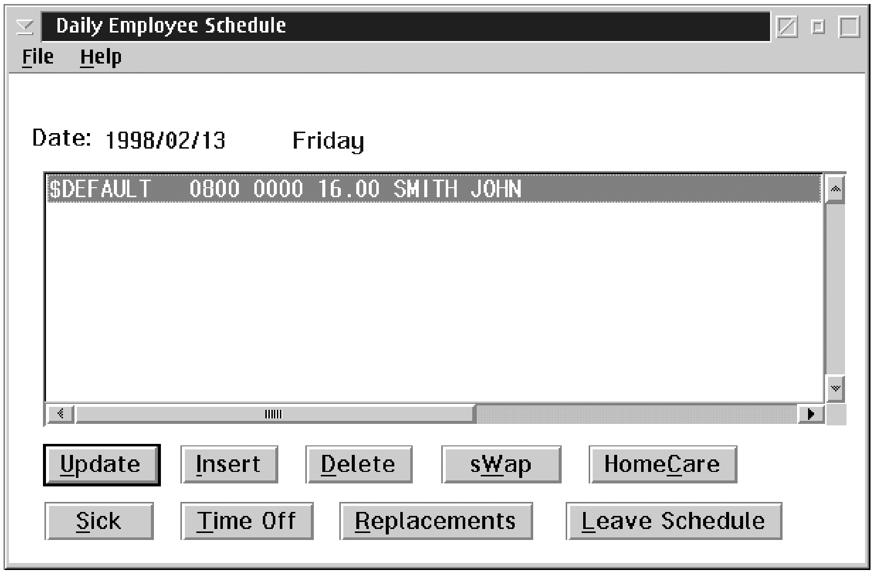
The "Daily Schedule" dialog box only requires the user to enter the desired starting date for the date range. The date must be entered in YYYY/MM/DD format.

Work Time The WORK TIME button, or the **Schedule Work** option in the File menu extracts and displays only the shift assignments that are actual work time.

All Time The ALL TIME button, or the **Full Schedule** option in the File menu extracts and displays all time segments including work time, vacation, sick time, etc.

Exit The ESC key, the EXIT button, or the **Exit** option in the File menu exits the function

The Daily Employee Schedule screen will appear as follows after a date has been selected:



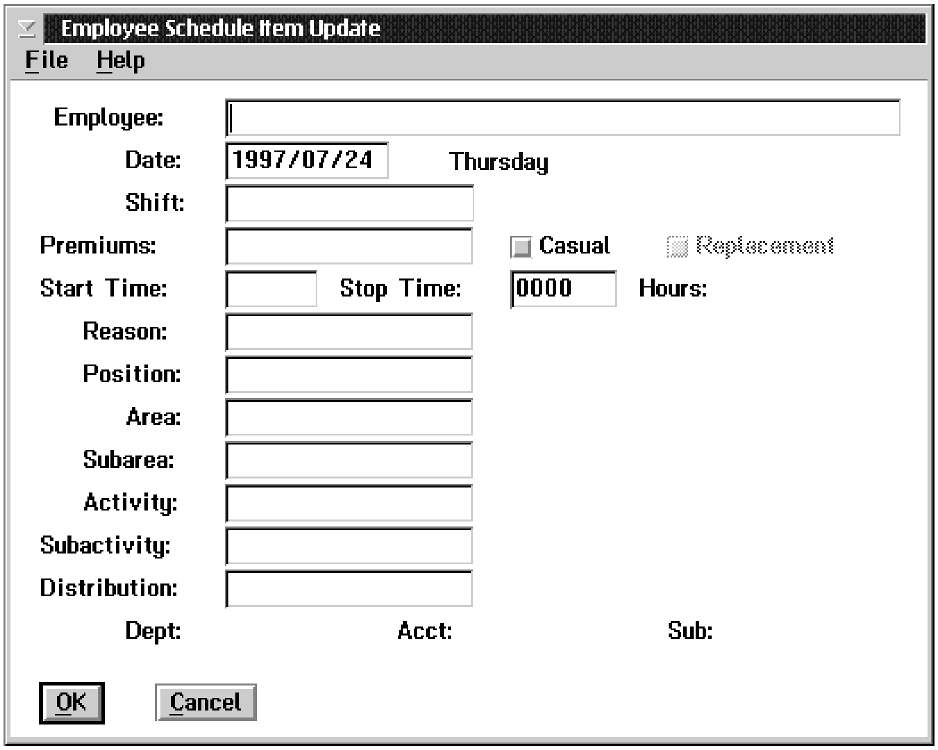
The screen contains the following data:

Field	Description
Date	The date the user has chosen will appear at the top of the screen with the day of the week it falls on to the right. This field is for display only.
List	The List shows the shift code, start time, stop time, gross hours, employee name, and position code for each time segment for the day.

Update

The UPDATE button allows the user to update all time segments for the employee that has a time segment selected (selection bar highlighting the schedule entry).

The dialog box will appear as follows:



Change the appropriate data and select the OK button.

Insert

The INSERT button allows the user to insert a new employee in the day schedule. A dialog box similar to the Employee Schedule Item Update, seen above, will appear. Fill in the data fields and select the OK button.

Delete

The DELETE button is used to delete the selected schedule item from the day schedule.

Swap

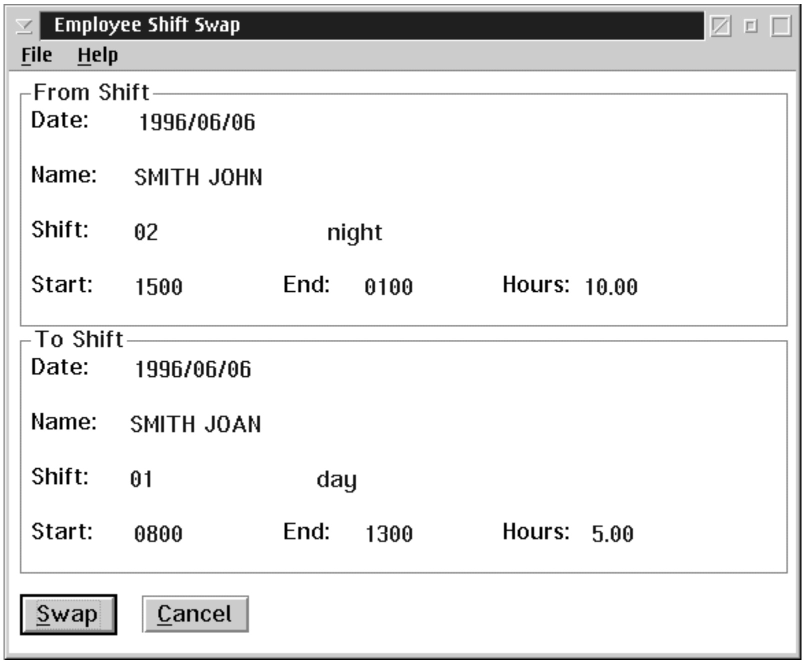
The SWAP button allows the user to swap the shifts between two existing scheduled shifts. There must be at least two existing shifts in order to swap.
To perform a swap do the following:

1. Move the selection bar to one of the shifts to be swapped and pressing the SWAP button.

The SWAP button will change to the SWAP TO button.

2. Move the selection bar to the other shift to be swapped and press the SWAP TO button.

The following screen will appear:



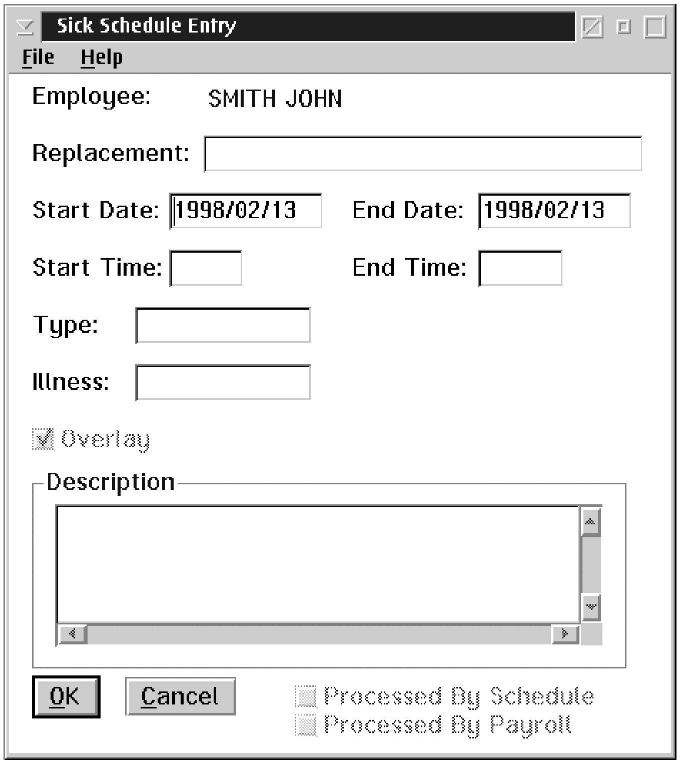
3. Confirm the swap by selecting the SWAP button.

Homecare

Sick

The SICK button allows the user to mark the selected scheduled employee as sick, and schedule a replacement. The “Sick Schedule Entry” screen is displayed when this button is selected.

The dialog box appears as follows:

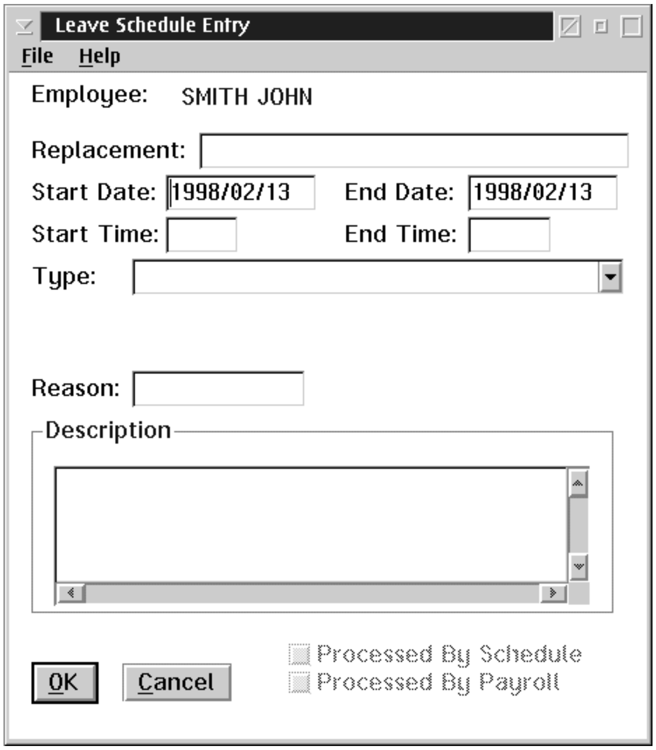


Enter the appropriate information and select the OK button to replace the employee on sick leave.

Time Off

The TIME OFF button allows the user to mark the selected scheduled employee as taking time off and schedule a replacement. The "Leave Schedule Entry" screen is displayed when this button is selected.

The dialog box appears as follows:



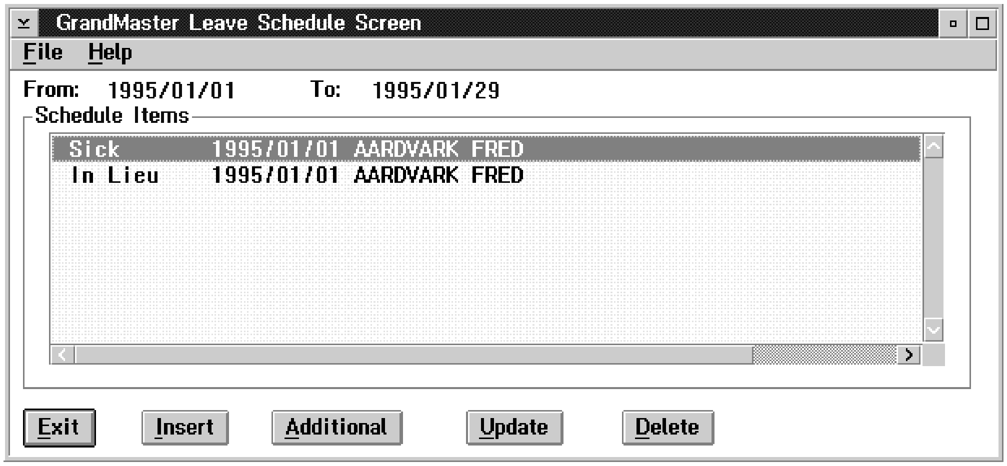
Enter the appropriate information and select the OK button to replace the employee taking time off.

Replacements

The REPLACEMENT button displays the "Replacement Schedule" screen. Any time segments requiring replacements are listed in the screen. See the section on Replacement Schedule for further information on replacing employees.

Leave Schedule

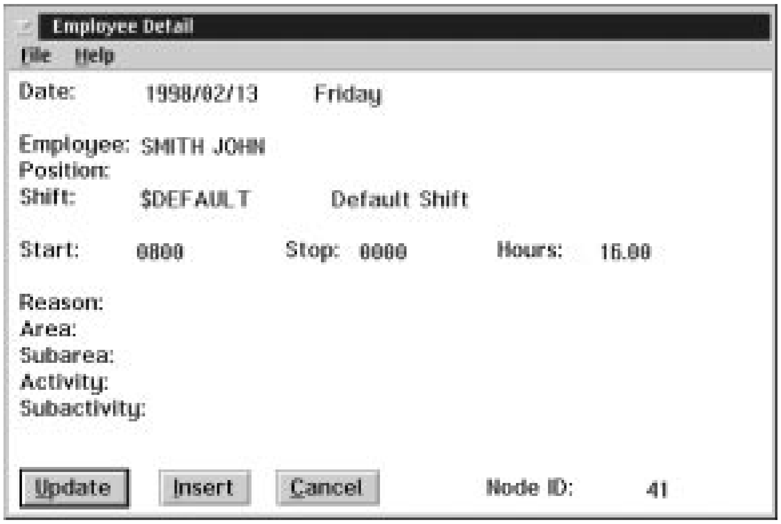
The following screen will appear:



Show Details

The **Show Detail** option from the File menu will bring up a screen that will contain all of the employee detail.

The following screen will appear:



The Employee Detail screen allows the user to update or insert as you would in the notebook pages.

Pg. Up (prior day) The PAGE UP key, or the **Prior Day** option in the File menu will change the date to the previous day and bring up the files for that day.

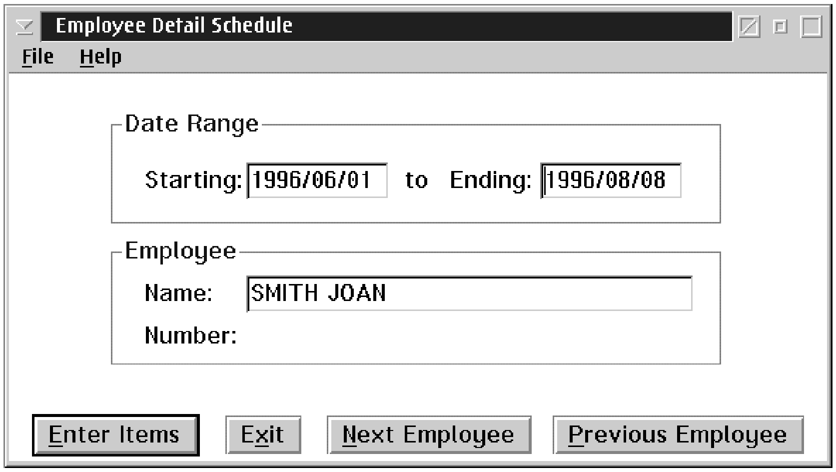
Pg. Down (next day) The PAGE DOWN key, or the **Next Day** option in the File menu will change the date to the following day and bring up the files for that day.

Esc (exit) The ESC key, or the **Exit** option from the File menu will exit the screen.

Employee Detail Schedule

The Employee Detail Schedule screen is brought up when this option is selected. This option operates on a single employee for a specified date range.

The dialog box should appear as follows:



The following table contains a description of the data fields in the dialog box:

Field	Description
Starting	The starting date of the date range for the employee detail schedule is entered in this data field. The format for the date is YYYY/MM/DD.
Ending	The ending date of the date range for the employee detail schedule is entered in this data field. The format for the date is YYYY/MM/DD.
Name	The name of the employee to enter the schedule is entered into this data field.
Number	The employee's badge number will be displayed in this field. If a payroll has been selected the employee number will be shown in place of the badge number. This field is for display only.

F8 (list) The F8 key, or the **List** option in the File menu will bring up a list of the available employees. The names that appear in the list will depend on whether or not an employee group has been selected (for further information see the section on Managing Employee Groups) and the order of the names will depend on the type of search technique set (for further information see the section on Set Seach Technique).

Enter Items The Enter Items button, or the Enter Items option in the File menu will bring up the dialog box in which to enter the detail schedule for the employee.

Next Employee The NEXT EMPLOYEE button, or the **Next Employee** option from the File menu will move to the next employee in the employee list. The order of the list will depend on the type of search technique set (for further information see the Set Search Technique section), and/or whether an employee group is selected (for further information see the section on Managing Employee Groups).

Previous Employee

The PREVIOUS EMPLOYEE button, or the **Previous Employee** option from the File menu will move to the previous employee in the employee list. The order of the list will depend on the type of search technique set (for further information see the Set Search Technique section), and/or whether an employee group is selected (for further information see the section on Managing Employee Groups).

Set Search Technique

The **Set Search Technique** option will bring up the screen to select the type of search carried out for employees. The search can be done by name, employee number, or badge number. For further information see the section on Set Search Technique.

Esc (exit)

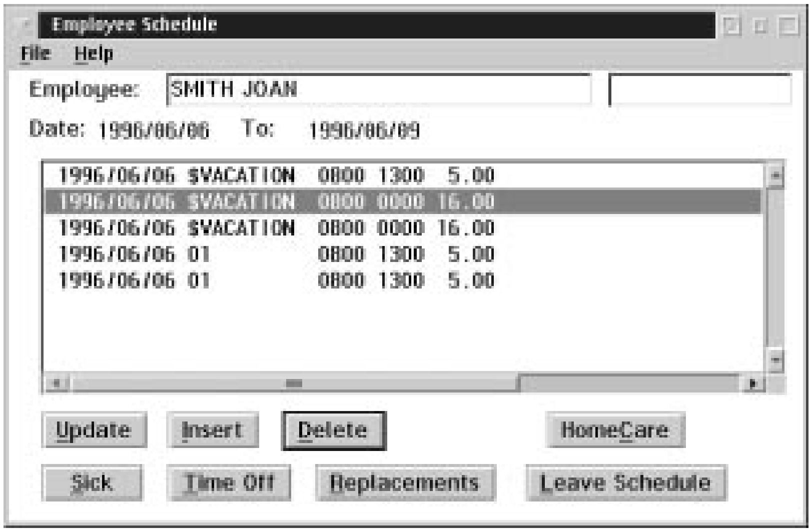
The ESC key, the EXIT button, or the **Exit** option from the File menu will exit the screen without saving any changes.

Detail Schedule Selection

After the date range and the employee name are entered in the Employee Detail Schedule dialog box and the ENTER ITEMS button selected the Employee Schedule Item Entry dialog box will appear. In this dialog box the schedule items that exist for the employee will be displayed in a list.

The user may modify or delete the existing schedule items, as well as enter new schedule items.

The list will appear similar to the following:



The dialog box contains the following data fields:

Field	Description
Employee	The employee name will appear in this field. This field is for display only. The badge number will appear to the right of the employee name.
Date Range	The date range that was chosen is displayed in this field below the employee name. This field is for display only.
Schedule Items List	The Schedule Items for Employee List will contain any previously scheduled items. The list contains the following information from left to right: date, shift code, premium codes, starting time, ending time, net hours, and the position code.

F10 (save) The F10 key, the OK button, or the **Save** option from the File menu will permanently save any changes made in the dialog box.

Esc (exit) The ESC key, the CANCEL button, or the **Exit** option in the File menu will exit the screen without saving any changes.

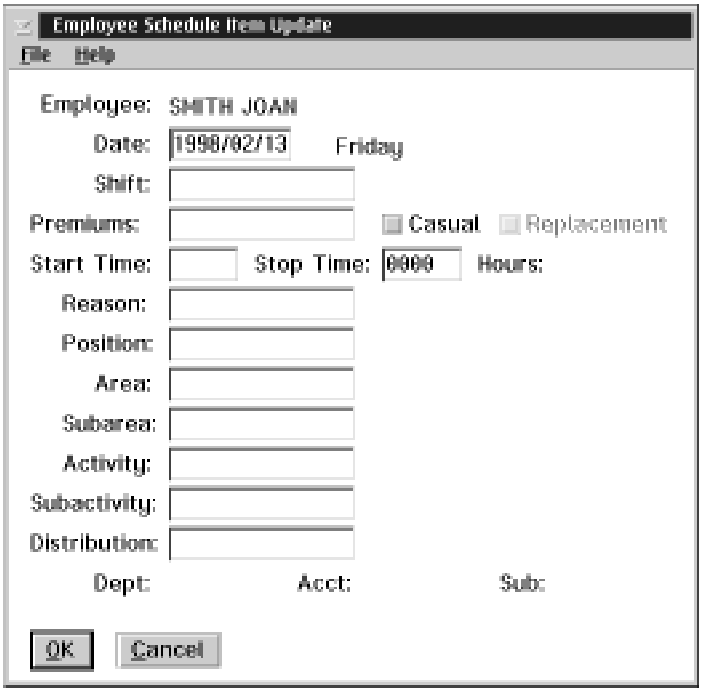
Display Fields When the Display Fields function in the Options menu is selected the Employee Schedule Detail Item Entry screen will automatically be displayed when one of the list entries is highlighted. This allows for the details of that shift to be changed.

To activate the Display Fields simply select it from the Options menu so that a check mark appears to the left. To turn it off select it again so that the check mark is no longer to the left of the option.

If the Display Fields function is turned off the user gets the same results by double clicking on the appropriate list entry. The Display Fields function saves the user the action of pressing the ENTER key.

Schedule Detail Entry

When a user selects a schedule item from the Employee Schedule Item Entry dialog box the following detail screen will appear:



Each Schedule item entry allows for the following data fields to be input:

Field	Description
Date	This field contains the date for the schedule entry
Shift	This field contains the access code for the shift to be worked. The shift may be a user defined or a system defined shift.
Premiums	The premium code is entered in this field. A premium code is a one character code to designate special premiums owing to the employee. A premium is additional money on top of the shift wages for additional responsibility. Up to 10 premium codes can be entered for an employee per shift. The premium codes are set up in the Earning Translation Table option in the Update menu.
Casual	When a check mark appears in the Casual box the item will NOT be copied by the copy block function.
Replacement	
Start Time	This field contains the starting time for the shift.
Stop Time	This field contains the ending time for the shift.
Reason	This field contains the reason code for the schedule entry. This must be a valid reason code (defined through the object table).
Hours	The Start Time minus the Stop Time calculates the Hours. This field is for display only since it is automatically calculated for the user.
Position	This field contains the position for the schedule entry. This must be valid position code (defined through the object table).
Area	This field area code for the schedule entry. This must be a valid area code.
Sub Area	This field contains the sub area code for the schedule entry. This must be a valid sub area code.
Activity	This field contains the activity code for the schedule entry. This must be a valid activity code.
Sub Activity	This field contains the sub activity code for the schedule entry. This must be a valid sub activity code.
G/L Code	The General Ledger code is entered into this field. This must be a valid G/L code previously defined by the user. This field is only available when the GrandMaster II payroll is not being used in conjunction with the GrandMaster Suite.
Department	This field contains the department code for the schedule entry. This must be a valid department code. This field is only available when the GrandMaster II payroll system is being used in conjunction with the GrandMaster Suite Schedule Module.
Account	This field contains the account code for the schedule entry. This must be a valid account code. This field is only available when the GrandMaster II payroll system is being used in conjunction with the GrandMaster Suite Schedule Module.
Sub Account	This field contains the sub account code for the schedule entry. This must be a valid sub account code. This field is only available when the GrandMaster II payroll system is being used in conjunction with the GrandMaster Suite Schedule Module.

This detail entry option will check the schedule entry data against the employee available records. If the entered values fall outside of the declared availability a warning message will be displayed.

Scheduled entries made through the Employee Detail Schedule entry option are allowed to override the leave schedule entries. However leave schedule entries made after the specific schedule entry will modify the schedule items.

F8 (list) The F8 key, or the **List** option from the File menu will bring up a list of the valid choices for the field which contains the cursor. The fields which will have a list are shift, position, reason, area, sub area, activity, sub activity, and department.

Save Entry The OK button, or the **Save Entry** option in the File menu will temporarily save the data. A permanent save is done when the OK button in the Employee Schedule Item Entry dialog box is selected.

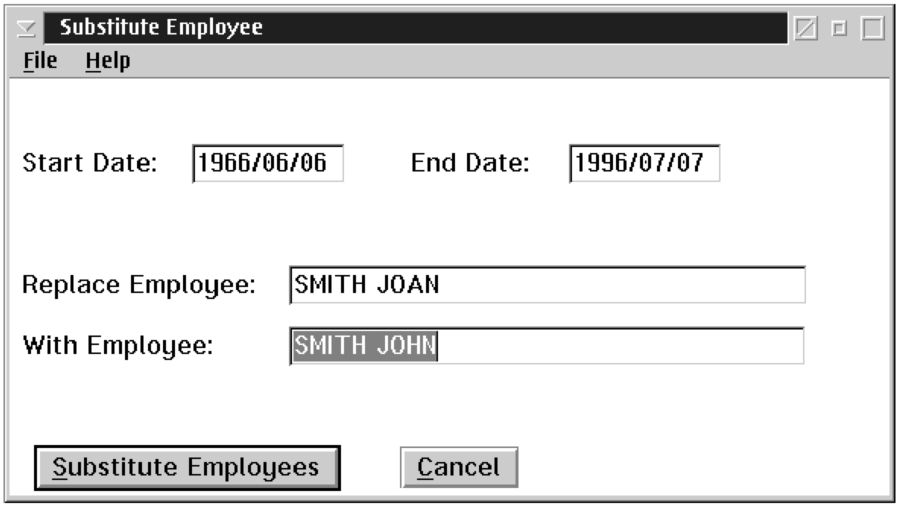
Delete Entry The DELETE button, or the **Delete Entry** option from the File menu will delete the data currently in the dialog box.

Esc (exit) The ESC key, the CANCEL button, or the **Exit** option from the File menu will exit the screen without saving any changes.

Substitute Employees

The **Substitute Employees** option allows the user to replace one employee with another. The replacement done by this function is permanent.

The dialog box will appear as follows when the option is selected:



The dialog box has the following data fields:

Field	Description
Start Date	Starting date for replacement. The date is entered in YYYY/MM/DD format.
End Date	Ending date for replacement. The date is entered in YYYY/MM/DD format.
Replace Employee	This field is used to enter the name of the employee that will be replaced.
With Employee	This field is used to enter the name of the employee that will work the shifts assigned to the replaced employee.

F8 (list) The F8 key, or the **List** option in the File menu will bring up a list of the available employees. The names that appear in the list will depend on whether or not an employee group has been selected (for further information see the section on Managing Employee Groups) and the order of the names will depend on the type of search technique set (for further information see the section on Set Seach Technique).

Substitute Employees The SUBSTITUTE EMPLOYEES button will begin the processing.

Esc (exit) The ESC key, the CANCEL button, or the **Exit** option in the File menu will exit the dialog box.

Copying a Schedule Block

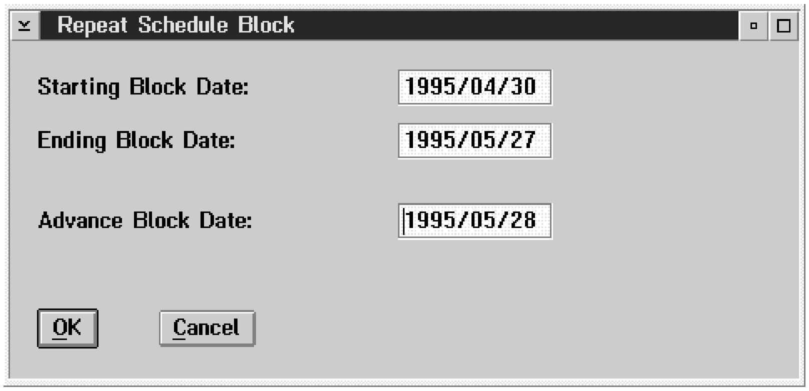
The **Copy Schedule Block** option is used to copy a tailored schedule for a given date range to a new date range.

☞ After the schedule block is copied any leave schedule entries present are applied to the new schedule block.

☞ This option will not create Schedule items for an employee when an individual item for a particular date already appears in the Schedule Item Table.

☞ The copy operation is restricted to the current employee group.

The following screen will appear when the **Copy Schedule Block** option is selected.



The dialog box contains the following data entry fields:

Field	Description
Starting Block Date	This field contains the starting date for the Schedule copy process.
Ending Block Date	This field contains the ending date for the Schedule copy process.
Advance Block Date	This field contains the advance block date for the new Schedule block.

OK The OK button will begin the process of copying the schedule for the date range entered in the Starting Block Date and Ending Block Date fields to the advance block.

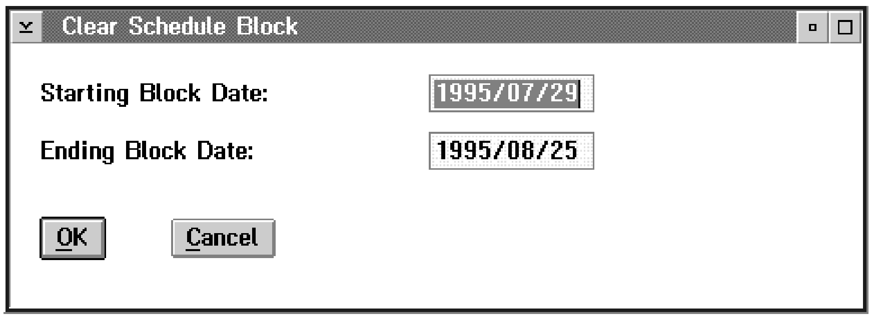
Cancel The CANCEL button will exit from the function without copying any schedule items.

Clear a Selection Block

The **Clear Schedule Block** option is used to clear schedule blocks for a given date range.

☞ The clear option is restricted to the current employee group.

The following screen will appear when the **Clear Selection Block** option is selected.



The dialog box contains the following data entry fields:

Field	Description
Starting Block Date	This field contains the starting date for the schedule clearing.
Ending Block Date	This field contains the ending date for the schedule clearing.

OK The OK button is pressed to Clear the Schedule block for the date range entered in the Starting Block Date and Ending Block Date fields.

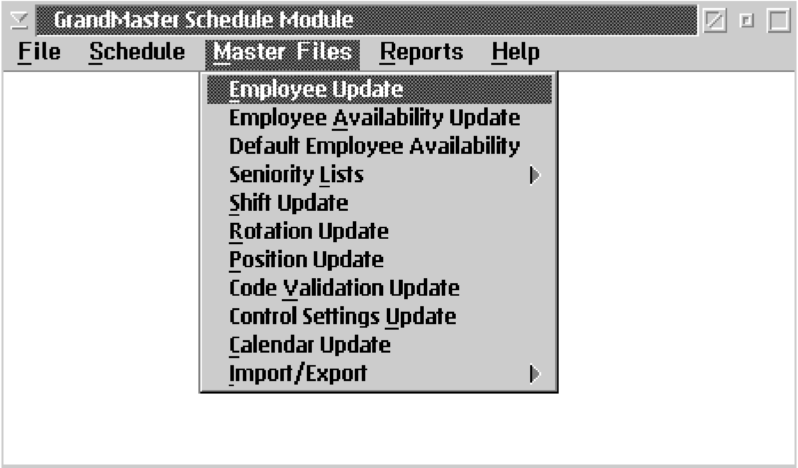
Cancel The CANCEL button is pressed to exit from the function without clearing any items.

MASTER FILES

The **Master Files** menu from the main menu bar contains options that maintain the data tables used for the preparation of GrandMaster Suite Schedules. These options are:

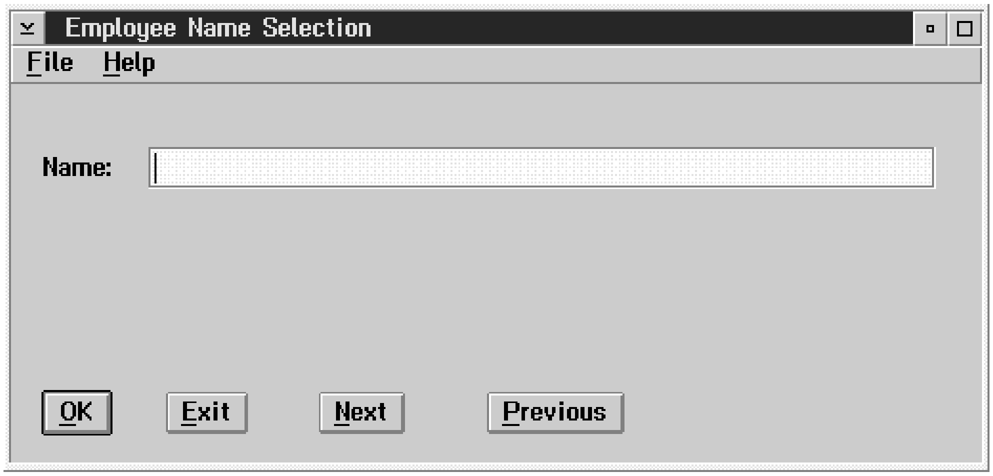
- employee update, see page 112
- employee availability update, see page 122
- shift update, see page 136
- rotation update, see page 141
- position update, see page 148
- control settings update, see page 146
- calendar update, see page 156

The **Master Files** menu appears as follows:



Employee Update

When the **Employee Update** option is selected a dialog box appears as follows:



To select an employee, type in your choice of the last name, employee number, or the badge number in the name data field. The data entered must correspond to the type of search technique that has been set.

☞ The employee number can only be used if a payroll has been selected.

Next Employee

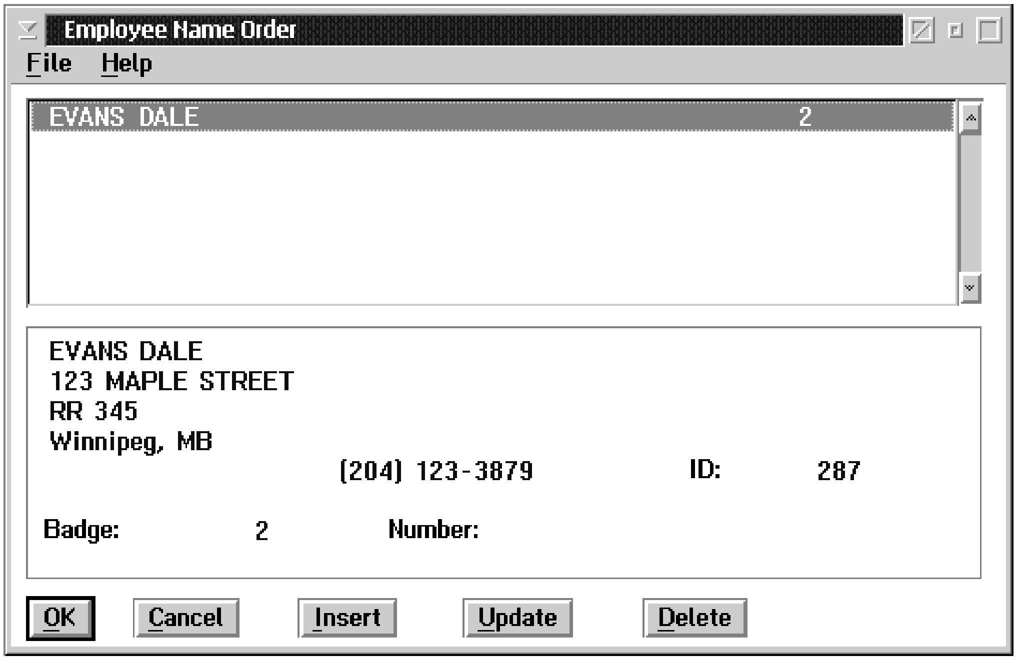
The NEXT EMPLOYEE button, or the **Next Employee** option from the File menu will bring up the next employee in the list.

Previous Employee

The PREVIOUS EMPLOYEE button, or the **Previous Employee** option from the File menu will go back to the previous employee in the list.

F8(list)

The F8 key, or the **List** option in the File menu will bring up a list of employees. The screen will appear similar to the following:



☞ To have the list start somewhere other than the beginning simply type in the letter(s) corresponding to where you would like the list to begin before selecting the F8 key.

☞ This list will vary depending on whether or not a payroll has been selected. If no payroll is selected all employees will appear in a list. However if a payroll is selected only the employees in that payroll will appear in the list.

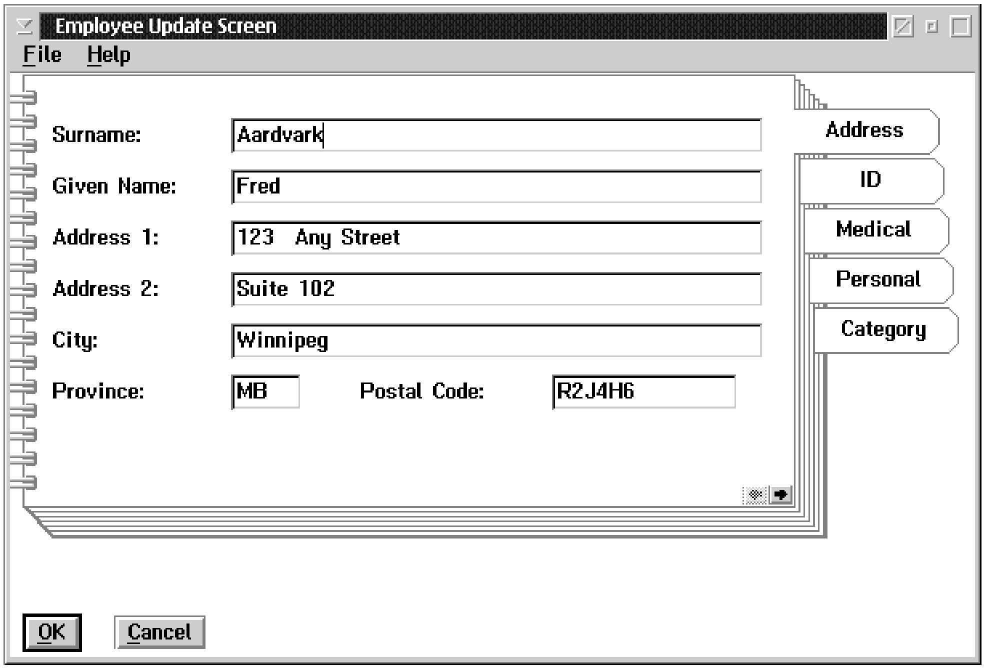
☞ The search technique and whether or not an employee group has been selected will affect the order that the employees appear in the list (see Employee Selection List, page 12).

From the list dialog box the user can insert new employees (page 115), and update or delete (page 121) existing employees.

Search Technique

The search technique gives the user several ways searching through the employee list. The types of searches available are name, employee number, and badge number. For more information see the section on Set Search Technique, page 2.

OK The OK button will select the employee entered into the name data field and move to the Employee Update screen where the employee information can be updated. The screen will appear as follows:



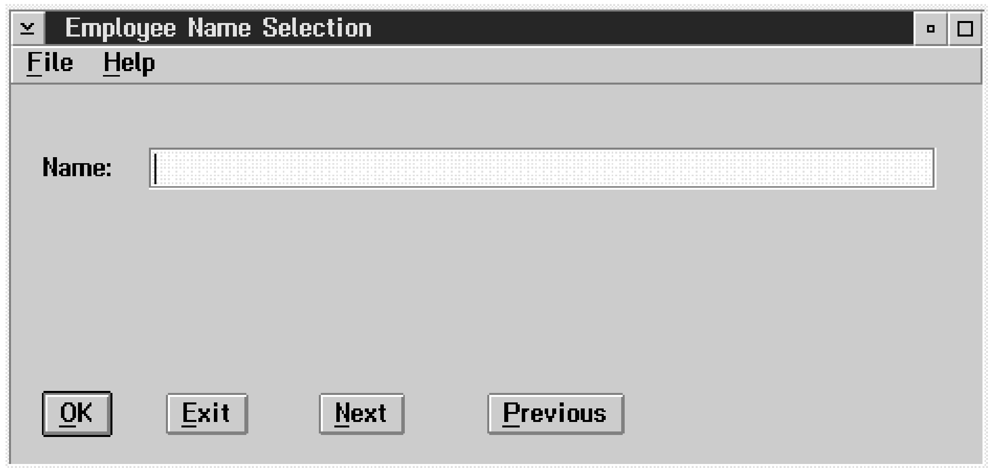
The screen contains four tabs: address, ID, medical, and personal. These four screens are described in the Inserting an Employee section beginning on page 116.

Esc (exit) The ESC key, the CANCEL button, or the **Exit** option in the File menu will exit the user from the current screen.

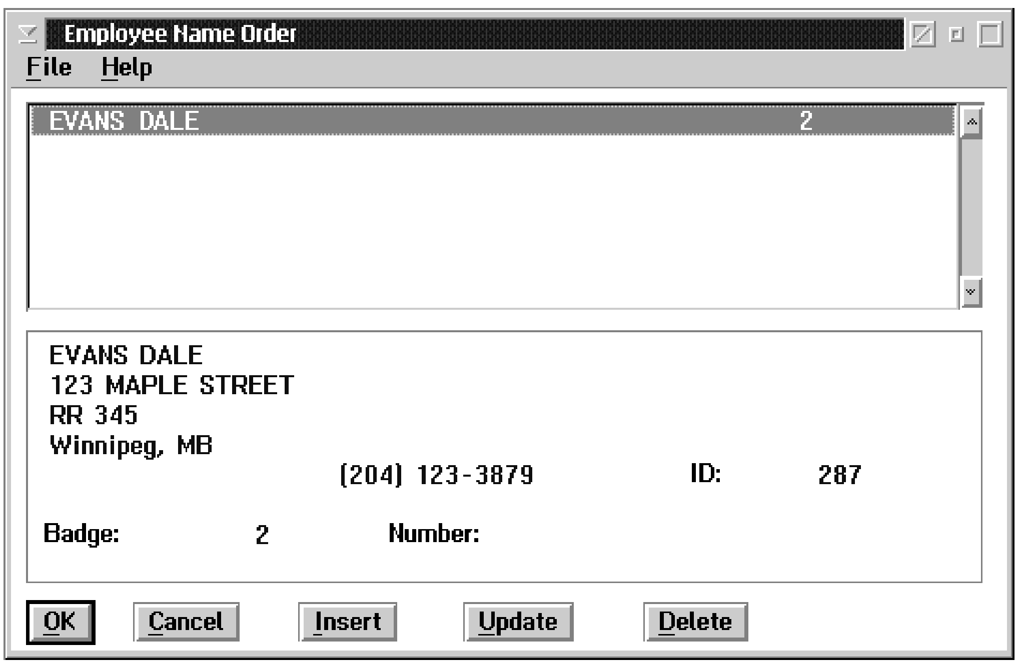
Inserting an Employee

To insert a new employee do the following:

1. Select the **Employee Update** option from the Master Files menu. The Employee Name Selection dialog box will appear:

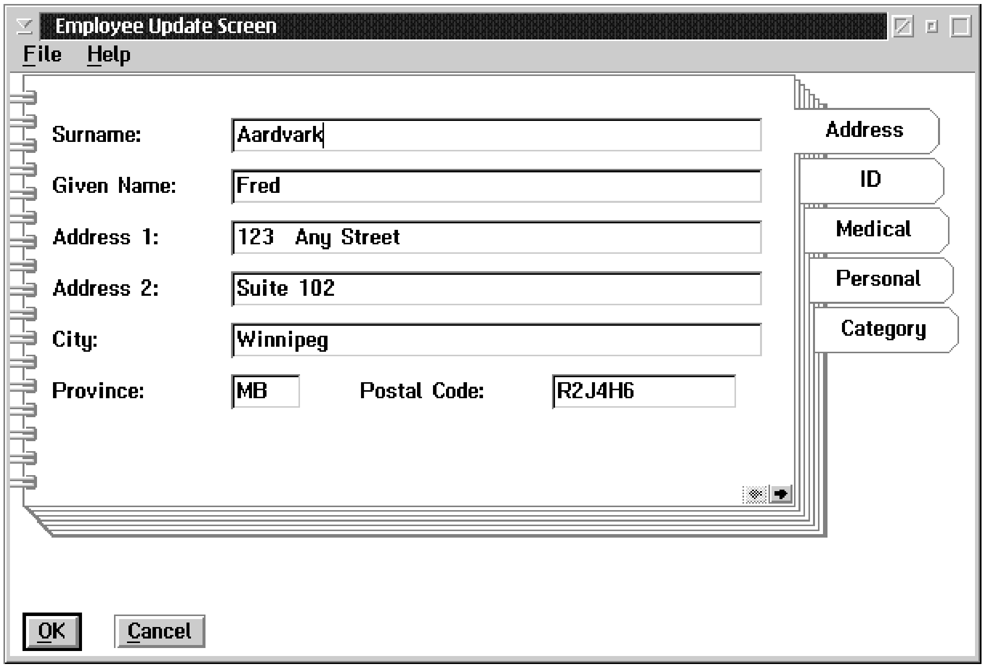


2. Select the F8 key or the **List** option in the File menu. The Employee Name Order dialog box will appear:



3. Select the INSERT button. A dialog box will appear which contains four tabs: address, ID, medical, and personal (these screens are defined below).
4. Enter in the required information and select the OK button.

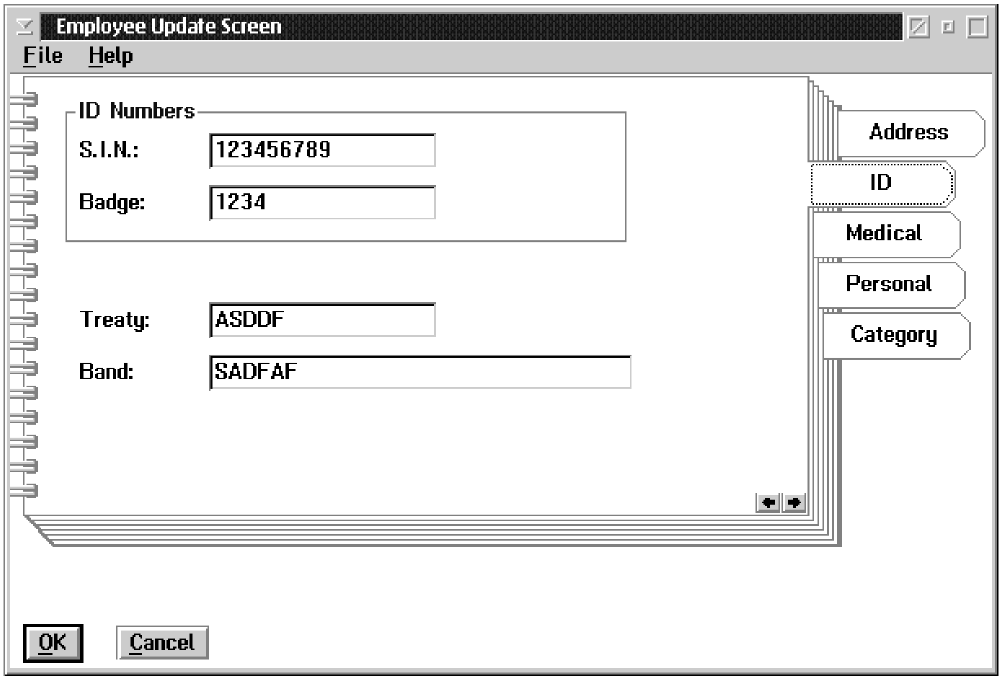
The Address page of the notebook appears as follows:



The following table contains a description of the fields in the screen:

Field	Description
Surname	This field contains the surname of the employee.
Given Name	The given name of the employee is entered into this field.
Address Line 1	The Address Line 1 field is used to enter in the address of the employee.
Address	Line 2 is used as an extra address field if the space is needed.
City	This field contains the city in which the employee lives.
Province	The province of the employee should be entered into this field.
Postal Code	This field is for entering the employee's postal code.

The ID page of the notebook appears as follows:

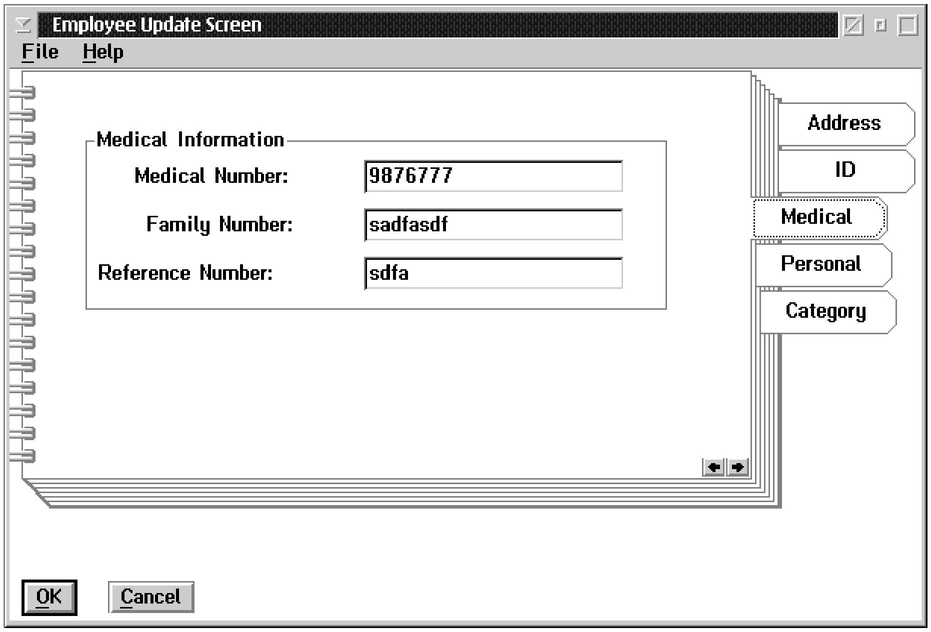


The following table contains a description of the fields in the screen:

Field	Description
S.I.N.	The employee's social insurance number is entered into this field.
Badge Number	The badge number of the employee is contained in this field. Using a badge number is optional.
Treaty Number	If the employee has a treaty number it may be entered in this field.
Band Name	If the employee has a band name it may be entered in this field.

MASTER FILES

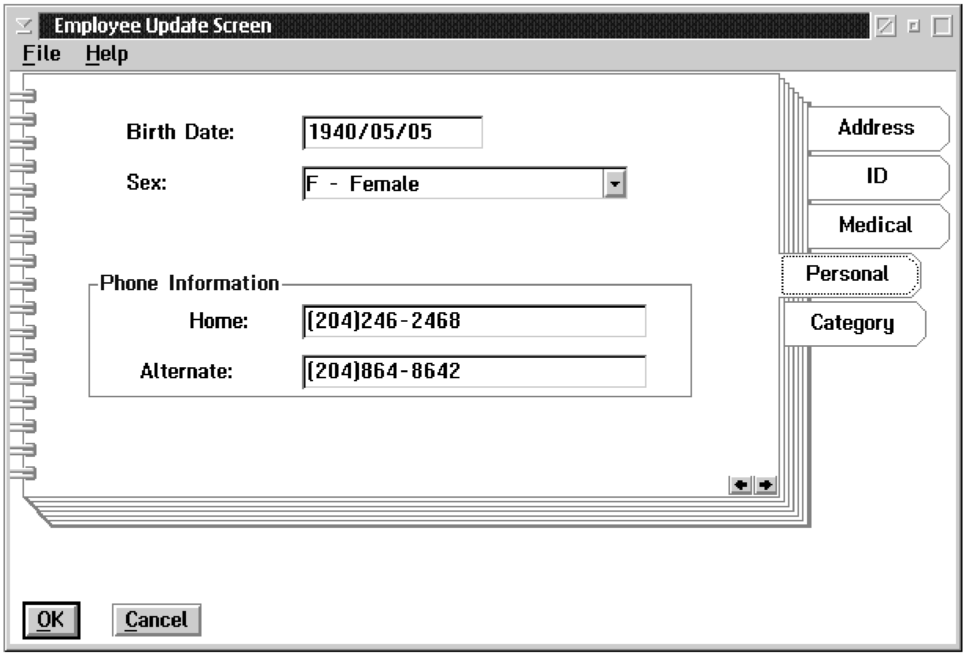
The Medical page appears as follows:



The following table contains a description of the fields in the screen:

Field	Description
Medical Number	This is the medical number of this person only.
Family Number	This is the family medical number for the entire family.
Reference Number	This is a n additional medical reference number used by some provinces.

The Personal page appears as follows:



The following table contains a description of the fields in the screen:

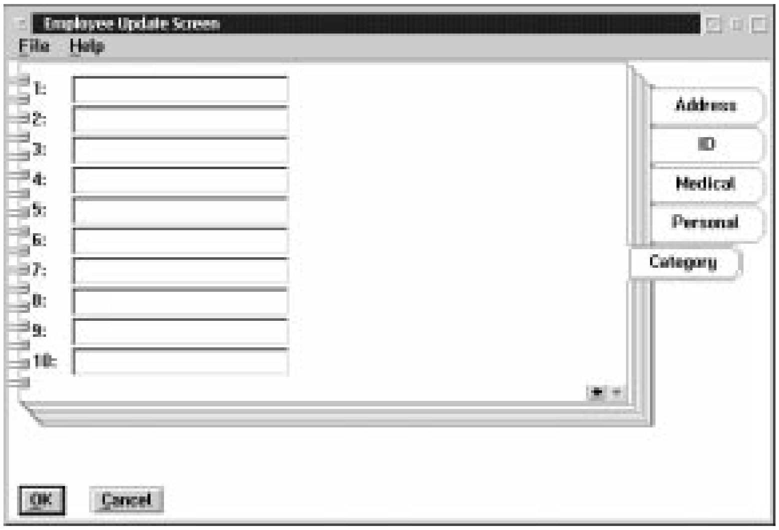
Field	Description
Birth Date	The birth date of the employee should be entered into this field in YYYY/MM/DD format.
Sex	Either "M" for male, or "F" for female is used to enter in the employee's sex in this field. Data can be entered into this field using the pull down menu.
Home	The home phone number of the employee can be entered into this field.
Alternate	An alternate phone number used to reach the employee may be placed in this field.

For all the notebook pages the following functions are possible:

F10 (save) The F10 key, the OK button, or the **Save** option from the File menu will save any changes made within the Main Employee Data screen.

Esc (exit) The ESC key, the CANCEL button, or the **Exit** option from the File menu will exit the screen without saving any changes.

The Category page appears as follows:



The category page of the notebook contains the following data fields:

- The screen contains 10 fields that contain 10 character code.
- These codes are defined in the code validation update with the description of the user defined code.
- These can be any codes that you want to use to sort on or categorize your group of employees.

Deleting Employees

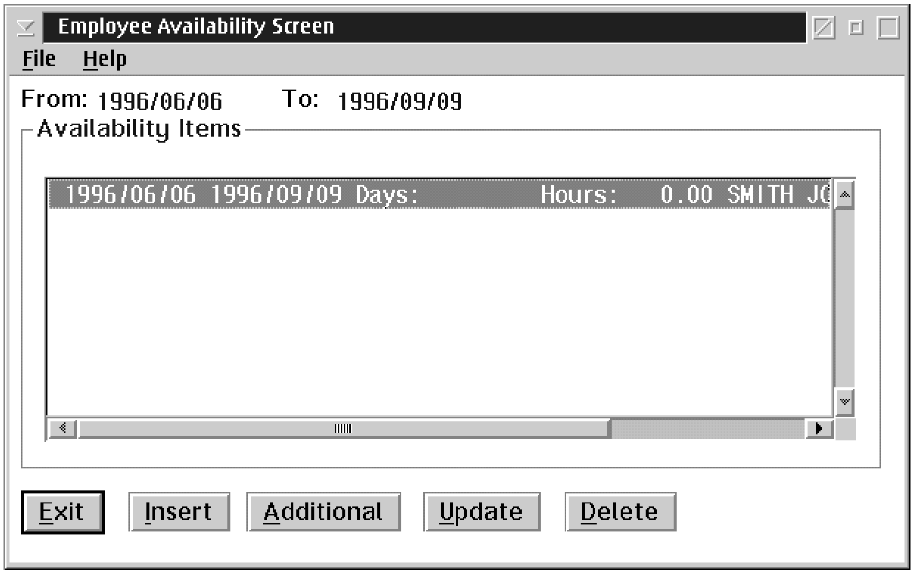
To delete an existing employee follow these steps:

1. Select the **Employee Update** option in the Master Files menu.
2. When the Employee Name Selection dialog box appears select the F8 key, or the **List** option in the File menu to obtain a list of employees.
3. Move the selection bar to the employee to delete.
4. Select the DELETE button at the bottom of the Employee Name Order dialog box.
5. A message will appear asking you to confirm the deletion. Select the YES button to delete, or the NO button to cancel the deletion process.

Employee Availability Update

The **Employee Availability Update** option allows the user to specify the days of the week and the time of day that the employee is available for work as well as prefers to work.

A screen containing a list similar to the following will appear when the **Employee Availability Update** option is selected:



The screen lists the following from left to right: starting date, ending date, days available, number of hours available per week and the employee's name.

Set Date Range A date range can be specified through the **Set Date Range** option in the File menu.

☞ If no information has been previously entered within the date range, the list will be empty.

Insert By selecting the INSERT button, or the **Insert Item** option in the File menu new data can be inserted into the list of employee availability.

Update When one of the items in the list is highlighted, selecting the UPDATE button, or the **Update Entry** option in the File menu will allow the user to update an item that has already been entered.

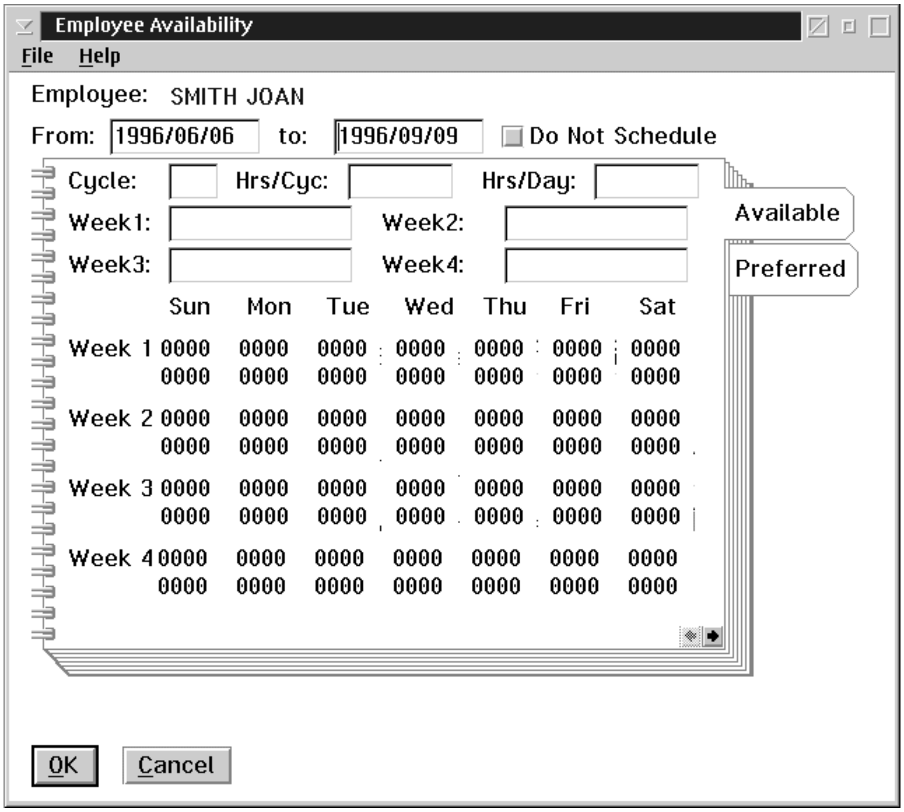
Delete By selecting the DELETE button, or the **Delete Entry** option in the File menu the highlighted item can be cleared from the list of employee availability.

Additional The **Additional for Employee** option in the File menu, or the ADDITIONAL button creates an additional record for the same employee as the highlighted line. The screen is the same as the update screen. This is useful for creating availability records with different dates for the same employee.

Entering Employee Availability

Two groups of fields may be input through the **Employee Availability Update** function. The first group is used for the days of the week, hours per week and the times of day that the employee can be available for work. The second group of fields can be used to input the days and times that the employee would prefer to work.

When either the INSERT or UPDATE buttons is selected the following dialog box will appear:



MASTER FILES

The following table gives a description of the data fields within the dialog box:

Field	Description
Employee	The employee whose availability is being entered will be shown at the top of the dialog box. This field is for display only.
Effective Date	The first date of a date range pertaining to the availability times.
to	The last date of a date range pertaining to the availability times.
Times Available	
Days of Week	The days of the week the employee is available.
Hours/Week	The maximum number of hours per week for which the employee is available to work.
Daily Hours	Each day of the week is listed with two data fields to the right. The first field is for the earliest time and the second is for the latest time the employee is available to work on that day.
Preferred Times	
Days of Week	The days of the week the employee prefers to work.
Hours/Week	The maximum number of hours the employee prefers to work is entered into this field.
Daily Hours	Each day of the week is listed with two data fields to the right. The first field is for the earliest time and the second is for the latest time that the employee prefers to work on that day.

F10 (save) The F10 key, or the **Save** option in the File menu will save any changes made in the dialog box.

Esc (exit) The ESC key, or the **Exit** option in the File menu will exit the dialog box without saving any changes.

☞ A special system shift definition named “$NOTAVAIL” may be used to specify specific dates and times that the employee will not be available for work.

The availability data for an employee is used to test any shift schedule data input. Warning messages will be produced when scheduled dates and times produce a conflict with the employee availability data input.

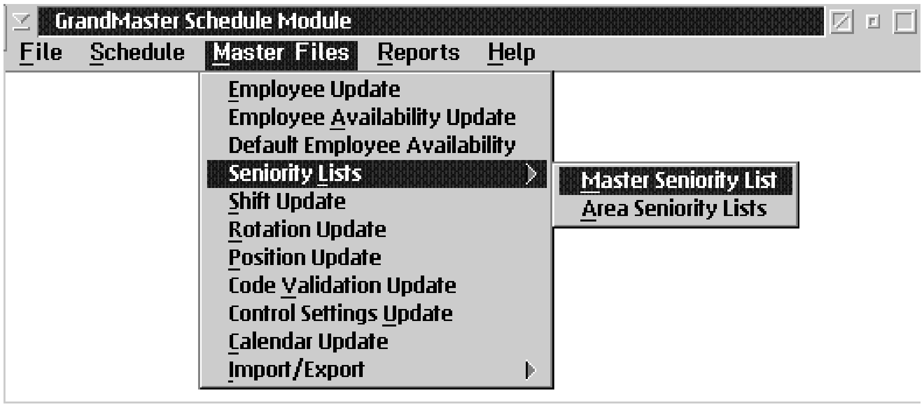
Default Employee Availability

The Default Employee Availability is the same as Employee Availability the only difference is the default Employee Availability is available for all employees and the Employee Availability is for one employee at a time.

For information on how to fill in the Default Employee Availability screens please refer to pages 122-124.

Seniority List

When the user selects Seniority Lists from the Master Files menu the following screen will appear:

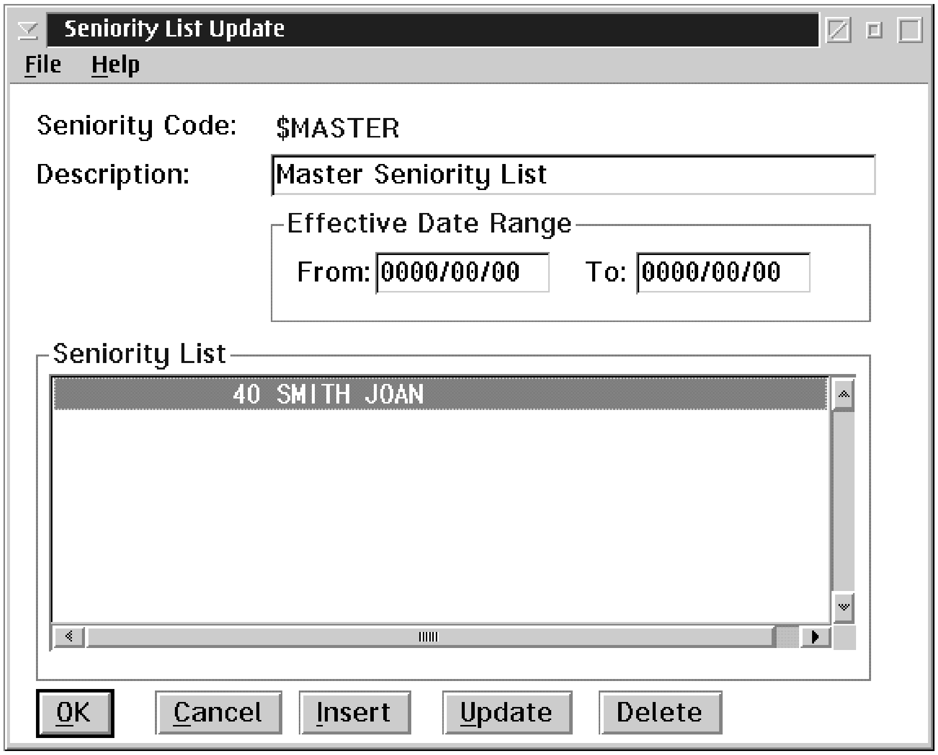


The following options are available to the user:

- Master Seniority List
- Area Seniority List

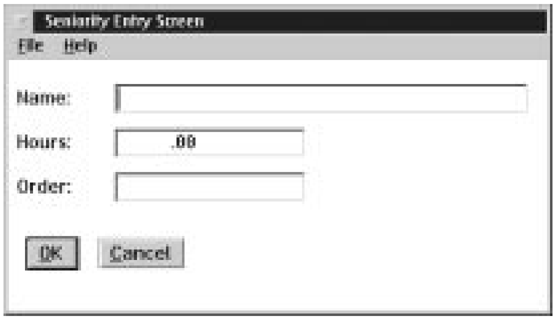
Master Seniority List

When the user selects the Master Seniority List the following screen will appear:



Insert

The Insert button allows the user insert seniority list. The following screen appears when the insert button is pressed.



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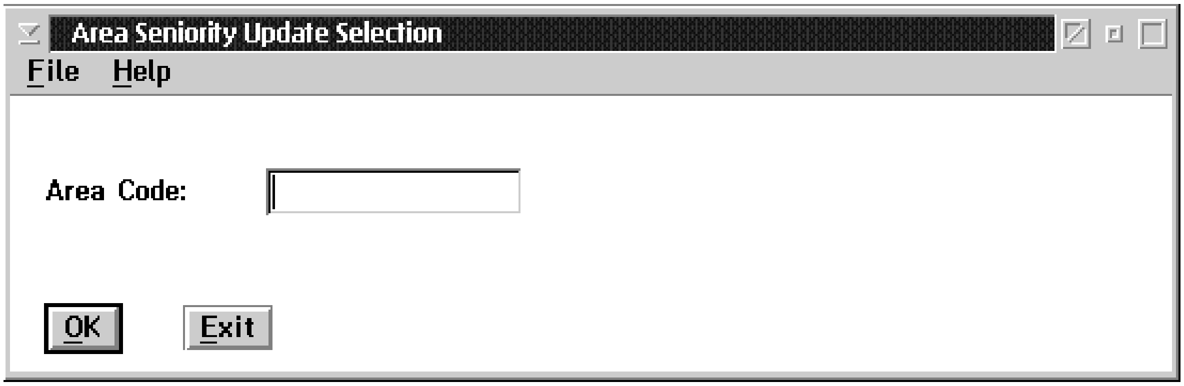
Area Seniority Update

The area seniority update allows you to set up seniority lists for a given area, or the master seniority list if no area has been specified.

The option first requests the area for the seniority list.

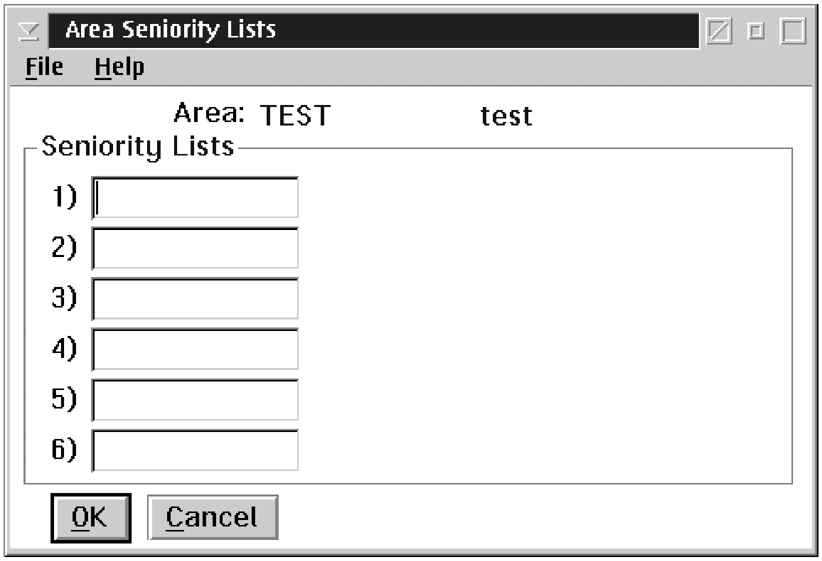


F8 (list) The F8 key or the list option from the file menu will bring up a list of all the areas.

ESC The ESC key, CANCEL button, or Exit option in the File menu will exit the dialog box without saving any changes.

OK The OK button or update from the file menu will allow you to update the seniority list.

After the area is selected the option presents a screen showing the area and description with the ability to select 6 lists for this area.

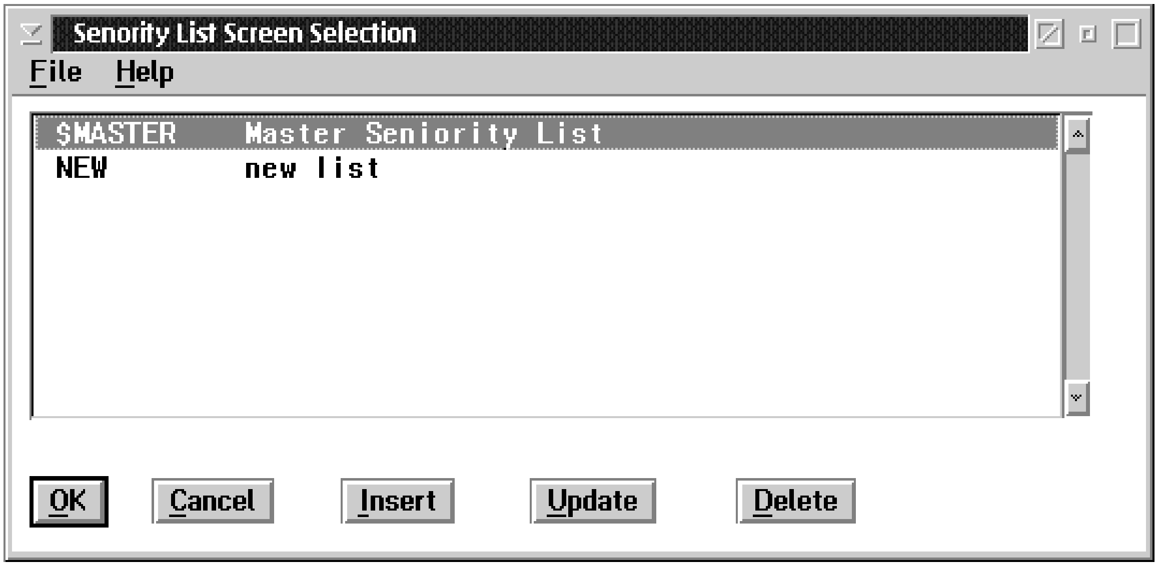


F8 (List) The F8 key or list option from the file menu will allow you to select a seniority list from the given list of available seniority lists.

ESC The ESC key, CANCEL button, or Exit option in the File menu will exit the dialog box without saving any changes.

OK The OK button or UPDATE option from the file menu will allow you to save your add or changes to the seniority list.

When you are selecting your seniority list from the list of seniority lists you may update or change the lists.



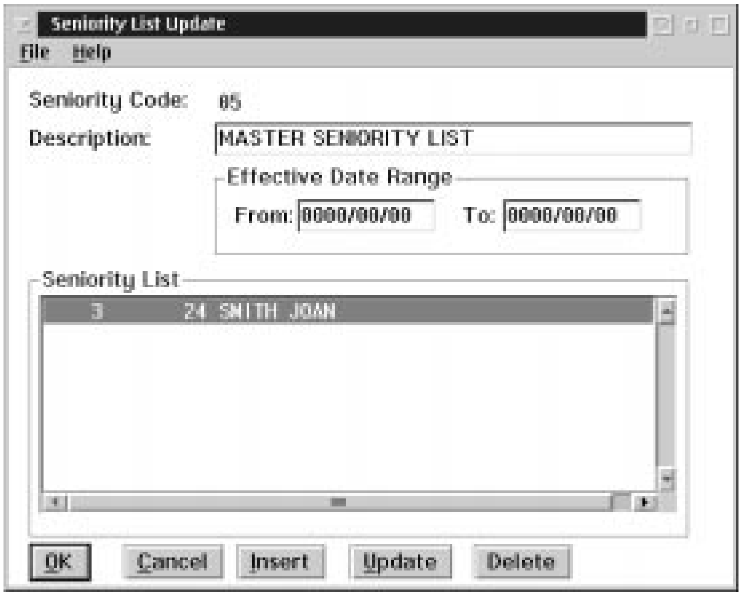
Insert The INSERT button will allow you to add a new list.

Update The UPDATE button will allow you to update a list.

Delete The DELETE button will allow you to delete a list.

OK The OK button or CANCEL button will return you to the screen where you select seniority lists for your area.

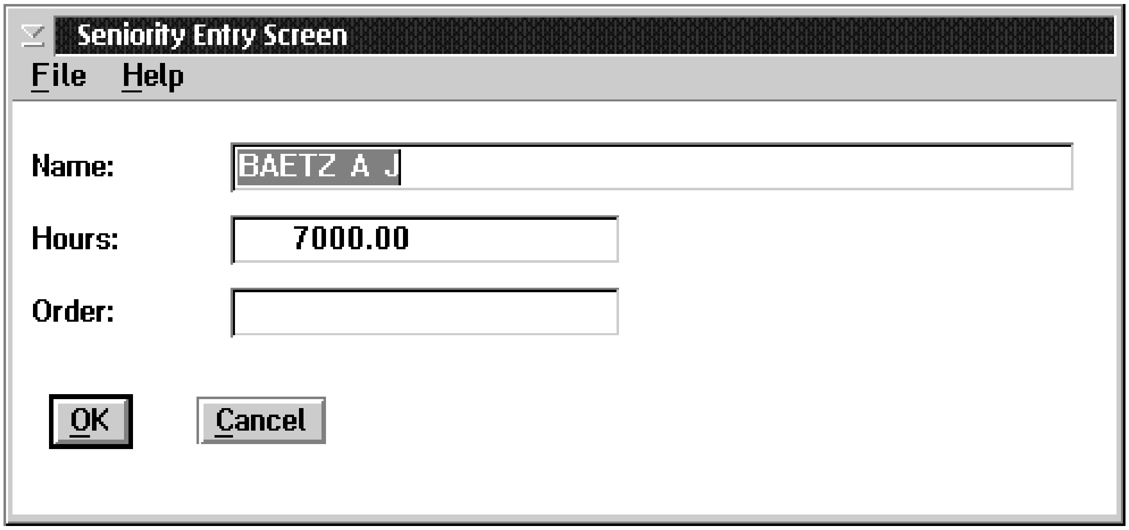
The seniority list update shows you the employees or the seniority list.



The following dialog box allows the data fields to be input:

Field	Description
Code	This field contains the name of the seniority list.
Description	This field contains a description of the seniority list code.
Effective Date From	This field contains the date the list is effective from.
Effective Date To	This field contains the date the list is effective to.
Seniority List	This field shows the order, hours, and the employee name starting with the employee with the most seniority.

The update an employee double click on the line or on a new line for a new employee to be added.



The information required for a new employee to be added is the employee name, number of hours and the order number.

The number of hours are the hours used to determine seniority.

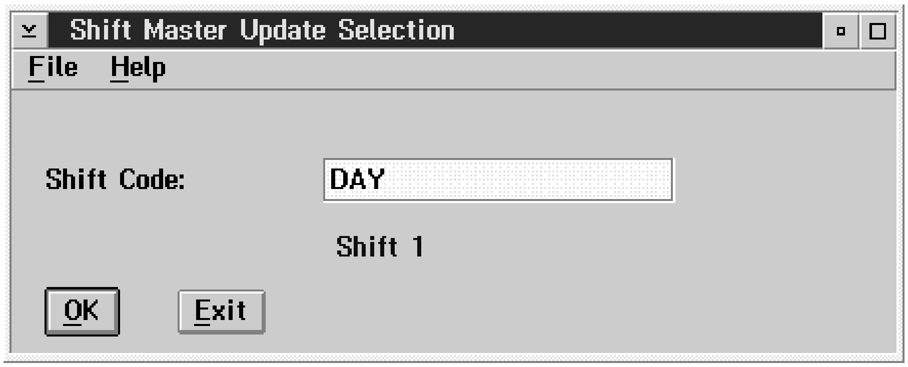
The order field is used to enter the position number if several employees have the same number of hours.

Shift Update

The **Shift Update** option from the **Master Files** menu is used to maintain the Shift Data Table. This table is used to determine the standard work hours and earnings for a shift.

☞ At least one User Defined Shift must be created for the module to schedule work time segments.

When the **Shift Update** option is selected the Shift Master Update screen appears as follows:



The only data field in this dialog box is the shift code field in which the user enters the shift code.

F8 (list) Selecting the F8 key, or the **List** option from the File menu will bring up a list of all the previously defined shift tables. The list will appear similar to the following:

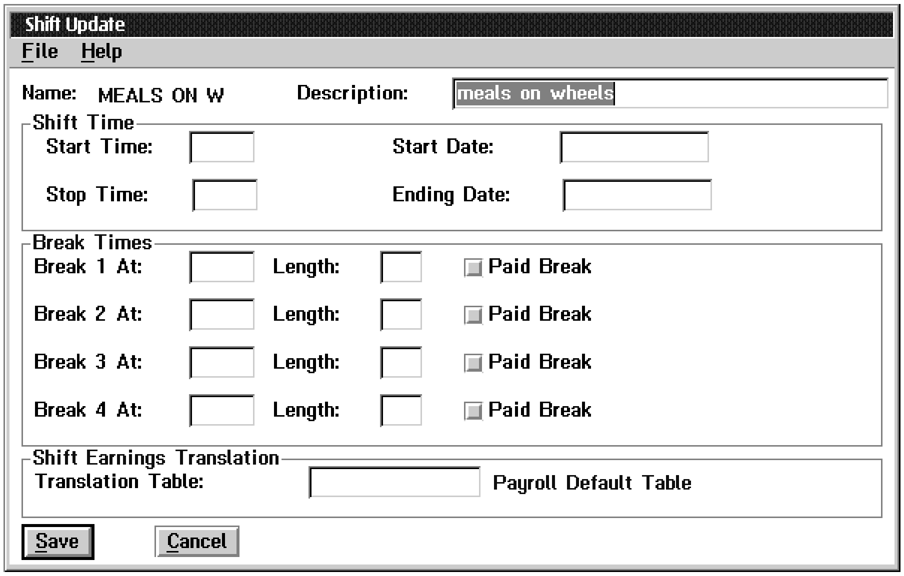
☞ If no shift codes have been previously defined the list will be empty.

The screen will list the shift codes with their description to the right.

From this screen the user can insert new shift codes (using the INSERT button), update defined shift codes (using the UPDATE button), or delete defined shift codes (using the DELETE button).

F10 (update)

The F10 key, the OK button, or the **Update** option from the File menu is used to make changes in previously defined shift codes. The shift code must first be entered into the shift code field.



The following data fields require input:

Field	Description
Shift Code	This field is used for the shift code. Access to the shift is done by entering the shift code.
Description	This field is used for a free form description of the shift. This field is displayed on pop-up lists and is used for reports.
Start Date	This field is used for the starting date of a date range in which the shift may be used. A value of zero indicates that no starting date is defined.
Ending Date	This field is used for the ending date of a date range in which the shift may be used. A value of zero indicates that no stopping date is defined.
Start Time	This field contains the standard starting time.
Stop Time	This field contains the standard stopping time
Break Times	The break time fields are used to define the breaks within a shift. Up to four (4) breaks may be defined for a shift.
Break # At	This field is used to contain the starting time for the break.
Length	This field is used for the length of the break.
Paid Break	This check box is used to indicate if the break is paid or unpaid. When a break is unpaid it is subtracted from the worked hours when calculating net hours to be paid.

Field	Description
Translation Table	This field is used to enter the code for the earnings translation table that is used to calculate overtime and premiums for a shift.

Esc (exit)

The ESC key, the EXIT button, or the **Exit** option in the File menu will exit the dialog box.

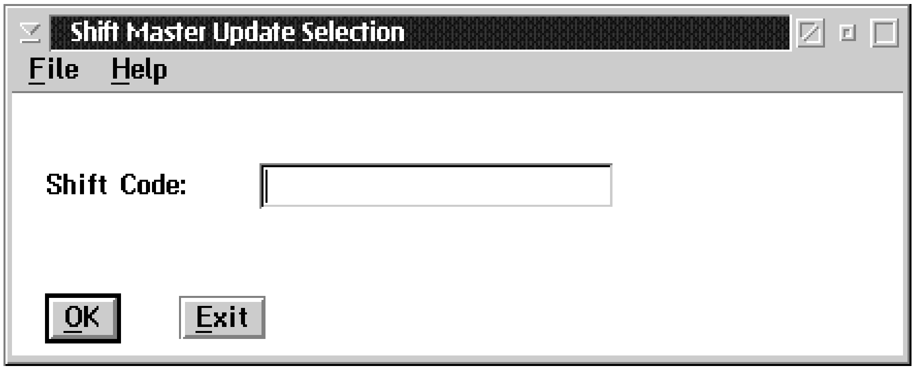
Defining a New Shift Code

The Schedule Module allows the user to define any number of shifts for use in scheduling employees. Shift codes defined by the user are referred to as User Defined Shift Codes.

☞ At least one User Defined Shift must be created for the module to schedule work time segments.

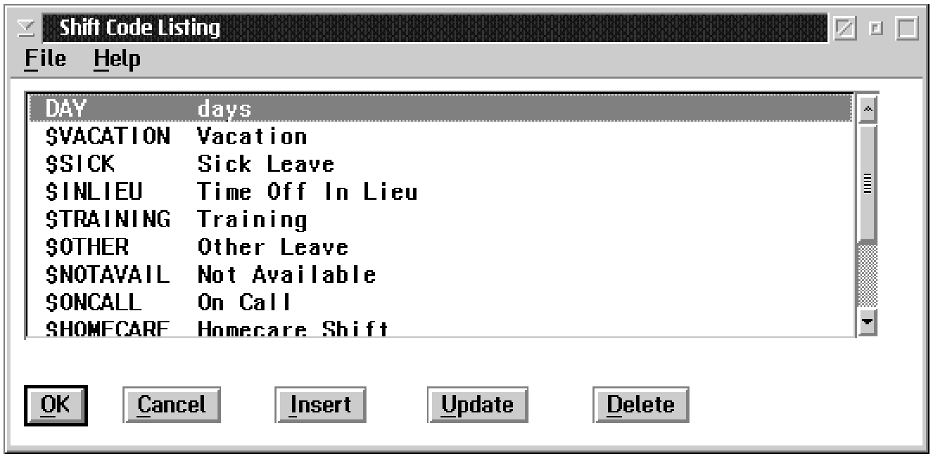
To create a new user defined shift code follow these steps:

1. Select the **Shift Update** option in the Master Files menu. The following dialog box will appear:



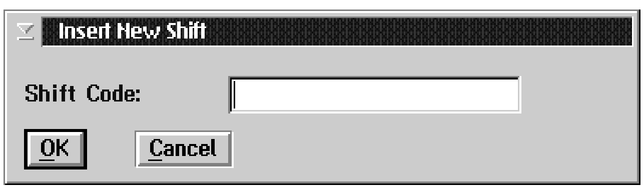
☞ If the user already knows the shift code to be defined has not been done so previously then he/she can enter the shift code directly into the Shift Master Update Selection dialog box, and select the F10 key, or the **Update** option from the File menu. This action will bypass the Shift Code Listing screen and bring up the Shift Earnings Definition dialog box, therefore skip to step five of this section. Otherwise carry on with step two.

2. When the Shift Master Update Selection dialog box appears select the F8 key, or the **List** option from the File menu to bring up the list of previously defined shift codes. The list will appear similar to the following:

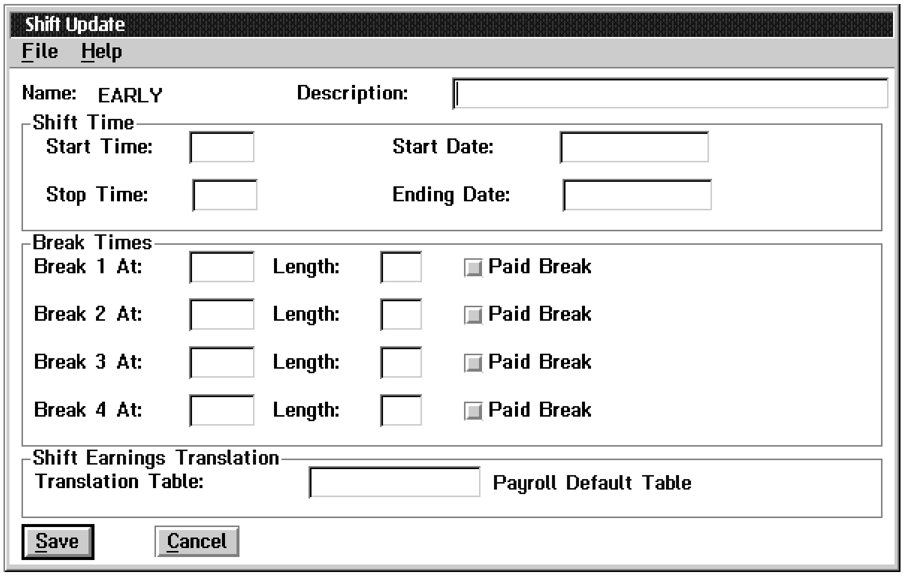


For information on the contents of the list see the previous description of this screen in the Shift Update section of this manual, page 133.

3. Select the INSERT button at the bottom of the Shift Code Listing screen to enter in a new shift code. A dialog box will appear as follows:



4. Enter the name of the new shift code into the Insert New Shift dialog box, and press the OK button. The Shift Earnings Definition dialog box will appear as follows:



5. Fill in the data fields in the dialog box to define the new shift.

For information about the data fields within this dialog box see the previous description of this dialog box in the Shift Update section of this manual, page 134.

6. Save the data by selecting the F10 key, OK button, or the **Save** option from the File menu when all the information has been entered correctly.

Example:

Shift Code -	DAY
Description -	Day Shift
Start Date -	zero (none)
Stop Date -	zero (none)
Start Time -	08:30
Stop Time -	17:00
Break 1 Start -	10:30
Break 1 Length -	15
Break 1 Paid -	(Paid Break)
Break 2 Start -	12:00
Break 2 Length -	30
Break 2 Paid -	(Not Paid)
Break3 Start -	15:00
Break 3 Length -	15
Break 3 Paid -	(Not Paid)
Earning Table -	E1

Deleting an Existing Shift Code

To delete a previously defined position code follow these steps:

1. Select the **Shift Update** option in the Master File menu.
2. When the Shift Master Update Selection dialog box appears select the F8 key, or the **List** option in the File menu to obtain a list of all defined shifts.
3. Move the selection bar to the shift code to delete.
4. Select the DELETE button at the bottom of the Shift Code Listing screen.
5. A message will appear asking you to confirm the deletion. Select the YES button to delete, or the NO button to cancel the deletion process.

System Defined Shifts

The leave time segments are defined by the system and may not be altered by the user. The following table contains the system defined shifts.

Shift	Description
$vacation	This shift is used when vacation time is scheduled for an employee.
$sick	This shift is used when sick leave is scheduled for an employee.
$training	This shift is used when training time is scheduled for an employee.
$inlieu	This shift is used when time off in lieu of overtime is scheduled for an employee.
$other	This shift is used when other leave time is scheduled for an employee.
$notavail	This shift is used when the employee will not be available for scheduling.

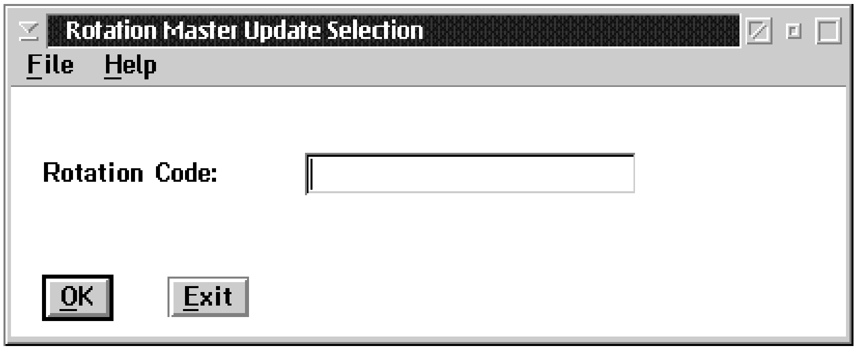
Rotation Update

The Schedule Module can use standard shift rotation patterns for scheduling employees. When this method is used the shift rotation pattern must be defined.

☞ The rotation pattern may contain up to 200 days. Each day may contain up to five shift assignments. Multiple shift assignments in a day are required for split shifts or multiple position assignments.

The **Rotation Update** option in the Master Files menu updates the rotation patterns in the Rotation Data Table.

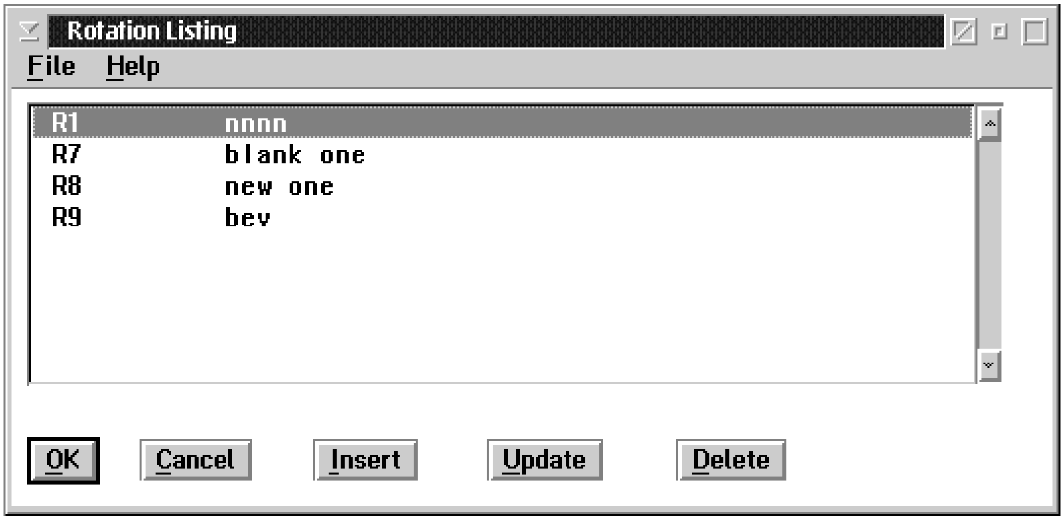
When this option is selected the following dialog box appears:



The only data field in this dialog box is the rotation code field in which the user enters a rotation code.

F8(list)

The F8 key, or the **List** option from the File menu will bring up a list of the rotation codes that have been previously defined. The list will appear similar to the following:



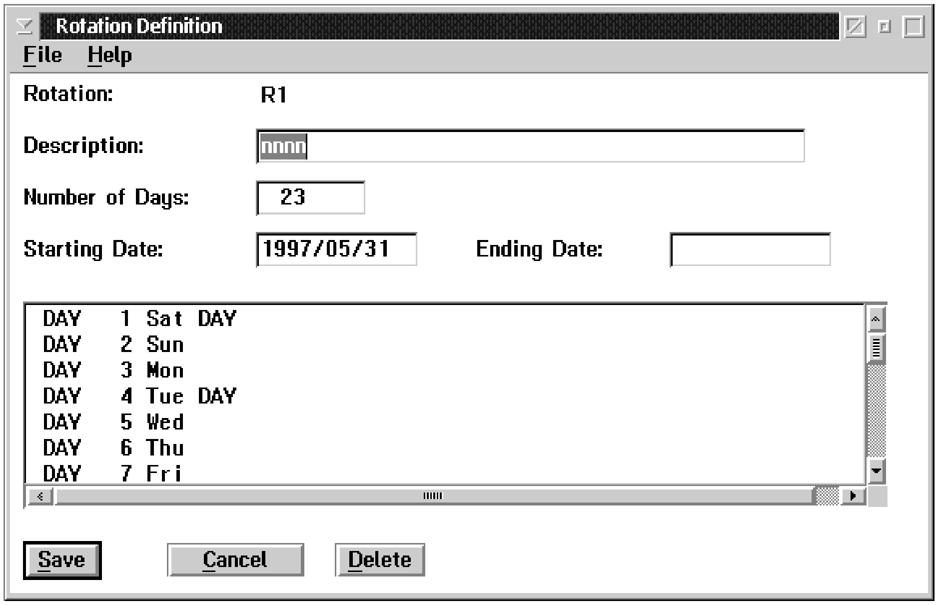
☞ If no rotation codes have been previously defined the list will be empty.

The screen will list the rotation codes with their description to the right.

From this screen the user can insert new rotation codes (using the INSERT button), update defined rotation codes (using the UPDATE button), or delete defined rotation codes (using the DELETE button).

F10 (update)

The F10 key, the OK button, or the **Update** option in the File menu is used to make changes in previously defined rotation codes. The rotation code must first be entered into the rotation code field.



The following data fields require input:

Field	Description
Rotation	The rotation code that is being defined will appear at the top of the dialog box. This field is for display only.
Description	A description of the rotation code can be entered into this field.
Number of Days	The number of days the rotation contains is entered into this field. The rotation pattern may contain up to 200 days.
Starting Date	This field contains the starting date of the rotation. This pattern will not be used for employee scheduling before this date.
Ending Date	This field contains the ending date of the rotation. This pattern will not be used for employee scheduling past this date.
List of Shift Assignments	From left to right the list shows the day number of the rotation, the day of the week, and up to five shifts for that day.

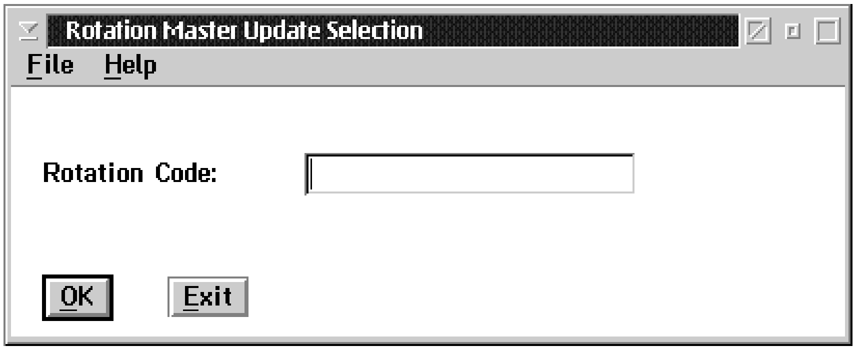
Esc (exit)

The ESC key, the EXIT button, or the **Exit** option in the File menu will exit the dialog box.

Defining New Rotation Codes

To create a new rotation code follow these steps:

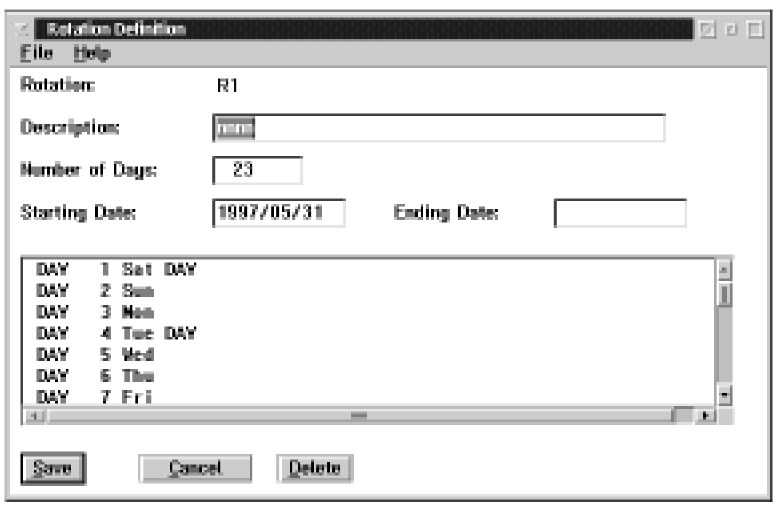
1. Select the **Rotation Update** option in the Master Files menu. The following dialog box will appear:



If the user already knows the rotation code to be defined and has not done so previously then he/she can enter the rotation code directly into the Rotation Master Update Selection dialog box, and select the F10 key, or the **Update** option from the File menu. This action will bypass the Rotation Listing screen and bring up the Rotation Definition dialog box, therefore skip to step five of this section. Otherwise carry on with step two.

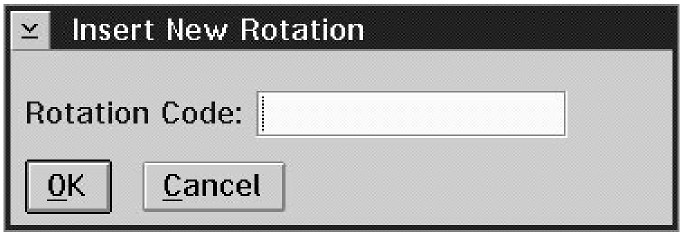
2. When the Rotation Master Update Selection dialog box appears press the F8 key, or the **List** option in the File menu to obtain a list of the defined rotation

3. codes. The list will appear similar to the following:



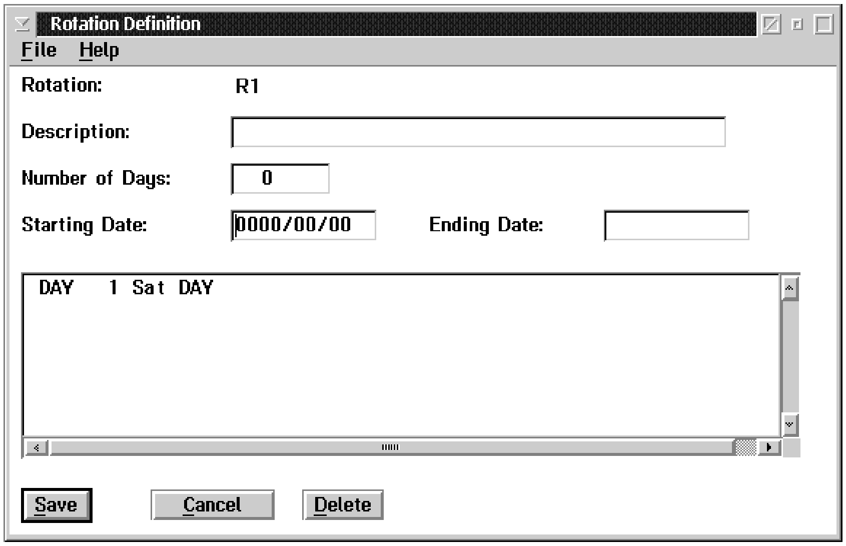
For information on the contents of the list see the previous description of this screen in the Rotation Update section of this manual, page 142.

4. Instead of selecting an item from the list, select the INSERT button at the bottom of the dialog box.



5. Type in the name of the new rotation code to be defined into the Insert New Rotation dialog box, then select the OK button. The Rotation Definition dialog box will appear as follows:

6.



7. Define the new rotation code by typing information needed in the correct data fields.

For information about the data fields within this dialog box see the previous description of this dialog box in the Rotation Update section of this manual, page 143.

8. Select the F10 key, OK button, or the **Save** option from the File menu when all the information has been entered correctly.

Deleting an Existing Rotation Code

To delete a previously defined position code follow these steps:

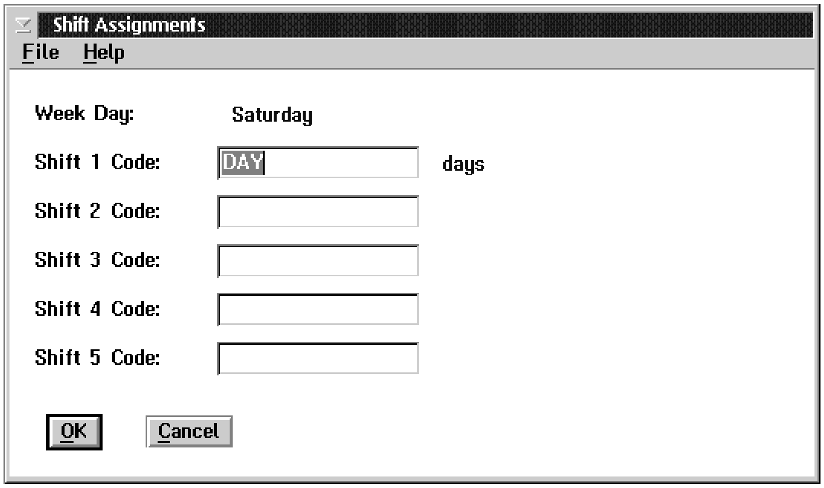
1. Select the **Rotation Update** option in the Master File menu.
2. When the Rotation Master Update Selection dialog box appears select the F8 key, or the **List** option in the File menu to obtain a list of all defined rotations.
3. Move the selection bar to the rotation code to delete.
4. Select the DELETE button at the bottom of the Rotation Listing screen.
5. A message will appear asking you to confirm the deletion. Select the YES button to delete, or the NO button to cancel the deletion process.

Shift Assignments

A Shift Assignment list entry exists for each of the days in the rotation pattern.

Each shift assignment entry allows for the specification of up to five shifts per day of the rotation.

When the user double clicks on one of the shift assignment list entries the following dialog box will appear:



Each shift specification allows for the input of the shift code to be included into the pattern.

When shifts are not assigned to a day in the rotation pattern no work segments will be scheduled for that day.

F8 (list)

The F8 key, or the **List** option in the File menu will bring up a list of previously defined shifts.

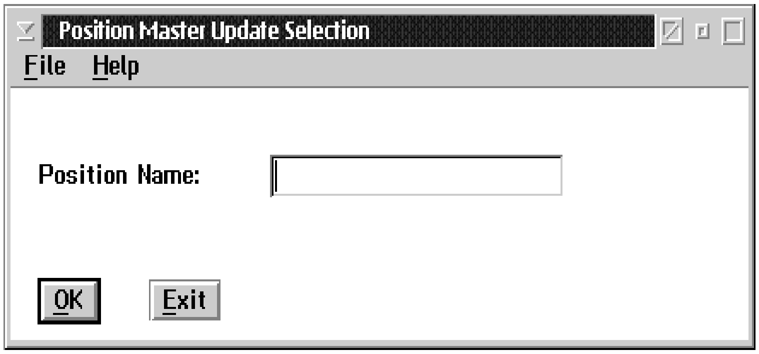
F10 (save) The F10 key, the OK button, or the **Save** option in the File menu will save the changes made in the dialog box.

Esc (exit) The ESC key, CANCEL button, or the **Exit** option from the File menu will exit the screen without saving any changes.

MASTER FILES

Position Update

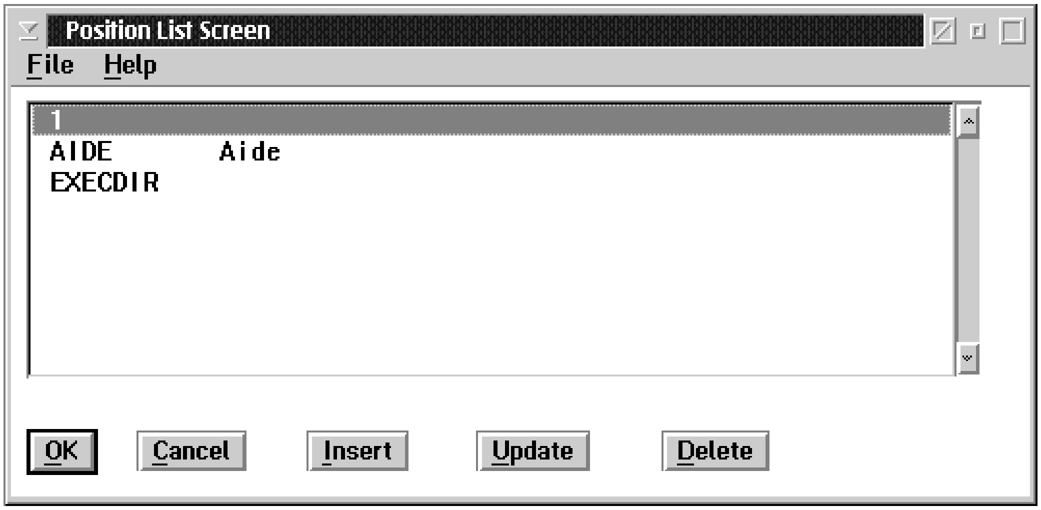
Selecting the **Position Update** option brings up the Position Master Update Selection screen. This screen appears as follows:



The position name must be entered into this dialog box. This can be done by typing the position name in or selecting it from a list of position names.

F8(list)

Selecting the F8 key, or the **List** option from the File menu will bring up a list of all the defined position names. The list will appear similar to the following:



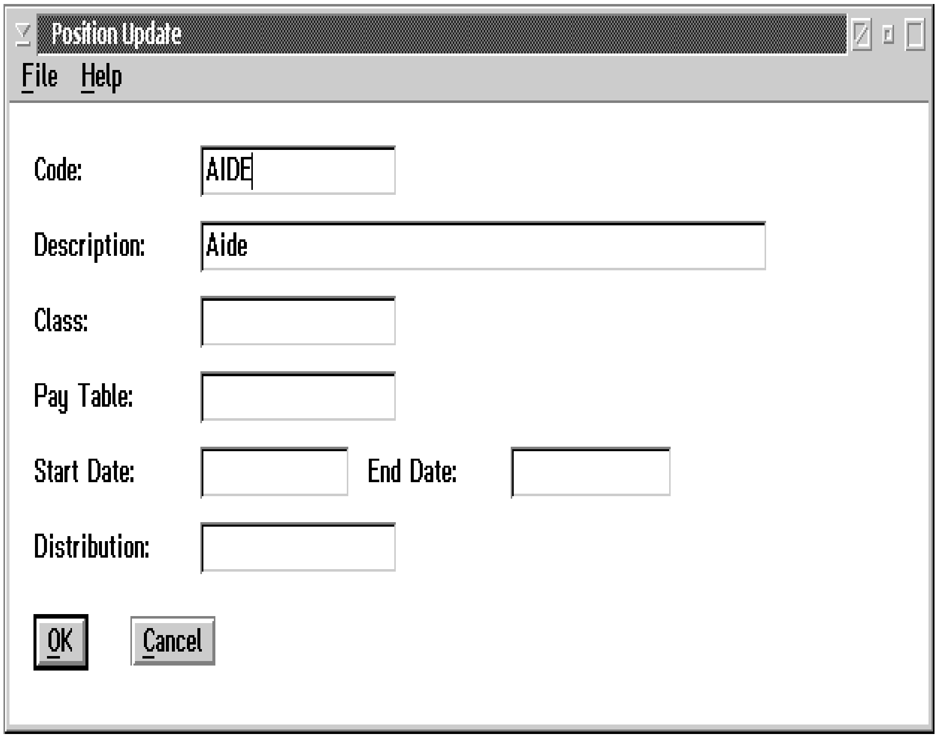
If no position codes have been previously defined the list will be empty.

The screen will list the position codes with their description to the right.

From this screen the user can insert new position codes (using the INSERT button), update defined position codes (using the UPDATE button), or delete defined position codes (using the DELETE button).

OK

The OK button, or the **Update** option from the File menu is used to make changes in previously defined position codes. The position code must first be entered into the position code field. The dialog box will appear as follows:



The following data fields require input:

Field	Description
Code	This field displays the Position Code.
Description	This field displays the position description.
Class	This field displays a model type if one has been or is to be assigned.
Pay Table	If the position pay rate is derived from a rate table the appropriate rate table code displayed or entered here.
Start Date	This field contains the starting date of the position update.
End Date	This field contains the ending date of the position update.
Distribution	This field displays the distribution table that the position has been assigned to.

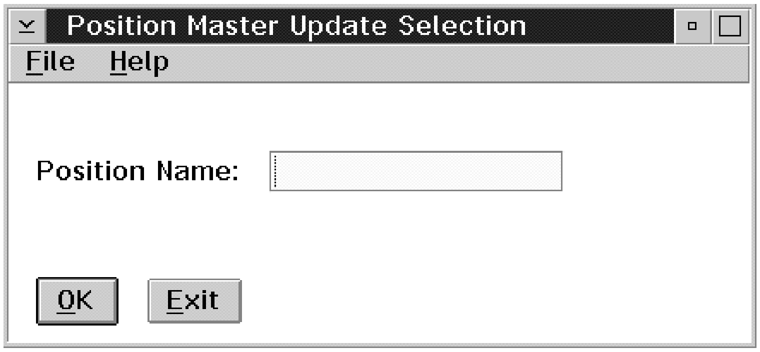
Esc (exit)

The ESC key, the EXIT button, or the **Exit** option from the File menu will exit the dialog box.

Defining a New Position Code

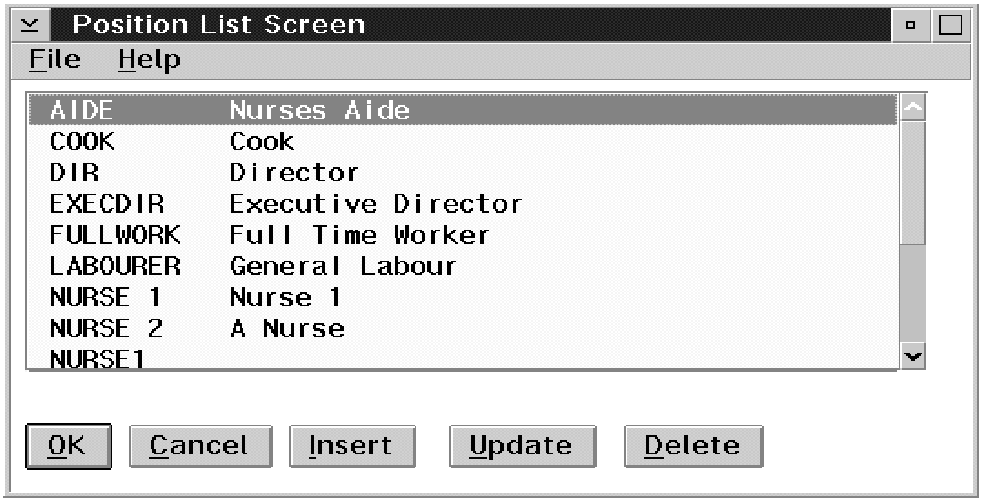
To create a new position code follow these steps:

1. Select the **Position Update** option in the Master Files menu. The Position Master Update Selection screen will appear as follows:



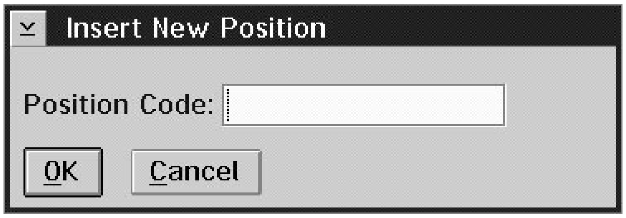
☞ If the user already knows the position code to be defined and has not done so previously then he/she can enter the position code directly into the Position Master Update Selection dialog box, and select the F10 key, or the **Update** option from the File menu. This action will bypass the Position List Screen and bring up the Position Update dialog box, therefore skip to step five of this section. Otherwise carry on with step two.

2. Select the F8 key, or the **List** option from the File menu to obtain a list of all the previously defined position codes. The list will appear similar to the following:



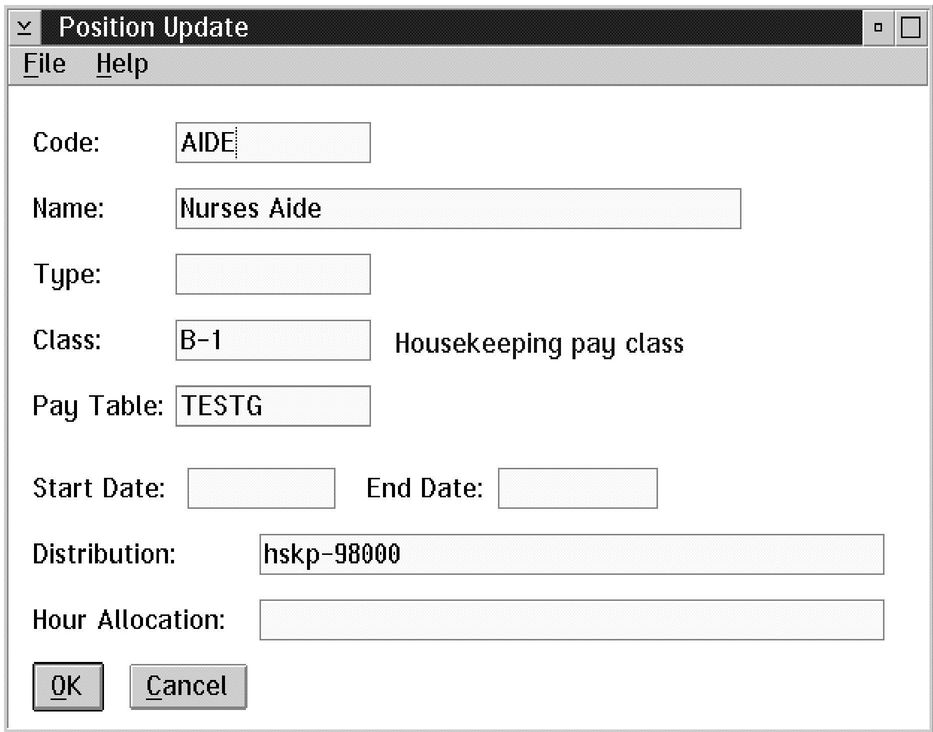
For information on the contents of the list see the previous description of this screen in the Position Update section of this manual, page 148.

3. Select the INSERT button at the bottom of the dialog box.



4. Enter the name of the new position code into the Insert New Position dialog box, then select the OK button. The Position Update screen will appear:

5.



6. Enter the information needed to define the position code that appears in the dialog box.

For information about the data fields within this dialog box see the previous description of this dialog box in the Position Update section of this manual, page 149.

7. Save the data by selecting the F10 key, OK button, or the **Save** option from the File menu when all the information has been entered correctly.

Deleting an Existing Position Code

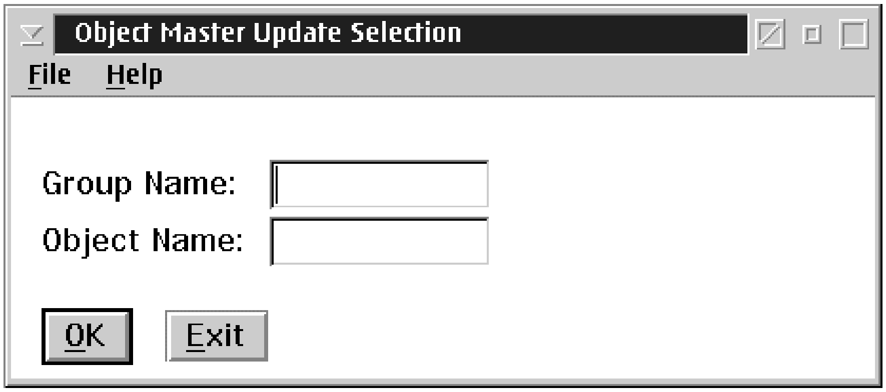
To delete a previously defined position code follow these steps:

1. Select the **Position Update** option in the Master Files menu.
2. When the Position Master Update Selection dialog box appears select the F8 key, or the **List** option in the File menu to obtain a list of all defined positions.
3. Move the selection bar to the position code to delete.
4. Select the DELETE button at the bottom of the Position List Screen.
5. A message will appear asking you to confirm the deletion. Select the YES button to delete, or the NO button to cancel the deletion process.

Code Validation Update

The code validation update function allows you to update the various user defined code tables provided by GrandMaster Suite.

When the user select Code Validation Update the following screen will appear:



The following table gives a description of the screen:

Field	Description
Group Name	The group name is the name of the code table to update a list of the code table may be obtained by using the “F8” list function.
Object Name	The object name is the code value to update.

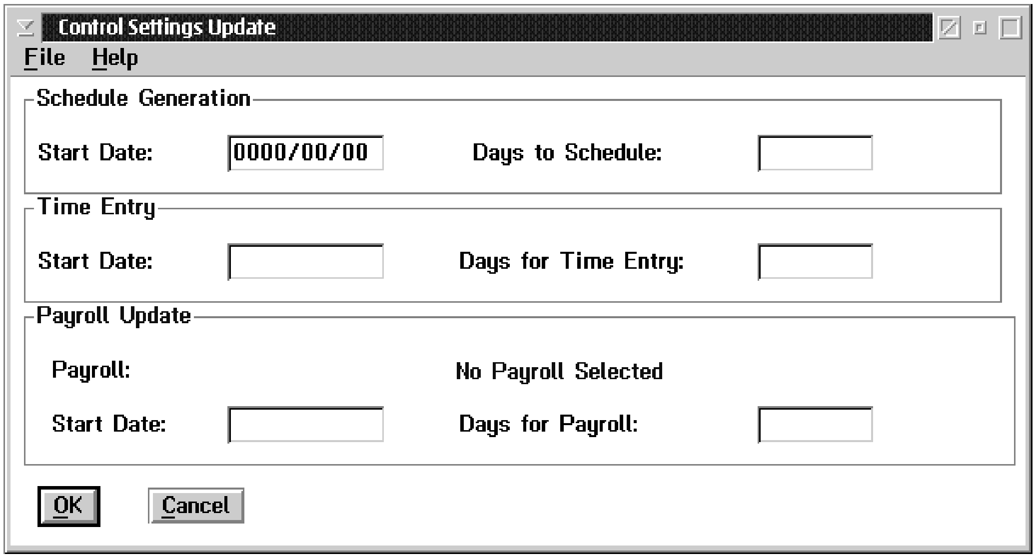
The system established code table group names all start with a “$” character. (Eg: $area is the group name for the ‘Area’ Code Table.

Control Settings Update

The option allows the user to control:

- schedule generation by specifying the starting date and days to schedule,
- time entry by specifying the starting date and the days for the time entry, and
- payroll update by specifying the payroll starting date and days for the payroll for each payroll.

The following dialog box will appear after selecting the **Control Setting Update** option in the Master File menu:



The following table gives a description of the fields within the dialog box:

Field	Description
Schedule Generation	
Start Date	The starting date from which to begin generating the schedule is entered into this data field.
Days to Schedule	
Time Entry	
Start Date	The starting date for the time entry is entered into this field.
Days for Time Entry	
Payroll Update	
Payroll	This field contains the name of the currently selected payroll. This field is for display only.
Start Date	The start date for updating the payroll is entered into this field.
Days for Payroll	

F10 (save)

The F10 key, OK button, or the **Save** option from the File menu will save any changes made to the data within the dialog box.

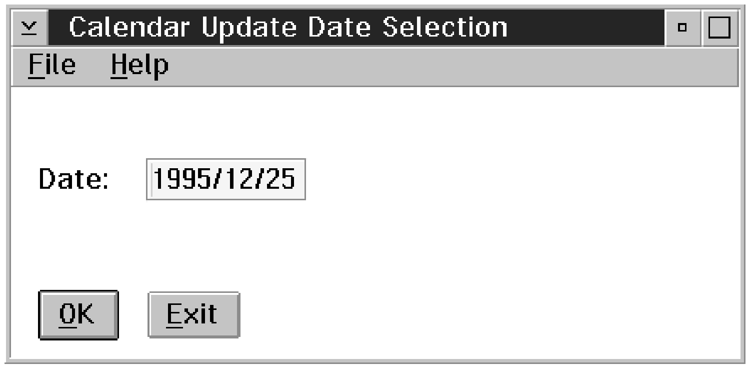
Esc (exit)

The ESC key, CANCEL button, or the **Exit** option from the File menu will exit the dialog box without saving any changes.

Calendar Update

The Schedule Module allows the use of special processing for specified dates through a system calendar. This calendar may be used to specify statutory and special company holidays. When the organization chart position requirements are used the calendar may also be used to control the inclusion or exclusion of positions for scheduling.

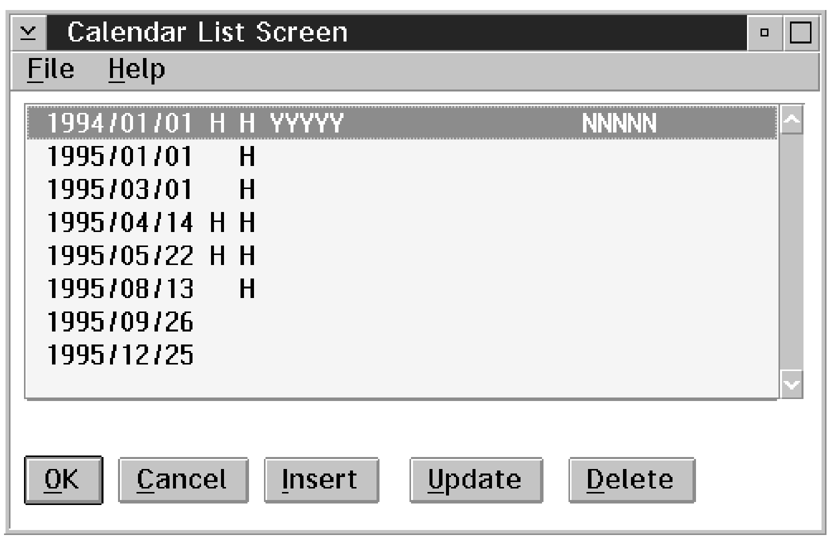
the calendar **Update** option brings up the following dialog box when selected:



The date can be entered by typing it in or by selecting a defined calendar date from a list.

F8(list)

A list of all the defined calendar dates will appear if the F8 key is pressed. The list will appear as follows:



If no dates have been previously defined then the list will appear empty.

The list contains the following information from left to right: date, stat holiday code, company holiday code, excludes (a 1 character code, up to 100 can be entered), and includes (a 1 character code, up to 100 can be entered).

From this screen the user can insert new calendar dates (using the INSERT button), update defined calendar dates (using the UPDATE button), or delete defined calendar dates (using the DELETE button).

F10 (update)

The F10 key, the OK button, or the **Update** option in the File menu will allow the user to change the data for the currently entered date. A date must be entered into the Calendar Update Date Selection dialog box for this function to work. A dialog box will appear as follows:

The following data fields require input:

Field	Description
Includes	This field may hold up to 100 one character codes to be flagged as included in the schedule processing.
Excludes	This field may hold up to 100 one character codes to be flagged as excluded from the schedule processing.
Stat Holiday	This field holds the code to define the date as a statutory holiday.
Company Holiday	This field holds the code to define the date as a company holiday.

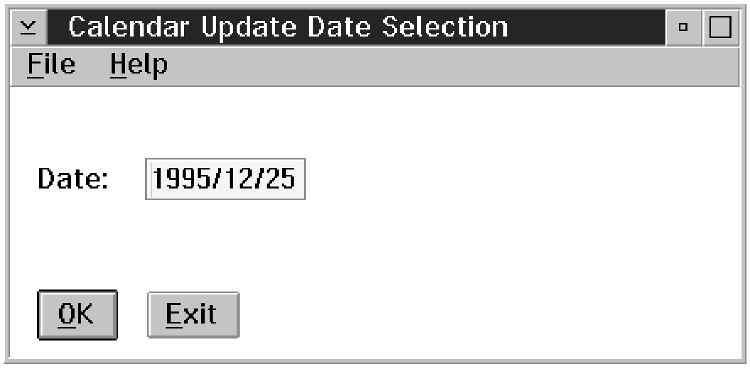
Esc (exit)

The ESC key, the CANCEL button or the **Exit** option from the File menu will exit the dialog box.

Defining a New Calendar Date

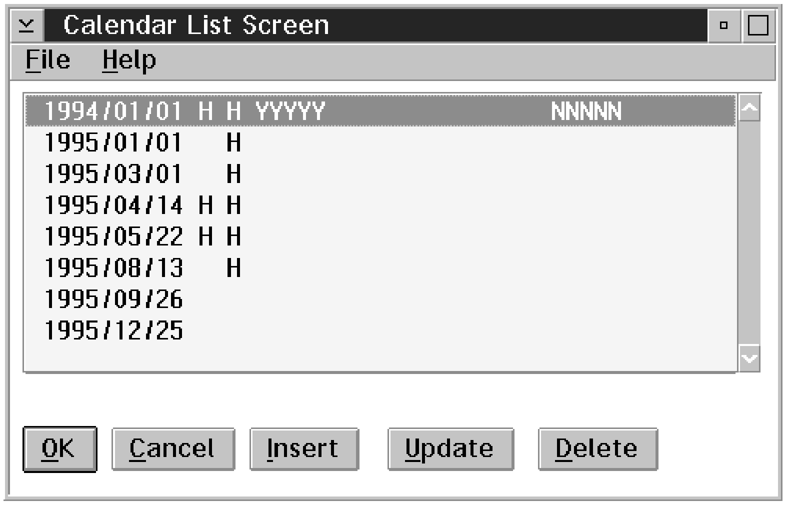
To define a new calendar date follow these steps:

1. Select the **Calendar Update** option in the Master File menu. The Calendar Update Date Selection dialog box will appear as follows:



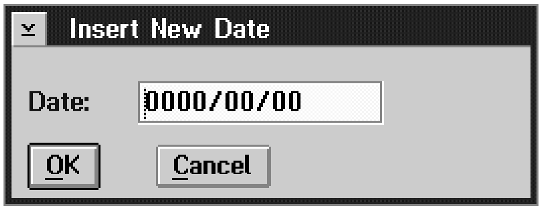
If the date to be defined is already known without checking which dates have been previously defined in the system then enter the date directly into the Calendar Update Date Selection dialog box, and select the F10 key, or the **Update** option from the File menu. This action will bypass the Calendar List Screen and bring up the Calendar Update dialog box, therefore skip to step five. Otherwise, carry on with step two.

2. When the Calendar Update Date Selection dialog box appears select the F8 key, or the **List** option from the File menu to obtain a list of all defined calendar dates. The Calendar List Screen will appear as follows:



For information about the contents of the list see the previous description of this screen in the Calendar Update section of this manual, page 156.

3. Select the INSERT button at the bottom of the Calendar List Screen to enter in a new calendar date. A dialog box will appear as follows:



4. Enter the date in the Insert New Date dialog box, and select the OK button. The Calendar Update dialog box will appear as follows:

5. Within the Calendar Update dialog box enter the required information to define the calendar date.

For information about the data fields within this dialog box see the previous description of this dialog box in the Calendar Update section of this manual, page 157.

6. Select the F10 key, OK button, or the **Save** option from the File menu when all the information has been entered correctly.

Deleting an Existing Calendar Date

To delete a previously defined calendar date follow these steps:

1. Select the **Calendar Update** option in the Master File menu.

2. When the Calendar Update Date Selection dialog box appears press the F8 key, or the **List** option from the File menu to obtain a list of all defined calendar dates.

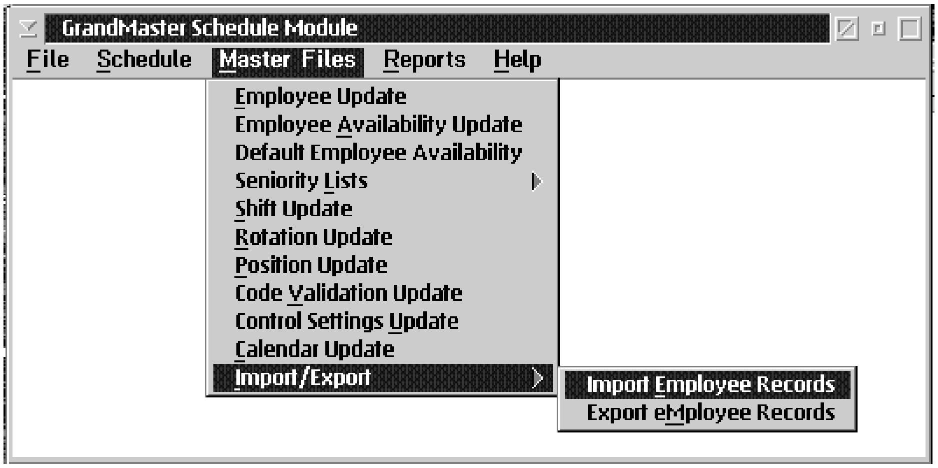
3. Move the selection bar to the calendar date to delete.

4. Select the DELETE button at the bottom of the Calendar List Screen.

5. A message will appear asking you to confirm the deletion. Select the YES button to delete, the NO button to cancel the deletion process.

Import/Export

When the user selects the Import/Export menu the following screen will appear:



The following options are available to the user:

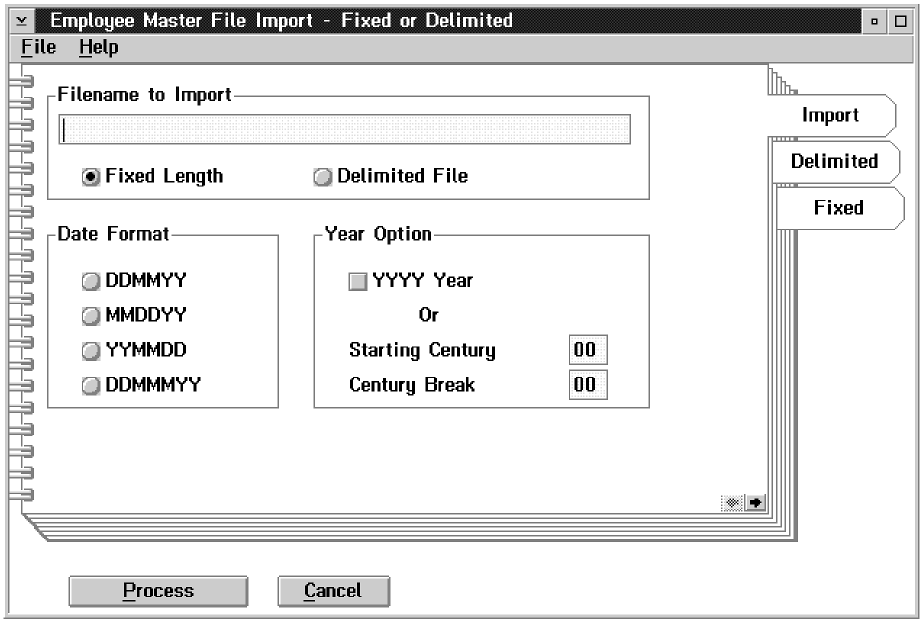
- Import Employee Records
- Export Employee Records

Employee Import

The **Employee Master File Import** option imports employee information from a comma delimited ASCII file or a fixed file format.

This function allows the user to select the date format, the data fields to be included in the import and to select the import file format.

The following dialog box appears when the **Employee Import** is chosen:



Saving... The selection made by the user can be saved by selecting the **Save Parameters** option in the File menu.

File Name for Export This field is the name of the file for the imported employee imported information. When entering a file name for the import file the file is expected to be in the current drive and directory. You may import from elsewhere by specifying the drive and directories before the file name. The file information can be up to 60 characters long. Eg) P:\GRANDDEV\SOURCE\MYFILE.TXT

☞ You must specify if the import file is a fixed length or delimited file type

Date Format Selection A date format is selected for the import when the box to the left of the date format has a check mark.

The date format selection allows for the following date options:

- DDMMYY
- MMDDYY
- DDMMMYY

If the box to the left of the YYYY year field has a check mark the year will be in the 4 digit format. EG) DDMMYY will become DDMMYYYY

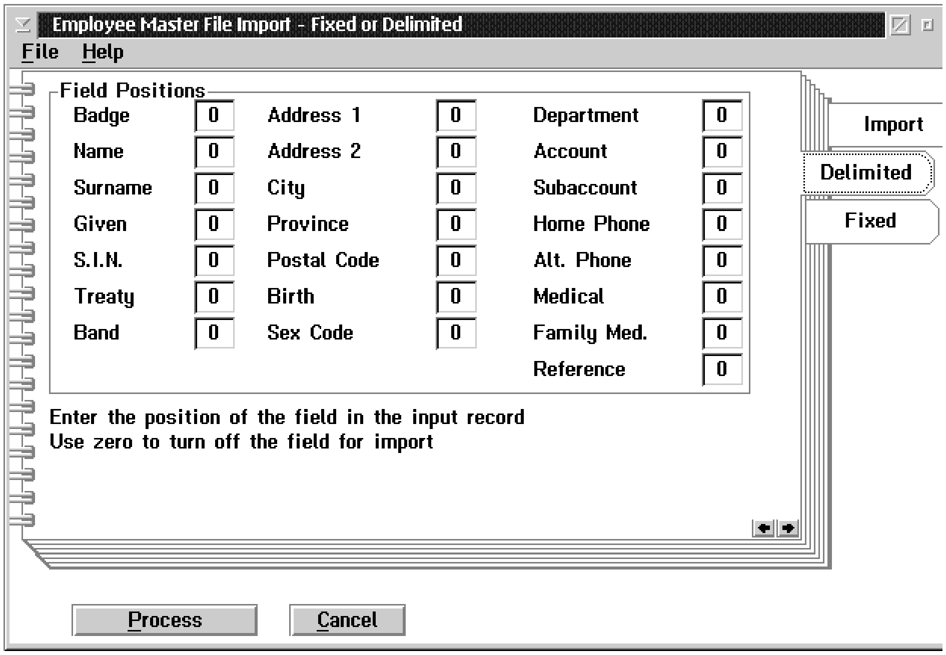
When you are changing the year into a 4 digit year from 2 digits in the import file you must specify the following:

- Starting Century
- Century Break

The starting century is the first two numbers of the century numbers we are starting with. Eg) 19

The century break is the last two number of the century that the century will change on Eg) 00 this means that when we hit 1999 the next century will be 2000.

The following dialog box appears for the employee hours import when the delimited tab is chosen:



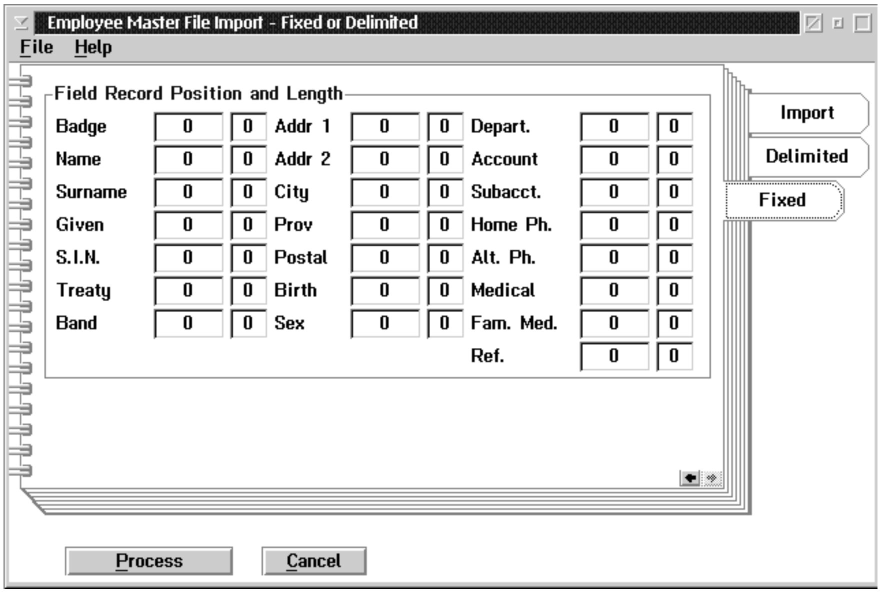
Delimited Field Position Selection

A data field is selected for the import when the box to the right of the field has the position number. If the position number is zero that field will not be imported. That field will be written in the file record according to the position number.

The report field selection allows for the inclusion of the following data fields from the master file:

Fields	Description
Badge	When this field is checked the badge number of the employee will be imported.
Name	When this field is checked the name of the employee will be imported.
Surname	When this field is checked the surname of the employee will be imported.
Given	When this field is checked the given name of the employee will be imported.
S.I.N.	When this field is checked the social insurance number of the employee will be imported.
Birth Date	When this field is checked the birth date of the employee will be imported.
Start Date	When this field is checked the starting date of the employee will be imported.
End Date	When this field is checked the ending date of the employee will be imported.
ADD1	When this field is checked the address line 1 of the employee will be imported.
ADD2	When this field is checked the address line 2 of the employee will be imported.
City	When this field is checked the city of the employee will be imported.
Prov	When this field is checked the province of the employee will be imported.
Postal Code	When this field is checked the postal code of the employee will be imported.
Department	When this field is checked the department of the employee will be imported.
Account	When this field is checked the account of the employee will be imported.
Sub Account	When this field is checked the sub account of the employee will be imported.
Home Phone	When this field is checked the home phone of the employee will be imported,
Alt. Phone	When this field is checked the alternate phone number of the employee will be imported.
Medical	When this field is checked the medical number of the employee will be imported.
Family Med.	When this field is checked the family med. number of the employee will be imported.
Treaty	When this field is checked the treaty number of the employee will be imported.
Band	When this field is checked the band number of the employee will be imported.
Position	When this field is checked the position of the employee will be imported.
Sex (M/F)	When this field is checked the sex code of the employee will be imported.

The following dialog box appears for the employee hours import when the fixed tab is chosen:



Fixed Field Position Selection

A data field is selected for the import when the box to the right of the field has the position number. If the position number is zero that field will not be imported. That field will be written in the file record according to the position number.

The report field selection allows for the inclusion of the following data fields from the master file:

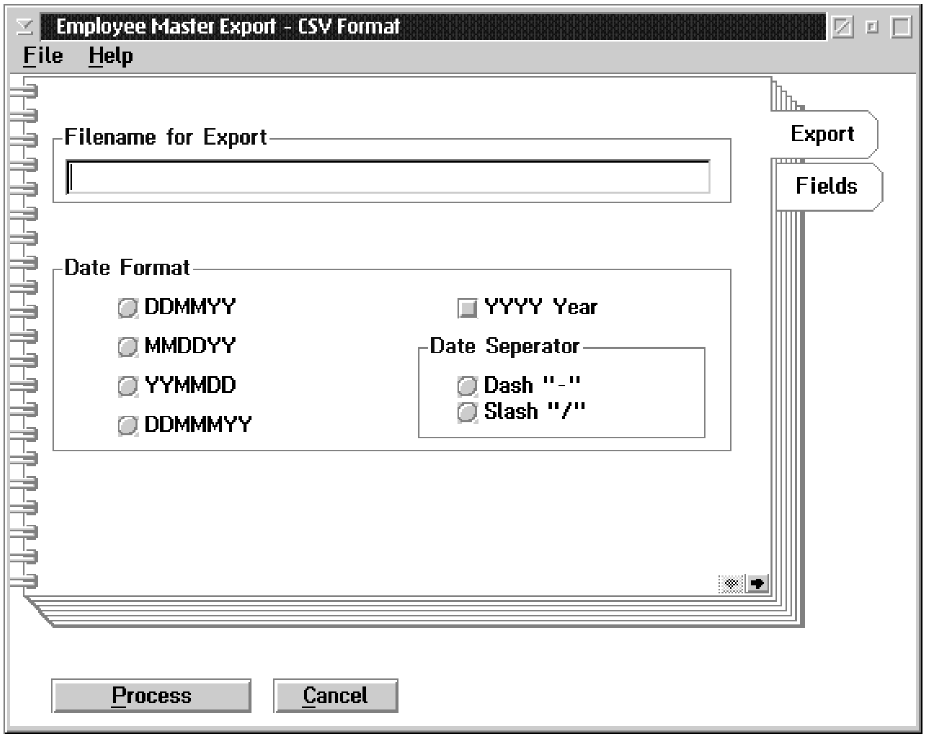
Fields	Description
Badge	When this field is checked the badge number of the employee will be imported.
Name	When this field is checked the name of the employee will be imported.
Surname	When this field is checked the surname of the employee will be imported.
Given	When this field is checked the given name of the employee will be imported.
S.I.N.	When this field is checked the social insurance number of the employee will be imported.
Birth Date	When this field is checked the birth date of the employee will be imported.
Start Date	When this field is checked the starting date of the employee will be imported.
End Date	When this field is checked the ending date of the employee will be imported.
ADD1	When this field is checked the address line 1 of the employee will be imported.
ADD2	When this field is checked the address line 2 of the employee will be imported.
City	When this field is checked the city of the employee will be imported.
Prov	When this field is checked the province of the employee will be imported.
Postal Code	When this field is checked the postal code of the employee will be imported.
Department	When this field is checked the department of the employee will be imported.
Account	When this field is checked the account of the employee will be imported.
Sub Account	When this field is checked the sub account of the employee will be imported.
Home Phone	When this field is checked the home phone of the employee will be imported,
Alt. Phone	When this field is checked the alternate phone number of the employee will be imported.
Medical	When this field is checked the medical number of the employee will be imported.
Family Med.	When this field is checked the family med. number of the employee will be imported.
Treaty	When this field is checked the treaty number of the employee will be imported.
Band	When this field is checked the band number of the employee will be imported.
Position	When this field is checked the position of the employee will be imported.
Sex (M/F)	When this field is checked the sex code of the employee will be imported.

Employee Export

The **Employee Master File Export** option exports employee information to a comma delimited ASCII file.

This function allows the user to select the filename for exported data, the data fields to be included in the export and to select the objects to be included or excluded in the export.

The following dialog box appears when the **Employee Export** is chosen:



Saving... The selections made by the user can be saved by selecting the **Save Parameters** option in the File menu.

File Name for Export

This field is the name of the file for the exported employee exported information. When entering a file name for the export the file will be created in your current drive and directory. You may place it elsewhere by specifying the drive and directories before the filename. The filename information can be up to 60 characters long. Eg) P:\GRANDDEV\SOURCE\MYFILE.TXT

Date Range Selection

To limit the range of the report starting and ending dates may be entered. If both dates are zero the entire report will be printed. If only the ending date is zero the report will print from the starting date until the end of the report.

Date Format Selection

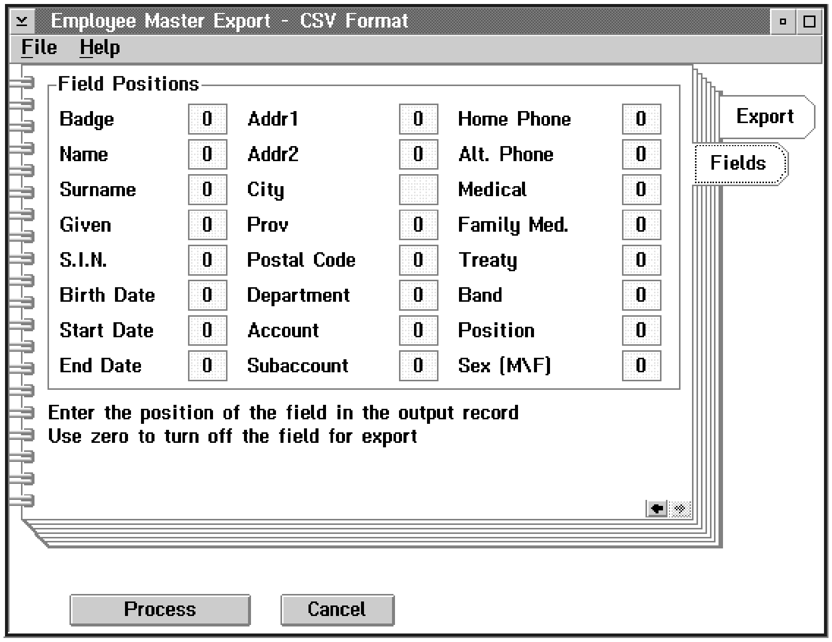
A date format is selected for the export when the box to the left of the date format has a check mark.

The date format selection allows for the following date options:

- DDMMYY
- MMDDYY
- YYMMDD
- DDMMMYY

If the box to the left of the YYYY year field has a check mark the year will be in the 4 digit format. Eg) DDMMYY will become DDMMYYYY.

The following dialog box appears when the fields tab is chosen in the employee master export:



Export Field Position Selection

A data field is selected for the export when the box to the right of the field has the position number. If the position number is zero that field will not be exported. That field will be written in the file record according to the position number.

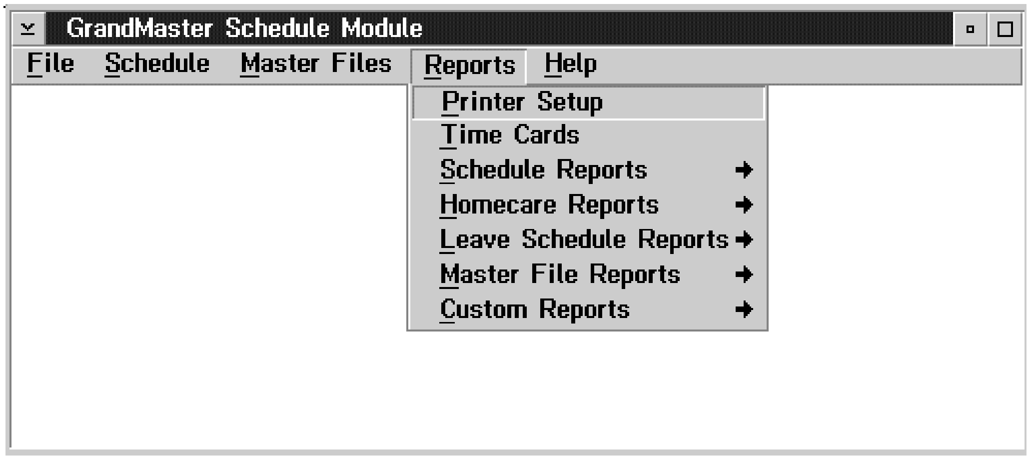
The report field selection allows for the inclusion of the following data fields from the master file:

Fields	Description
Badge	When this field is checked the badge number of the employee will be exported.
Name	When this field is checked the name of the employee will be exported.
Surname	When this field is checked the surname of the employee will be exported.
Given	When this field is checked the given name of the employee will be exported.
S.I.N.	When this field is checked the social insurance number of the employee will be exported.
Birth Date	When this field is checked the birth date of the employee will be exported.
Start Date	When this field is checked the starting date of the employee will be exported.
End Date	When this field is checked the ending date of the employee will be exported.
ADD1	When this field is checked the address line 1 of the employee will be exported.
ADD2	When this field is checked the address line 2 of the employee will be exported.
City	When this field is checked the city of the employee will be exported.
Prov	When this field is checked the province of the employee will be exported.
Postal Code	When this field is checked the postal code of the employee will be exported.
Department	When this field is checked the department of the employee will be exported.
Account	When this field is checked the account of the employee will be exported.
Sub Account	When this field is checked the sub account of the employee will be exported.
Home Phone	When this field is checked the home phone of the employee will be exported,
Alt. Phone	When this field is checked the alternate phone number of the employee will be exported.
Medical	When this field is checked the medical number of the employee will be exported.
Family Med.	When this field is checked the family med. number of the employee will be exported.
Treaty	When this field is checked the treaty number of the employee will be exported.
Band	When this field is checked the band number of the employee will be exported.
Position	When this field is checked the position of the employee will be exported.
Sex (M/F)	When this field is checked the sex code of the employee will be exported.

REPORTS

The **Reports** menu from the main menu bar is used to print reports containing the data from the GrandMaster Suite Scheduling system.

The **Reports** menu appears as follows:



The report generation process will only include those employees that are part of the current employee group.

The Schedule Module provides two classes of reports, system defined reports, and custom reports.

The date ranges entered limit the range of the report to only those records that fall within the selected date range.

Custom reports are discussed in the section on custom report definition and generation.

System defined reports have a standard format. The data fields included in the report may be modified by the user to eliminate any that are not being used.

Standard Reports	
Time Cards	This report is used to print time cards.
Employee Schedule	This report is used to print the employee schedule report.
Weekly Schedule	This report is used to print the weekly schedule.
Calendar Schedule	This report is used to print the calendar schedule.
Homecare Employee Worksheet	This report is used to print the homecare employee worksheet.
Homecare Client Work Worksheet	This report is used to print a client homecare worksheet.
Homecare Client List	This report is used to print a homecare client list.
Vacation Leave Schedule	This report is used to print the employee vacation schedule report.
Sick Leave Schedule	This report is used to print the employee sick leave schedule report.
Time off in lieu Schedule	This report is used to print the employee time off in lieu schedule report.
Training Schedule	This report is used to print the employee training schedule report.
Other Leave Schedule	This report is used to print the other leave schedule report.
All Leave Schedule	This report is used to print the all leave schedule report.
Shift Table Report	This report is used to print the contents of the shift table.
Position Table Report	This report is used to print the contents of the position table.
Rotation Table Report	This report is used to print the contents of the rotation table.
Calendar Report	This report is used to print the contents of the system calendar.
Availability Report	This report is used to print the employee availability report.

General Operation

The report program presents the user with a data selection screen that shows the data fields selected according to the default parameters saved for the report.

The user may change the data field selections for the report. These changes may be saved as the default selection for the report with the **Save Parameters** menu choice.

The user may select a subset of the user defined items in the system for inclusion in the report. A maximum of one hundred items may be included in the subset.

After the appropriate selections are made the user can print the report by pressing the PRINT REPORT button.

Printer Setup

The **Printer setup** option allows for the user to select a printer, select different fonts, and to select the orientation for the print job.

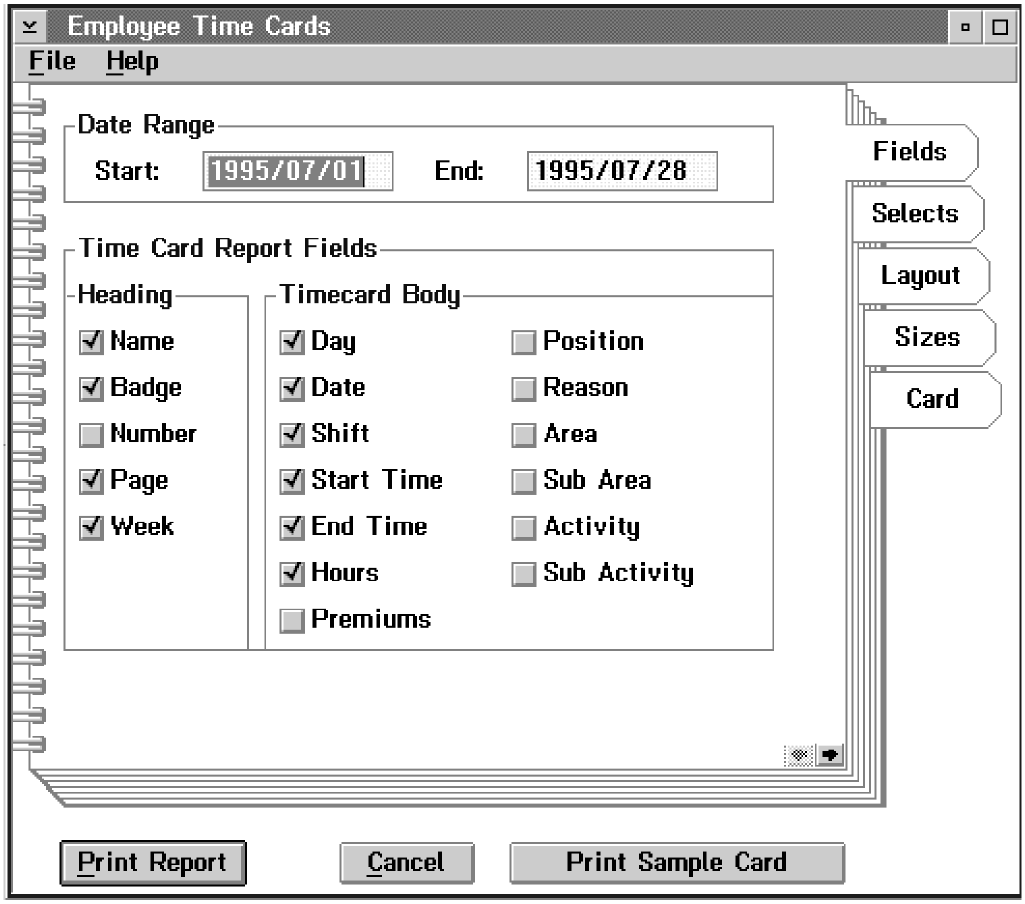
Please refer to page of the printer chapter for more information on printer setups.

Time Cards

The **Time Card Report** option prints a listing of the time cards.

This function allows the user to select the date range for the report, the data fields to include in the report, the card specification, the time card report layout, the sort order for the report, and to select the area to include or exclude in the report.

The dialog box for the **Time Card Report** option in the report menu appears as follows:



Saving... The selections made by the user can be saved by selecting the **Save Parameters** option in the File menu.

Date Range Selection

To limit the range of the report you may enter the starting and ending date. If both dates are zero the entire report will be printed. If only the ending date is zero both the reports will be printed from the starting date until the end of the report.

Report Fields Selection

A data field is selected for the report when the box to the left of the field has a check mark.

The report field selection allows for the inclusion of the following 5 heading fields and 13 body fields:

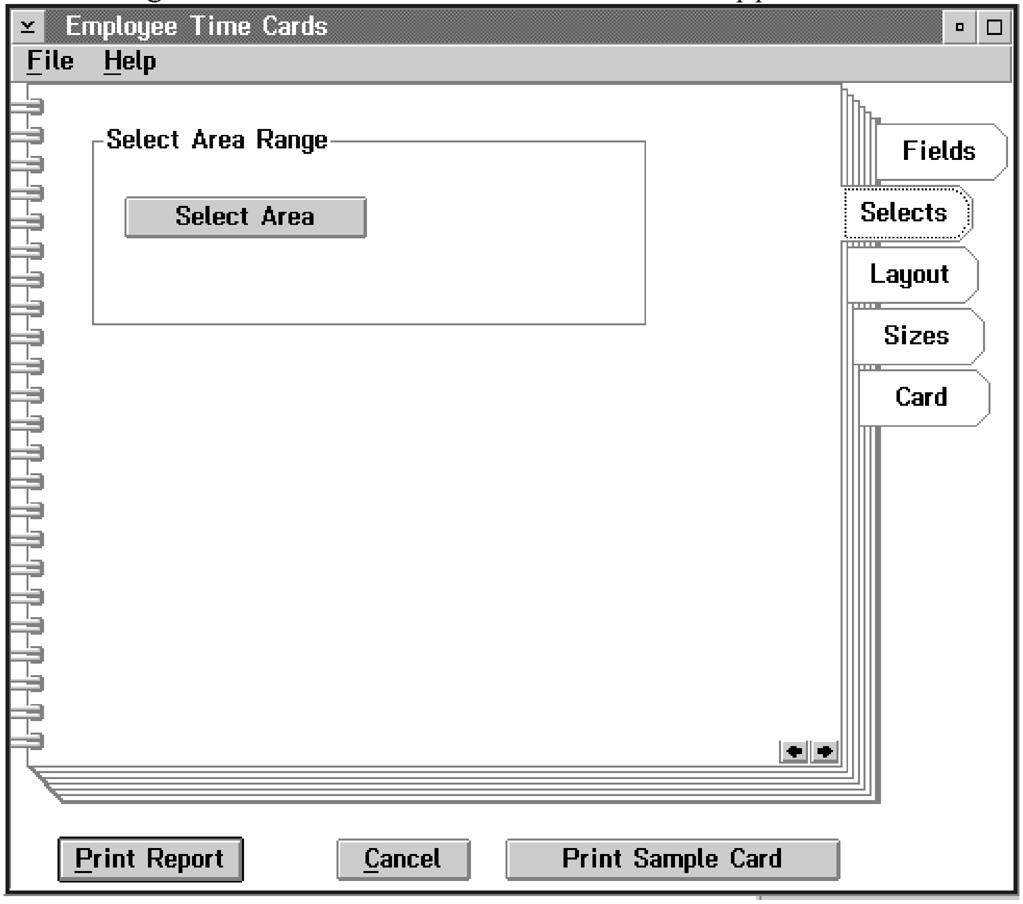
Time Card Heading Area

Field	Description
Name	This field prints the name of the employee
Badge	This field prints the badge number of the employee
Employee Number	This field prints the employee number of the employee
Page	This field prints the page number of the time cards
Week	This field prints the ending date of the time card

Time Card Body Area

Field	Description
Day	This field prints the day of the week
Date	This field prints the date
Shift	This field prints the shift
Start Time	This field prints the starting time
End Time	This field prints the ending time
Hours	This field prints the hours
Premium	This field prints the premium code of the shift
Position	This field prints the position of the time card
Reason	This field prints the reason
Area	This field prints the area
Sub Area	This field prints the sub area
Activity	This field prints the activity
Sub Activity	This field prints the sub activity

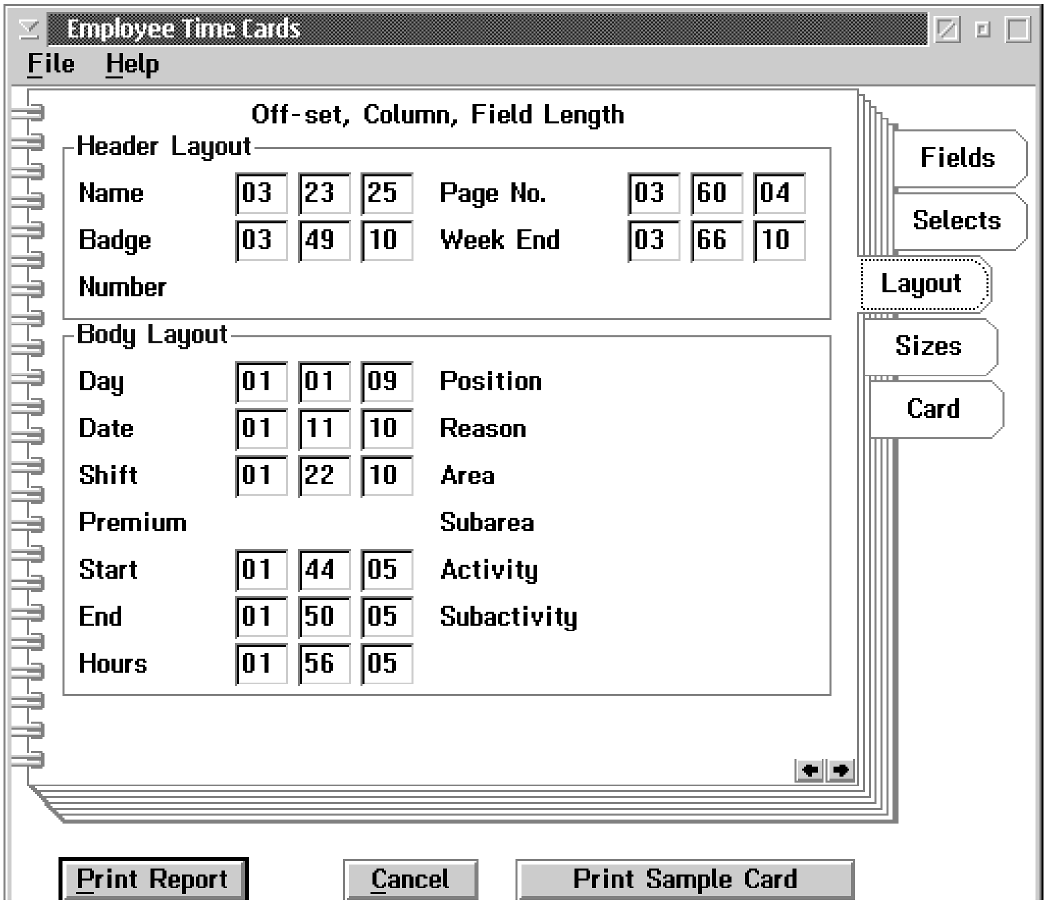
Selects Selection The dialog box for the time card selection appears as follows:



Area To choose area for the Employee Time Card Report select the Select Area object.

For instructions on how to select areas refer to page 5 of the common selection screen chapter. If you have selected shifts the message Exclude selections or Include selections will be displayed beside the selection button when you return to the select report objects dialog box.

Layout Selection The dialog box for the timecard layout appears as follows:



Defaults The default selections can be re-displayed by selecting the default selections in the File menu. If you wish to always use the defaults select the **Save Parameters** option in the File menu.

In order to design a report layout you must specify the following 3 things:

- Off- Set
- Column
- Field Length

Off-Set

This is the line offset used for printing the time card information. Eg) if you want this field to print on the first line of this time card information use an off-set of zero. If it is to follow on the second line use an off-set of 1. You may have as many off-sets as you need to print all the fields you have selected.

Column

This is the character position on the print line for the time card information. Eg) if the field is to start 5 spaces in from the left hand margin enter a 6 in the column field. The column numbers are only limited by the number of characters you can print on each line of your selection page.

Field Length

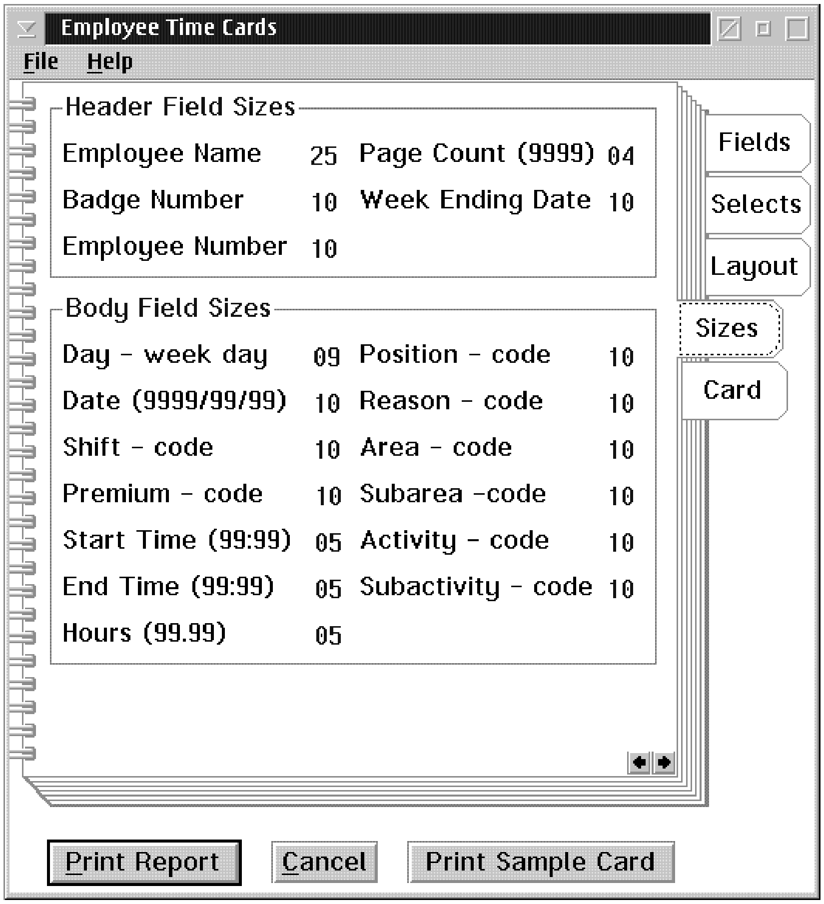
This is the number of characters that make up the field. Eg) employee number is 10 characters long. If you want to see the entire employee number enter 10 in the field length. If you are doing the date which is 10 characters you may choose to print only the last 5 giving you mm/dd. The date field is the only field that takes the characters from the right hand side.

☞ If you asked to print the day of the week or the date, these fields will print even if there is no other time card information for that day.

Print Sample Card

If you click on the print sample card button a sample time card will be printed for you to print you sample card layout.

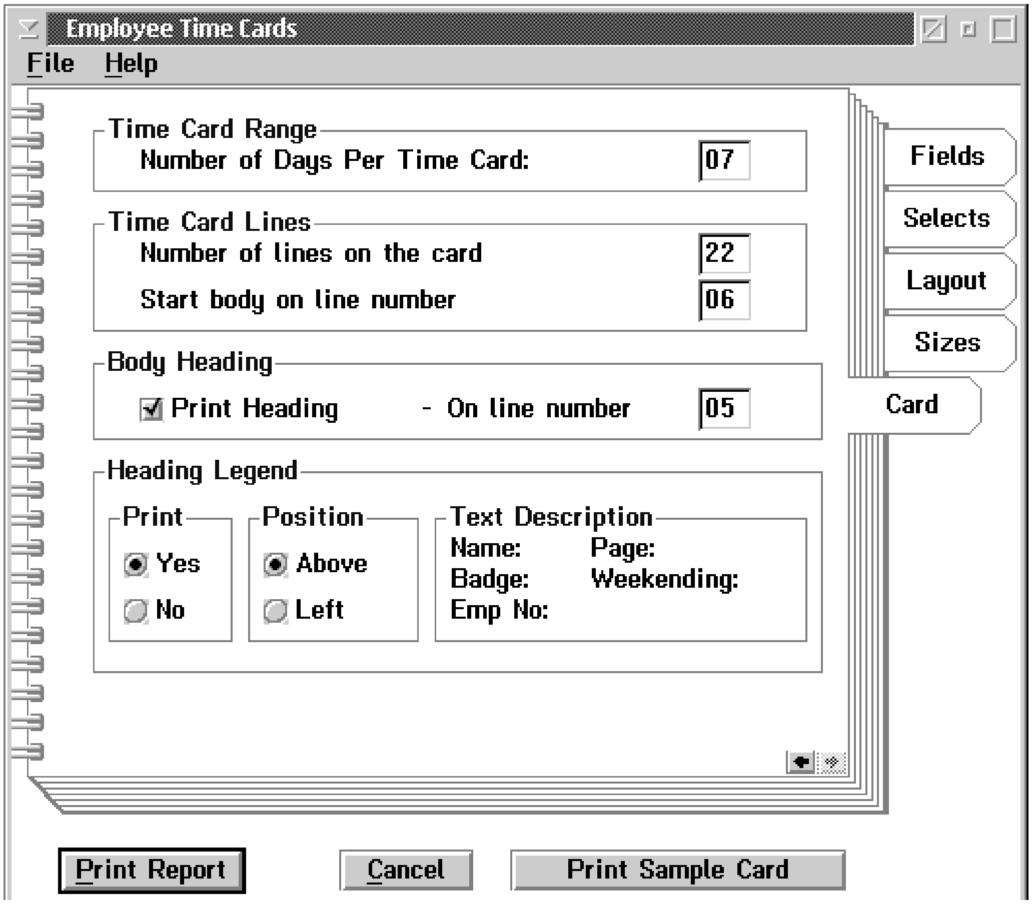
Sizes Selection The following box for the timecard sizes appears as follows:



REPORTS

Card Selection

The following dialog box for the card appears as follows:



In laying out the report the other things the program needs to know is:

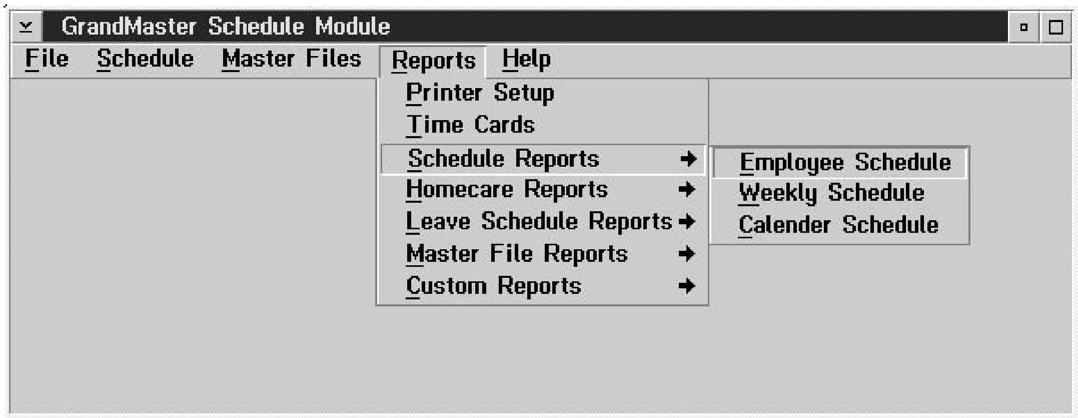
1. The number of days per time card. Most timecards are for 7 or 14 days.
2. The number of lines your timecard will hold. Most timecards are 21 lines long.
3. The line the timecard body will start on. This means that after the heading fields are printed the timecard information will start on the line number.
4. The body format allows you to print body headings or not. If you ask for the body heading you must specify the line the heading is to appear on.
5. The heading format allows you to print header legend or not. The text to the right of the print yes or no box will show you the printable legend.

☞ When you specify your heading fields make sure that they are where the timecard body will start on, that no fields are set to print on top of one another and that you don't specify columns past the right edge of your time card.

Schedule Reports

The **Schedule Reports** menu from the menu bar is used to print schedule reports from the schedule data.

The **Schedule Reports** sub menu appears as follows:



☞ Schedule Reports

- Employee Schedule
- Weekly Schedule
- Calendar Schedule

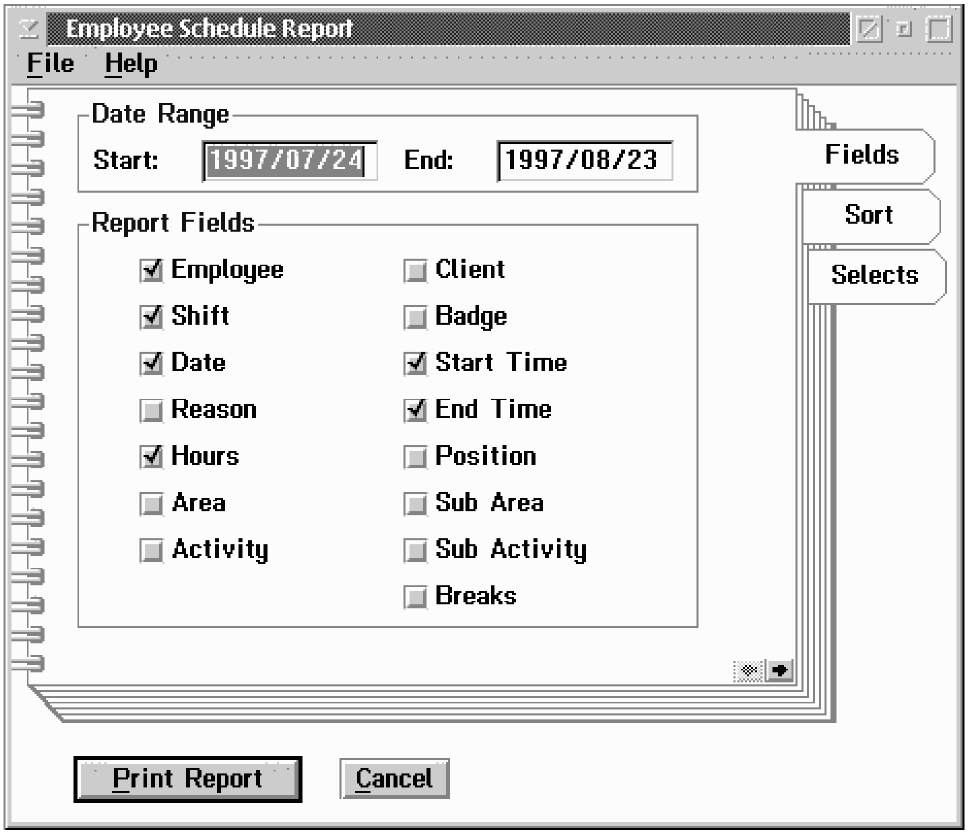
REPORTS

Employee Schedule Report

The **Employee Schedule Report** option presents a listing of the detail schedule for each employee.

This function allows the user to select the date range for the report, the data fields to be included in the report, the sort order for the report, and to select the objects to be included or excluded in the report.

The following dialog box appears when the **Employee Schedule Report** option is chosen:



Saving... The selections made by the user can be saved by selecting the **Save Parameters** option in the File Menu.

Date Range Selection

To limit the range of the report the starting and ending dates may be entered. If both dates are zero the entire report will be printed. If only the ending date is zero the report will print from the starting date until the end of the report.

Report Field Selection

A data field is selected for the report when the box to the left of the field has a check mark.

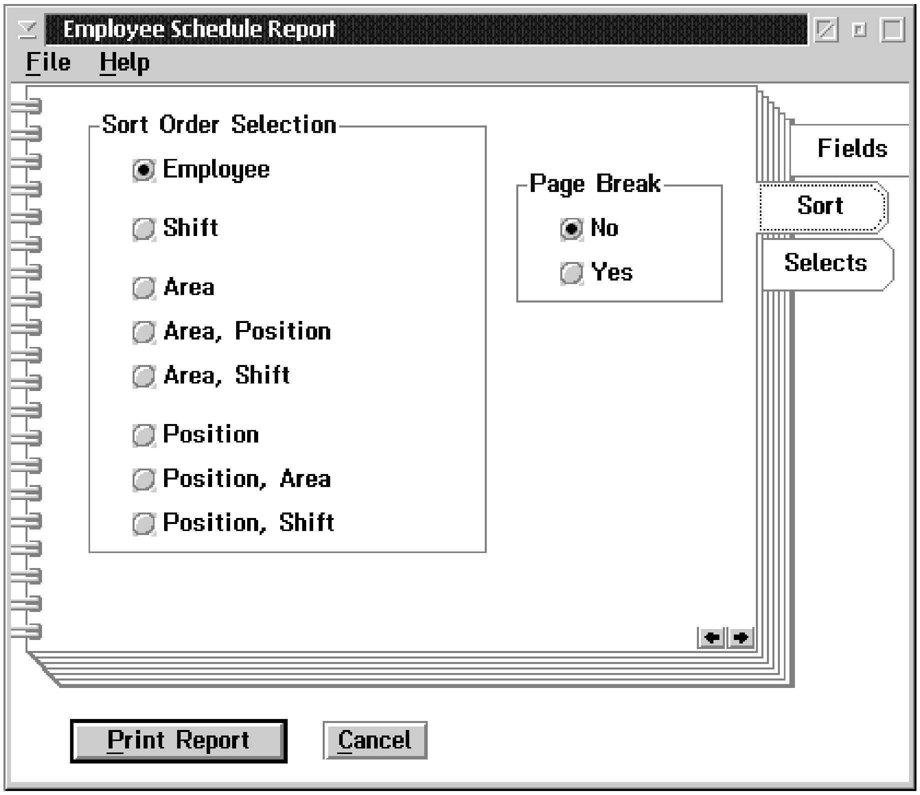
The Report field selection allows for inclusion of the following data fields:

Field	Description
Employee	When this field is checked the name of the employee having the employee schedule will be printed on the report.
Date	When this field is checked the date for the employee schedule will be printed on the report.
Start Time	When this field is checked the starting time for the employee schedule will be printed on the report.
End Time	When this field is checked the ending time for the employee schedule will be printed on the report.
Area	When this field is checked the area for the employee schedule will be printed on the report.
Sub Area	When this field is checked the sub area for the employee schedule will be printed on the report.
Activity	When this field is checked the activity for the employee schedule will be printed on the report.
Sub Activity	When this field is checked the sub activity for the employee schedule will be printed on the report.
Badge	When this field is checked the badge number of the employee having the employee schedule will be printed on the report.
Hours	When this field is checked the hours for the employee schedule will be printed on the report.
Position	When this field is checked the position for the employee schedule will be printed on the report.
Reason	When this field is checked the reason for the employee schedule will be printed on the report.
Shift	When this field is checked the shift for the employee schedule will be printed on the report.
Client	When this field is checked the client for the employee schedule will be printed on the report.

☞ The client field is only available when the homecare module is installed.

REPORTS

The following dialog box appears when the sort tab is chosen:

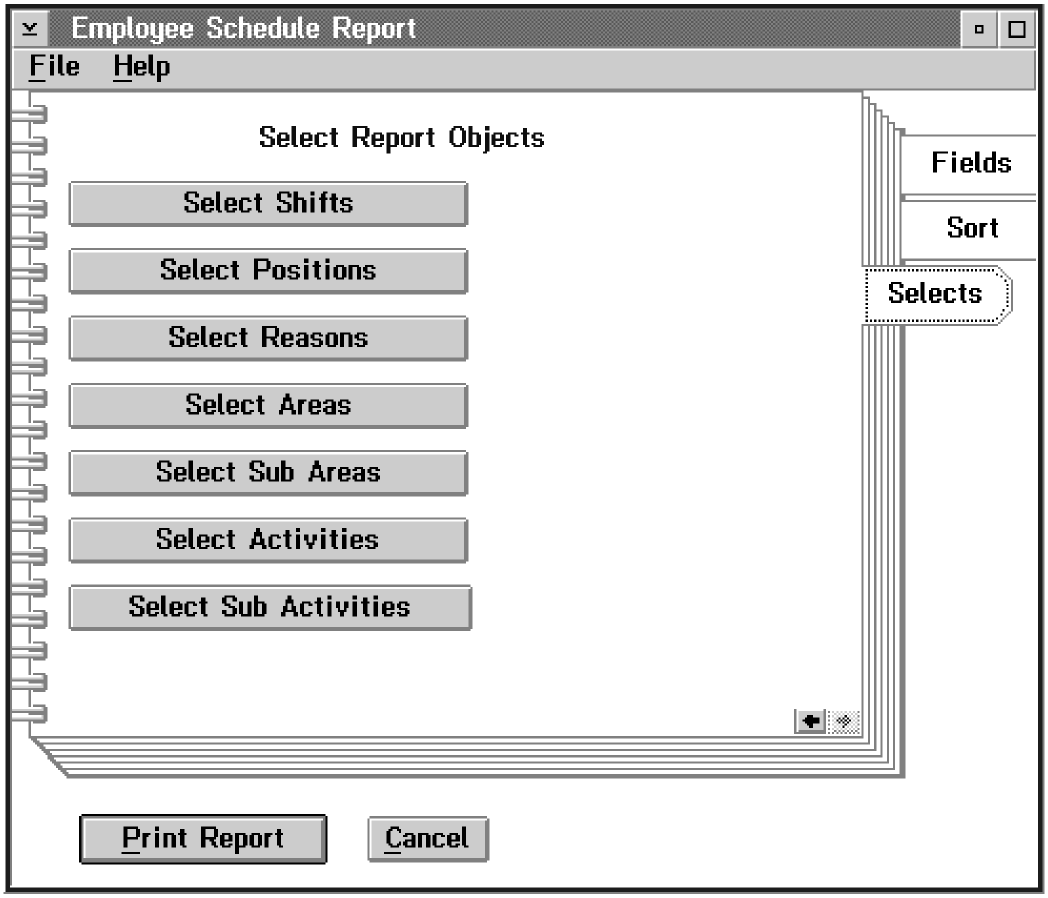


Sort Order Selection

The sort order selection for the report allows for the following sort order selections:

- Employee - Employee Name
- Shift - User defined shift code & employee name
- Area - User defined area code & employee name
- Area, Position - User defined area position & employee name
- Area, Shift - User defined area shift & employee name
- Position - User defined position code & employee name
- Position, Area - User defined position code & area code & employee name
- Position, Shift - User defined position code & shift code & employee name

The following dialog box appears when the select tab is chosen:



Select Report Objects

The Select Report Objects selection for the report allows for the following selection options:

- Shift - User defined shift code
- Position - User defined position code
- Reason - User defined reason code
- Area - User defined area code
- Sub Area - User defined sub area code
- Activity - User defined activity code
- Sub Activity - User defined sub activity code

REPORTS

Select Report Objects

The Select Report Objects selection for the report allows for the following selection options:

Shift

For instructions on how to select shifts refer to page 11 of the common selection screen chapter. If you have selected shifts the message Exclude selections or Include selections will be displayed beside the SELECT SHIFTS button when you return to the select report objects dialog box.

Position

For instructions on how to select positions refer to page 9 of the common selection screen chapter. If you have selected positions the message Exclude selections or Include selections will be displayed beside the SELECT POSITIONS button when you return to the select report objects dialog box.

Reason

For instructions on how to select reasons refer to page 10 of the common selection screen chapter. If you have selected reasons the message Exclude selections or Include selections will be displayed beside the SELECT REASON button when you return to the select report objects dialog box.

Area

For instructions on how to select area refer to page 5 of the common selection screen chapter. If you have selected area the message Exclude selections or Include selections will be displayed beside the SELECT AREA button when you return to the select report objects dialog box.

Sub Area

For instructions on how to select sub area refer to page 16 of the common selection screen chapter. If you have selected sub area the message Exclude selections or Include selections will be displayed beside the SELECT SUB AREA button when you return to the select report objects dialog box.

Activity

For instructions on how to select activity refer to page 4 of the common selection screen chapter. If you have selected activity the message Exclude selections or Include selections will be displayed beside the SELECT ACTIVITY button when you return to the select report objects dialog box.

Sub Activity

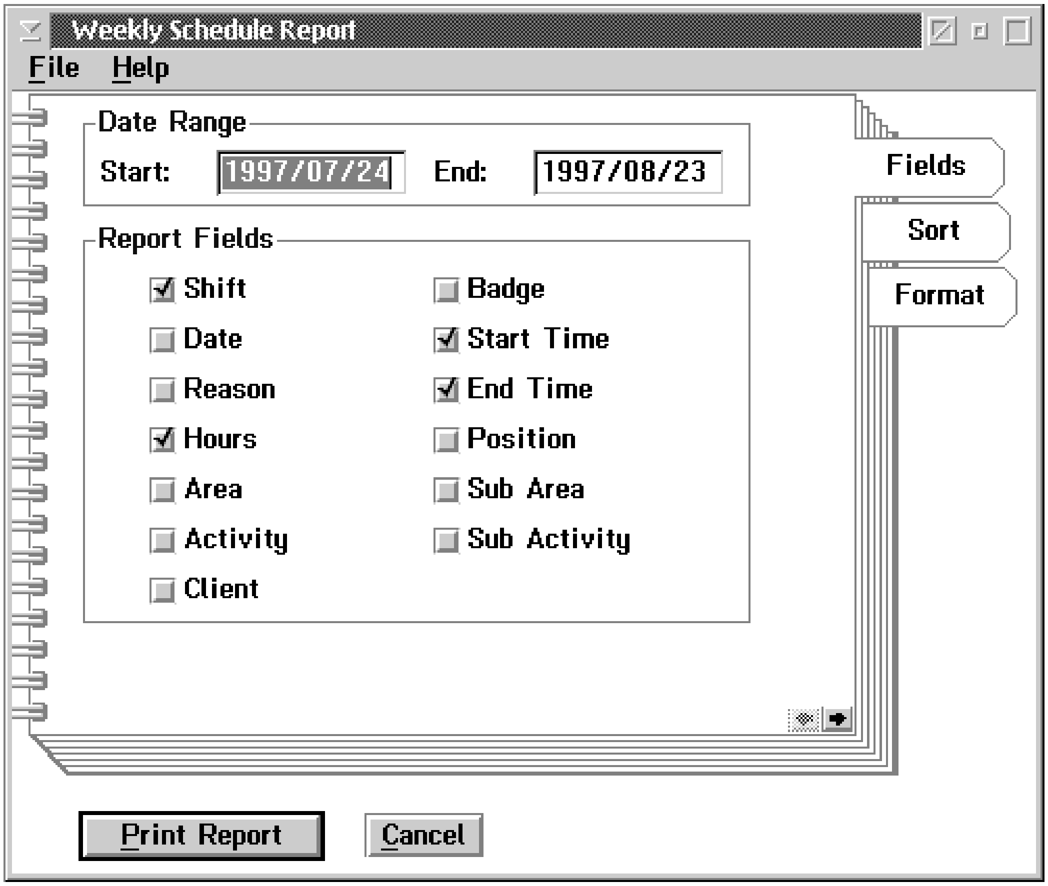
For instructions on how to select sub activity refer to page 15 of the common selection screen chapter. If you have selected sub activity the message Exclude selections or Include selections will be displayed beside the SELECT SUB ACTIVITY button when you return to the select report objects dialog box.

Weekly Schedule Report

The **Weekly Schedule Report** option presents a weekly format listing of the schedule information for each employee.

This function allows the user to select the date range for the report, the format for the report (one week or two weeks), the data fields to include in the report, the sort order for the report, and to select the shift to include in the report.

The following dialog box appears when the **Weekly Schedule Report** option is chosen:



Saving... The selections made by the user can be saved by selecting the **Save Parameters** option in the File menu.

Date Range Selection

To limit the range of the report the starting and ending dates may be entered. If both dates are zero the entire report will be printed. If only the ending date is zero the report will print from the starting date until the end of the report.

Report Field Selection

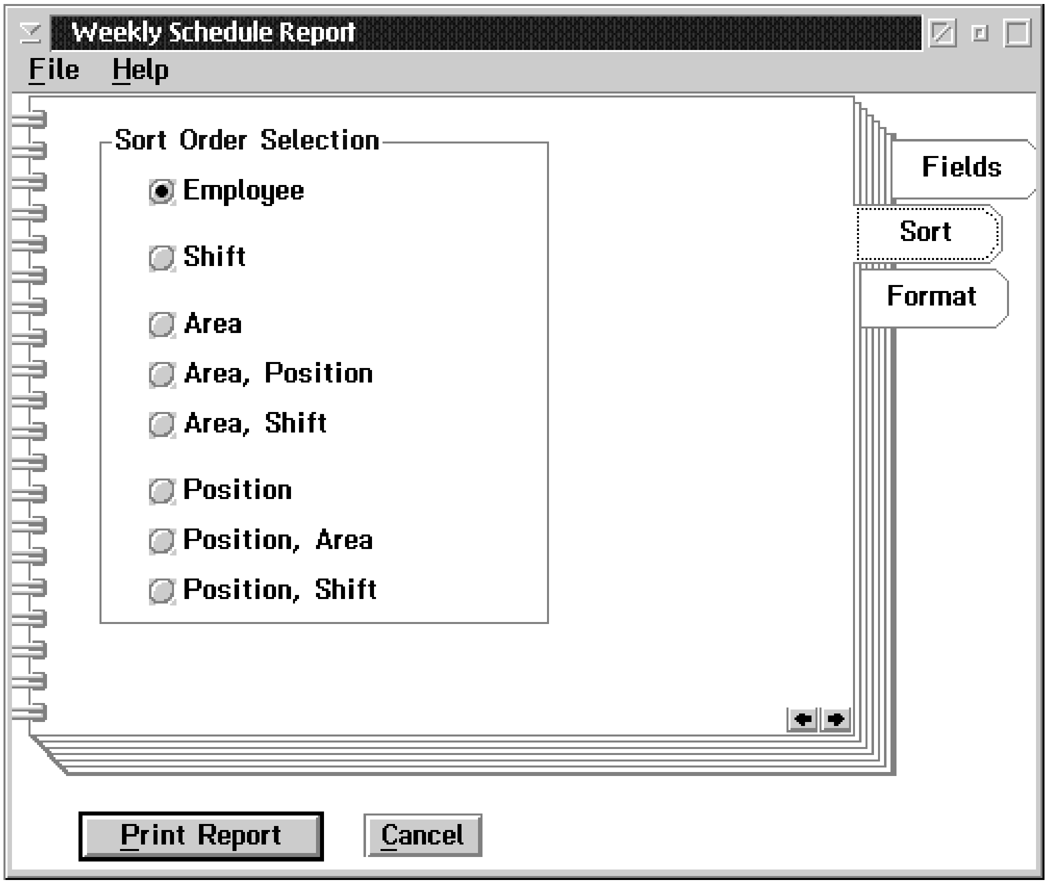
A data field is selected for the report when the box to the left of the field has a check mark.

The Report field selection allows for inclusion of the following data fields:

Field	Description
Employee	When this field is checked the name of the employee having the weekly schedule will be printed on the report.
Date	When this field is checked the date for the weekly schedule will be printed on the report.
Start Time	When this field is checked the starting time for the weekly schedule will be printed on the report.
End Time	When this field is checked the ending time for the weekly schedule will be printed on the report.
Area	When this field is checked the area for the weekly schedule will be printed on the report.
Sub Area	When this field is checked the sub area for the weekly schedule will be printed on the report.
Activity	When this field is checked the activity for the weekly schedule will be printed on the report.
Sub Activity	When this field is checked the sub activity for the weekly schedule will be printed on the report.
Badge	When this field is checked the badge number of the employee having the weekly schedule will be printed on the report.
Hours	When this field is checked the hours for the weekly schedule will be printed on the report.
Position	When this field is checked the position for the weekly schedule will be printed on the report.
Reason	When this field is checked the reason for the weekly schedule will be printed on the report.
Shift	When this field is checked the shift for the weekly schedule will be printed on the report.
Client	When this field is checked the client for the weekly schedule will be printed on the report.

☞ The client field is only available when the homecare module is installed.

The following dialog box appears when the sort tab is chosen:

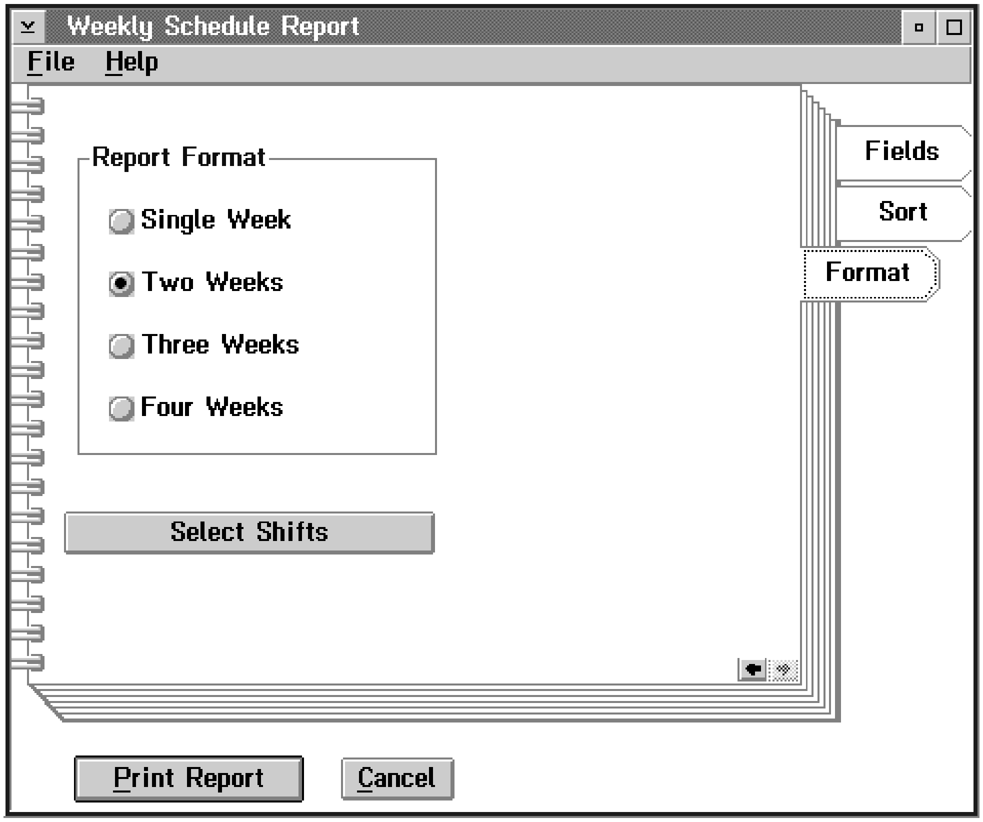


Sort Order Selection

The sort order selection for the report allows for the following sort order selections:

- Employee - Employee Name
- Shift - User defined shift code & employee name
- Area - User defined area code & employee name
- Area, Position - User defined area code & position code & employee name
- Area, Shift - User defined area code & shift code & employee name
- Position - User defined position code & employee name
- Position, Area - User defined position code & area code & employee name
- Position, Shift - User defined position code & shift code & employee name

The following dialog box appears when the format tab is chosen:



Select Report Format Selection

The report format selection for the report allows for the following weekly format options:

- Single Week
- Two Weeks
- Three Weeks
- Four Weeks

☞ The type of printer and printer fonts will determine the number of weeks that maybe printed across the page.

Shift

To choose shifts for the Weekly Schedule Report select the Select Shifts object.

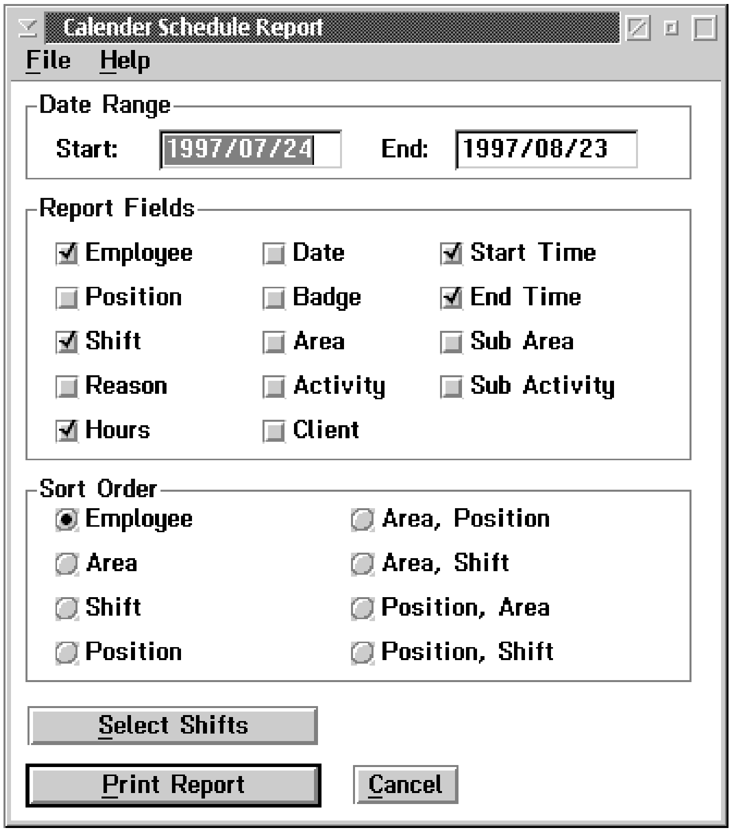
For instructions on how to select shifts refer to page 11 of the common selection screen chapter. If you have selected shifts the message Exclude selections or Include selections will be displayed beside the selection button when you return to the select report objects dialog box.

Calendar Schedule Report

The **Calendar Schedule Report** option presents a calendar format listing of the schedule information for each employee.

This function allows the user to select the date range for the report, the data fields to be included in the report, the sort order for the report, and to select the objects to be included or excluded in the report.

The following dialog box appears when the **Calendar Schedule Report** option is chosen:



Saving... The selections made by the user can be saved by selecting the **Save Parameters** option in the File menu.

Shift To choose shifts for the Calendar Schedule Report select the Select Shifts object.

For instructions on how to select shifts refer to page 11 of the common selection screen chapter. If you have selected shifts the message Exclude selections or Include selections will be displayed beside the selection button when you return to the select report objects dialog box.

Date Range Selection

To limit the range of the report the starting and ending dates may be entered. If both dates are zero the entire report will be printed. If only the ending date is zero the report will print from the starting date until the end of the report.

Report Field Selection

A data field is selected for the report when the box to the left of the field has a check mark.

The Report field selection allows for inclusion of the following 14 data fields:

Field	Description
Employee	When this field is checked the name of the employee having the calendar schedule will be printed on the report.
Date	When this field is checked the date for the calendar schedule will be printed on the report.
Start Time	When this field is checked the starting time for the calendar schedule will be printed on the report.
End Time	When this field is checked the ending time for the calendar schedule will be printed on the report.
Area	When this field is checked the area for the calendar schedule will be printed on the report.
Sub Area	When this field is checked the sub area for the calendar schedule will be printed on the report.
Activity	When this field is checked the activity for the calendar schedule will be printed on the report.
Sub Activity	When this field is checked the sub activity for the calendar schedule will be printed on the report.
Badge	When this field is checked the badge number of the employee having the calendar schedule will be printed on the report.
Hours	When this field is checked the hours for the calendar schedule will be printed on the report.
Position	When this field is checked the position for the calendar schedule will be printed on the report.
Reason	When this field is checked the reason for the calendar schedule will be printed on the report.
Shift	When this field is checked the shift for the calendar schedule will be printed on the report.
Client	When this field is checked the client for the calendar schedule will be printed on the report.

☞ The client field is only available when the homecare module is installed.

Sort Order Selection

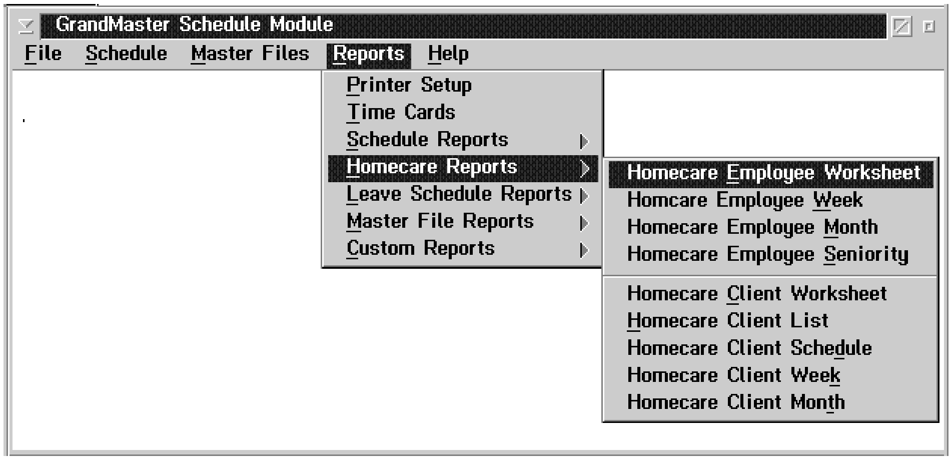
The sort order selection for the report allows for the following sort order selections:

- Employee - Employee Name
- Shift - User defined shift code & employee name
- Area - User defined area code & employee name
- Area, Position - User defined area position code & employee name
- Area, Shift - User defined area shift code & employee name
- Position - User defined position code & employee name
- Position, Area - User defined position code & area code & employee name
- Position, Shift - User defined position shift code & employee name

HomeCare Reports

The **HomeCare Reports** menu from the menu bar is used to print HomeCare reports from the Homecare data.

The **HomeCare Reports** sub menu appears as follows:



☞ HomeCare Reports

The following homecare reports are available:

- Employee Worksheet
- Client Worksheet
- Client List

Employee Worksheet

The **Employee Schedule Worksheet** option prints the detailed employee schedule worksheet showing the scheduled clients.

Please refer to page 288 of the Home Care chapter for more information.

Client Schedule Worksheet

The **Client Schedule Worksheet** option prints the detailed client schedule worksheet showing the schedule employees

Please refer to page 303 of the homecare chapter for more information on homecare modules.

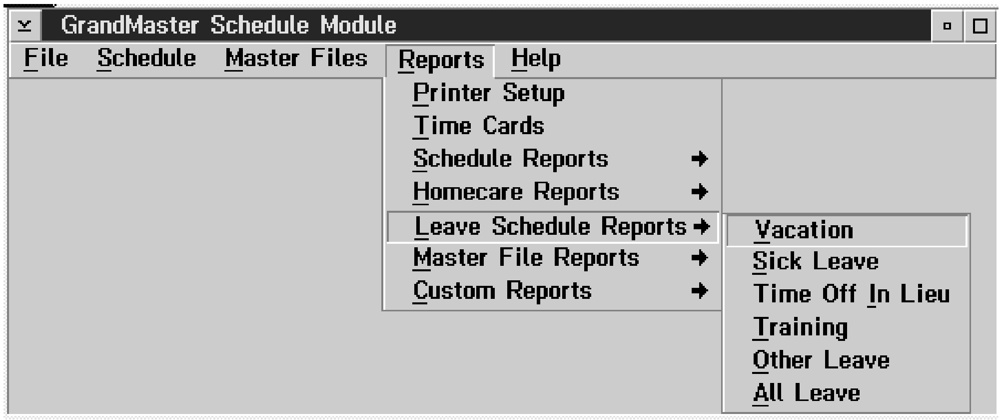
Client List

The **Home Care Client List** option prints the client list.

Please refer to page 307 of the home care chapter for more information on home care modules.

Leave Schedule Reports

The **Leave Schedule Reports** submenu appears as follows:



☞ Leave Schedule Reports

The following Leave Schedule reports are available:

- Vacation Report
- Sick Leave Report
- Training Report
- In Lieu Report
- Other Leave Report
- All Leave Report

Vacation Report

The **Vacation Report** option prints a listing of the vacation reasons for each employee.

This function allows the user to select the date range for the report, the data fields to include in the report, the sort order for the report, and to select the reasons to include or exclude in the report.

If a single employee was selected before running this program only that employee will be printed. The employee name will be shown after the report name at the top of the window when a single employee has been selected.

The dialog box for the vacation report option in the reports menu appears as follows:

Saving.. The selections made by the user can be saved by selecting the **Save Parameters** option in the File Menu.

Date Range Selection

To limit the range of the report the starting and ending dates may be entered. If both dates are zero the entire report will be printed. If only the ending date is zero the report will print from the starting date until the end of the report.

Report Field Selection

A report field is selected for the report when the box to the left of the field has a check mark.

The report field selection for the report allows for the inclusion of the following data fields.

Field	Description
Employee	When this field is checked the name of the employee having the vacation leave will be printed on the report.
Reason	When this field is checked the vacation leave reason will be printed on the report.
Start Date	When this field is checked the start date for the vacation leave will be printed on the report.
End Date	When this field is checked the ending date for the vacation leave will be printed on the report.
Start Time	When this field is checked the starting time for the vacation leave will be printed on the report.
End Time	When this field is checked the end time for the vacation leave will be printed on the report.
Description	When this field is checked the vacation leave description will be printed on the report.
Badge	When this field is checked the badge number of the employee having the vacation leave will be printed on the report.

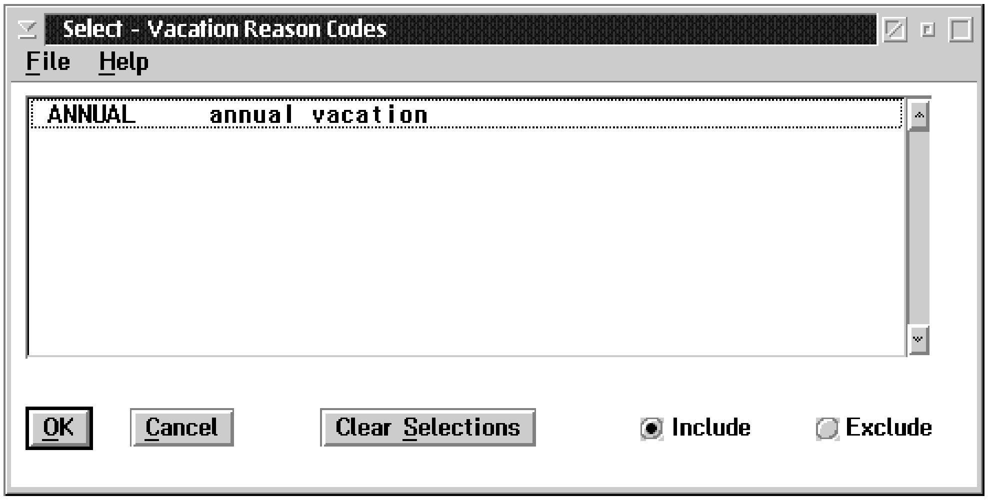
Sort Order Selection

The sort order selection for the report allows the following sort order selections:

- Employee - Employee name
- Date - Starting date of the vacation
- Reason - Vacation reason

Select Reasons Selection

To choose vacation reasons for the report select the **Select Reasons** object and a list of all defined reasons will appear as follows:



The reasons are selected by clicking on the desired reason with the mouse once, this reason will now be highlighted. Any number of reasons may be selected by repeating this procedure.

When all the desired reasons are selected press the OK button.

To de-select a single reason simply click on the highlighted reason and it will no longer be selected. To de-select all the selected reasons click on the **Clear Selections** button.

Description Field Selection

The description field selection for the report allows for the following field options:

- Full Description - Entire description entered
- First Paragraph - First paragraph entered

The description area can be up 8,000 characters and you may not want to see the entire description printed in all cases. If you select the **First Paragraph** option in the report it will print all the description information up to the first time you pressed the ENTER key.

Sick Leave Report

The **Sick Leave Report** option prints a listing of the sick leave reasons for each employee.

This function allows the user to select the date range for the report, the data fields to include in the report, the sort order for the report, and to select the reasons and include illnesses to include or exclude in the report.

If a single employee was selected before running this program only that employee will be printed. The employee name will be shown after the report name at the top of the window when a single employee has been selected.

The dialog box for the **Sick Leave Report** option in the reports menu appears as follows:

Saving.. The selections made by the user can be saved by selecting the **Save Parameters** option in the File menu.

Date Range Selection

To limit the range of the report the starting and ending dates may be entered. If both dates are zero the entire report will be printed. If only the ending date is zero the report will print from the starting date until the end of the report.

Report Field Selection

A report field is selected for the report when the box to the left of the field has a check mark.

The report field selection allows for the inclusion of the following data fields.

Field	Description
Employee	When this field is checked the name of the employee having the sick leave will be printed on the report.
Reason	When this field is checked the sick leave reason will be printed on report.
Illness	When this field is checked the sick leave illness will be printed on the report.
Start Date	When this field is checked the starting date for the sick leave will be printed on the report.
End Date	When this field is checked the ending date for the sick leave will be printed on the report.
Start Time	When this field is checked the starting time for the sick leave will be printed on the report.
End Time	When this field is checked the ending time for the sick leave will be printed on the report.
Description	When this field is checked the description for the sick leave will be printed on the report.
Badge	When this field is checked the badge number of the employee having the sick leave will be printed on the report.

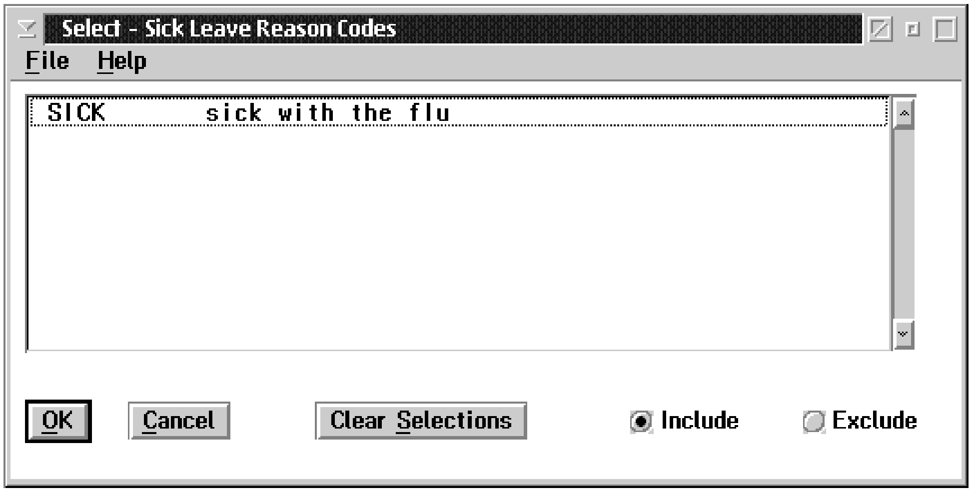
Sort Order Selection

The sort order selection for the report allows the following sort order selections:

- Employee - Employee name
- Date - Starting date of sick leave
- Reason - sick leave reason
- Illness - sick leave illness

Select Reason Selection

To choose sick leave reasons for the report select the **Select Reasons** object and a list of all defined reasons will appear as follows:



The reasons are selected by clicking on the desired reason with the mouse once, this reason will now be highlighted. Any number of reasons may be selected by repeating this procedure.

When all the desired reasons are selected press the OK button.

To de-select a single reason simply click on the highlighted reason and it will no longer be selected. To de-select all the selected reasons select the **Clear Reasons** option in the file menu.

When you are selecting certain reasons you may include or exclude all the selected reasons in the report. This is done by clicking on the Include or Exclude object.

If you have selected reasons the message EXCLUDE SELECTIONS or INCLUDE SELECTIONS will be displayed beside the Select Reasons object.

Description Field Selection

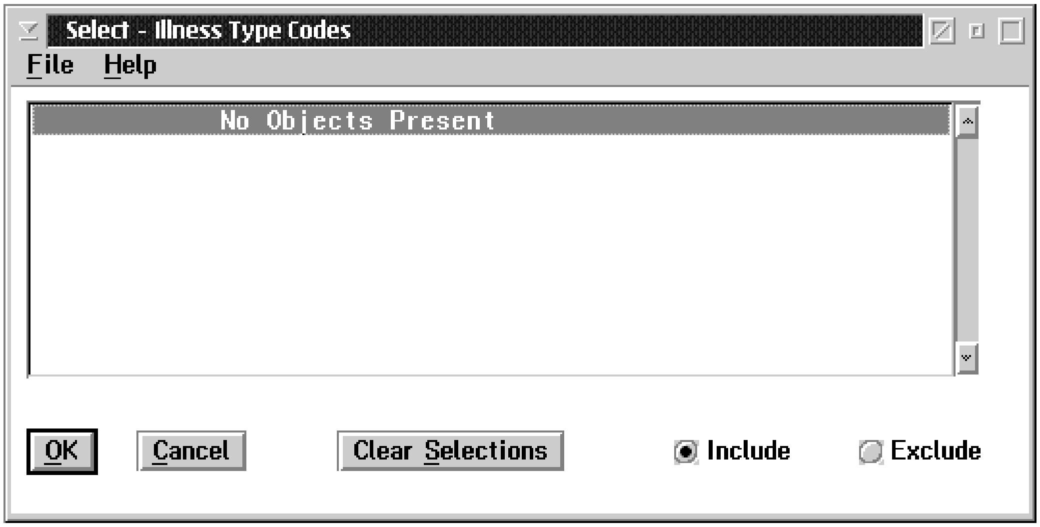
The description field selection for the report allows for the following field options:

- Full Description - Entire description entered
- First Paragraph - First paragraph entered

The description area can be up 8,000 characters and you may not want to see the entire description printed in all cases. If you select the **First Paragraph** option in the report it will print all the description information up to the first time you pressed the ENTER key.

Illness Selection

To choose illnesses for the Sick Leave Report select the **Select Illnesses** object. A list of all defined illnesses will appear as follows:



The illnesses are selected by clicking on the desired illnesses with the mouse once, this illnesses will now be highlighted. Any number of illnesses may be selected by repeating this procedure.

When all the desired illnesses are selected press the OK button.

To de-select a single illness simply click on the highlighted illness and it will no longer be selected. To de-select all the selected illnesses select the **Clear Illnesses** object.

Description Field Selection

The description field selection for the report allows for the following field options:

- Full Description - Entire description entered
- First Paragraph - First paragraph entered

The description area can be up 8,000 characters and you may not want to see the entire description printed in all cases. If you select the **First Paragraph** option in the report it will print all the description information up to the first time you pressed the ENTER key.

Training Report

The **Training Report** option prints a listing of the training reasons for each employee.

This function allows the user to select the date range for the report, the data fields to include in the report, the sort order for the report, and to select the reasons to include or exclude in the report.

When this is run from the employee menu before running this program only that employee will be printed. The employee name will be shown after the report name at the top of the window when a single employee has been selected.

The dialog box for the **Training Report** option in the reports menu appears as follows:

Saving.. The selections made by the user can be saved by selecting the **Save Parameters** option in the File menu.

Date Range Selection

To limit the range of the report the starting and ending dates may be entered. If both dates are zero the entire report will be printed. If only the ending date is zero the report will print from the starting date until the end of the report.

Report Field Selection

A report field is selected for the report when the box to the left of the field has a check mark.

The report field selection allows for the inclusion of the following data fields.

Field	Description
Employee	When this field is checked the name of the employee having training leave will be printed on the report.
Badge	When this field is checked the badge number of the employee having the training leave will be printed on the report.
Reason	When this field is checked the reason for the training leave will be printed on the report.
Start Date	When this field is checked the starting date for the training leave will be printed on the report.
End Date	When this field is checked the ending date for the training leave will be printed on the report.
Start Time	When this field is checked the starting time for the training leave will be printed on the report.
End Time	When this field is checked the ending time for the training leave will be printed on the report.
Description	When this field is checked the description of the training leave will be printed on the report.

Sort Order Selection

The sort order selection for the report allows the following sort order selections:

- Employee - Employee Name
- Date - Starting date of the training
- Reason - Training reason

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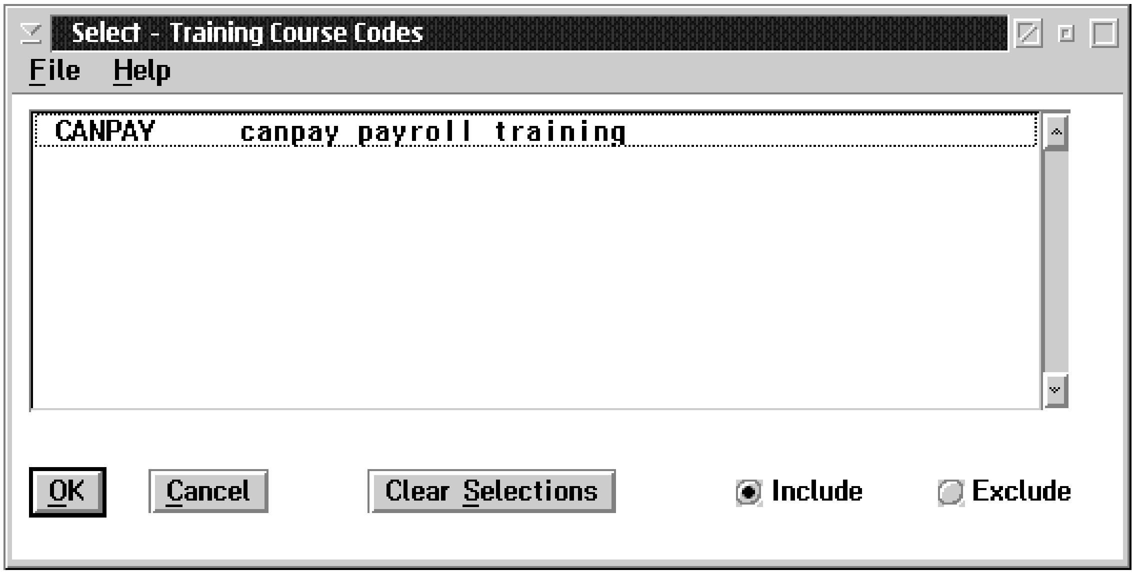
Reason Selection

To choose training reasons for the report select the **Select Reasons** object a list of all defined reasons will appear as follows:



The reasons are selected by clicking on the desired reason with the mouse once, this reason will now be highlighted. Any number of reasons may be selected by repeating this procedure.

When all the desired reasons are selected press the OK button.

To de-select a single reason simply click on the highlighted reason and it will no longer be selected. To de-select all the selected reasons select the **Clear Reasons** option in the file menu.

Description Field Selection

The description field selection for the report allows for the following field options:

- Full Description - Entire description entered
- First Paragraph - First paragraph entered

The description area can be up 8,000 characters and you may not want to see the entire description printed in all cases. If you select the **First Paragraph** option in the report it will print all the description information up to the first time you pressed the ENTER key.

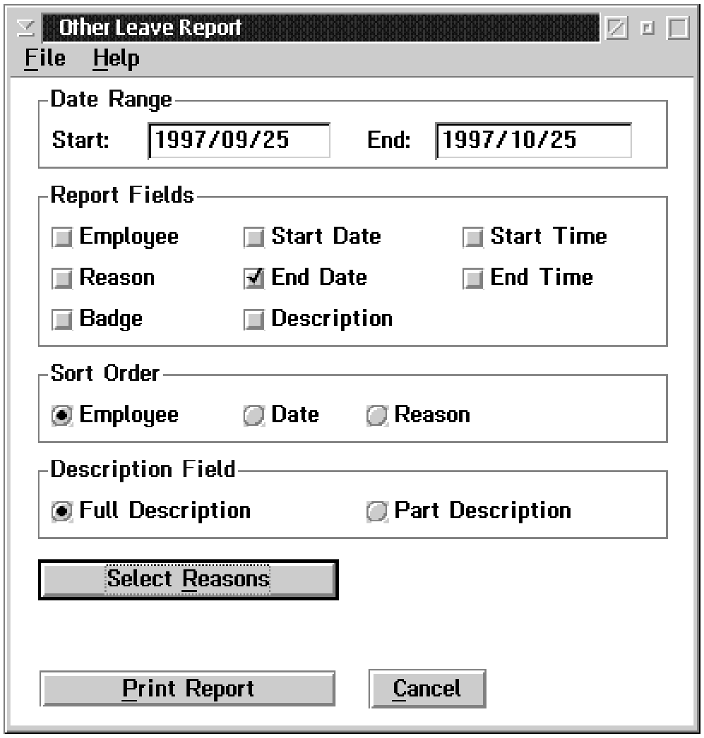
Other Leave Report

The **Other Leave Report** option prints a listing of the other leave reasons for each employee.

This function allows the user to select the date range for the report, the data fields to include in the report, the sort order for the report, and to select the reasons to include or exclude in the report.

If a single employee was selected before running this program only that employee will be printed. The employee name will be shown after the report name at the top of the window when a single employee has been selected

The dialog box for the **Other Leave Report** option in the reports menu appears as follows:



Saving.. The selections made by the user can be saved by selecting the **Save Parameters** option in the File menu.

Date Range Selection

To limit the range of the report the starting and ending dates may be entered. If both dates are zero the entire report will be printed. If only the ending date is zero the report will print from the starting date until the end of the report.

Report Field Selection

A report field is selected for the report when the box to the left of the field has a check mark.

The report field selection for the report allows for the inclusion of the following data fields.

Field	Description
Employee	When this field is checked the name of the employee having the other leave will be printed on the report.
Badge	When this field is check the badge number of the employee having the other leave will be printed on the report.
Reason	When this field is checked the other leave reason will be printed on the report.
Start Date	When this field is checked the starting date for the other leave will be printed on the report.
End Date	When this field is checked the ending date for the other leave will be printed on the report.
Start Time	When this field is checked the starting time for the other leave will be printed on the report.
End Time	When this field is checked the ending time for the other leave will be printed on the report.
Description	When this field is checked the description for the other leave will be printed on the report.

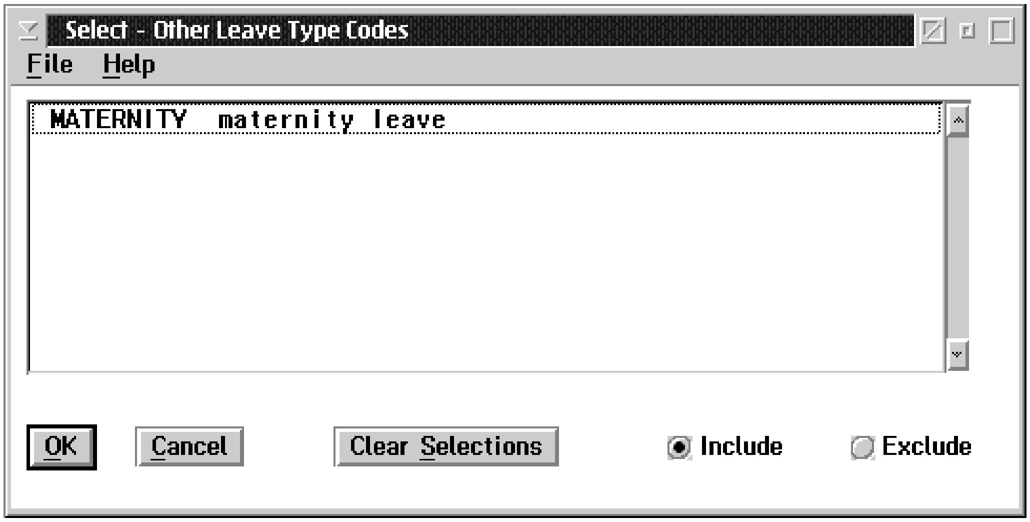
Sort Order Selection

The sort order selection for the report allows the following sort order selections:

- Employee - Employee name
- Date - Starting date of the other leave
- Reason - Other leave reason

Reason Selection

To choose other leave reasons for the report select the **Select Reasons** object a list of all defined reasons will appear as follows:



Leave Report option in the reports menu appears as follows:The reasons are selected by clicking on the desired reason with the mouse once, this reason will now be highlighted. Any number of reasons may be selected by repeating this procedure.

When all the desired reasons are selected press the OK button.

To de-select a single reason simply click on the highlighted reason and it will no longer be selected. To de-select all the selected reasons select the **Clear Reasons** option in the file menu.

Description Field Selection

The description field selection for the report allows for the following field options:

- Full Description - Entire description entered
- First Paragraph - First paragraph entered

The description area can be up 8,000 characters and you may not want to see the entire description printed in all cases. If you select the **First Paragraph** option in the report it will print all the description information up to the first time you pressed the ENTER key.

All Leave Report

The **All Leave Report** option prints a listing of the All Leave reasons for each employee.

This function allows the user to select the date range for the report, the data fields to include in the report, the sort order for the report, and to select the reasons to include or exclude in the report.

If a single employee was selected before running this program only that employee will be printed. The employee name will be shown after the report name at the top of the window when a single employee has been selected.

The dialog box for the **All Leave Report** appears as follows:

Saving..

The selections made by the user can be saved by selecting the **Save Parameters** option in the File menu.

Date Range Selection

To limit the range of the report the starting and ending dates may be entered. If both dates are zero the entire report will be printed. If only the ending date is zero the report will print from the starting date until the end of the report.

Report Field Selection

The report field selection for the report allows for the inclusion of the following data fields.

Field	Description
Employee	When this field is checked the name of the employee having the leave will be printed on the report.
Badge	When this field is checked the badge number of the employee having the leave will be printed on the report.
Reason	When this field is checked the reason for the leave will be printed on the report.
Start Date	When this field is checked the starting date for the leave will be printed on the report.
End Date	When this field is checked the ending date for the leave will be printed on the report.
Start Time	When this field is checked the starting time for the leave will be printed on the report.
End Time	When this field is checked the ending time for the leave will be printed on the report.
Description	When this field is checked the description for the leave will be printed on the report.

Sort Order Selection

The sort order selection for the report allows the following sort order selections:

- Employee - Employee name
- Date - Starting date of the leave

Description Field Selection

The description field selection for the report allows for the following field options:

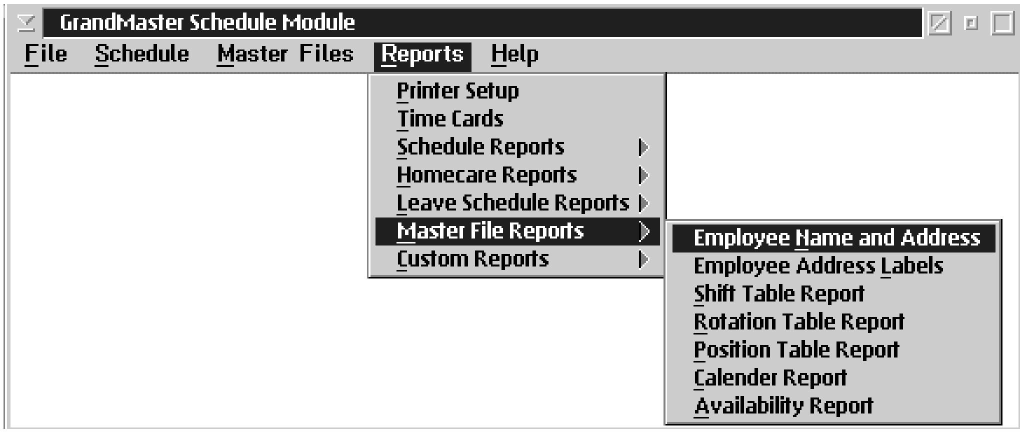
- Full Description - Entire description entered
- First Paragraph - First paragraph entered

The description area can be up 8,000 characters and you may not want to see the entire description printed in all cases. If you select the **First Paragraph** option in the report it will print all the description information up to the first time you pressed the ENTER key.

Master File Reports

The **Master Files Reports** menu from the menu bar is used to print reports from the schedule data.

The **Master File Reports** menu appears as follows:



☞ Master File Reports

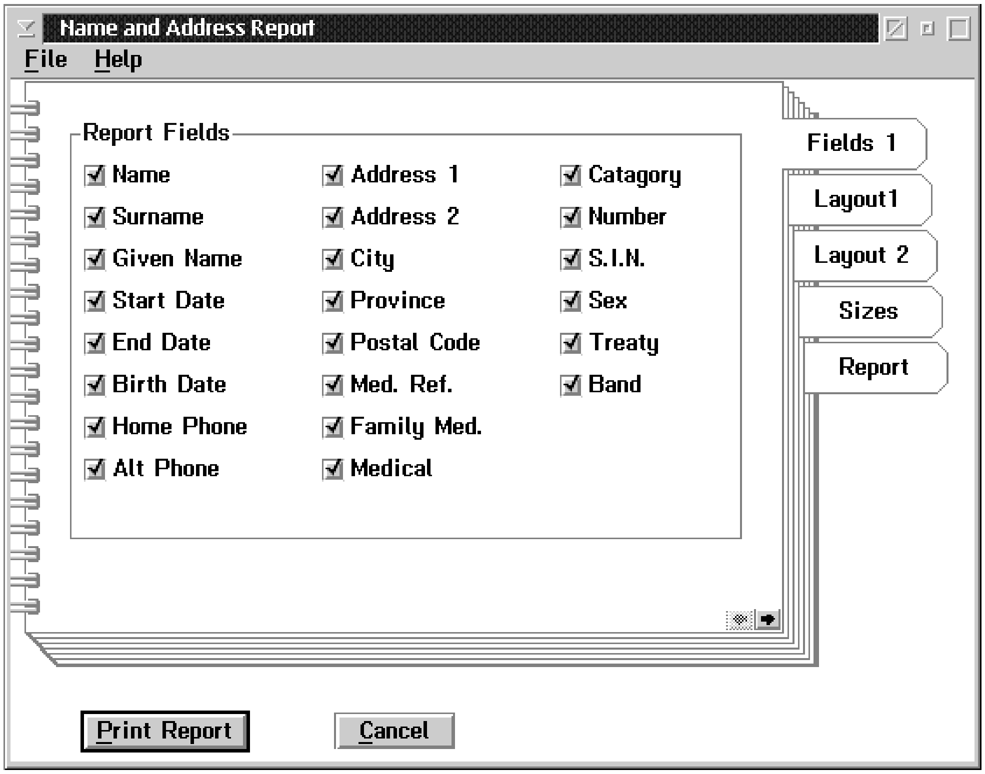
- Employee Name and Address
- Employee Address Labels
- Shift Table Report
- Rotation Table Report
- Position Table Report
- Calendar Report
- Availability Report

Name and Address Report

The **Name and Address** report option prints a listing of the Employee name and addresses.

This function allows the user to select the data fields to include in the report, the name and address layout, and to select a single employee for the report.

The dialog box for the **Name & Address Report** option in the report menu appears as follows:



Saving... The selections made by the user can be saved by selecting the **Save Parameters** in the File menu.

Report Fields Selection

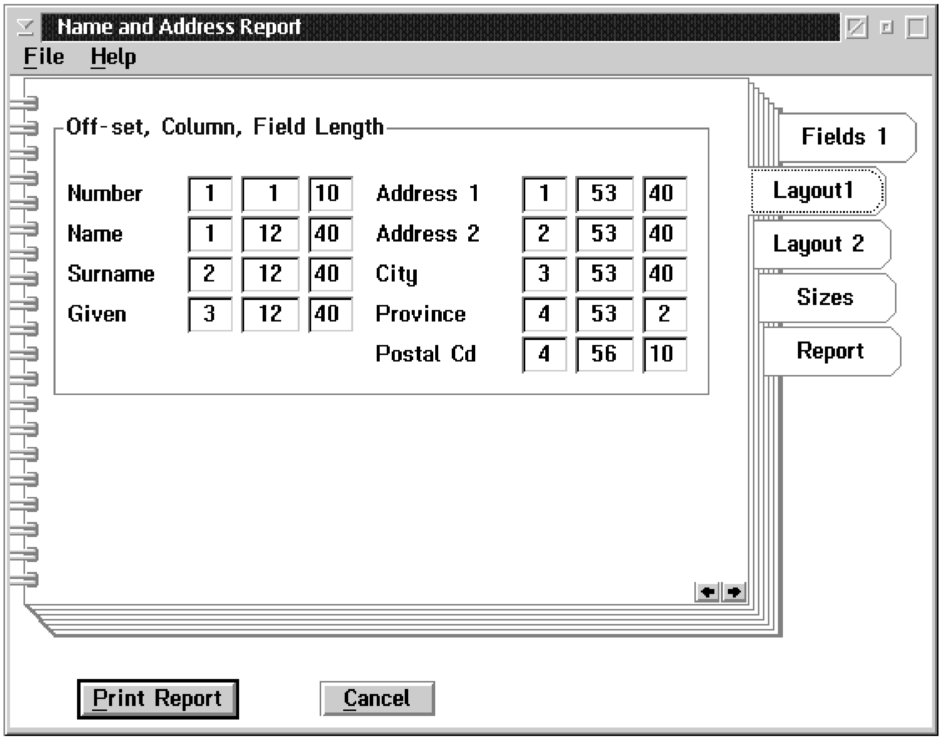
A data field is selected for the report when the box to the left of the field has a check mark.

The report field selection allows for the inclusion of the following 25 data fields:

Field	Description
Name	When this field is checked the name of the employee in the name and address report will be printed.
Surname	When this field is checked the surname of the employee in the name and address report will be printed.
Given Name	When this field is checked the given name of the employee in the name and address report will be printed.
Start Date	When this field is checked the starting date of the name and address report will be printed.
End Date	When this field is checked the ending date of the name and address report will be printed.
Medical	When this field is checked the medical of the name and address report will be printed.
Family Med.	When this field is checked the family med. of the name and address report will be printed.
Home Phone	When this field is checked the home phone number of the name and address report will be printed.
Address 1	When this field is checked the address 1 of the name and address report will be printed.
Address 2	When this field is checked the address 2 of the name and address report will be printed.
City	When this field is checked the city of the name and address report will be printed.
Province	When this field is checked the province of the name and address report will be printed.
Postal Code	When this field is checked the postal code of the name and address report will be printed.
Department	When this field is checked the department of the name and address report will be printed.
Account	When this field is checked the account of the name and address report will be printed.
Sub Account	When this field is checked the sub account of the name and address report will be printed.
Alt. Phone	When this field is checked the alt.phone of the name and address report will be printed.
Badge	When this field is checked the badge number of the name and address report will be printed.
Number	When this field is checked the number of the name and address report will be printed.
S.I.N.	When this field is checked the S.I.N. of the name and address report will be printed.
Sex	When this field is checked the sex of the name and address report will be printed.
Position	When this field is checked the position of the name and address report will be printed.
Treaty	When this field is checked the treaty of the name and address report will be printed.
Band	When this field is checked the band of the name and address report will be printed.

Layout 1 Selection

The dialog box for the name and address report layout appears as follows:

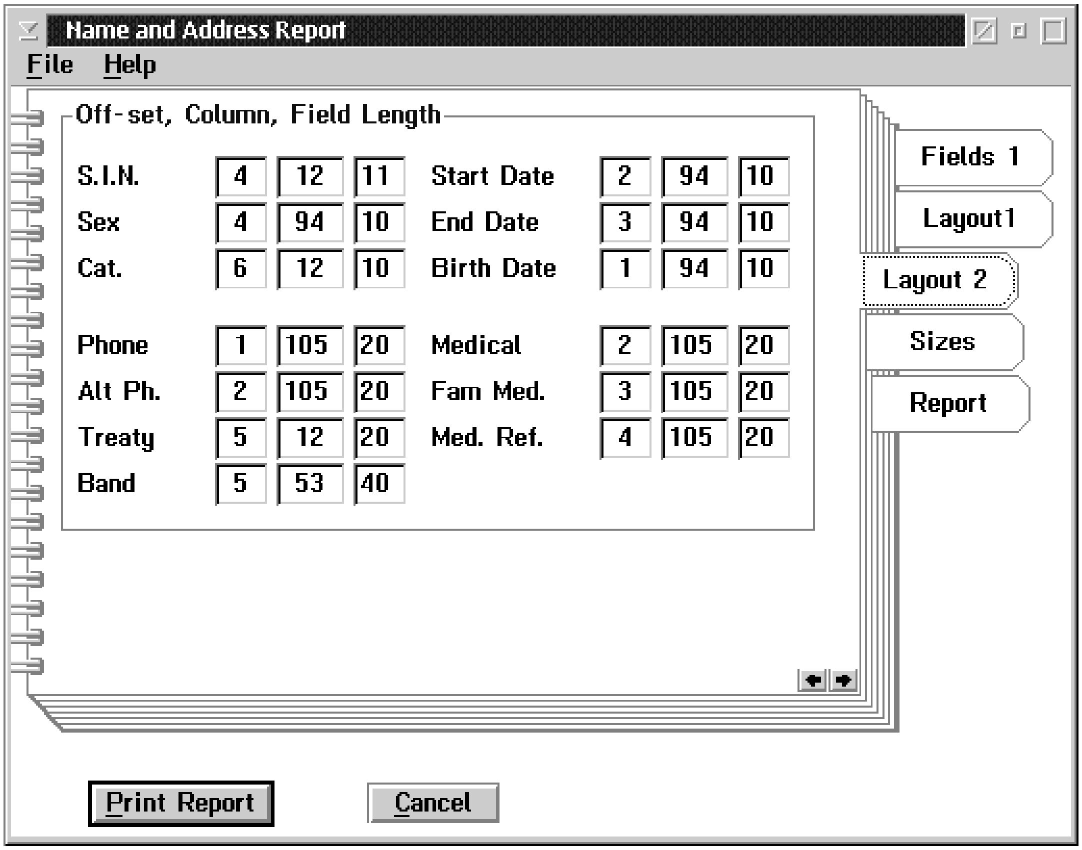


Defaults

The default selections can be re-displayed by selecting the default selections in the file menu. If you wish to always use the defaults select the **Save Parameter** option in the File menu.

Layout 2 Selection

The second dialog box for the name and address report layout appears as follows:



Defaults

The default selections can be re-displayed by selecting the default selections in the file menu. If you wish to always use the defaults select the **Save Parameter** option in the File menu.

In order to design a report layout you must specify the following 3 things:

- Off-Set
- Column
- Field Length

Off-Set

This is the line offset used for printing the name and address information. Eg) If you want this field to print on the first line of this name and address information use an off-set of zero. If it is to follow on the second line use an off-set of 1. You may have as many off-sets as you need to print all the fields you have selected.

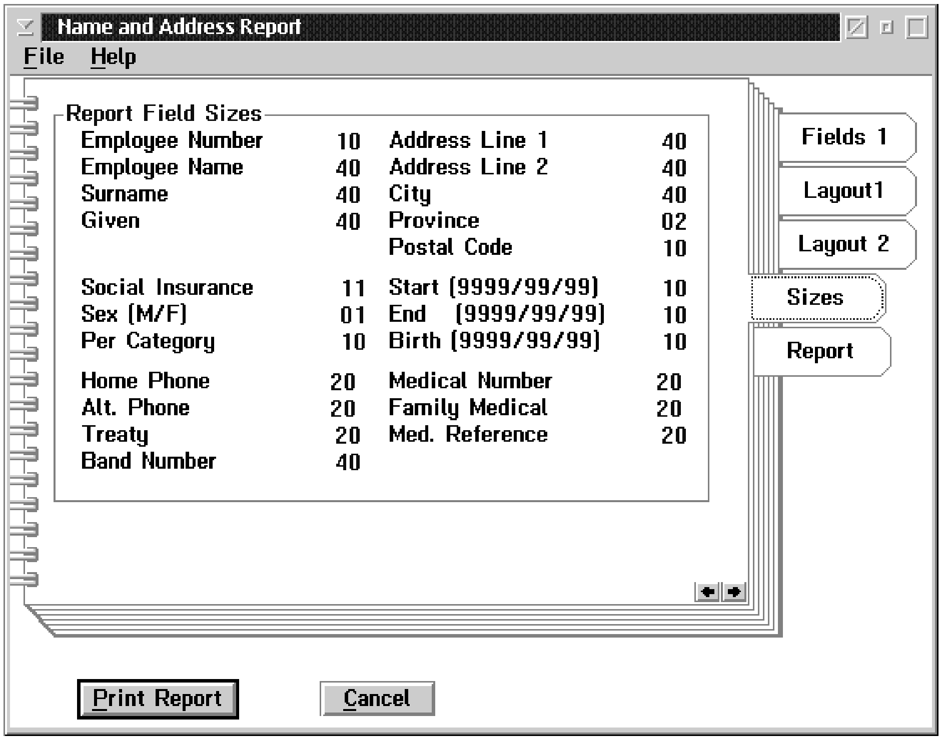
Column

This is the character position on the print line for the name and address information. Eg) If the field is to start 5 spaces in from the left hand margin enter a 6 in the column field. The column numbers are only limited by the number of characters you can print on each line of your selection page.

Field Length

This is the number of characters that make up the field. Eg) Employee number is 10 characters long. If you want to see the entire employee number enter 10 in the field length. If you are doing the date which is 10 characters you may choose to print only the last 5 giving you mm/dd. The date field is the only field that takes the characters from the right hand side.

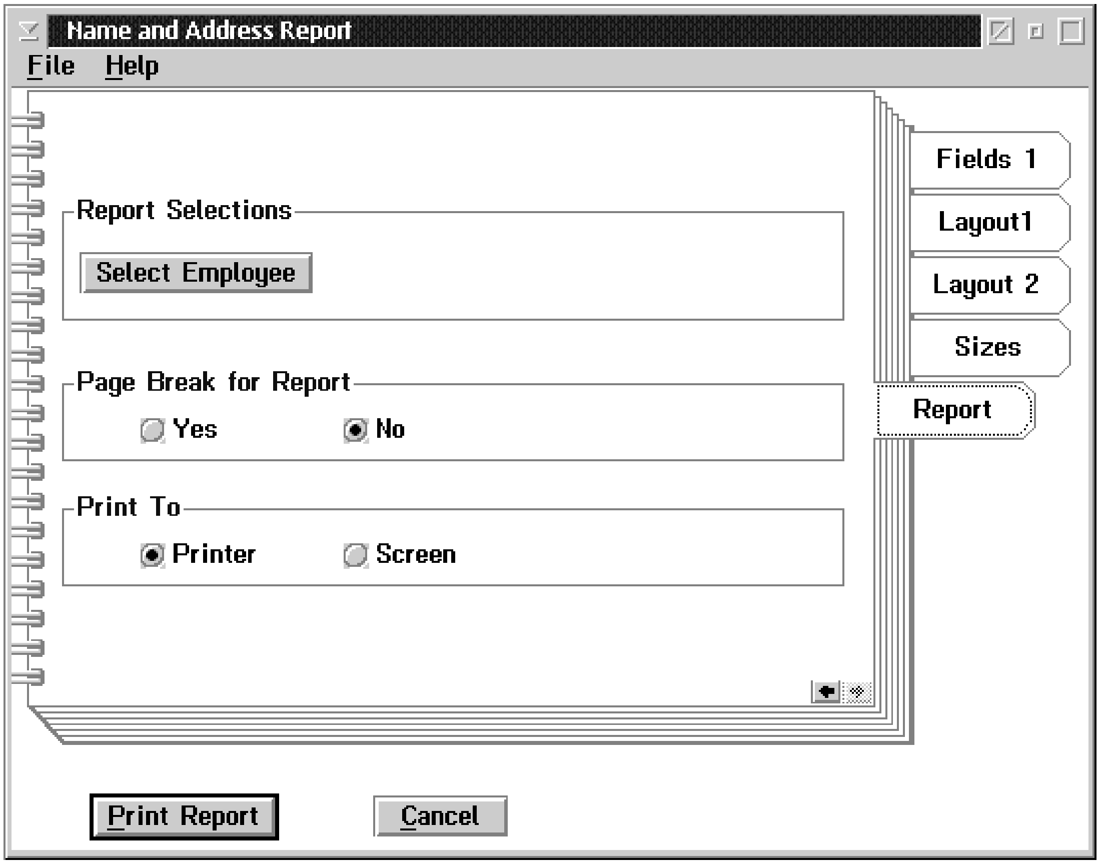
Sizes Selection The following dialog box for the name and address report appears as follows:



REPORTS

Select Report Selection

The dialog box for the name and address report appears as follows:



Single Employee Option

To choose a single employee option for the Name and Address report select the Single Employee object.

For instructions on how to select a single employee option refer to page 13 of the common selection screen chapter.

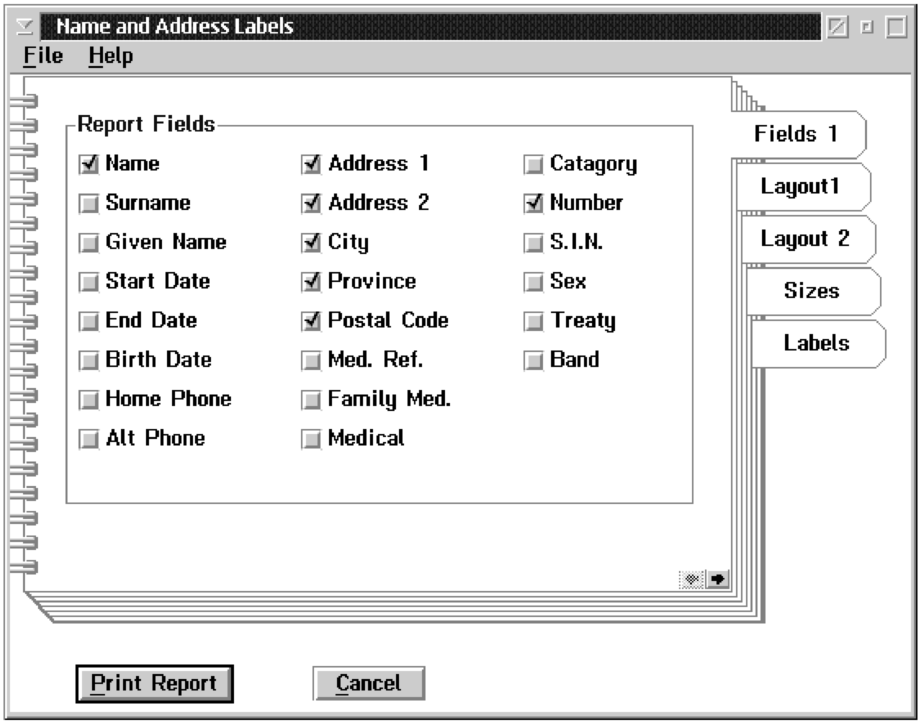
This report allows you the option to print each employee on a separate page. Select the page break yes field. When this is selected the box to the left of the field has a check mark.

Name and Address Label

The **Name & Address Label** option prints an employee name and address label.

This function allows the user to select the data fields to include in the label, the name and address layout, and to set up the label layout.

The dialog box for the **Name & Address Label** option in the report menu appears as follows:



Saving... The selections made by the user can be saved by selecting the **Save Parameters** in the File menu.

Report Fields Selection

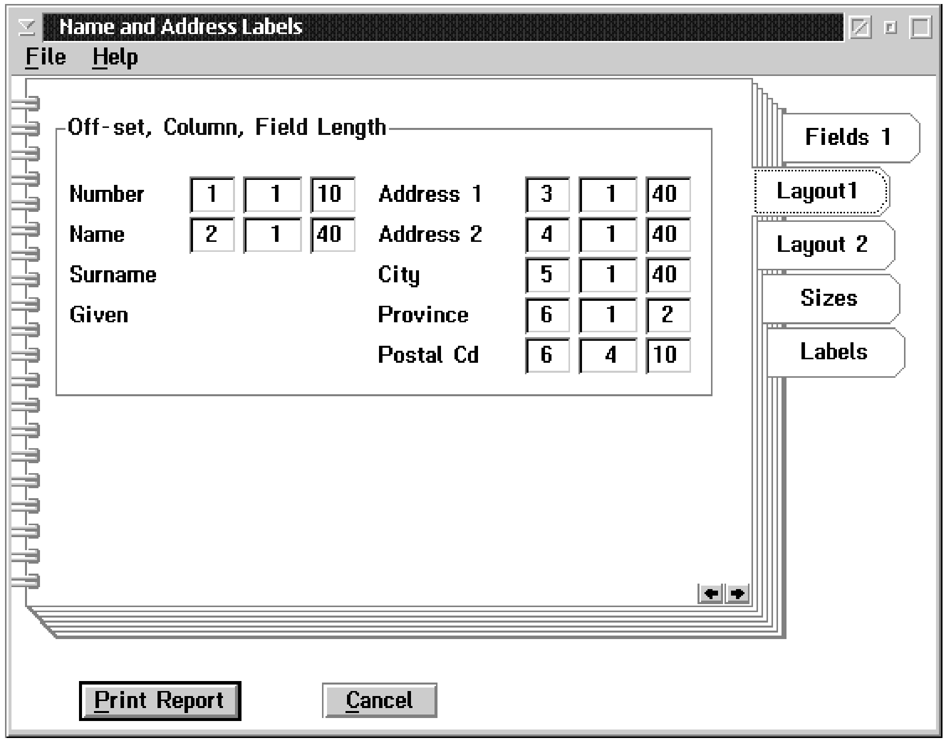
A data field is selected for the label when the box to the left of the field has a check mark.

The report field selection allows for the inclusion of the following 25 data fields:

Field	Description
Name	When this field is checked the name of the employee in the name and address label will be printed.
Surname	When this field is checked the surname of the employee in the name and address label will be printed.
Given Name	When this field is checked the given name of the employee in the name and address label will be printed.
Start Date	When this field is checked the starting date of the name and address label will be printed.
End Date	When this field is checked the ending date of the name and address label will be printed.
Medical	When this field is checked the medical of the name and address label will be printed.
Family Med.	When this field is checked the family med. of the name and address label will be printed.
Home Phone	When this field is checked the home phone number of the name and address label will be printed.
Address 1	When this field is checked the address 1 of the name and address label will be printed.
Address 2	When this field is checked the address 2 of the name and address label will be printed.
City	When this field is checked the city of the name and address label will be printed.
Province	When this field is checked the province of the name and address label will be printed.
Postal Code	When this field is checked the postal code of the name and address label will be printed.
Department	When this field is checked the department of the name and address label will be printed.
Account	When this field is checked the account of the name and address label will be printed.
Sub Account	When this field is checked the sub account of the name and address label will be printed.
Alt. Phone	When this field is checked the alt.phone of the name and address label will be printed.
Badge	When this field is checked the badge number of the name and address label will be printed.
Number	When this field is checked the number of the name and address label will be printed.
S.I.N.	When this field is checked the S.I.N. of the name and address label will be printed.
Sex	When this field is checked the sex of the name and address label will be printed.
Position	When this field is checked the position of the name and address label will be printed.
Treaty	When this field is checked the treaty of the name and address label will be printed.
Band	When this field is checked the band of the name and address label will be printed.

Layout 1 Selection

The second dialog box for the name and address label layout appears as follows:

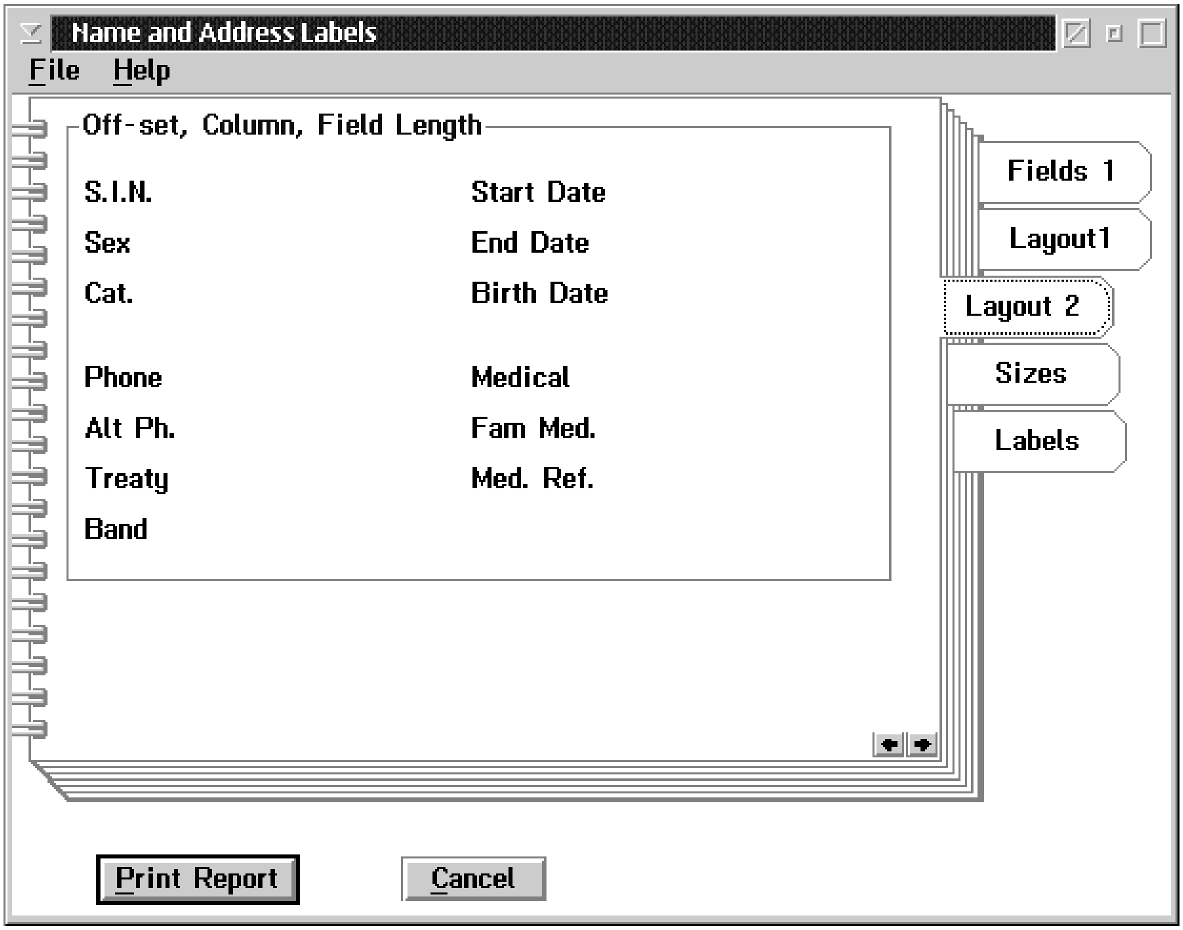


Defaults

The default selections can be re-displayed by selecting the default selections in the file menu. If you wish to always use the defaults select the **Save Parameter** option in the File menu.

Layout 2 Selection

The second dialog box for the name and address label layout appears as follows:



Defaults

The default selections can be re-displayed by selecting the default selections in the file menu. If you wish to always use the defaults select the **Save Parameter** option in the File menu.

In order to design a label layout you must specify the following 3 things:

- Off-Set
- Column
- Field Length

Off-Set

This is the line offset used for printing the name and address information. Eg) If you want this field to print on the first line of this name and address information use an off-set of zero. If it is to follow on the second line use an off-set of 1. You may have as many off-sets as you need to print all the fields you have selected.

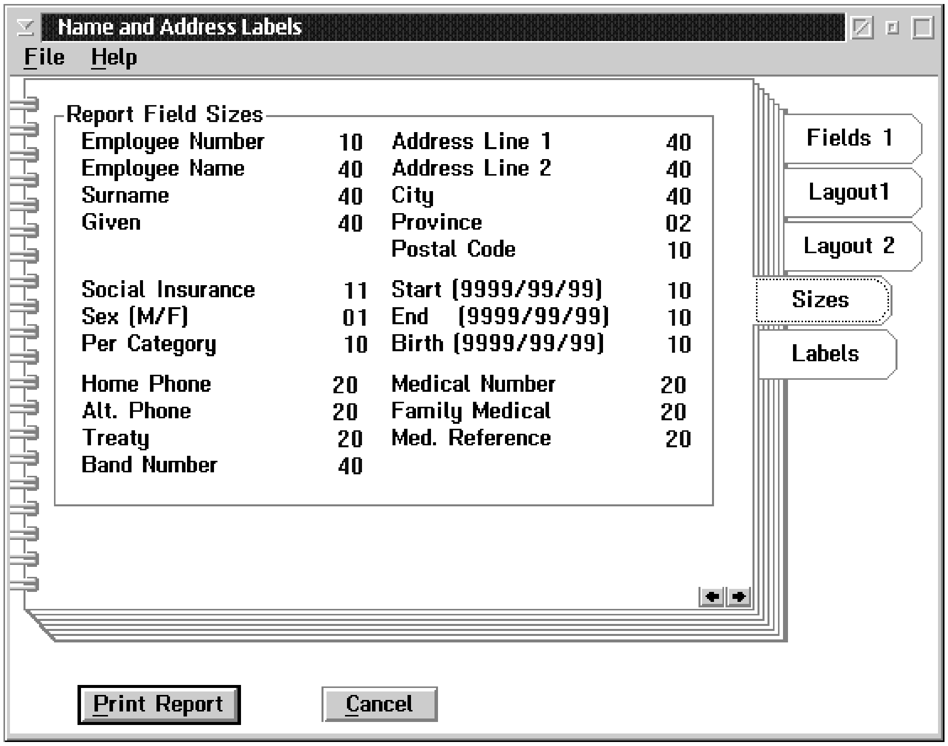
Column

This is the character position on the print line for the name and address information. Eg) If the field is to start 5 spaces in from the left hand margin enter a 6 in the column field. The column numbers are only limited by the number of characters you can print on each line of your selection page.

Field Length

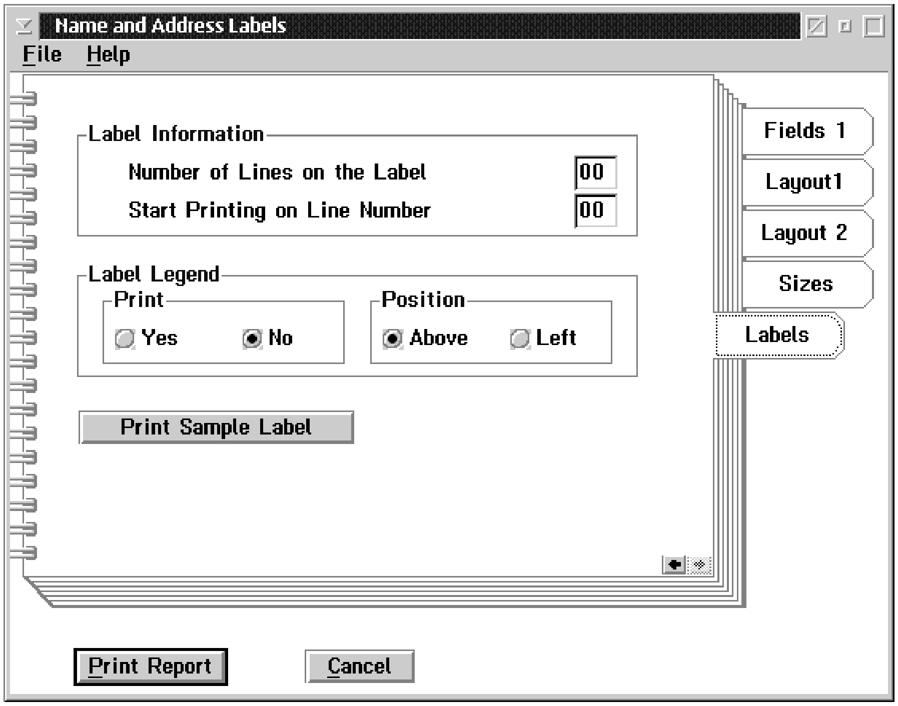
This is the number of characters that make up the field. Eg) Employee number is 10 characters long. If you want to see the entire employee number enter 10 in the field length. If you are doing the date which is 10 characters you may choose to print only the last 5 giving you mm/dd. The date field is the only field that takes the characters from the right hand side.

Sizes Selection The following dialog box for the name and address label appears as follows:



Label Selection

The following dialog box for the label appears as follows:



In laying out the label the other things the program needs to know is:

1. The number of lines your label will hold. A standard label is 8 lines long.
2. The line the label information will start on. This means that after the heading fields are printed the label information will start on the line number.

Label Legend - You can specify if the legend will be printed above or to the left of the label information.

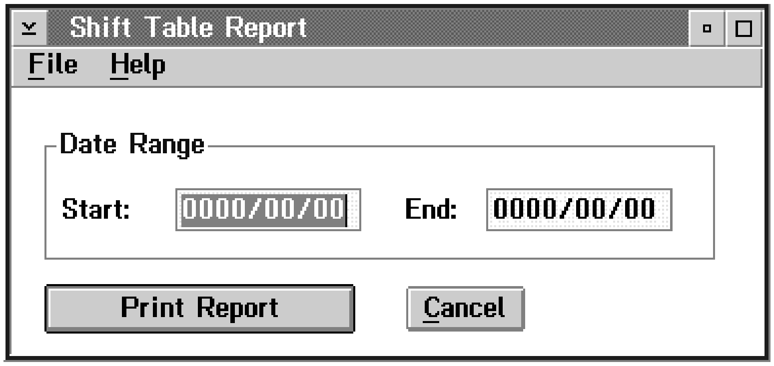
Print Sample Label

This will print a sample label for you to verify the line up of your label.

Shift Table Report

The **Shift Table Report** prints a listing of the shift control information. This function allows the user to select the date range for the report.

The dialog box for the **Shift Table Report** option in the Master File Report menu appears as follows:



Date Range Selection

To limit the range of the report the starting and ending date may be entered. If both dates are zero the entire report will be printed. If only the ending date is zero the report will print from the starting date until the end of the report.

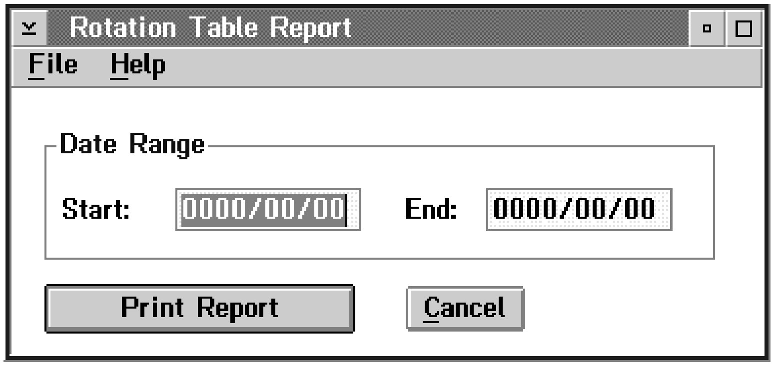
Field	Description
Shift Code	This field is the shift code.
Shift Description	This field is used to show the description of the shift code.
Start Date	This field is the starting date of the shift table information.
Ending Date	This field is the ending date of the shift table information.
Earning Table Code	If an earning table is entered the earning code for the table will be printed or the word NONE will appear if no earning table code has been specified.
Start Time	This field is the starting time of the shift.
End Time	This field is the ending time of the shift.
Break Number	This field is used to determine the break number.
Break Start	This field is used to determine the starting time of the break.
Break Length	This field is used to determine the length of the break.

☞ You may specify up to 7 breaks per shift.

Rotation Table

The **Rotation Table Report** option prints a listing of the rotation patterns. This function allows the user to select the date range for the report.

The dialog box for the **Rotation Table Report** option in the Master File Reports menu appears as follows:



Date Range Selection

To limit the range of the report the starting and ending date may be entered. If both dates are zero the entire report will be printed. If only the ending date is zero the report will print from the starting date until the end of the report.

Report Fields

Field	Description
Rotation Code	This field is the rotation code of the rotation pattern.
Rotation Description	This field is used to show the description of the rotation code.
Start Date	This field is the starting date for the rotation pattern.
Stop Date	This field is the stopping date for the rotation pattern.
Rotation Day	This field is the day number for the rotation table information.
Rotation Shift	This field is the shift code name used for the rotation table information.

☞ You may have up to 400 rotation days set up in the rotation table for each rotation code. Each rotation day may have up to 5 user defined shifts.

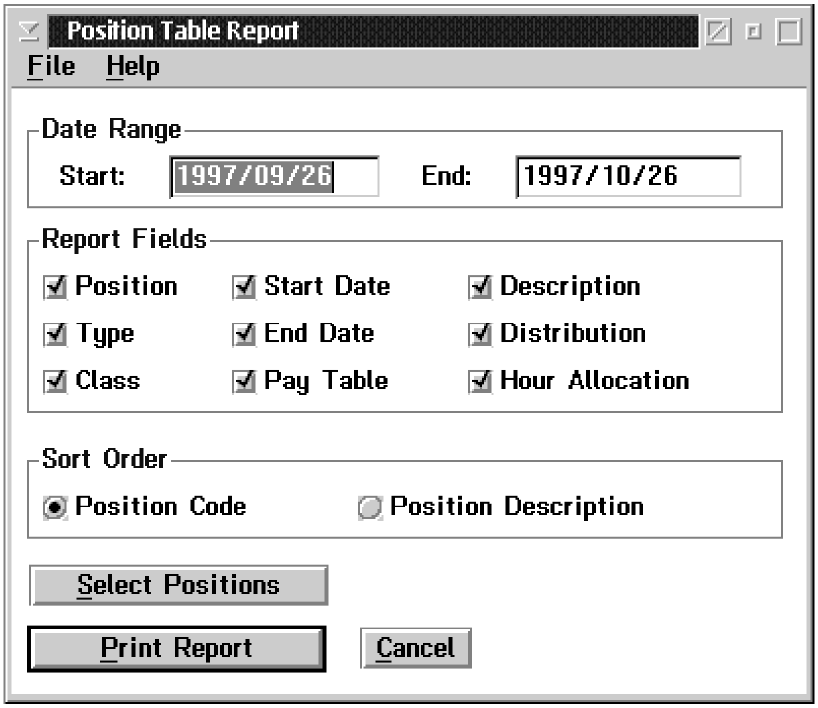
Position Table Report

The **Position Table Report** option prints a listing of Position Information.

This function allows the user to select the date range for the report, the data fields to include in the report, the sort order for the report, and to select the object to include or exclude in the report.

If a single position was selected before running this program only that position will be printed. The name of the position will be shown after the report name at the top of the window when a single position has been selected. The **Select Positions** option will not be available when a single position has been selected.

The dialog box for the **Position Table Report** option in the Reports menu appears as follows:



Saving... The selections made by the user can be saved by selecting the **Save Parameters** in the File menu.

Date Range Selection

To limit the range of the report you may enter the starting and ending date. If both dates are zero the entire report will be printed. If only the ending date is zero both the report will be printed from the starting date until the end of the report.

Report Fields Selection

A data field is selected for the report when the box to the left of the field has a check mark.

The report field selection allows for the inclusion of the following nine data fields.

Field	Description
Position	When this field is checked the position will be printed on the report.
Description	When this field is checked the description of the position will be printed on the report.
Type	When this field is checked the position type code will be printed on the report.
Class	When this field is checked the position class code will be printed on the report.
Start Date	When this field is checked the starting date of the position will be printed on the report.
End Date	When this field is checked the ending date of the position will be printed on the report.
Pay Table	When this field is checked the pay table will be printed on the report.
Distribution	When this field is checked the distribution will be printed on the report.
Hour Allocation	When this field is checked the position hour allocation will be printed on the report.

Sort Order Selection

The sort order selection for the report allows for the following sort order selections:

- Position Code - User Defined Code
- Position Description - User Defined Description

Select Positions Selection

To choose selected positions for the Position Assignment Report select the **Select Positions** object.

For instructions on how to select positions refer to page 9 of the common selection screen chapter.

If you have selected positions the message Exclude Selections or Include Selections will be displayed beside the selection button when you return to the select report object dialog box.

Description Field Selection

The description field selection for the report allows for the following field options:

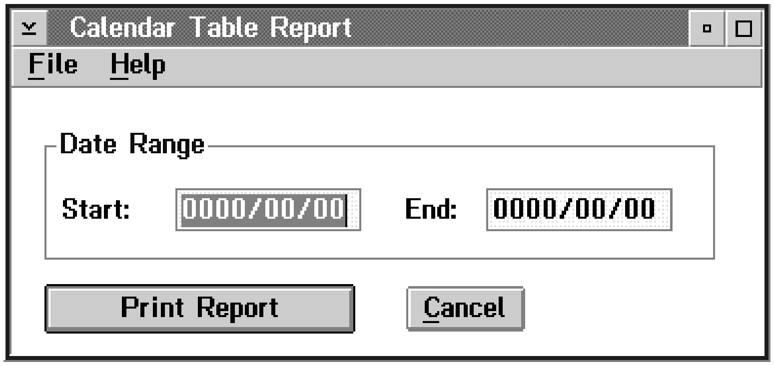
- Full Description - Entire description entered
- First Paragraph - First paragraph entered

The description area can be up 8,000 characters and you may not want to see the entire description printed in all cases. If you select the **First Paragraph** option in the report it will print all the description information up to the first time you pressed the ENTER key.

Calendar Table Report

The **Calendar Table Report** prints a listing of the calendar holiday information. This function allows the user to select the date range for the report.

The dialog box for the **Calander Table Report** option in the Master File Reports menu appears as follows:



Date Range Selection

To limit the range of the report the starting and ending date may be entered. If both dates are zero the entire report will be printed. If only the ending date is zero the report will print from the starting date until the end of the report.

Report Fields

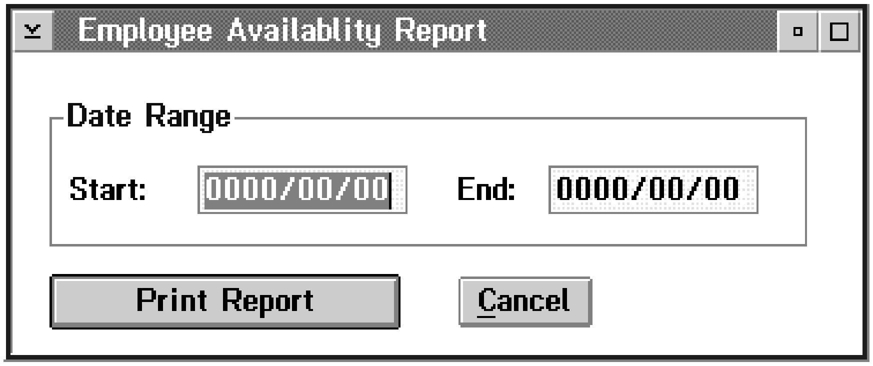
Field	Description
Calendar Date	This field contains the calendar date.
Statutory Holiday	This field contains the message statutory if it is a statutory holiday.
Calendar Holiday	This field contains the message calendar holiday if it is a calendar holiday.
Description	This field contains the user defined description of the calendar holiday when available.
Included	This field is a list of user defined codes to be included.
Excluded	This field is a list of user defined codes to be excluded.

☞ The user defined codes allows up to 100 characters these codes are used in schedule generation to determine if the calendar date is included or excluded.

Availability Report

The **Availability Report** prints a listing of the available time for each employee. This function allows the user to select the date range for the report.

The dialog box for the **Availability Report** option in the Master File Report appears as follows:



Date Range Selection

To limit the range of the report the starting and ending date may be entered if both dates are zero the entire report will be printed. If only the ending date is zero the report will print from the starting date until the end of the report.

Report Fields

Fields	Description
Employee Name	This field is the name of the employee
Start Date	This field is the starting date of this availability information.
End Date	This field is the ending date of this availability information.
Weeks	The number of weeks in the cycle is entered in this field.
Week-1	This field is used to show the day number of the week when an employee is available to work in week one.
Week-2	This field is used to show the day number of the week when an employee is available to work in week two.
Week-3	This field is used to show the day number of the week when an employee is available to work in week three.
Week-4	This field is used to show the day number of the week when an employee is available to work in week four.
Available Hours	This field is used to show the number of hours the employee is available to work in the week.
Day of Week	This field is the day of week specified by the day number.
Starting Time	This field is the starting time that the employee is available on this day
Ending Time	This field is the ending time that the employee is available on this day.
Preferred Days	This field is used to show the day number of the week that an employee prefers to work.
Preferred Hours	This field is used to show the number of hours the employee prefers to work in the week.
Starting Time	This field is the starting time the employee prefers to work.
Ending Time	This field is the ending time the employee prefers to work.

Custom Reports

The Grand Master Suite Custom Reports module provides a **report definition** function and a **Report Generation** function. These two functions allow the user to define and print reports that includes data from the system defined database and the user defined database.

Please refer to page of the custom reports chapter for more information on custom reports.

HOMECARE

The GrandMaster Suite Homecare Module is a separately installed product. The module adds additional functionality to the GrandMaster Suite Schedule Module.

The added functionality allows the user to prepare master schedules for homecare clients, generate detailed schedule items for homecare clients and prepare homecare schedule reports.

Installation

The Homecare module is a separate add-on module for the GrandMaster Schedule Module. As such, it has a separate distribution disk and installation procedure.

☞ The Homecare module should be installed AFTER the GrandMaster Schedule Module is installed.

Windows Installation

GrandMaster Suite Homecare utilizes the standard windows setup program. Windows 3.1x must be operational.

The following steps will take you through the installation:

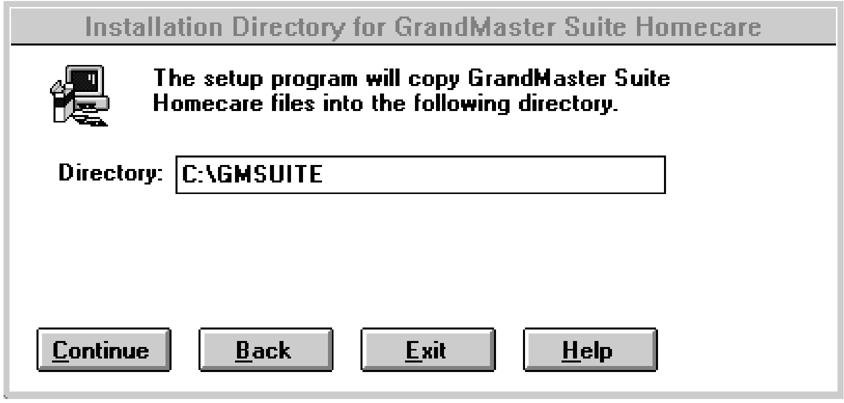
1. Insert the disk labeled “GrandMaster Suite Homecare Setup” into the diskette drive.
2. From the program manager select **Run** option from the File menu.
3. Enter A:\SETUP into the command line field and click on the OK BUTTON.

A window will appear indicating that the GrandMaster Suite Homecare installation program is being initialized. The window will appear as follows:

After the initialization process completes, the dialog box below will appear which allows the user to continue with the installation, or exit from the install process.

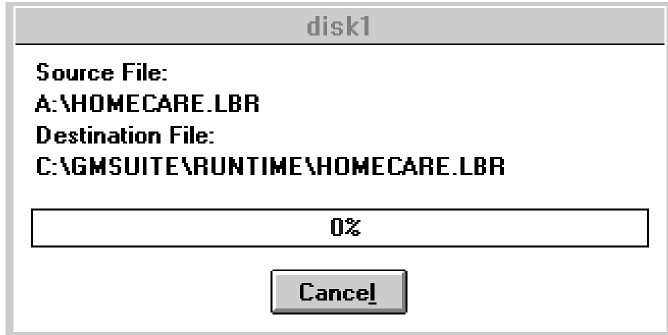
4. Press the CONTINUE button to proceed with the installation.

The "Installation Directory for GrandMaster Suite Homecare" dialog box, shown below, is used to determine the root directory for GrandMaster Suite Homecare on your hard drive. The default is C:\GMSUITE.



5. Enter the directory that you used to install GrandMaster Suite and select the CONTINUE button.

The following screen will appear as the installation continues:



This screen will disappear when the installation has finished.

If the installation was completed successfully the following screen will appear indicating the installation was successful:

6. Select the OK button to exit the installation process.

GrandMaster Suite Homecare

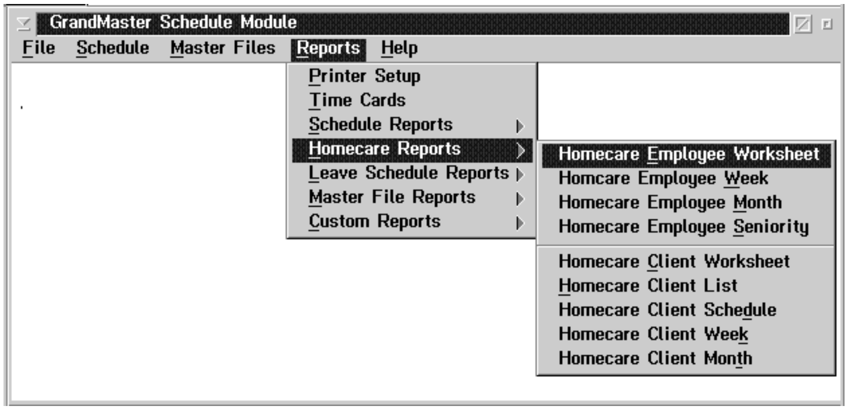
The GrandMaster Suite Homecare Module is an extension to the GrandMaster Suite Schedule Module.

The Homecare sub menu from the Schedule menu appears as follows:

The Homecare Module adds the following functions to the main schedule menu.

- Client Activity Schedule - This function is used to define the schedule of services for a client.
- Client Master Schedule - This function is used to define the master schedule of services for a client.
- Employee Activity Schedule - This function is used to access the client activities by assigned employee.
- Locate Unallocated Calls - This function is used to locate client services that have not been allocated to an employee.
- Cancel Homecare Call - This function is used to cancel homecare calls for a client within a date range.
- Generate Detail Schedule - This function is used to generate the detail Homecare Schedule items from the client schedule of services.
- Delete Detail Schedule - This function is used to delete portions of the detail Homecare Schedule.
- Area Seniority List Update - This function is used to update the seniority list to be assigned to the area code.
- Update Client Master - This function is used to access the homecare client update.

The Homecare sub menu from the Reports menu appears as follows:



The Homecare Module also provides additional functionality for the Schedule Module functions.

When a schedule item is generated from the homecare activity schedule the daily employee schedule, weekly employee schedule, and the employee detail schedule functions will present the client name as well as the other schedule detail fields.

The Employee Detail Schedule report allows an additional field to print the client name on the Schedule Report.

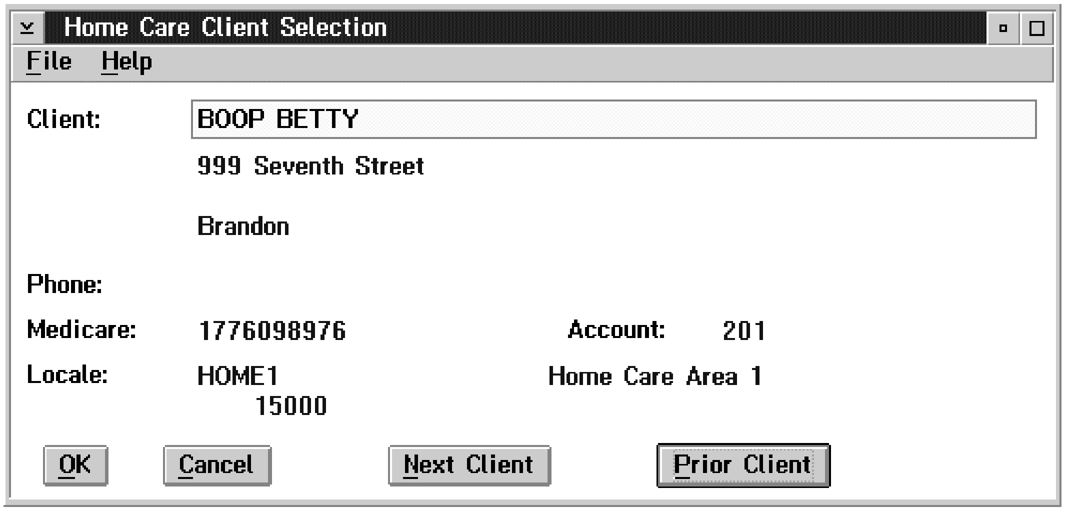
The Homecare Module adds the following report functions to the Schedule Report menu.

- Homecare Employee Worksheet - This report presents an employees' schedule of homecare calls with the days of the month as rows and the time of day as columns. The client name and activity for the calls scheduled are printed in the appropriate row and column.
- Homecare Employee Week - This report prints the activity times slots with (clients names) for the employee for a given week.
- Homecare Employee Month - This report prints the activity, time slots with clients names for the employee in a calendar format for a given month.
- Homecare Employee Seniority - This report prints the area code and up to six seniority lists for each area. The report on request will show the detail on the seniority lists showing the employees in seniority order.
- Homecare Client Worksheet - The report presents a client's schedule of homecare calls with the days of the month as rows and the time of day as columns. The employee name and activity for the calls scheduled are printed in the appropriate row and column.
- Homecare Client List - The report presents a listing of the details on homecare clients including and the service scheduled for the client, with the employee assignments.
- Homecare Client Schedule - This report prints the detail information for each homecare schedule item for that client in the given date range.
- Homecare Client Week - This report prints the activity, time slots with assigned employees for the client in a given week.
- Homecare Client Month - This report prints the activity time slots in the assigned employees for the client in a calendar format for a given month.

Client Activity Schedule

The **Client Activity Schedule** option allows the user to enter in all the activities required by the client and to assign employees to the activities.

This option first prompts the user for the name of the client for which to schedule activities. The dialog box will appear as follows:



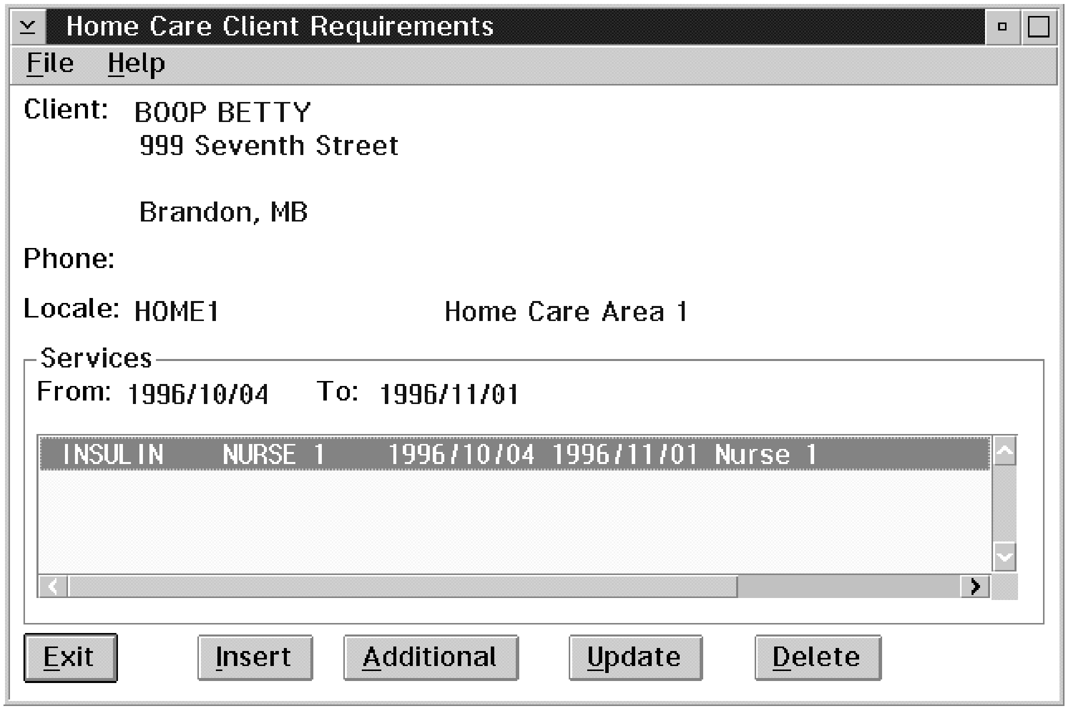
The following fields appear in the dialog box:

Field	Description
Client	The client field is used to select a client by typing in the client's name
Address	The address of the client will appear below the client field after a client has been selected - no changes can be made to this information in this screen.
Phone	The phone number of the client will appear in this field. This field is for display only - no changes can be made to this information in this screen.
Medicare	The medicare number of the client will appear in this field. This field is for display only - no changes can be made to this information in this screen.
Account	The account number of the client will appear in this field. This field is for display only - no changes can be made to this information in this screen.
Locale	The area of the client's home will appear in this field. This field is for display only - no changes can be made to this information in this screen.
Client Node	This is the internal reference number for the client information.

OK	The OK button will save any changes made in the dialog box.
Esc (exit)	The ESC key, CANCEL button, or **Exit** option from the File menu will exit the dialog box without saving any changes.
Next Client	The NEXT CLIENT button calls up the next client, in name order.
Prior Client	The PRIOR CLIENT button calls up the prior client, in name order.
F8 (list)	The F8 key, or the **List** option from the File menu will bring up a list of client names from which the user can select a client. From the dialog box containing the list the user can also insert, update, or delete clients from the list. For more information about this dialog box please see the "Update Client Master" section in this manual.

Client Requirements

Once a client has been selected, in the Client Activity Schedule option, the following screen will appear in which the user can set up activity schedules for the selected client:



The GrandMaster Homecare Schedule module supports multiple activity schedules for each client.

The following fields appear in the dialog box:

Field	Description
Client	The client name will be displayed.
Address	The client address will be displayed.
Phone	The client telephone number will be displayed.
Locale	The homecare district code and description will be displayed.
Services list	The list contains the activities established for the client that have to be scheduled and assigned employees. The list shows the activity, position, start date, end date and position description.

Set Date Range The **Set Date Range** option from the File menu is used to change the date range.

Esc (exit) The ESC key, the EXIT button, or the **Exit** option from the File menu will exit from the screen without saving any changes.

Insert The INSERT button will allow the user to insert a new activity schedule in the services list.

Additional The ADDITIONAL button makes a copy of the selected activity and allows the user to update the copy.

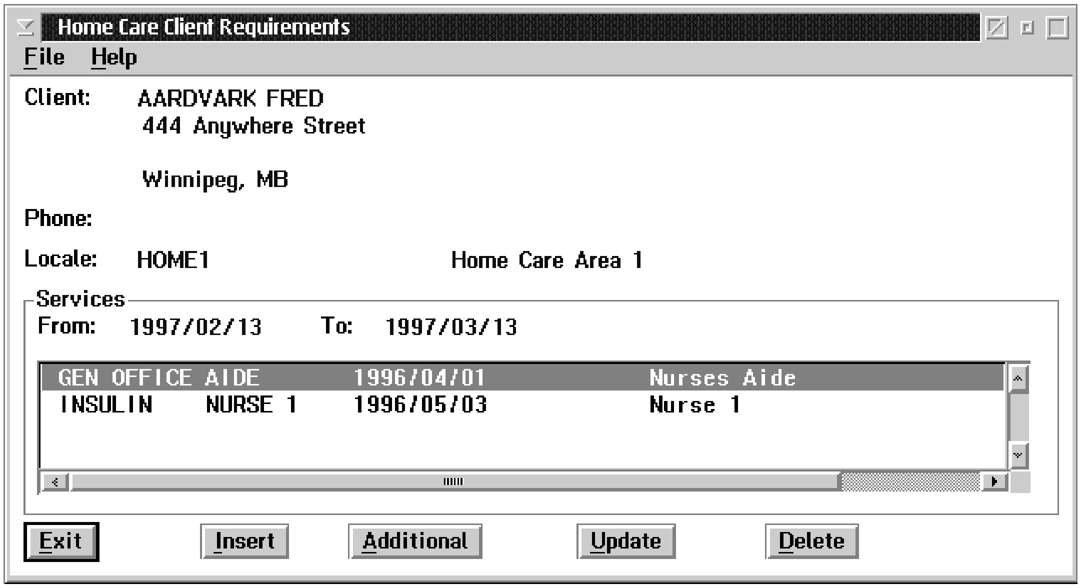
Update The UPDATE button will allow the user to update any existing activity schedules in the services list.

Delete The DELETE button will allow the user to delete any activity schedules from the services list.

Entering Client Requirements

To insert new activities required by the client do the following:

1. Select the **Client Activity Schedule** option and choose a client when the Home Care Client Selection dialog box appears.
2. The Home Care Client Requirements dialog box will appear, select the INSERT button. A dialog box will appear as follows:



3. Enter the required information into the dialog box and select the OK button.

Each activity schedule defines the position class and activity code that is used for the scheduled items.

The following fields appear in the dialog box:

Field	Description
Client	The client name will be displayed.
Start Date	The start date is used to determine the earliest date for scheduling an activity. An activity must **always** have a start date. The schedule generation process uses the start date to control the creation of schedule items for the activity.
End Date	The end date is used to determine the latest date for scheduling an activity. An end date of zero indicates that the activity may be scheduled for an unlimited number of days into the future. The schedule generation process uses the end date to control the creation of schedule items for the activity.
Essential Service	This flag will be checked if this service is required on statutory holidays.
Position	The position class is used to determine the pay rates and description for the employee(s) assigned to the client schedule.
Activity	The activity code is used to classify the time and description for billing the time to the Homecare client.
Monthly	When this field is checked the rotation is monthly.
Number of Employees	This field indicates the number of employees to be assigned to the activity.
Weeks to Schedule	This field indicates the number of weeks to use when generating the detail schedule items can be from 1 to 6.
Daily Schedule Slots	Each notebook page contains up to three schedule slots per day for the activity. The starting time and ending time entered should be in a 24 hour clock format. Up to 6 weeks rotation can be setup.
ID	This field contains the internal client ID number.

☞ When the end date of an activity is changed the system will delete any schedule items that extend past the new end date.

☞ When the start date of an activity is changed the system will delete any schedule items that occur prior to the new start date.

☞ If the scheduled items to delete have been processed by the Time keeping function a warning message will be issued, the schedule items will be left on file, and an exception report will be generated.

Each activity may define a rotation pattern for service times that may be up to six weeks in length. This rotation pattern is used to generate the schedule items for the client.

Each notebook page contains up to three schedule slots per day for the activity. If an activity must be scheduled more than three times per day another activity schedule may be created that overlaps the first activity date range.

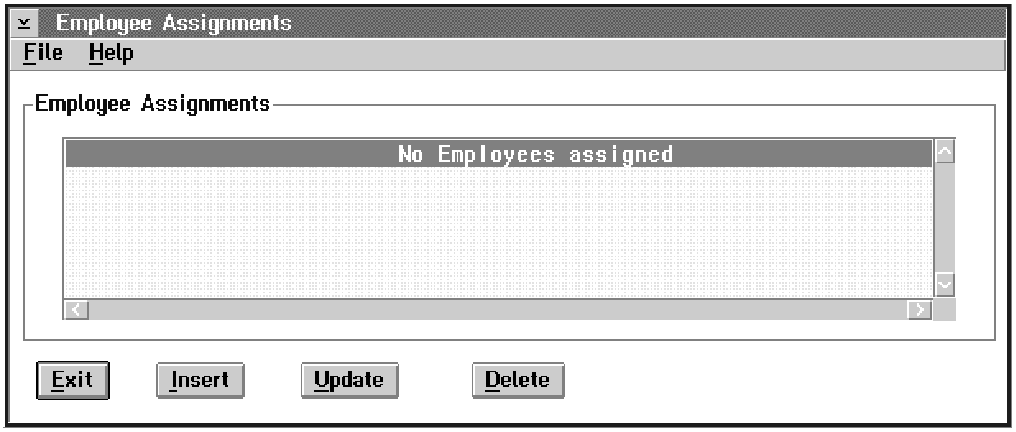
List The **List** option from the File menu will bring up a list of the positions or activities available depending on which field contains the cursor.

Save	The **Save** option from the File menu will save any changes made to the screen.
Generate Schedule	The **Generate Schedule** option from the File menu will generate the schedule.
Exit	The **Exit** option from the File menu will exit the screen without saving any changes.

Employee Assignments

To assign employees to the client activities select the EMPLOYEE ASSIGNMENT button within the Home Care Services dialog box.

The following dialog box will appear:



This dialog box will list all the employees assigned, and their start and end date.

Insert The INSERT button will allow the user to add a new employee into the employee assignments list for the client activity.

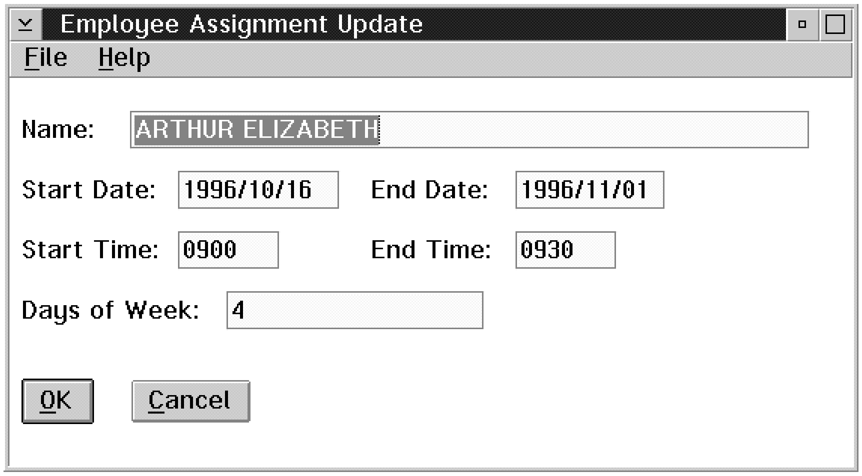
Update The UPDATE button will allow the user to update an employee that already exists in the employee assignments list for the client activity.

Delete The DELETE button will allow the user to remove an employee from the employee assignments list.

Exit The ESC key, or the EXIT button from the File menu will exit the screen without saving.

Inserting an Employee

Select the INSERT button to add an employee to the Employee Assignments list. The following screen will appear:



The following table contains a description of the fields in the above dialog box:

Field	Description
Employee	This field contains the employee name.
Start Date	This field is used to determine the earliest date that the employee will be assigned homecare calls for this activity. A date of zero indicates that the activity start date is used.
End Date	This field is used to determine the latest date that the employee will be assigned homecare calls for this activity.
Start Time	This field is used to determine the earliest time of day that the employee will be assigned homecare calls for this activity.
End Time	This field is used to determine the latest time of day that the employee will be assigned homecare calls for this activity.
Days of the Week	This field is used to determine the days of the week that the employee will be assigned homecare calls for this activity. The days are from Sunday (1) to Saturday (7).

F8 (list) The F8 key, or the **List** option from the File menu will, when the cursor is placed in the Name field, bring up a list of client names from which the user can select a client.

OK The OK button will confirm the choice of the client and display the list of activities scheduled for the client

Esc (exit) The ESC key, CANCEL button, or the **Exit** option from the File menu will exit the screen without saving any changes.

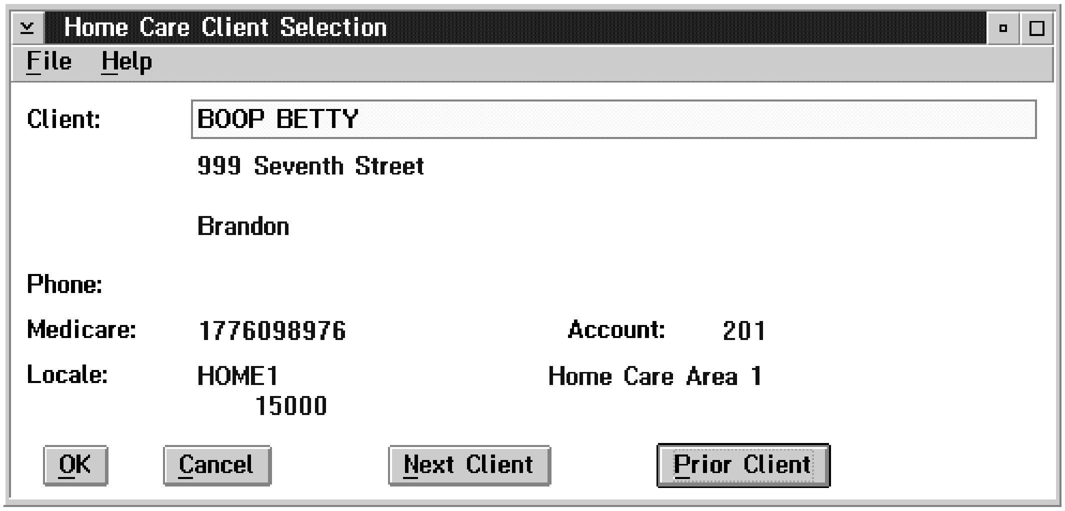
Client Master Schedule

The **Client Master Schedule** option allows the user to enter in all the master activities required by the client and to assign employees to the activities.

The master schedule allows the following enhancements to the regular client activity schedule feature:

- multiple activities for a given time slot
- up to eight slots per date rather than 3 at a time
- allows you to use the on call person rather than an open assignment by seniority
- allows an activity to occur within a time slot duration rather than at a specific start and stop time

This option first prompts the user for the name of the client for which to schedule activities. The dialog box will appear as follows:



The following fields appear in the dialog box:

Field	Description
Client	The client field is used to select a client by typing in the client's name
Address	The address of the client will appear below the client field after a client has been selected - no changes can be made to this information in this screen.
Phone	The phone number of the client will appear in this field. This field is for display only - no changes can be made to this information in this screen.
Medicare	The medicare number of the client will appear in this field. This field is for display only - no changes can be made to this information in this screen.
Account	The account number of the client will appear in this field. This field is for display only - no changes can be made to this information in this screen.

Field	Description
Locale	The area of the client's home will appear in this field. This field is for display only - no changes can be made to this information in this screen.
Client Node	This is the internal reference number for the client information.

OK The OK button will save any changes made in the dialog box.

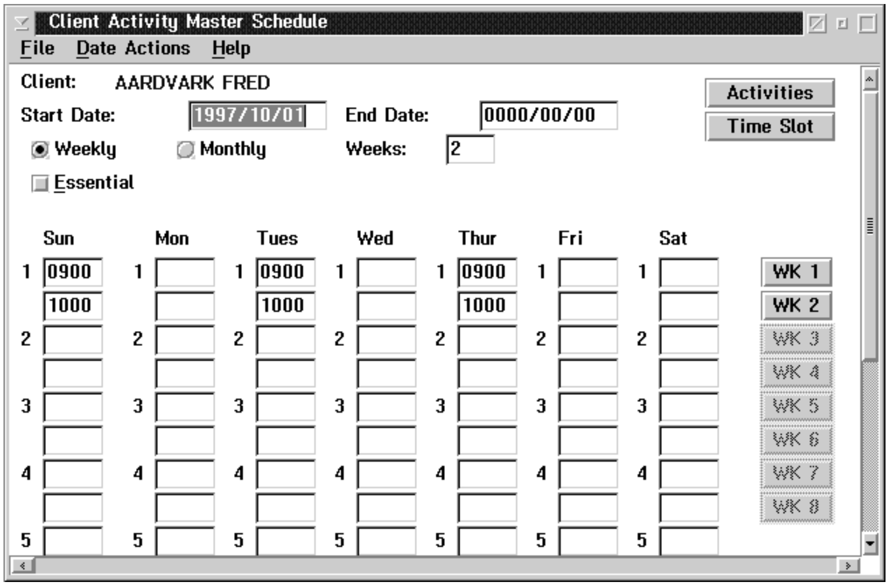
Esc (exit) The ESC key, CANCEL button, or **Exit** option from the File menu will exit the dialog box without saving any changes.

Next Client The NEXT CLIENT button calls up the next client, in name order.

Prior Client The PRIOR CLIENT button calls up the prior client, in name order.

F8 (list) The F8 key, or the **List** option from the File menu will bring up a list of client names from which the user can select a client. From the dialog box containing the list the user can also insert, update, or delete clients from the list. For more information about this dialog box please see the "Update Client Master" section in this manual.

Once you have selected the desired client the Client Activity Master Schedule screen will appear:

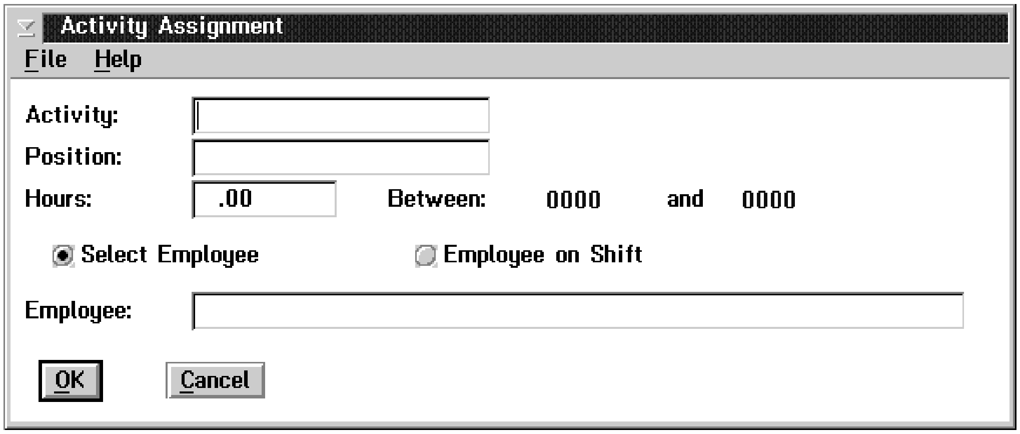


The following fields appear in the dialog box:

Field	Description
Start D ate	This field contains the starting date of the schedule.
End Date	This field contains the ending data of the schedule.
Weekly	When this field is checked the schedule is weekly.
Monthly	When this field is checked the schedule is monthly.
Weeks	This field contains the number of weeks in the schedule.

You may click on the desired week and enter up to 8 time slots per day.

If you click on the activity button you will see the Activity Assignment screen.



You may enter the following fields for a given activity.

Fields	Description
Activity	This field contains the activity code of the assignment.
Position	This field contains the position code of the assignment.
Hours	This field contains the hours for the activity. The time slot will be displayed beside the hours.

You have the following option on selecting the employee:

- Select Employee (pick the employee you want)
- Employee on Shift (use the on call employee)

Under the date action menu item you may do the following

- Time slot assignments
- Delete slot assignments
- delete day assignments
- copy slot (from a slot to a slot)
- Copy day (from a day to a day)

Employee Activity Schedule

The **Employee Activity Schedule** option provides a method for accessing the client activity master schedule records that are assigned to a particular employee.

The option allows the user to insert new employee assignments, update existing employee assignments, and delete existing employee assignments.

The option first requests the employee. This selection uses the standard employee selection screen as follows:

When you choose to insert, add or delete the activity assignment you will be taken to the Client Activity Schedule. For more information on how to schedule clients and activities turn to the Client Activity Schedule section.

Search Technique The **Search Technique** option in the File menu allows the user to set the manner in which the employees should be located. There are three ways to search the employee list: by name, by employee number, or by badge number. See the section on Setting Search Technique from the File menu for further information.

Next Employee The NEXT button, or the **Next Employee** option from the File menu will move to the next employee in the list.

Previous Employee The PREVIOUS button, or the **Previous Employee** option from the File menu will move to the previous employee in the list.

F8 (list) The F8 key, or the **List Employees** option from the File menu will bring up a list of the employees. The employees within the list will depend on whether or not an employee group has been selected (see the section on managing employee groups from the File menu for further information). The order of the employees in the list will depend on the type of search technique that has been set.

Esc (exit) The ESC key, the EXIT button, or the **Exit** option from the File menu will exit the screen without saving any changes.

Employee Activities

After the employee is selected the option presents a list of the employee's assignments that fall within the default date range.

The screen contains the following data fields:

Field	Description
Employee	This field contains the employees name and address.
Phone Number	This field contains the employees phone number.
Client List	The list contains the activity, the starting and ending date, client name, position code and description.

The date range can be changed using the **Set Date Range** option under the File menu.

Insert The INSERT button allows the user to establish a relationship between the selected employee and a client activity.

Additional The ADDITIONAL button allows the user to establish another assignment between the selected employee and the client activity under the selection bar.

Update The UPDATE button allows the user to update the client activity under the selection bar.

Delete The DELETE button allows the user to delete the assignment to the activity under the selection bar.

Esc (exit) The ESC key, the EXIT button, or the **Exit** option from the File menu will exit the screen without saving any changes.

Locate Unallocated Calls

The **Locate Unallocated Calls** option is used to find Homecare Schedule detail items that do not have an employee assignment.

When the **Locate Unallocated Calls** option is selected the following screen will appear:

The Homecare Unallocated Calls dialog box contains the following fields:

Field	Description
Start Date	This field contains the starting date of your date range.
Ending Date	This field contains the ending date of your date range.
Client	This field contains the name of the client for which to find the unallocated calls.

Homecare Schedule detail items may lack an employee assignment for a number of reasons.

- No employee is assigned to the client activity
- The assigned employee is on vacation, sick leave, or is absent for some other reason.
- During schedule generation the assigned employee has a schedule conflict with another scheduled activity.

The **Locate Unallocated Calls** function allows an employee to be assigned to a schedule detail item. This assignment does not affect the employee assignment list for the client activity schedule.

When the missing employee assignment is a result of scheduled leave the function uses the standard schedule replacement functions.

F8 (list)

The F8 key, or the **List** option from the File menu will bring up a list of the clients.

Locate Items

The LOCATE ITEMS button, or the **Locate Items** option from the File menu will locate any unallocated calls for the current client.

Next Client

The NEXT CLIENT button, or the **Next Client** option from the File menu will move to the next client in the client list.

Previous Client

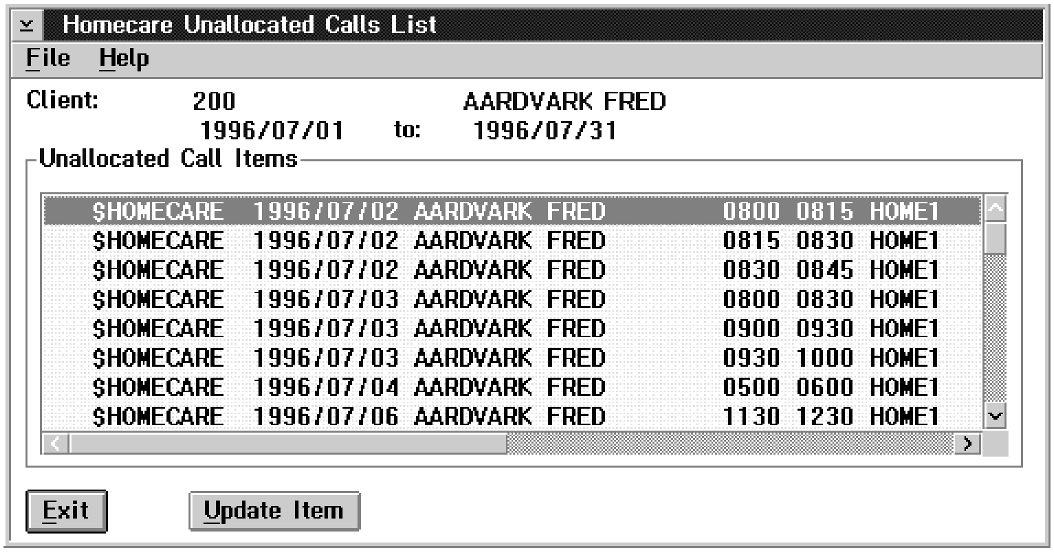
The PREVIOUS CLIENT button, or the **Previous Client** option from the File menu will move to the previous client in the client list.

Esc (exit)

The ESC key, the EXIT button, or the **Exit** option from the File menu will exit the screen without saving any changes.

Locate Items

When the LOCATE ITEMS button is selected, in the Homecare Unallocated Calls dialog box, the system will begin the generation of a list of all unallocated calls within the specified date range. The list will appear similar to the following:

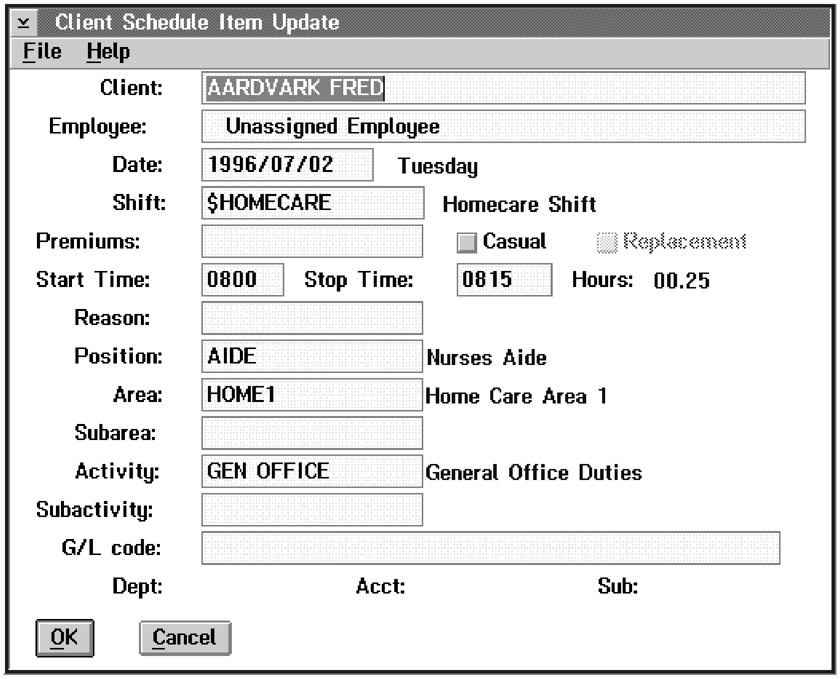


The following table gives a description of the fields within the screen:

Field	Description
Client	The client's name and client ID. For display only.
Start Date	The start date of your date range. For display only.
Ending Date	The ending date of your date range. For display only.
Unallocated Call Items List	This list contains all the unallocated call items within the date range. The columns from left to right are: shift, date, client, start time, stop time, and area.

Update Item

The UPDATE ITEM button, or double clicking on the item in the list will allow the user to update the schedule item highlighted by the selection bar. When the update item button is pressed the following screen will appear:



The following table gives a description of the fields within the screen:

Field	Description
Client	This field contains the client's name for the schedule item.
Employee	This field contains the employees name for the schedule item.
Date	This field contains the date for the schedule item.
Shift	This field contains the shift code for the schedule item.
Premiums	This field contains the premium code for the schedule item.
Start Time	This field contains the starting time for the schedule item.
End Time	This field contains the ending time for the schedule item.
Hours	This field contains the hours for the schedule item.
Reason	This field contains the reason code for the schedule item.
Position	This field contains the position code for the schedule item.
Area	This field contains the area code for the schedule item.
Sub Area	This field contains the sub area code for the schedule item.
Activity	This field contains the activity code for the schedule item.
Sub Activity	This field contains the sub activity code for the schedule item.
G/L Code	This field contains the G/L code for the schedule item.

Cancel Homecare Calls

The **Cancel Homecare Calls** option is used to mark homecare calls as canceled.

When a call is canceled the employee assigned to the call may be assigned to another call without a schedule conflict.

Cancellations may be entered for a date range and may specify a start time and stop time range.

The following screen will appear when the Cancel Homecare Calls option is selected:

The following table gives a description of the fields within the screen:

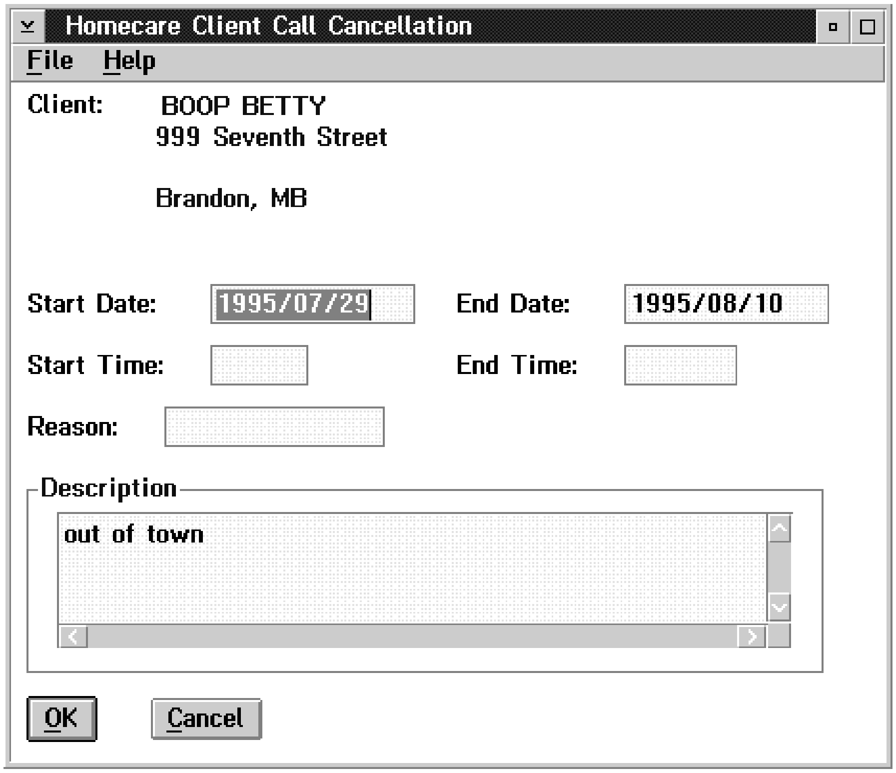
Field	Description
Date From	This field contains the starting date.
Date To	This field contains the ending date.
Cancellations	This field contains a list of cancellations.

Set Date Range — The **Set Date Range** option in the File menu will allow the user to change the date range.

Insert — The INSERT button, or the **Insert Item** option in the File menu allows the user to add a new cancellation for any client to the cancellation list.

Additional — The ADDITIONAL button, or the **Additional for Employee** option in the File menu allows the user to add additional cancellations for the client currently under the selection bar.

Update The UPDATE button or the **Update Entry** option in the File menu allows the user to update the currently selected cancellation in the cancellation list. The update screen appears as follows:



The fields requiring input are as follows:

Field	Description
Start Date	Starting date for a date range for canceling calls.
End Date	Ending date for the cancellation date range.
Start Time	Starting time for a time range for canceling calls.
End Time	Ending time for the cancellation time range.
Reason	This field is used to enter the reason code for the cancellation. Selecting the F8 key, or the **List** option from the File menu will bring up a list of reasons when the cursor is placed in the reason field.
Description	This field can be used to enter a description for the cancellation.

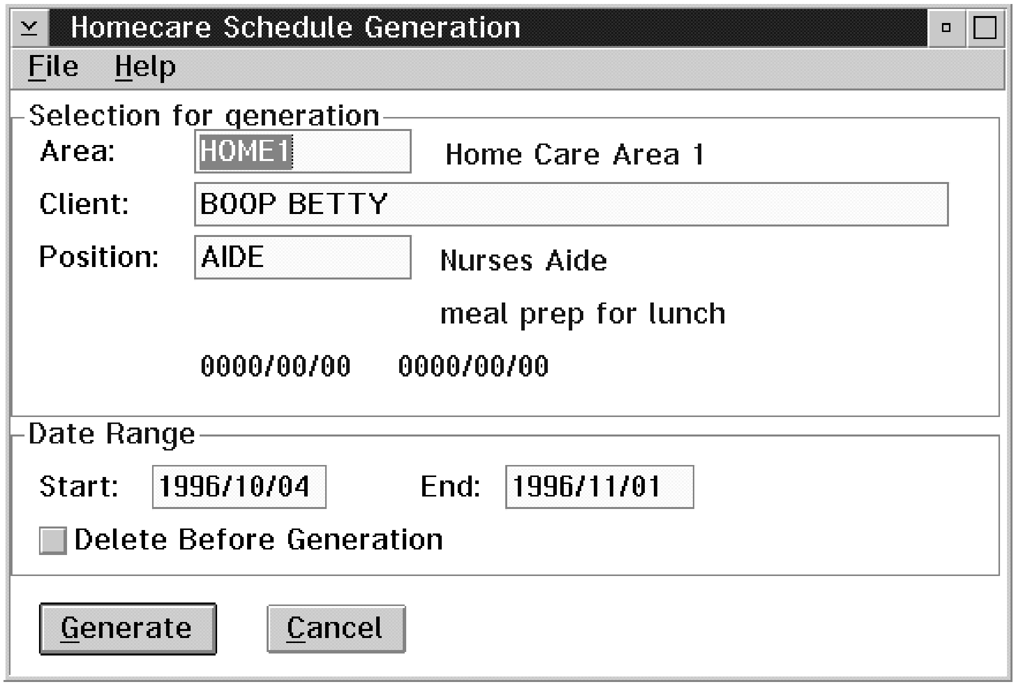
Delete The DELETE button, or the **Delete Entry** option from the File menu will remove the item selected by the selection bar.

Esc (exit) The ESC key, the EXIT button, or the **Exit** option from the File menu will exit the screen without saving any changes.

Generate Detail Schedule

The **Generate Detail Schedule** option creates the detail schedule items from the client activity schedule data and the associated employee assignments.

When the **Generate Detail Schedule** option is selected the following screen will appear:



The dialog box contains the following fields:

Field	Description
Area	The area for which to generate a detail schedule. If this field is left blank the schedule will be generated for all areas. When a client is selected, the area of the client is automatically entered in the area field.
Client	The client for which to generate a detail schedule.
Position	The position for which to generate a detail schedule. A client must be selected before a position can be entered. If this field is left blank the schedule will be generated for all positions of the client.
Start	The starting date of the date range for schedule generation.
End	The ending date of the date range for schedule generation.
Delete Before Generation	This check box forces the deletion of any previously generated detail items.

The function will attempt to allocate the associated employees according to the day of the week and time of day limits set on the employee association. The function tests for a conflict with any other time scheduled for an employee before assigning the employee to the call.

When no associated employee can be allocated the call is created without an employee assigned the locate unallocated calls function is used to assign employees to calls on an ad hoc basis.

The generate detail schedule function allows the user to select individual areas, clients, or client activities to limit the schedule detail generation.

After the detail schedule is generated any employee leave time scheduled is applied to the detail schedule item.

F8 (list) The F8 key, or the **List** option from the File menu will bring up a list of information corresponding to the field in which the cursor is placed. The fields which will have a list available are area, client, and position.

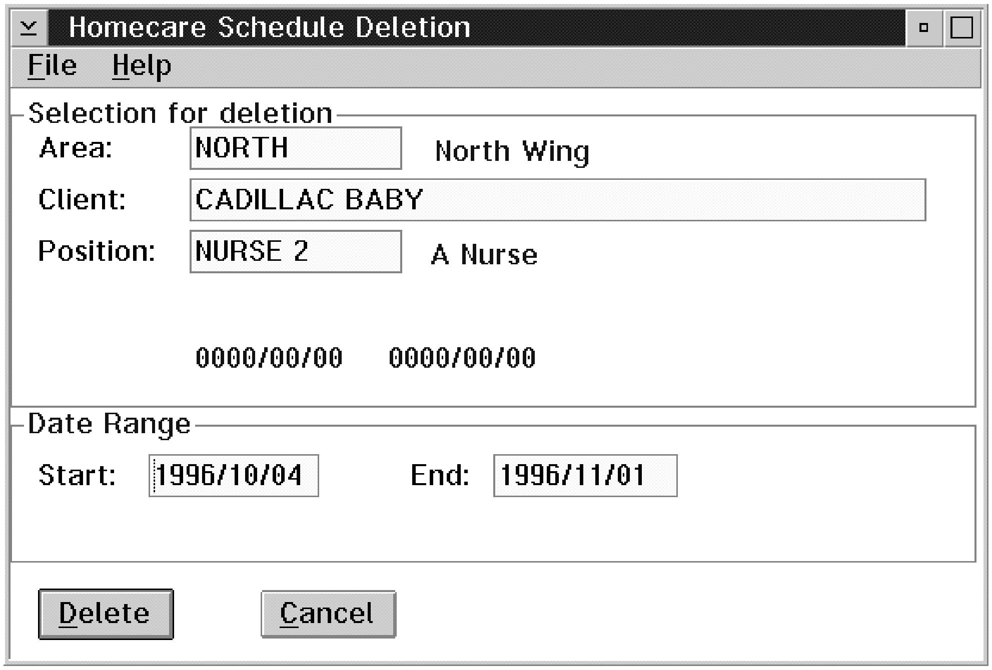
Esc (exit) The ESC key, the CANCEL button, or the **Exi**t option from the File menu will exit the screen without saving any changes.

Generate The GENERATE button will begin the generation of the detail schedule.

Delete Detail Schedule

The **Delete Detail Schedule** option is used to delete detail schedule items.

When the **Delete Detail Schedule** option is selected the following screen will appear:



The dialog box contains the following fields:

Field	Description
Area	The area for which to delete a detail schedule. If this field is left blank the schedule will be detected for all areas. When a client is selected, the area of the client is automatically entered in the area field.
Client	The client for which to delete a detail schedule.
Position	The position for which to delete a detail schedule. A client must be selected before a position can be entered. If this field is left blank the schedule will be deleted for all positions of the client.
Start	The starting date of the date range for schedule deletion.
End	The ending date of the date range for schedule deletion.

The option allows the user to select individual areas clients or client activities to limit the schedule items deleted.

F8 (list) The F8 key, or the **List** option from the File menu will bring up a list of information corresponding to the field in which the cursor is placed. The fields which will have a list available are area, client, and position.

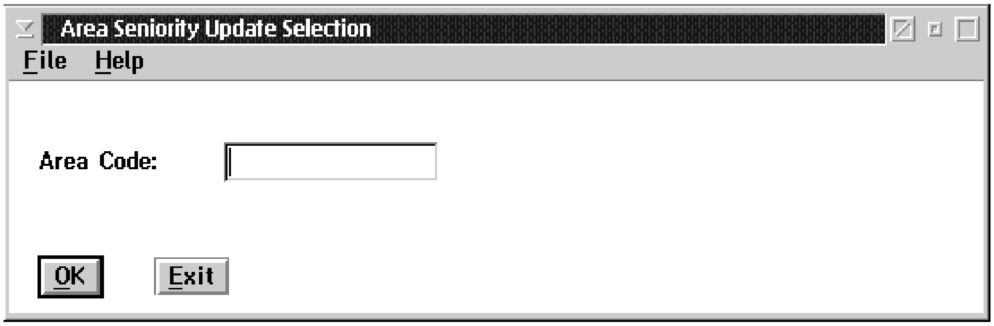
Esc (exit) The ESC key, the CANCEL button, or the **Exit** option from the File menu will exit the screen without saving any changes.

Delete The Delete button will begin the deletion of the detail schedule.

Area Seniority Update

The area seniority update allows you to set up seniority lists for a given area, or the master seniority list if no area has been specified.

The option first requests the area for the seniority list.

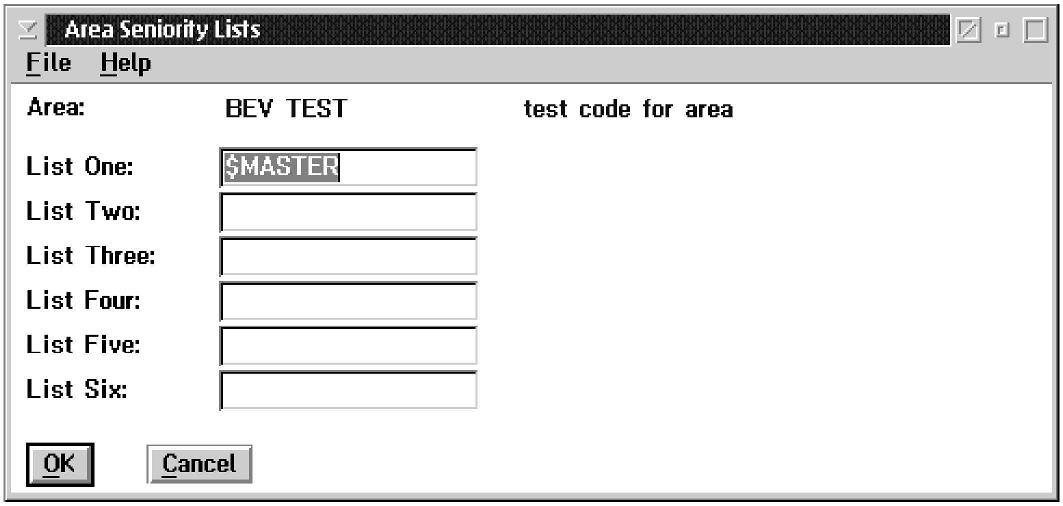


F8 (list) The F8 key or the list option from the file menu will bring up a list of all the areas.

ESC The ESC key, CANCEL button, or Exit option in the File menu will exit the dialog box without saving any changes.

OK The OK button or update from the file menu will allow you to update the seniority list.

After the area is selected the option presents a screen showing the area and description with the ability to select 6 lists for this area.



F8 (List) The F8 key or list option from the file menu will allow you to select a seniority list from the given list of available seniority lists.

ESC The ESC key, CANCEL button, or Exit option in the File menu will exit the dialog box without saving any changes.

OK The OK button or UPDATE option from the file menu will allow you to save your add or changes to the seniority list.

When you are selecting your seniority list from the list of seniority lists you may update or change the lists.

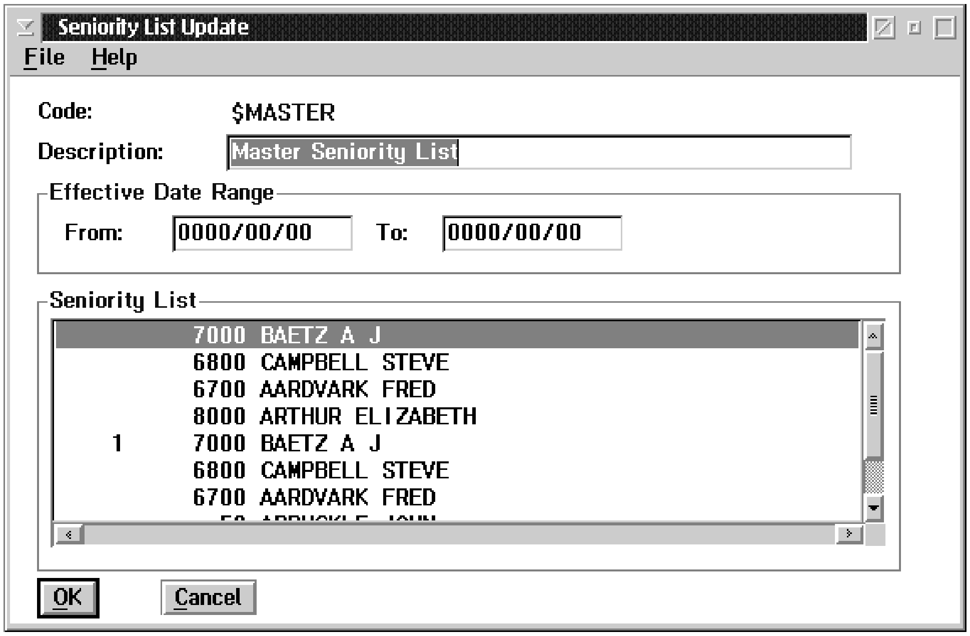
Insert The INSERT button will allow you to add a new list.

Update The UPDATE button will allow you to update a list.

Delete The DELETE button will allow you to delete a list.

OK The OK button or CANCEL button will return you to the screen where you select seniority lists for your area.

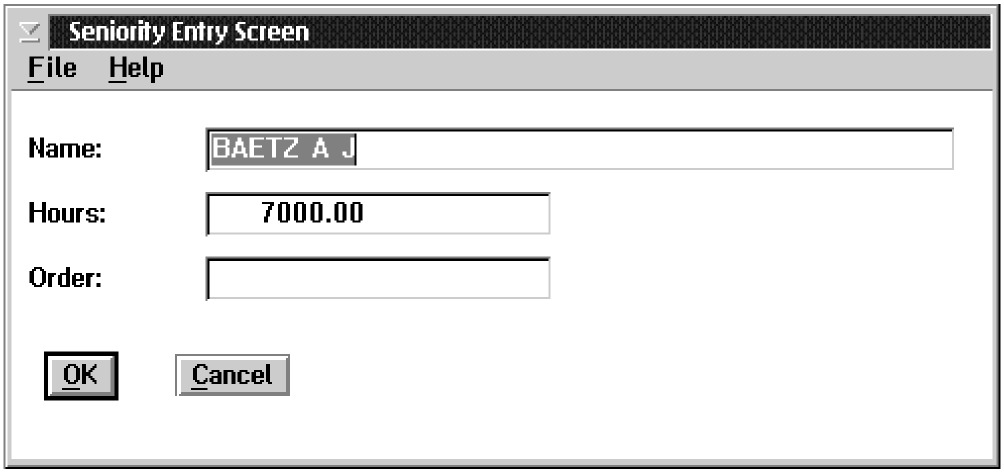
The seniority list update shows you the employees or the seniority list.



The following dialog box allows the data fields to be input:

Field	Description
Code	This field contains the name of the seniority list.
Description	This field contains a description of the seniority list code.
Effective Date From	This field contains the date the list is effective from.
Effective Date To	This field contains the date the list is effective to.
Seniority List	This field shows the order, hours, and the employee name starting with the employee with the most seniority.

The update an employee double click on the line or on a new line for a new employee to be added.



The information required for a new employee to be added is the employee name, number of hours and the order number.

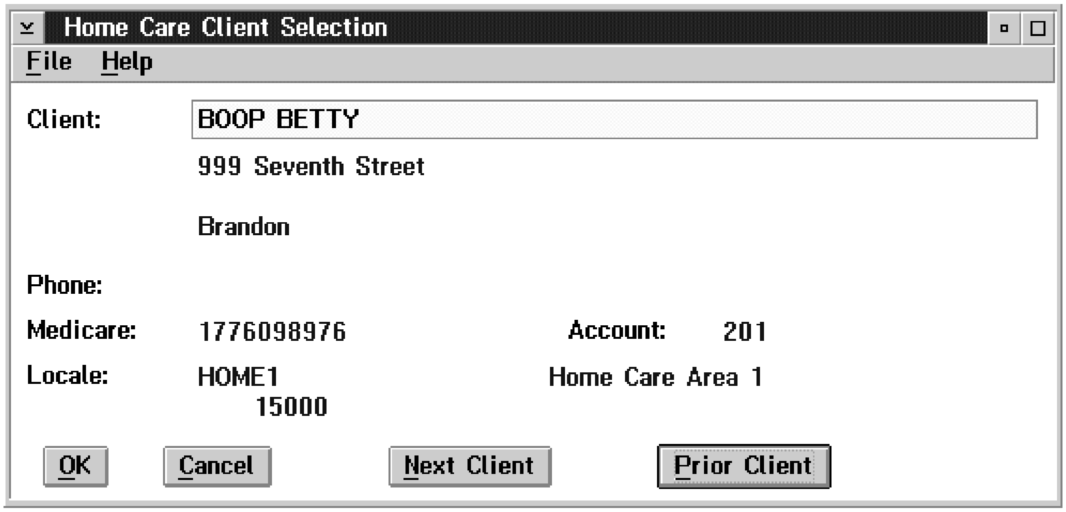
The number of hours are the hours used to determine seniority.

The order field is used to enter the position number if several employees have the same number of hours.

Update Client Master

The **Update Client Master** option allows the user to enter in new clients (through the list option) and update existing clients master information. This information includes address, ID, emergency, and notes.

When the **Update Client Master** option is selected the following dialog box will appear:



The following fields appear in the dialog box:

Field	Description
Client	The client field is used to select an existing client to update by typing in the client's name.
Address	The address of the client will appear below the client field after a client has been selected - no changes can be made to this information in this screen.
Phone	The phone number of the client will appear in this field. This field is for display only - no changes can be made to this information in this screen.
Medicare	The medicare number of the client will appear in this field. This field is for display only - no changes can be made to this information in this screen.
Account	The account number of the client will appear in this field. This field is for display only - no changes can be made to this information in this screen.
Locale	The area of the client's home will appear in this field. This field is for display only - no changes can be made to this information in this screen.
Client Node	This is the internal client Id number.

OK

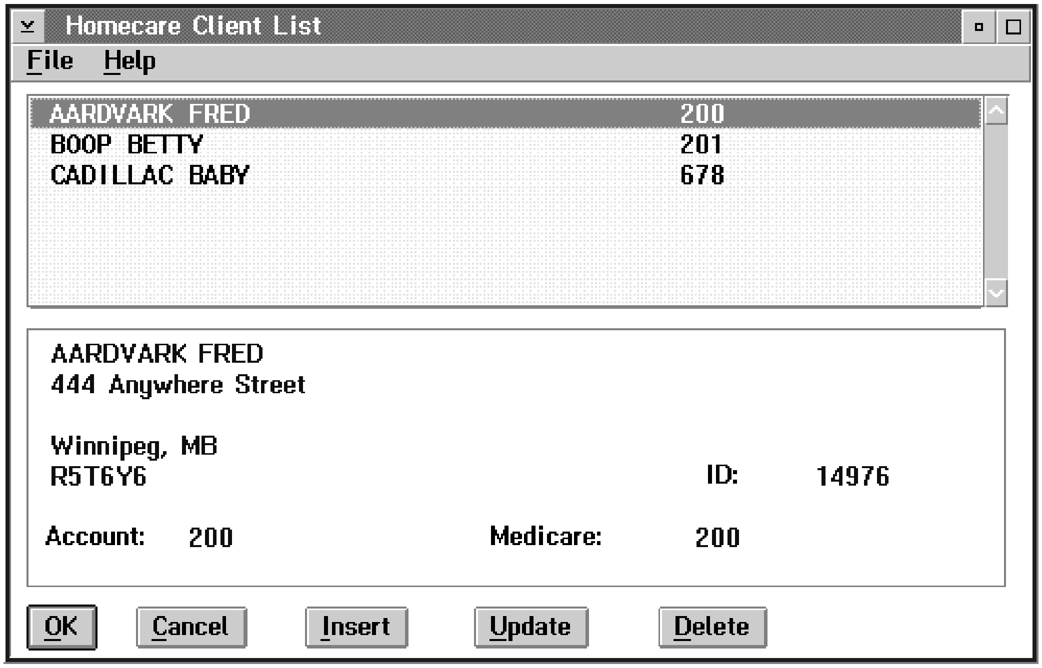
The OK button will allow the user to update the master information entered for the currently selected client.

Esc (exit) The ESC key, CANCEL button, or **Exit** option from the File menu will exit the dialog box.

Next Client The NEXT CLIENT button calls up the next client, in name order.

Prior Client The PRIOR CLIENT button calls up the prior client, in name order.

F8 (list) The F8 key, or the **List** option from the File menu will bring up a list of client names from which the user can select a client.



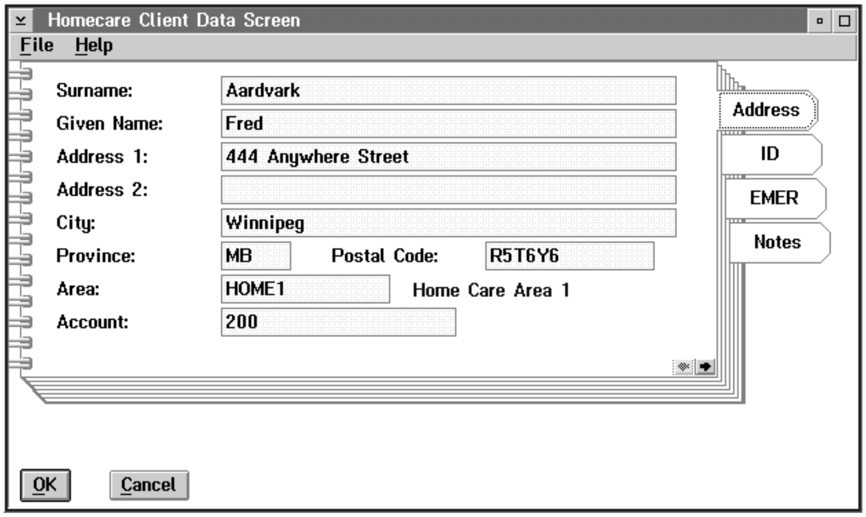
The general information for the client selected with the selection bar will appear at the bottom of the dialog box. General information includes address, ID, account, and medicare number. From the dialog box containing the list the user can insert, update, or delete clients from the list.

Inserting New Clients

To insert a new client do the following:

1. Select the **Update Client Master** option in the Homecare sub menu.
2. In the Home Care Client Selection dialog box select the F8 key, or the **List** option from the File menu.
3. When the Home Care Client List dialog box appears select the INSERT button. The Homecare Client Data Screen dialog box will appear. This dialog box contains four tabs: address, ID, emergency, and notes (a description of each screen is listed below).
4. Fill in the required data and select the OK button.

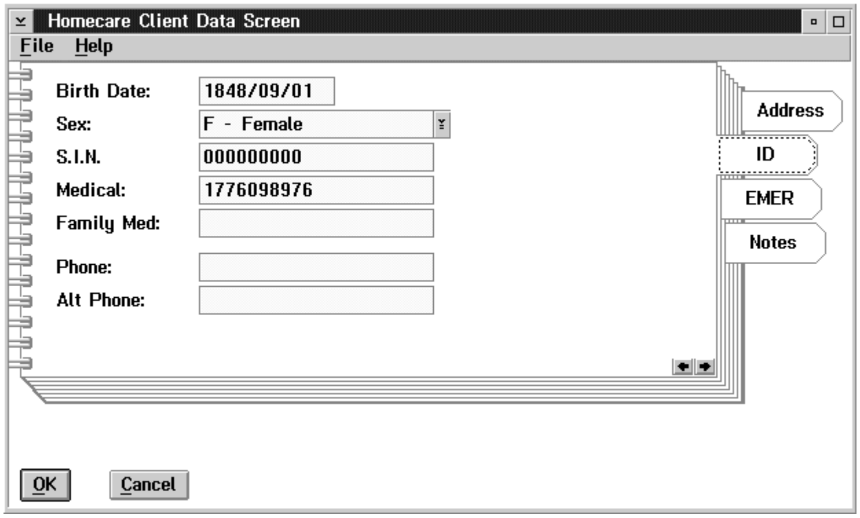
The Address screen appears as follows:



For each item on the list the following data fields may be input:

Field	Description
Surname	This field contains the surname of the client.
Given Name	This field contains the given name.
Address 1	This field contains the address line 1 of the client.
Address 2	This field contains a line 2 address of the client.
City	This field contains the city of the client.
Province	This field contains the province of the client.
Postal Code	This field contains the postal code of the client.
Area	This field contains the area code that the client is located in.
Account	This field contains the account number of the client.

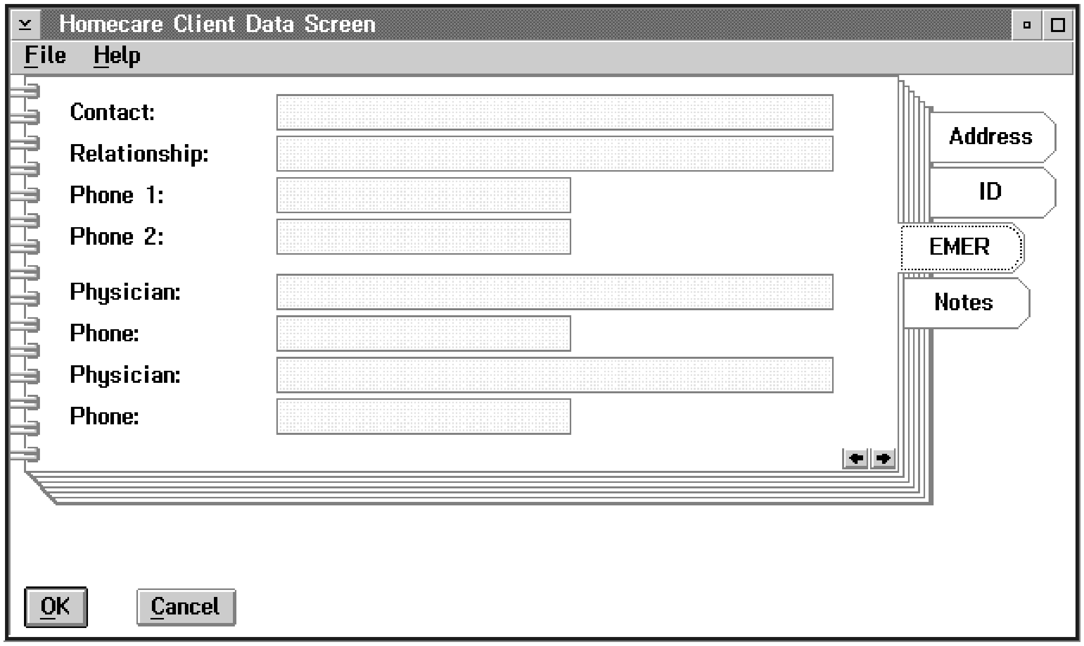
When the ID tab is chosen the following screen will appear:



For each item on the list the following data fields may be input.

Field	Description
Birth Date	This field contains the birth date of the client.
Sex	This field contains the sex of the client.
S.I.N.	This field contains the clients social insurance number.
Medical	This field contains the medical number of the client.
Family Med	This field contains the family medical number of the client.
Phone Number	This field contains the phone number of the client.
Alt Phone	This field contain an alternate phone number for the client.

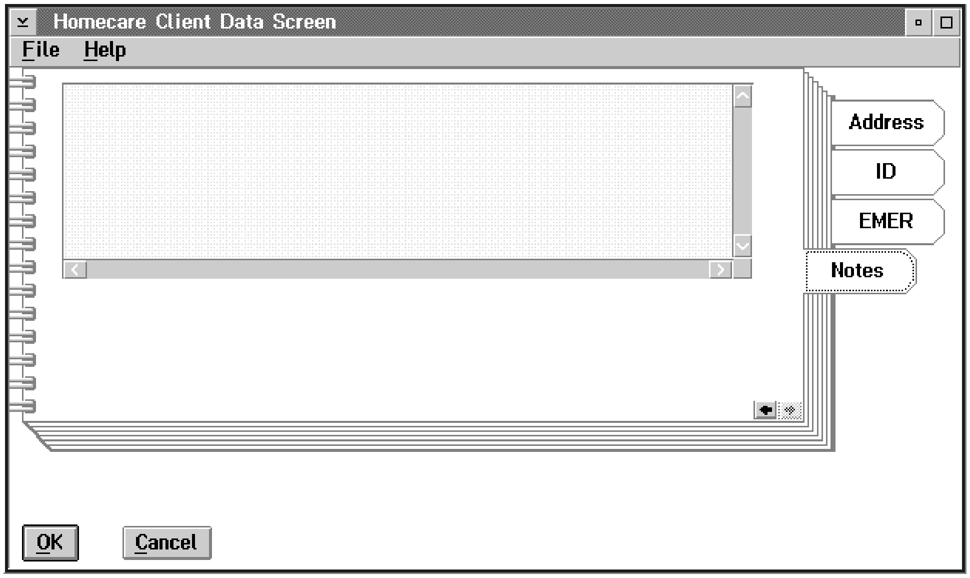
When the Emergency tab is chosen the following screen will appear:



For each item on the list the following data fields may be entered:

Field	Description
Contact	This field contains the name of the person to contact in case of an emergency.
Relationship	This field contains the relationship of the contact person in case of an emergency,
Phone 1	This field contains the phone number of the person to contact in case of an emergency.
Phone 2	This field contains an alternate phone number of the person to contact in case of an emergency,
Physician	This field contains the physician name for the client in case of the emergency.
Phone number	This field contains the phone number of the physician for the client in case of emergency.
Physician	This field contains the alternate physician name for the client in case of emergency.
Phone Number	This field contains the alternate phone number of the physician for the client in case of emergency.

When the Notes tab is chosen the following screen will appear:



This screen allows the user to enter notes about the client.

The notes can be up to 2 pages long.

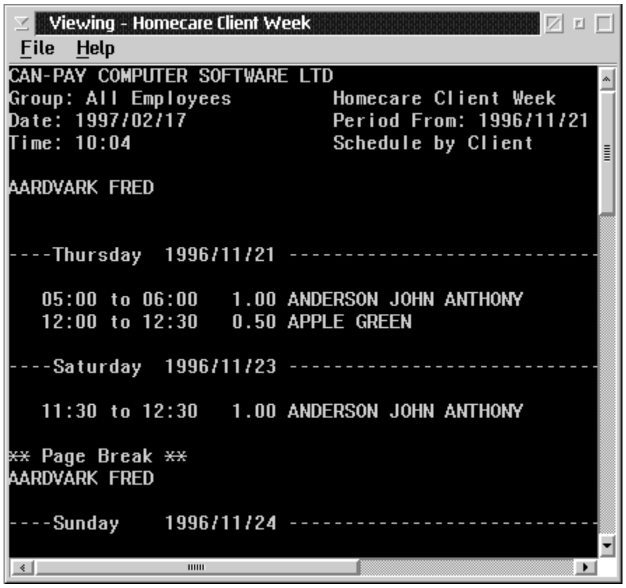
Field	Description
Notes	This screen allows for detailed information to be stored for each client.

Report Viewer

The Report Viewer is a general purpose utility that allows the user to view reports on the screen instead of printing the report on hard copy.

The printer setup screen can be used to turn on the report viewer for all reports. When the "Report Viewer" check box is checked reports will be routed to the report viewer.

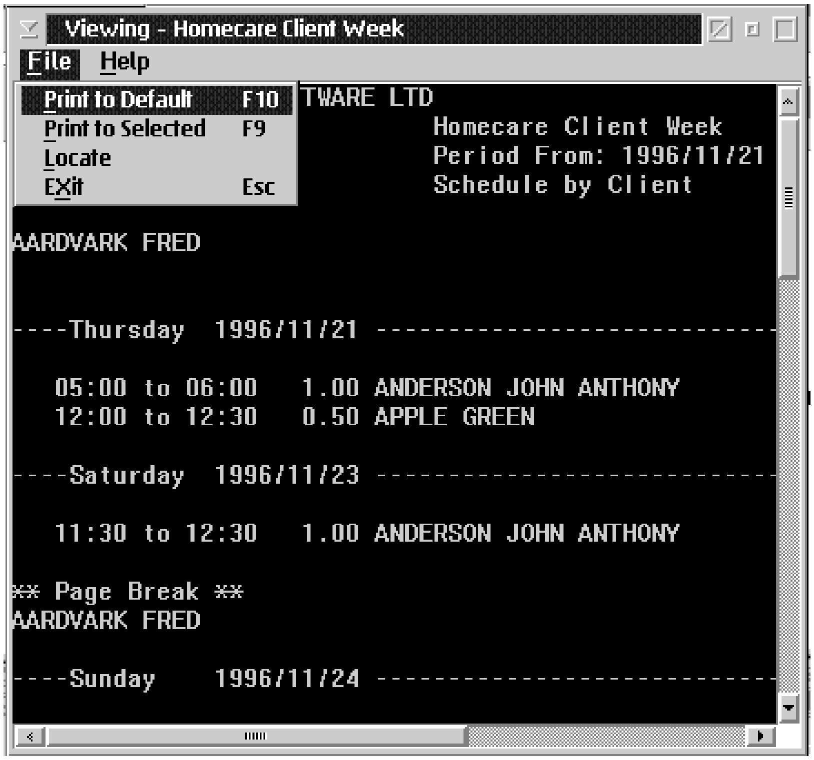
The Report viewer screen displays the report as it is generated the first (5) or nine (9) lines of the screen are used to display the report heading. (nine lines are used when the report width is less than eighty (80) characters). The thumb bar on the screen can be used to scan through the report as it is generated.



The report viewer title bar shows the report title prefaced by the current activity. The activity may be one of three values:

- Generating - This value indicates that the report program is processing data and creating the report.
- Viewing - This value indicates that the report program has completed it's processing and the complete report is available.
- Printing - This value indicates that the program is printing the report to a printer.

The Report Viewer menu bar has three menu selections under the “File” choice:



- Print To Default - This option will print the report in the viewer to the workstations default printer using the default font from the printer setup screen.
- Print To Selected - This option will print the report after allowing the user to select the printer and font.
- Exit - This option is used to exit the report viewer. When the viewer is showing the generating activity the report program will be canceled and the viewer window will close down. When the viewer is showing the printing activity the report printing will be canceled but the viewer window will remain open.

When viewing the report the heading lines will remain at the top of the screen and the report body will scroll in the lower portion of the window. The window may be sized to show more of the report data.

The report body is presented without any page breaks unless the program generating the report has requested a new page for some logical subdivision of the report. The page break is represented by a “page break” line in the report body.

Limitations

When the program generating the report uses dynamic page formatting based on the printer, font, and paper type selected by the user, the printing of the report from the page viewer may not duplicate the results obtained when the report is printed directly.

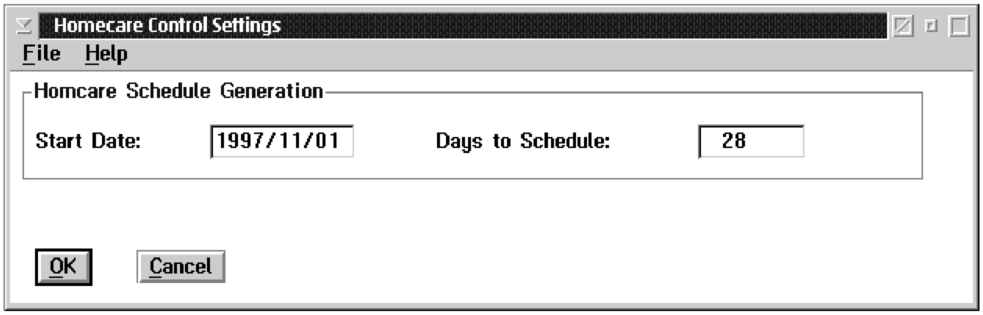
The report viewer obtains the page formatting information by assuming the report will be printed on the workstation default printer using the default font.

If the printer setup screen has the select printer and select font options turned on the report viewer will request a printer and font selection at the start of the report generation activity. The choices made will determine the page formatting used by the report viewer.

The choices made for the printer and font are not preserved for the printing of reports by the report viewer. They are only used to determine the page format for the on-screen display of the report.

Homecare Control Settings

When the Homecare Control Settings is selected from the Schedule menu bar the following screen will appear:



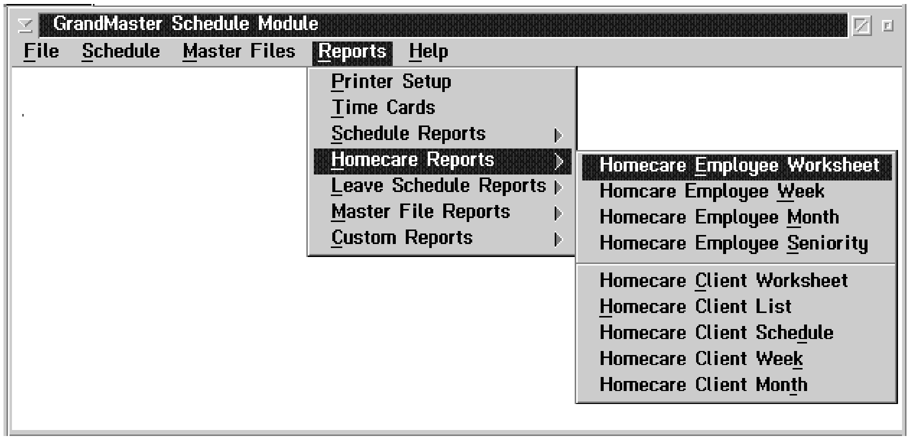
The following fields appear in the dialog box:

Field	Description
Start Date	This field contains the default start date for the homecare schedule processing.
Days to Schedule	This field contains the default number of days for the homecare schedule processing.

Homecare Reports

The Homecare Reports menu from the schedule menu bar is used to print Homecare reports from the home care data.

The Homecare Reports menu appears as follows:



☞ Homecare Reports

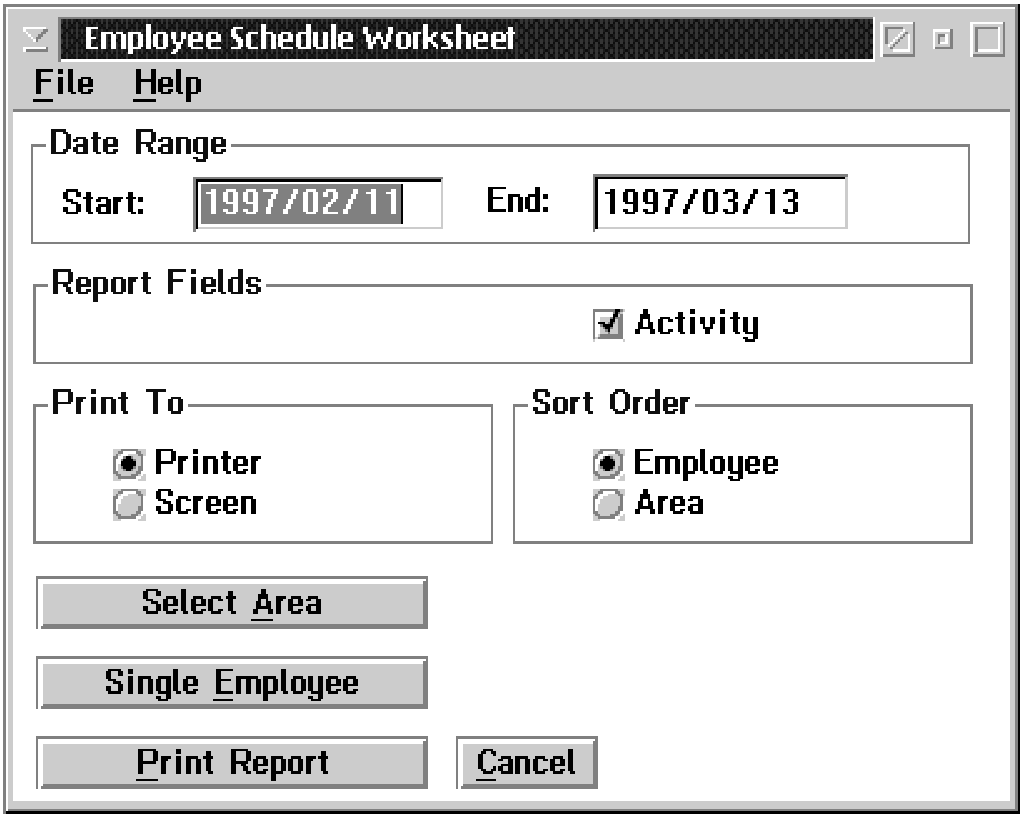
- Homecare Employee Worksheet
- Homecare Employee Week
- Homecare Employee Month
- Homecare Employee Seniority
- Homecare Client Worksheet
- Homecare Client List
- Homecare Client Schedule
- Homecare Client Week
- Homecare Client Month

Homecare Employee Worksheet

The **Homecare Employee Worksheet** option prints the homecare employee worksheet showing the scheduled clients.

This function allows the user to select the date range for the report, the data fields to include in the report, the sort order for the report, and to select the areas to include or exclude in the report.

A single employee schedule worksheet may be selected.



Saving... The selections made by the user can be saved by selecting the **Save Parameters** option in the File menu.

Report Information

This report prints the schedule items for the employee by area or by employee. A new employee worksheet page will be started for each new area, employee, or new month and year.

This report uses underlining to produce the worksheet, this may determine which printer font you wish to select. The report will produce the worksheet in 4, 8, 12 or 24 hour portions depending on the font chosen as this determines the printable length of the line.

This report will show all the scheduled items that have not had an employee assigned to them grouped by area and month. There may be multiple scheduled items per day and the report may print several lines per day if the scheduled items overlap. The unassigned schedule worksheet page will be printed first.

This report will show all the scheduled items per employee and will have the hours blocked out that the employee is available for work. This will look first for the preferred time, then to the available time. The employee worksheet page range will be from the first to the last hour available or scheduled. When the employee is unavailable the time slot will be stroked out. Canceled scheduled items will not be printed. A total of the available hours and scheduled hours per month are printed in the heading.

Date Range Selection

To limit the range of the report the starting and ending dates may be entered. If both dates are zero the entire report will be printed. If only the ending date is zero the report will print from the starting date until the end of the report.

Data Field Selection

A data field is selected for the report when the box to the left of the field has a check mark.

The data field selection for the report allows for the inclusion of the following data fields.

Data Field	Description
Activity	When this field is checked, the activity for the work segment will be printed on the report.

Print To Selection

The Print To selection for the report allows for the following report to be printed to the printer or on the screen.

- Printer
- Screen

Sort Order Selection

The sort order selection for the report allows for the following sort order selections.

- Employee
- Area

Single Employee Option

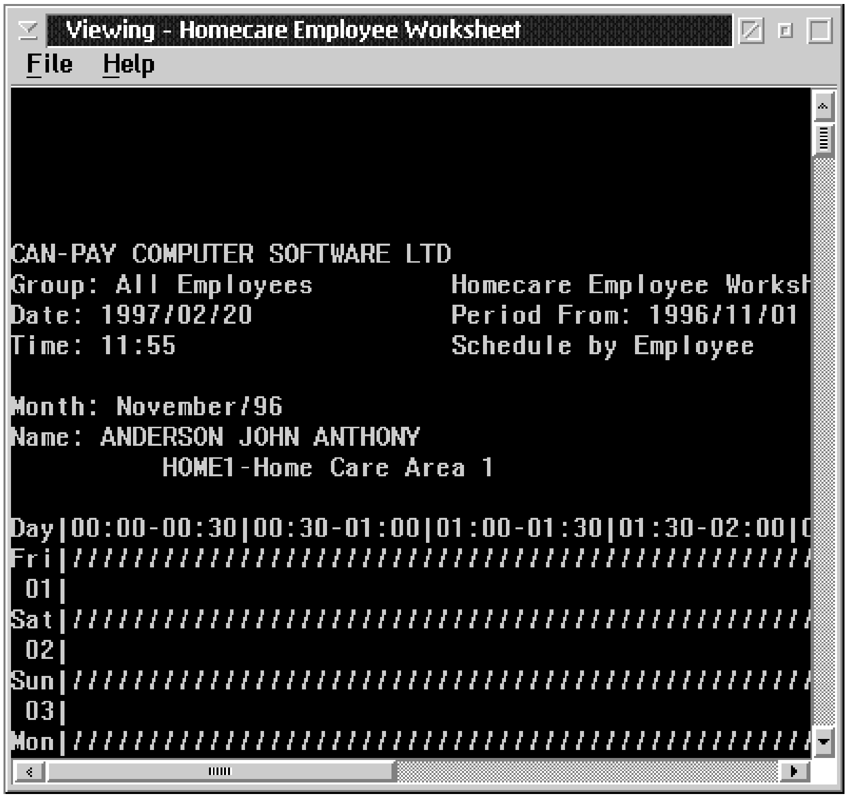
To choose a single employee option for the Homecare Employee Worksheet select the Single Employee object.

For instructions on how to select single employee option refer to the common selection screen chapter in the Schedule manual.

Selected Area Selection

To choose areas for the Homecare Employee Worksheet select the select areas object.

For instructions on how to select area refer to the common selection screen chapter in the Schedule manual. If you have selected area the message Exclude selections or Include selections will be displayed beside the selection button when you return to the select report objects dialog box.


Viewing - Homecare Employee Worksheet
File
Help
CAN-PAY COMPUTER SOFTWARE LTD
Group: All Employees
Homecare Employee Worksh
Date: 1997/02/20
Period From: 1996/11/01
Time: 11:55
Schedule by Employee
Month: November/96
Name: ANDERSON JOHN ANTHONY
HOME1-Home Care Area 1
Day|00:00-00:30|00:30-01:00|01:00-01:30|01:30-02:00|0
Fri|
01|
Sat|
02|
Sun|
03|
Mon|

Homecare Employee Week

The **Homecare Employee Week** option prints the homecare employee activity per week showing the scheduled clients.

This function allows the user to select the date range for the report, the data fields to include in the report, the sort order for the report, and to select the areas to include or exclude in the report. A single employee schedule worksheet may be selected.

Saving... The selections made by the user can be saved by selecting the **Save Parameters** option in the File menu.

☞ If the employee has no activity for that day the report will display the message that the employee is unassigned. If the employee has an availability record for that day the times the employee is available will be printed with the unassigned message.

Date Range Selection

To limit the range of the report the starting and ending dates may be entered. If both dates are zero the entire report will be printed. If only the ending date is zero the report will print from the starting date until the end of the report.

Data Field Selection

A data field is selected for the report when the box to the left of the field has a check mark.

The data field selection for the report allows for the inclusion of the following data fields.

Data Field	Description
Activity	When this field is checked, the activity for the work segment will be printed on the report.

Print To Selection

The Print To selection for the report allows for the following report to be printed to the printer or on the screen.

- Printer
- Screen

Sort Order Selection

The sort order selection for the report allows for the following sort order selections.

- Employee
- Area

Single Employee Option

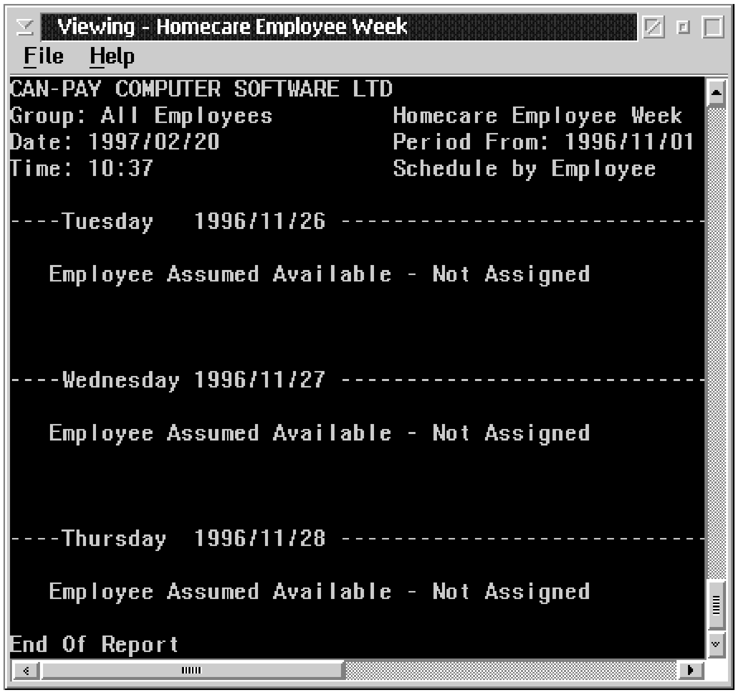
To choose a single employee option for the Homecare Employee Week select the Single Employee object.

For instructions on how to select single employee option refer to the common selection screen chapter in the Schedule manual.

Selected Area Selection

To choose areas for the Homecare Employee Week select the select areas object.

For instructions on how to select area refer to the common selection screen chapter in the Schedule manual. If you have selected area the message Exclude selections or Include selections will be displayed beside the selection button when you return to the select report objects dialog box.

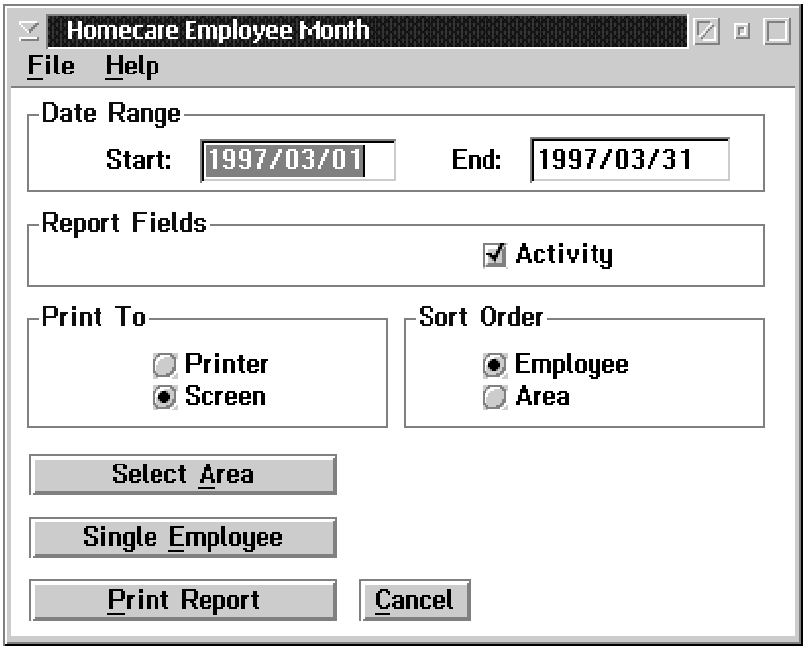

Viewing - Homecare Employee Week
File Help
CAN-PAY COMPUTER SOFTWARE LTD
Group: All Employees
Homecare Employee Week
Date: 1997/02/20
Period From: 1996/11/01
Time: 10:37
Schedule by Employee
----Tuesday 1996/11/26 ----------------------------
Employee Assumed Available - Not Assigned
----Wednesday 1996/11/27 ----------------------------
Employee Assumed Available - Not Assigned
----Thursday 1996/11/28 ----------------------------
Employee Assumed Available - Not Assigned
End Of Report

Homecare Employee Month

The **Homecare Employee Month** option prints the homecare employee activity for the month showing the scheduled clients.

This function allows the user to select the date range for the report, the data fields to include in the report, the sort order for the report, and to select the areas to include or exclude in the report.

A single employee schedule worksheet may be selected.



Saving... The selections made by the user can be saved by selecting the **Save Parameters** option in the File menu.

☞ The report is printed in a calendar format showing the date, start and end time, the client and the activity under the correct day of the week column. If the report page is wide enough the length of the activity will be printed.

Date Range Selection

To limit the range of the report the starting and ending dates may be entered. If both dates are zero the entire report will be printed. If only the ending date is zero the report will print from the starting date until the end of the report.

Data Field Selection

A data field is selected for the report when the box to the left of the field has a check mark.

The data field selection for the report allows for the inclusion of the following data fields.

Data Field	Description
Activity	When this field is checked, the activity for the work segment will be printed on the report.

Print To Selection

The Print To selection for the report allows for the following report to be printed to the printer or on the screen.

- Printer
- Screen

Sort Order Selection

The sort order selection for the report allows for the following sort order selections.

- Employee
- Area

Single Employee Option

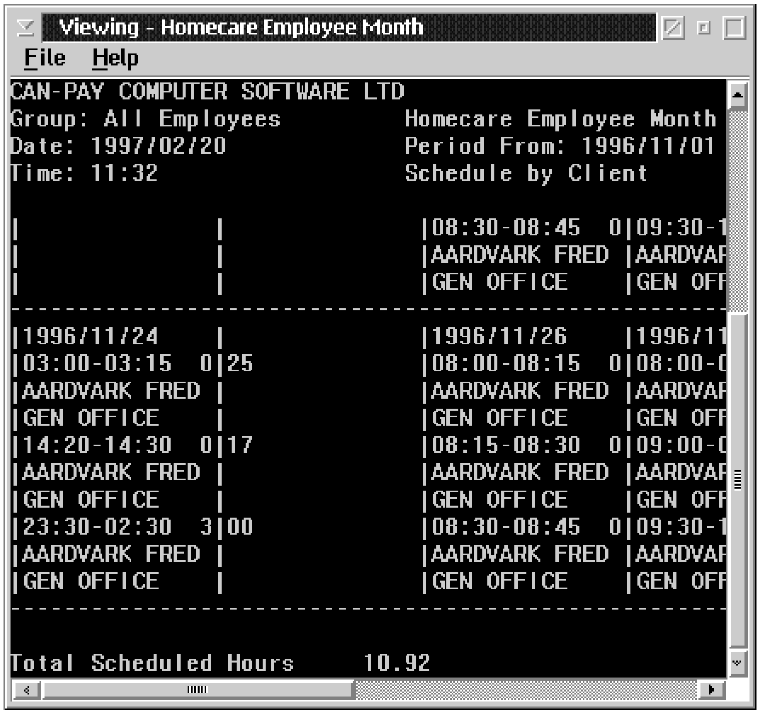
To choose a single employee option for the Homecare Employee Month select the Single Employee object.

For instructions on how to select single employee option refer to the common selection screen chapter in the Schedule manual.

Selected Area Selection

To choose areas for the Homecare Employee Month select the select areas object.

For instructions on how to select area refer to the common selection screen chapter in the Schedule manual. If you have selected area the message Exclude selections or Include selections will be displayed beside the selection button when you return to the select report objects dialog box.



Viewing - Homecare Employee Month

File Help

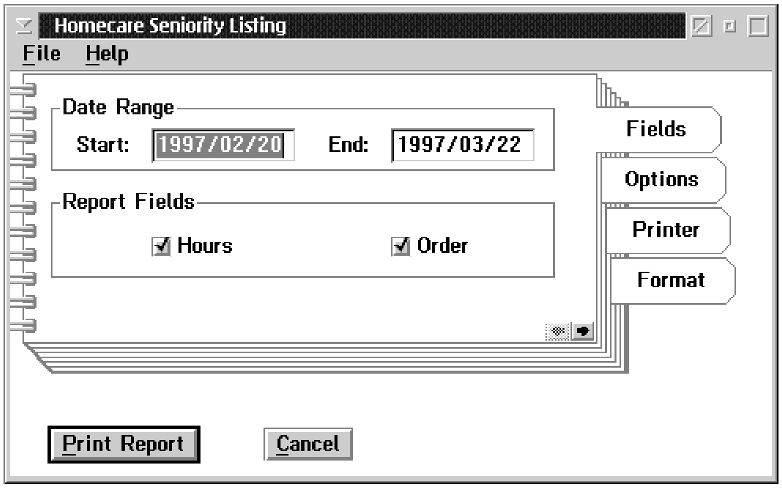
```
CAN-PAY COMPUTER SOFTWARE LTD
Group: All Employees          Homecare Employee Month
Date: 1997/02/20              Period From: 1996/11/01
Time: 11:32                   Schedule by Client

|              |              |08:30-08:45  0|09:30-1
|              |              |AARDVARK FRED |AARDVAR
|              |              |GEN OFFICE    |GEN OFF
-----------------------------------------------------
|1996/11/24    |              |1996/11/26    |1996/11
|03:00-03:15  0|25            |08:00-08:15  0|08:00-0
|AARDVARK FRED |              |AARDVARK FRED |AARDVAR
|GEN OFFICE    |              |GEN OFFICE    |GEN OFF
|14:20-14:30  0|17            |08:15-08:30  0|09:00-0
|AARDVARK FRED |              |AARDVARK FRED |AARDVAR
|GEN OFFICE    |              |GEN OFFICE    |GEN OFF
|23:30-02:30  3|00            |08:30-08:45  0|09:30-1
|AARDVARK FRED |              |AARDVARK FRED |AARDVAR
|GEN OFFICE    |              |GEN OFFICE    |GEN OFF
-----------------------------------------------------

Total Scheduled Hours     10.92
```

Homecare Seniority Listing

The Homecare Seniority option prints the seniority list by area.

The report format is an area list with seniority details, just a seniority list or just the area and seniority list names with no employee details.

The function allows the user to select the date range for the report, the data fields to include in the report, to select a single seniority list or area page breaks, send report to printed or screen and report format.



Date Range Selection

To limit the range of the report the starting and ending dates may be entered. If both dates are zero the entire report will be printed. If only the ending date is zero the report will print from the starting date until the end of the report.

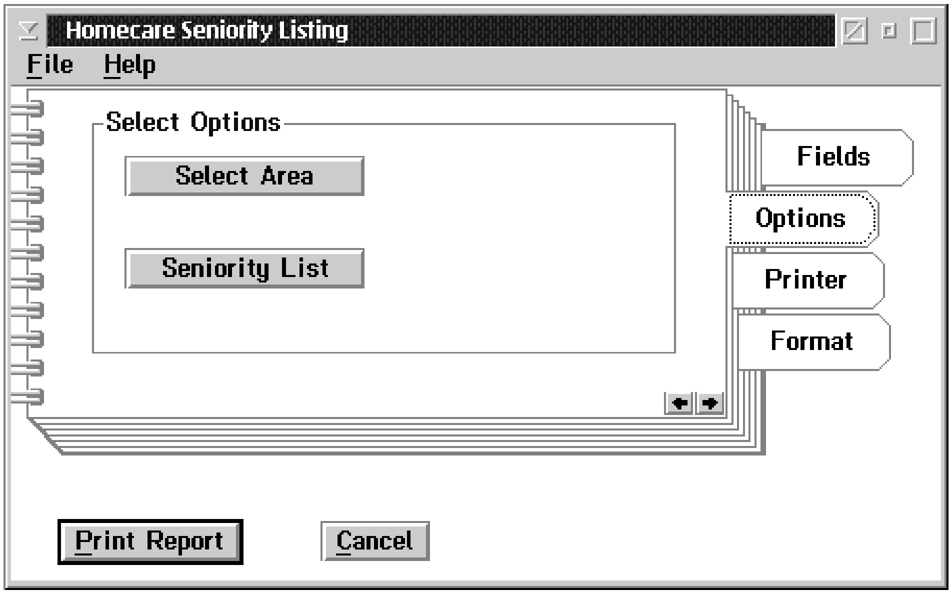
Data Field Selection

A data field is selected for the report when the box to the left of the field has a check mark.

The data field selection for the report allows for the inclusion of the following data fields:

Field	Description
Hours	This field is used to show the number of seniority hours per employee.
Order	This field is used to show the order within the group of employees with the same number of hours.

The following dialog box appears when the options tab is chosen:



Selected Area Selection

To choose areas for the Homecare Seniority Listing select the select areas object.

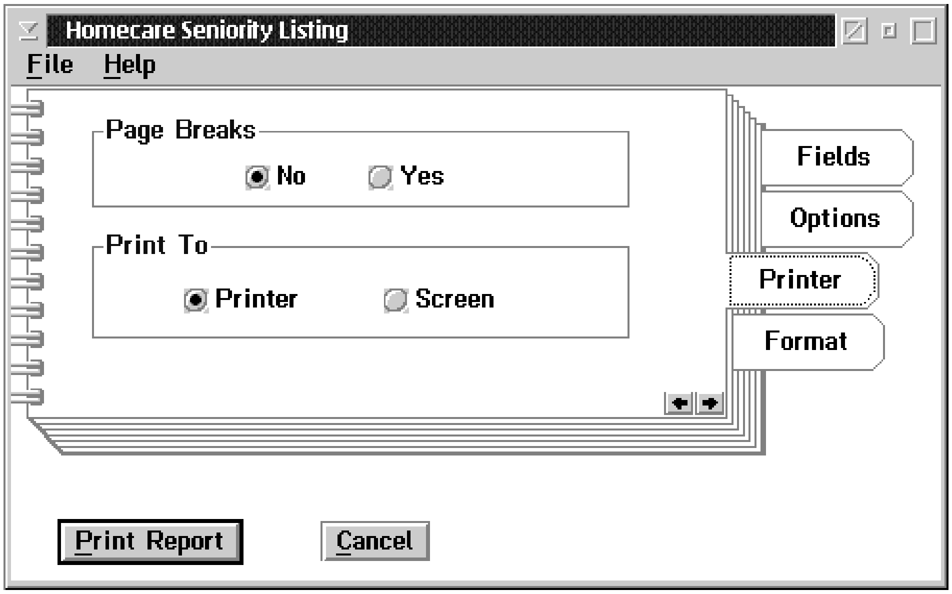
For instructions on how to select area refer to the common selection screen chapter. If you have selected area the message Exclude selections or Include Selections will be displayed beside the selection button when you return to the select report objects dialog box.

Single Seniority List Option

To choose single seniority list option for the Homecare Seniority Listing select the single seniority list object.

For instructions on how to select single seniority list refer to the common selection screen chapter in the Schedule manual.

When the printer tab is chosen the following screen will appear:



Page Break Selection

The page break selection for the report allows for the following page break selections.

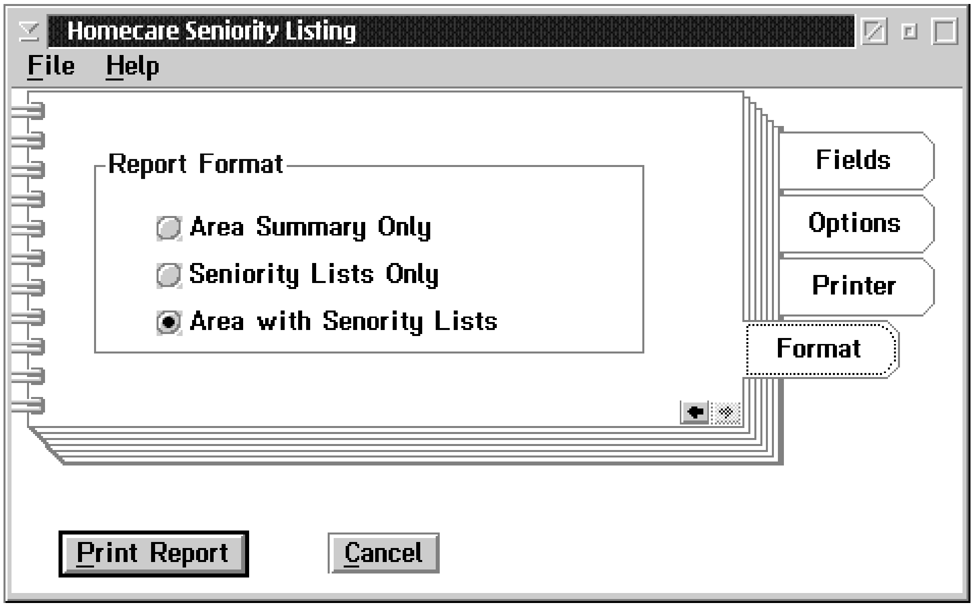
- No
- Yes

Print To Selection

The Print To Selection for the report allows for the following report to be printed to the report or on the screen.

- Printer
- Screen

The following dialog box will appear when the format tab is chosen:



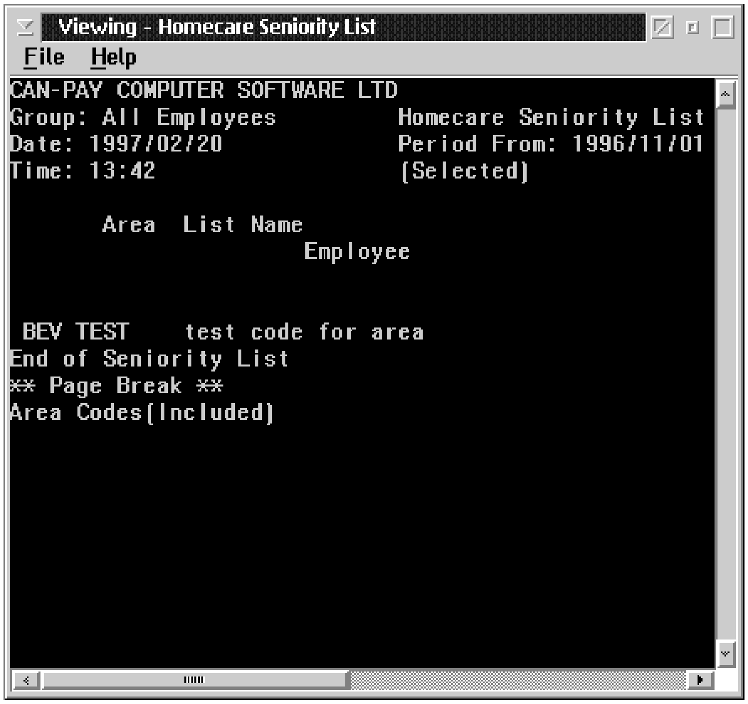
Report Format Selection

The sort order selection for the report allows for the following format selections:

- Area Summary Only
- Seniority Lists Only
- Area with Seniority Lists

The report format selection for the report allows for the inclusion of the following data fields:

Field	Description
Area Summary Only	This field is used to print the area list showing the seniority list code names only.
Seniority List Only	This field is used to print only the seniority list selected.
Area Seniority Lists	This field is used to print the areas selected with the seniority list code names as well as all the employee details.

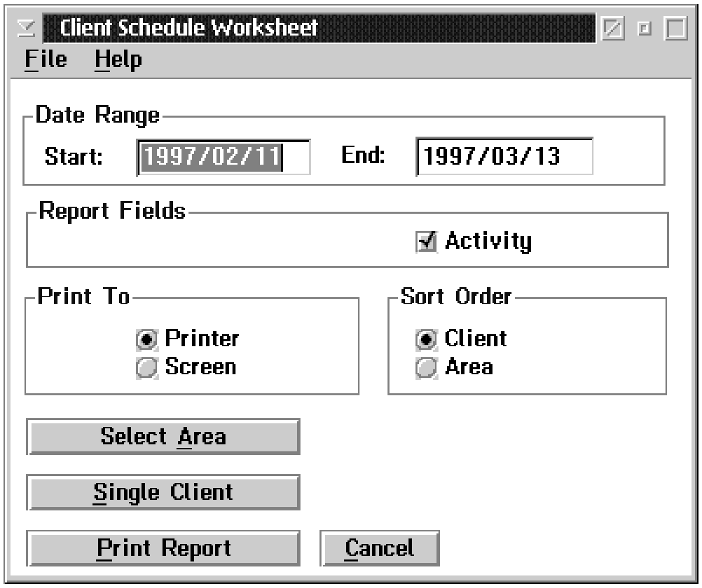

Viewing - Homecare Seniority List
File Help
CAN-PAY COMPUTER SOFTWARE LTD
Group: All Employees
Homecare Seniority List
Date: 1997/02/20
Period From: 1996/11/01
Time: 13:42
(Selected)
Area List Name
Employee
BEV TEST test code for area
End of Seniority List
** Page Break **
Area Codes(Included)

Homecare Client Worksheet

The **Homecare Client Worksheet** option prints the homecare client worksheet showing the scheduled employees.

The function allows the user to select the date range for the report, the data fields to include in the report, the sort order for the report, and to select the areas to include or exclude in the report.

A single client schedule worksheet may be selected.



Saving... The selections made by the user can be saved by selecting the **Save Parameters** option in the File menu.

Report Information

This report prints the scheduled items for the client by area or by clients. A new client worksheet page will be started for each new area, employee, or new month and year.

This report uses underlining to produce the worksheet, this may determine which printer font you wish to select. The report will produce the worksheet in 4, 8, 12 or 24 hour portions depending on the font chosen as this determines the printable length of the line.

This report will show all the scheduled items, those that have an employee assigned to them will show the employee name. There may be multiple scheduled items per day and the report may print several lines per day if the scheduled items overlap. All canceled scheduled items will be shown as canceled. A total of the scheduled hours is printed in the heading. The client worksheet page range will be from the first to last hour scheduled.

Date Range Selection

To limit the range of the report the starting and ending dates may be entered. If both dates are zero the entire report will be printed. If only the ending date is zero the report will print from the starting date until the end of the report.

Data Field Selection

A data field is selected for the report when the box to the left of the field has a check mark.

The data field selection for the report allows for the inclusion of the following data fields.

Data Field	Description
Activity	When this field is checked, the activity for the work segment will be printed on the report.

Print To Selection

The Print To selection for the report allows for the following report to be printed to the printer or on the screen.

- Printer
- Screen

Sort Order Selection

The sort order selection for the report allows for the following sort order selections.

- Client
- Area

Single Client Option

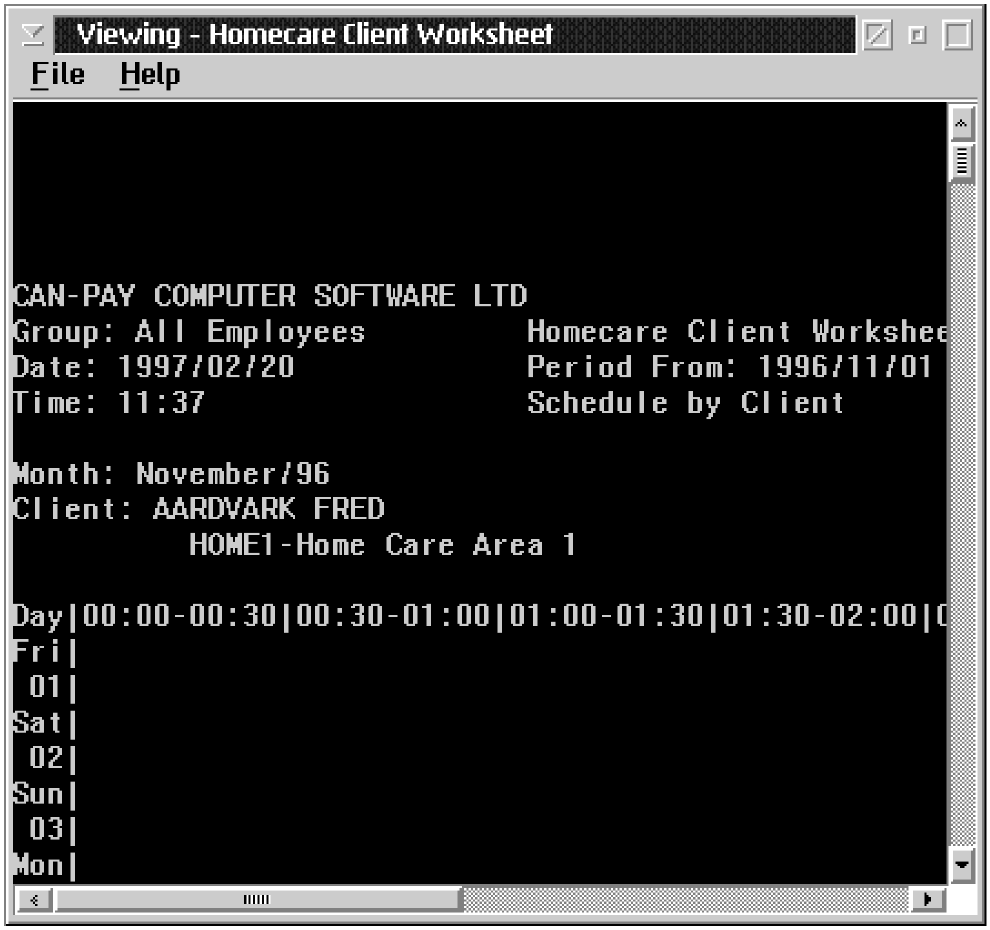
To choose single client option for the Homecare Client Worksheet select the single client object.

For instructions on how to select single client refer to the common selection screen chapter in the Schedule manual.

Area Selection

To choose areas for the Homecare Client Worksheet select the area selection option in the File menu.

For instructions on how to select area selection option refer to the common selection screen chapter in the Schedule manual.

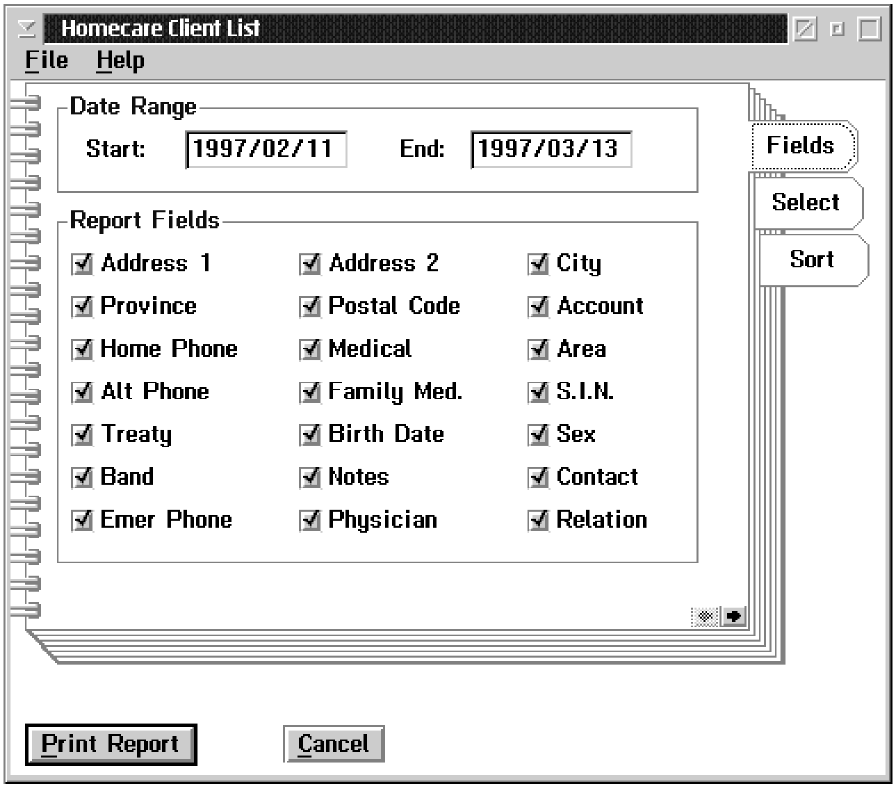

Viewing - Homecare Client Worksheet
File
Help
CAN-PAY COMPUTER SOFTWARE LTD
Group: All Employees
Homecare Client Workshee
Date: 1997/02/20
Period From: 1996/11/01
Time: 11:37
Schedule by Client
Month: November/96
Client: AARDVARK FRED
HOME1-Home Care Area 1
Day|00:00-00:30|00:30-01:00|01:00-01:30|01:30-02:00|0
Fri|
01|
Sat|
02|
Sun|
03|
Mon|

Homecare Client List

The **Homecare Client List** option prints the client list.

The function allows the user to select the date range for the report, the data fields to include in the report, the sort order for the report, and to select the areas to include or exclude in the report.

A single client list may be selected. The report allows for the options of printing the activity schedules and the employee assignments.



Saving... The selections made by the user can be saved by selecting the **Save Parameters** option in the File menu.

Report Options

This report prints the client list by area or by client. A new page will be started for each client if the activity schedule and the assigned employee are requested. The client's name is always printed on a report. This report requires a font that will produce a minimum of 100 characters per print line. If no activities are found a message “no activities scheduled” will be printed. If no employees are found a message “no employee assigned” will be printed.

The print option for the report allows for the following print option selections

- Show Activity Schedules
- Show Employee Assignments

☞ Activity Schedule

The following fields are printed for each activity

- activity name and position
- up to six weeks for the schedule if available
- up to 3 time slots per day if available
- for each week the starting and ending time is printed for each day

☞ Employee Assignments

The following fields are printed for each employee assignment

- employee name
- start dates
- end dates
- days in the month
- hours per day
- starting time
- ending time

If the activity schedule is not being printed the activity name & position will be printed for each employer.

Date Range Selection

To limit the range of the report the starting and ending dates may be entered. If both dates are zero the entire report will be printed. If only the ending date is zero the report will print from the starting date until the end of the report.

Data Field Selection

A data field is selected for the report when the box to the left of the field has a check mark.

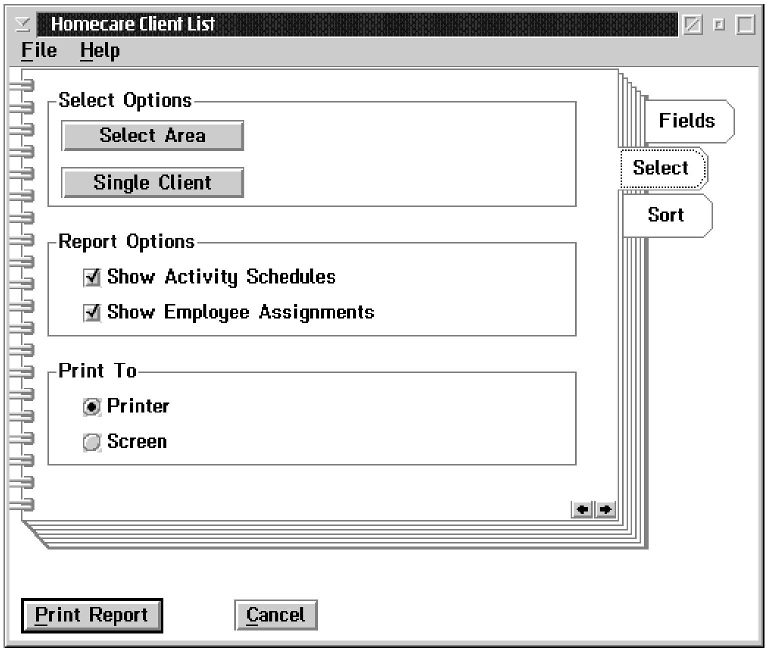
The data field selection for the report allows for the inclusion of the following data fields.

Field	Description
Address 1	address line 1
Address 2	address line 2
City	name of city
Province	2 character province code
Postal Code	postal code
Account	client account number
Home Phone	home phone number
Alt Phone	alternate phone number
Area	area of client
Medical	medical insurance number
Family Medical	family medical insurance number
S.I.N.	social insurance number
Birth Date	client birth date
Sex	male or female (Y or M)
Treaty	treaty number
Band	band number
Notes	notes on client
Contact	contact
Emer Phone	emergency phone number
Physician	name of physician of client
Relation	the relation to client

The print options are selected by clicking on the box before the desired print option with the mouse once, this option will be included when the box by the field has a check mark.

To de-select the print options click on the box before the desired option with the mouse and the check mark will disappear.

The following dialog box appears when the select tab is chosen:



Selected Area Selection

To choose areas for the Homecare Client List select the select areas object.

For instructions on how to select area refer to the common selection screen chapter. If you have selected area the message Exclude selections or Include selections will be displayed beside the selection button when you return to the select report objects dialog box.

Single Client Option

To choose single client option for the Homecare Client List select the single client object.

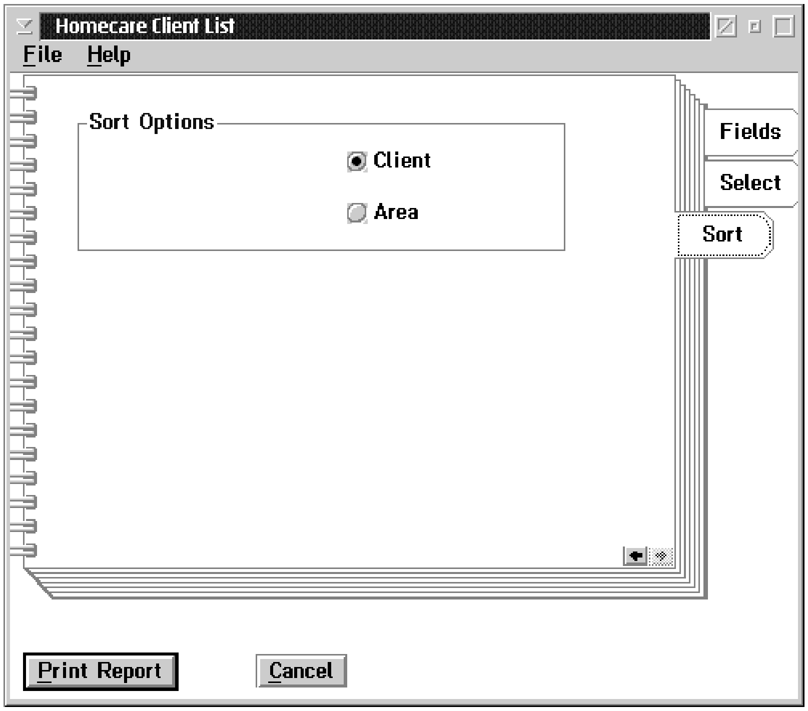
For instructions on how to select single client refer to the common selection screen chapter in the Schedule manual.

Print To Selection

The Print To selection for the report allows for the following report to be printed to the printer or on the screen.

- Printer
- Screen

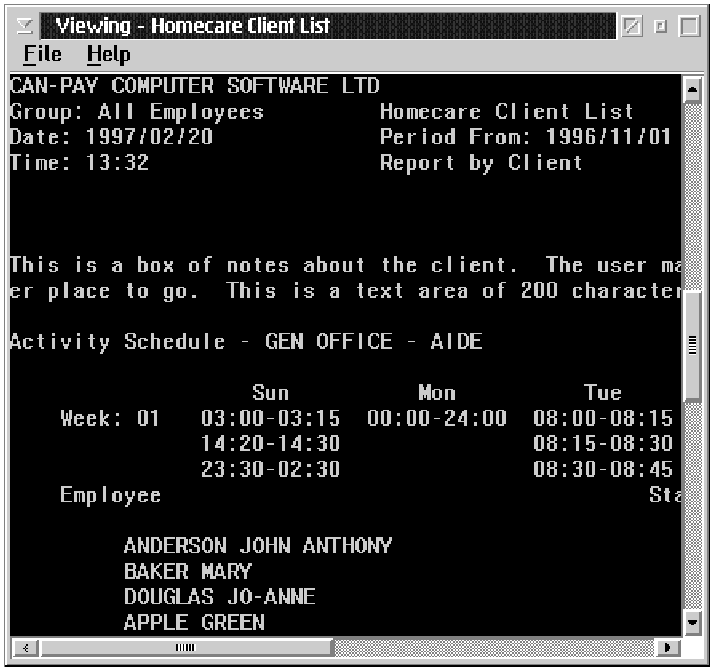
The following dialog box appear when the sort tab is chosen:



Sort Order Selection

The sort order selection for the report allows for the following sort order selections.

- Client
- Area

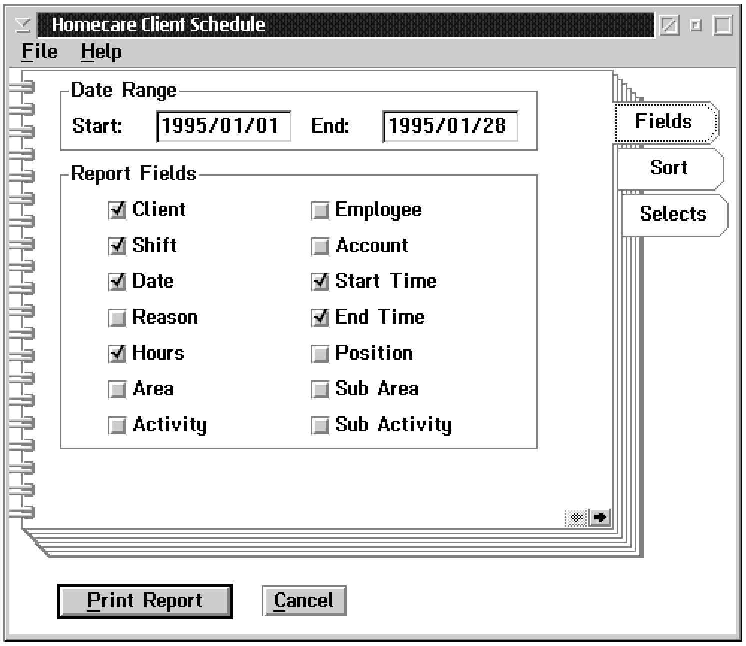

Viewing - Homecare Client List
File Help
CAN-PAY COMPUTER SOFTWARE LTD
Group: All Employees Homecare Client List
Date: 1997/02/20 Period From: 1996/11/01
Time: 13:32 Report by Client
This is a box of notes about the client. The user ma
er place to go. This is a text area of 200 character
Activity Schedule - GEN OFFICE - AIDE
Sun Mon Tue
Week: 01 03:00-03:15 00:00-24:00 08:00-08:15
14:20-14:30 08:15-08:30
23:30-02:30 08:30-08:45
Employee Sta
ANDERSON JOHN ANTHONY
BAKER MARY
DOUGLAS JO-ANNE
APPLE GREEN

Homecare Client Schedule

The **Homecare Client Schedule** option prints the client list.

The function allows the user to select the date range for the report, the data fields to include in the report, the sort order for the report, and to select the areas to include or exclude in the report.

A single client list may be selected. The report allows for the options of printing the activity schedules and the employee assignments.



Saving... The selections made by the user can be saved by selecting the **Save Parameters** option in the File menu.

Date Range Selection

To limit the range of the report the starting and ending dates may be entered. If both dates are zero the entire report will be printed. If only the ending date is zero the report will print from the starting date until the end of the report.

Data Field Selection

A data field is selected for the report when the box to the left of the field has a check mark.

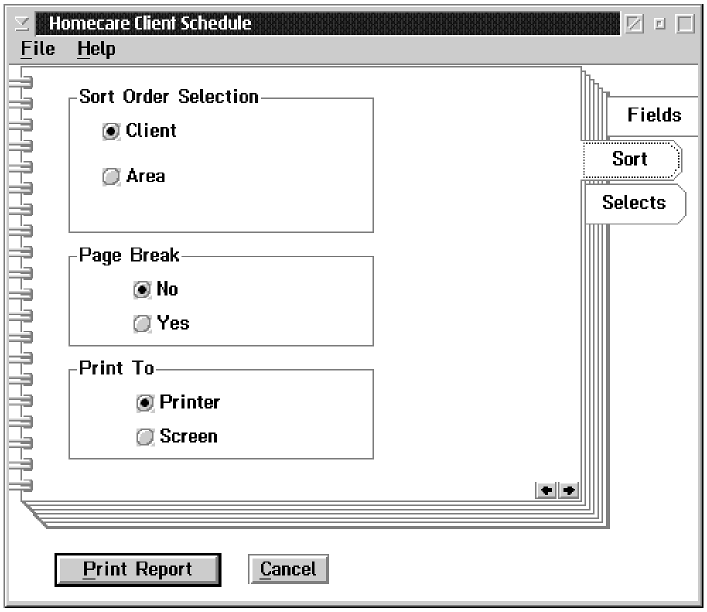
The data field selection for the report allows for the inclusion of the following data fields.

The Report field selection allows for inclusion of the following data fields:

Field	Description
Client	When this field is checked the name of the client having the client schedule item will be printed on the report.
Date	When this field is checked the date for the client schedule item will be printed on the report.
Start Time	When this field is checked the starting time for the client schedule item will be printed on the report.
End Time	When this field is checked the ending time for the client schedule item will be printed on the report.
Area	When this field is checked the area for the client schedule item will be printed on the report.
Sub Area	When this field is checked the sub area for the client schedule item will be printed on the report.
Activity	When this field is checked the activity for the client schedule item will be printed on the report.
Sub Activity	When this field is checked the sub activity for the client schedule item will be printed on the report.
Badge	When this field is checked the badge number of the employee having the client schedule item will be printed on the report.
Hours	When this field is checked the hours for the client schedule item will be printed on the report.
Position	When this field is checked the position for the client schedule item will be printed on the report.
Reason	When this field is checked the reason for the client schedule item will be printed on the report.
Shift	When this field is checked the shift for the client schedule item will be printed on the report.
Employee	When this field is checked the employee for the client schedule item will be printed on the report.
Account	When this field is checked the account for the client schedule item will be printed on the report.

The print options are selected by clicking on the box before the desired print option with the mouse once, this option will be included when the box by the field has a check mark.

The following screen will appear when the sort tab is chosen:



Sort Order Selection The sort order selection for the report allows for the following sort order selections.

- Client
- Area

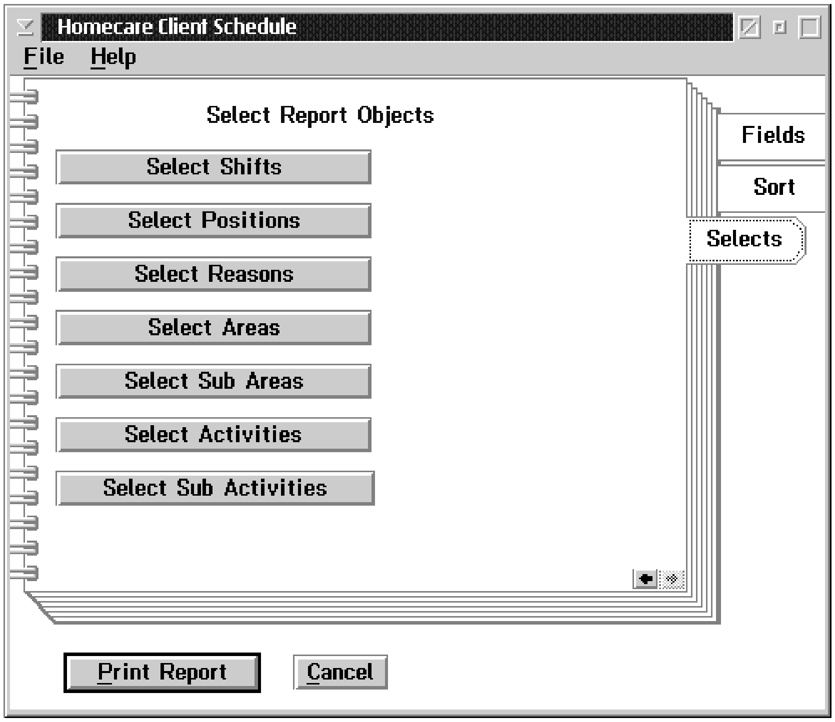
Page Break The page break selection for the report allows for the following page break selections.

- No
- Yes

Print To Selection The Print To selection for the report allows for the following report to be printed to the printer or on the screen.

- Printer
- Screen

The following screen will appear when the select tab is chosen:



Select Report Objects

The Select Report Objects selection for the report allows for the following selection options:

Shift

For instructions on how to select shifts refer to page 11 of the common selection screen chapter. If you have selected shifts the message Exclude selections or Include selections will be displayed beside the SELECT SHIFTS button when you return to the select report objects dialog box.

Position

For instructions on how to select positions refer to page 9 of the common selection screen chapter. If you have selected positions the message Exclude selections or Include selections will be displayed beside the SELECT POSITIONS button when you return to the select report objects dialog box.

Reason

For instructions on how to select reasons refer to page 10 of the common selection screen chapter. If you have selected reasons the message Exclude selections or Include selections will be displayed beside the SELECT REASON button when you return to the select report objects dialog box.

Area

For instructions on how to select area refer to page 5 of the common selection screen chapter. If you have selected area the message Exclude selections or Include selections will be displayed beside the SELECT AREA button when you return to the select report objects dialog box.

Sub Area

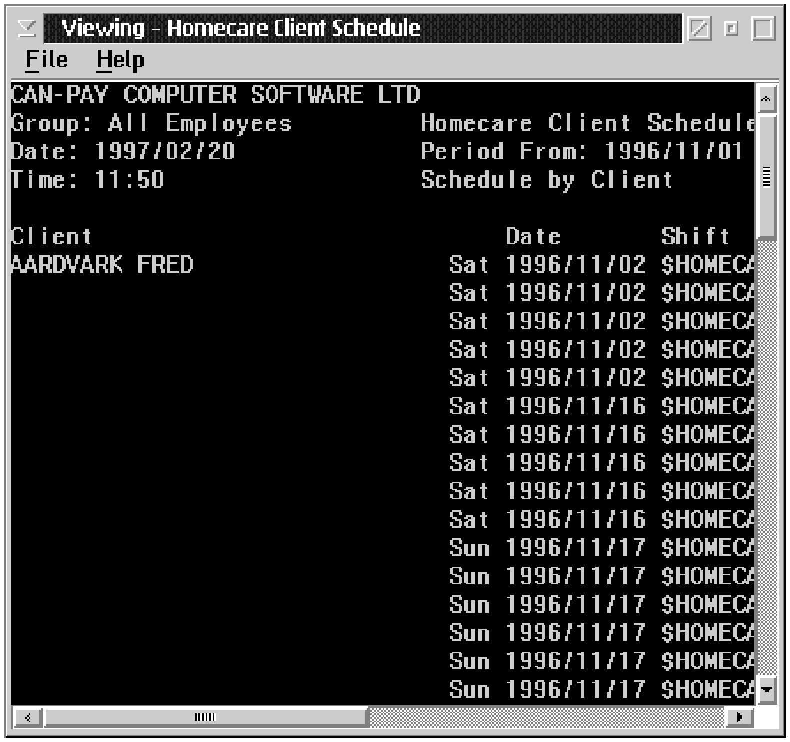
For instructions on how to select sub area refer to page 16 of the common selection screen chapter. If you have selected sub area the message Exclude selections or Include selections will be displayed beside the SELECT SUB AREA button when you return to the select report objects dialog box.

Activity

For instructions on how to select activity refer to page 4 of the common selection screen chapter. If you have selected activity the message Exclude selections or Include selections will be displayed beside the SELECT ACTIVITY button when you return to the select report objects dialog box.

Sub Activity

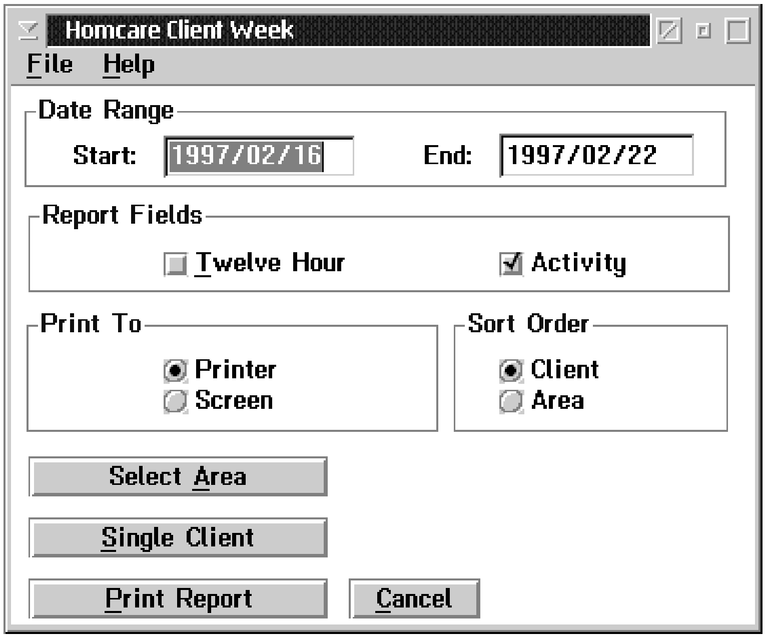
For instructions on how to select sub activity refer to page 15 of the common selection screen chapter. If you have selected sub activity the message Exclude selections or Include selections will be displayed beside the SELECT SUB ACTIVITY button when you return


Viewing - Homecare Client Schedule
File Help
CAN-PAY COMPUTER SOFTWARE LTD
Group: All Employees Homecare Client Schedule
Date: 1997/02/20 Period From: 1996/11/01
Time: 11:50 Schedule by Client
Client Date Shift
AARDVARK FRED Sat 1996/11/02 $HOMECA
Sat 1996/11/02 $HOMECA
Sat 1996/11/02 $HOMECA
Sat 1996/11/02 $HOMECA
Sat 1996/11/02 $HOMECA
Sat 1996/11/16 $HOMECA
Sat 1996/11/16 $HOMECA
Sat 1996/11/16 $HOMECA
Sat 1996/11/16 $HOMECA
Sat 1996/11/16 $HOMECA
Sun 1996/11/17 $HOMECA
Sun 1996/11/17 $HOMECA
Sun 1996/11/17 $HOMECA
Sun 1996/11/17 $HOMECA
Sun 1996/11/17 $HOMECA
Sun 1996/11/17 $HOMECA

Homecare Client Week

The **Homecare Client Week** option prints the homecare client weekly activities showing the scheduled employees.

The function allows the user to select the date range for the report, the data fields to include in the report, the sort order for the report, and to select the areas to include or exclude in the report. A single client schedule worksheet may be selected.



Saving... The selections made by the user can be saved by selecting the **Save Parameters** option in the File menu.

Date Range Selection

To limit the range of the report the starting and ending dates may be entered. If both dates are zero the entire report will be printed. If only the ending date is zero the report will print from the starting date until the end of the report.

Data Field Selection

A data field is selected for the report when the box to the left of the field has a check mark.

The data field selection for the report allows for the inclusion of the following data fields.

Data Field	Description
Activity	When this field is checked, the activity for the work segment will be printed on the report.
Twelve Hour	When this field is checked, the time will be printed as am or p.m. not the 24 hour clock.

Print To Selection

The Print To selection for the report allows for the following report to be printed to the printer or on the screen.

- Printer
- Screen

Sort Order Selection

The sort order selection for the report allows for the following sort order selections.

- Client
- Area

Single Client Option

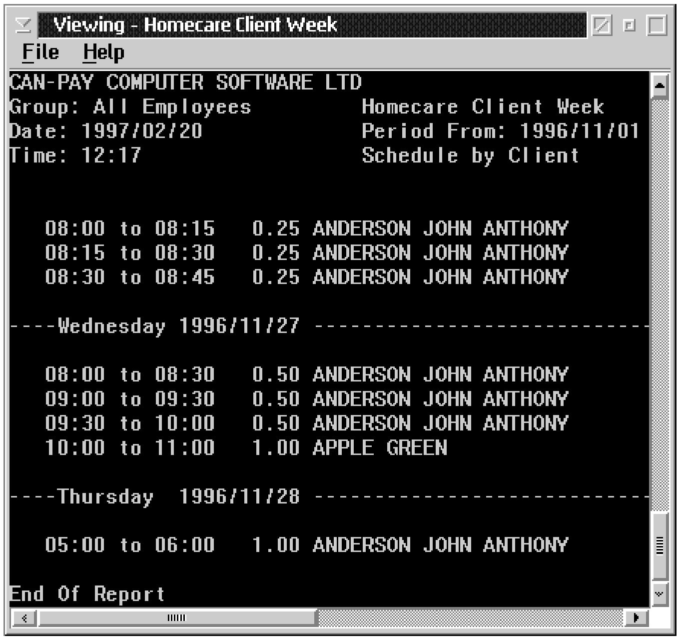
To choose single client option for the Homecare Client Week select the single client object.

For instructions on how to select single client refer to the common selection screen chapter in the Schedule manual.

Area Selection

To choose areas for the Homecare Client Week select the area selection option in the File menu.

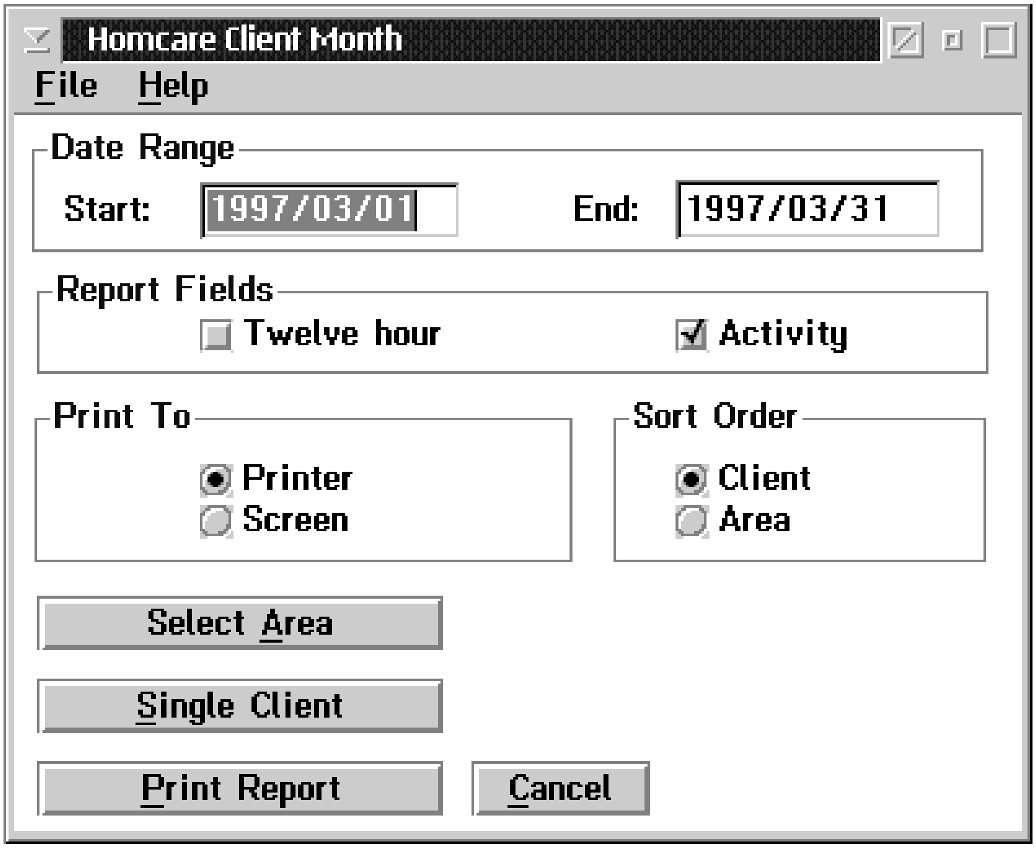
For instructions on how to select area selection option refer to the common selection screen chapter in the Schedule manual.


Viewing - Homecare Client Week
File Help
CAN-PAY COMPUTER SOFTWARE LTD
Group: All Employees
Homecare Client Week
Date: 1997/02/20
Period From: 1996/11/01
Time: 12:17
Schedule by Client
08:00 to 08:15 0.25 ANDERSON JOHN ANTHONY
08:15 to 08:30 0.25 ANDERSON JOHN ANTHONY
08:30 to 08:45 0.25 ANDERSON JOHN ANTHONY
----Wednesday 1996/11/27 ----------------------------
08:00 to 08:30 0.50 ANDERSON JOHN ANTHONY
09:00 to 09:30 0.50 ANDERSON JOHN ANTHONY
09:30 to 10:00 0.50 ANDERSON JOHN ANTHONY
10:00 to 11:00 1.00 APPLE GREEN
----Thursday 1996/11/28 ----------------------------
05:00 to 06:00 1.00 ANDERSON JOHN ANTHONY
End Of Report

Homecare Client Month

The **Homecare Client Month** option prints the homecare client monthly activities showing the scheduled employees.

The function allows the user to select the date range for the report, the data fields to include in the report, the sort order for the report, and to select the areas to include or exclude in the report. A single client schedule worksheet may be selected.



Saving... The selections made by the user can be saved by selecting the **Save Parameters** option in the File menu.

Date Range Selection

To limit the range of the report the starting and ending dates may be entered. If both dates are zero the entire report will be printed. If only the ending date is zero the report will print from the starting date until the end of the report.

Data Field Selection

A data field is selected for the report when the box to the left of the field has a check mark.

The data field selection for the report allows for the inclusion of the following data fields.

Data Field	Description
Activity	When this field is checked, the activity for the work segment will be printed on the report.
Twelve Hour	When this field is checked, the time will be printed as am or p.m. not the 24 hour clock.

Print To Selection

The Print To selection for the report allows for the following report to be printed to the printer or on the screen.

- Printer
- Screen

Sort Order Selection

The sort order selection for the report allows for the following sort order selections.

- Client
- Area

Single Client Option

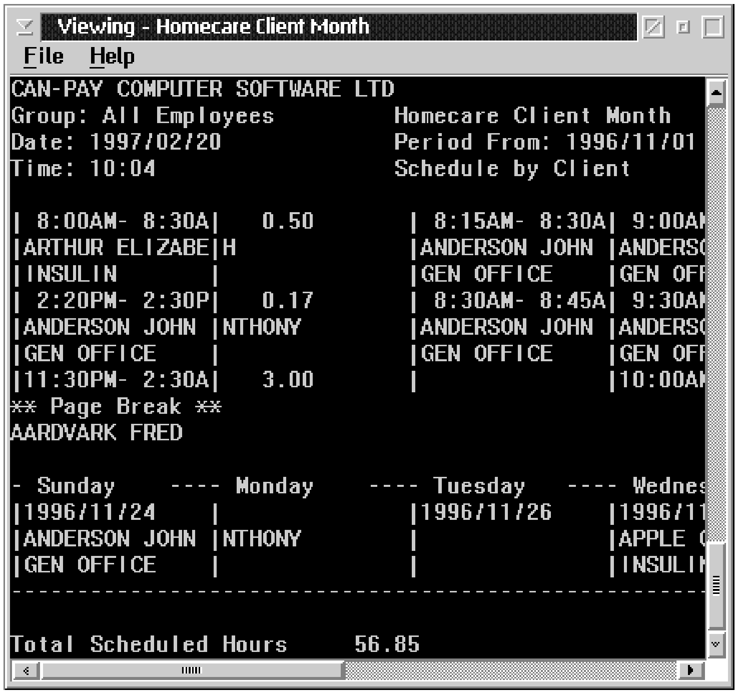
To choose single client option for the Homecare Client Month select the single client object.

For instructions on how to select single client refer to the common selection screen chapter in the Schedule manual.

Area Selection

To choose areas for the Homecare Client Month select the area selection option in the File menu.

For instructions on how to select area selection option refer to the common selection screen chapter in the Schedule manual.

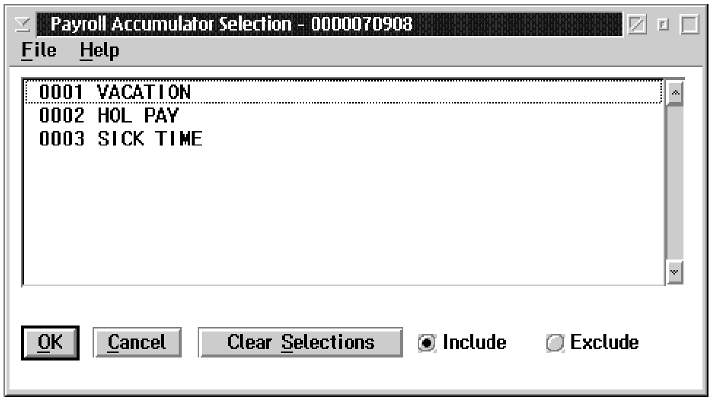

Viewing - Homecare Client Month
File Help
CAN-PAY COMPUTER SOFTWARE LTD
Group: All Employees Homecare Client Month
Date: 1997/02/20 Period From: 1996/11/01
Time: 10:04 Schedule by Client
| 8:00AM- 8:30A| 0.50 | 8:15AM- 8:30A| 9:00AM
|ARTHUR ELIZABE|H |ANDERSON JOHN |ANDERSO
|INSULIN | |GEN OFFICE |GEN OFF
| 2:20PM- 2:30P| 0.17 | 8:30AM- 8:45A| 9:30AM
|ANDERSON JOHN |NTHONY |ANDERSON JOHN |ANDERSO
|GEN OFFICE | |GEN OFFICE |GEN OFF
|11:30PM- 2:30A| 3.00 | |10:00AM
** Page Break **
AARDVARK FRED
- Sunday ---- Monday ---- Tuesday ---- Wednes
|1996/11/24 | |1996/11/26 |1996/11
|ANDERSON JOHN |NTHONY | |APPLE C
|GEN OFFICE | | |INSULIN
Total Scheduled Hours 56.85

Common Selection Screens

Accumulators

The Payroll Accumulator Selection screen allows you to select accumulators from the list of activities displayed.

The dialog box for the Payroll Accumulator Selection appears as follows:



The accumulators are selected by clicking on the desired accumulator with the mouse once, this accumulator will now be highlighted. Any number of accumulators may be selected by repeating this procedure.

When all the desired accumulators are selected click on the OK button.

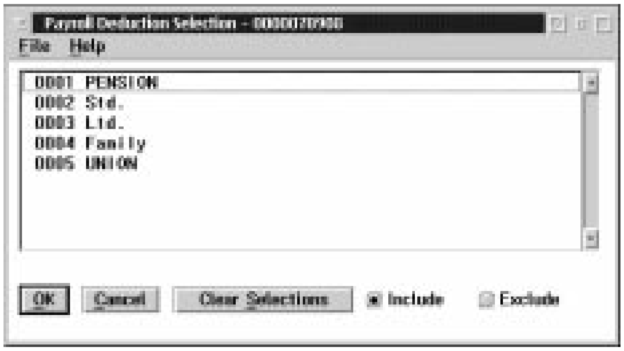
To de-select a single accumulator simply click on the highlighted accumulator and it will no longer be selected. To de-select all the selected accumulators click on the Clear Selection object.

When you are selecting certain accumulator you may include or exclude all the selected accumulators in the report. This is done by clicking on the Include or Exclude object.

Deductions

The Payroll Deduction Selection screen allows you to select deduction from the list of deductions displayed.

The dialog box for the Payroll Deduction Selection appears as follows:



The deductions are selected by clicking on the desired deductions with the mouse once, this deduction will now be highlighted. Any number of deductions may be selected by repeating this procedure.

When all the desired deductions are selected click on the OK button.

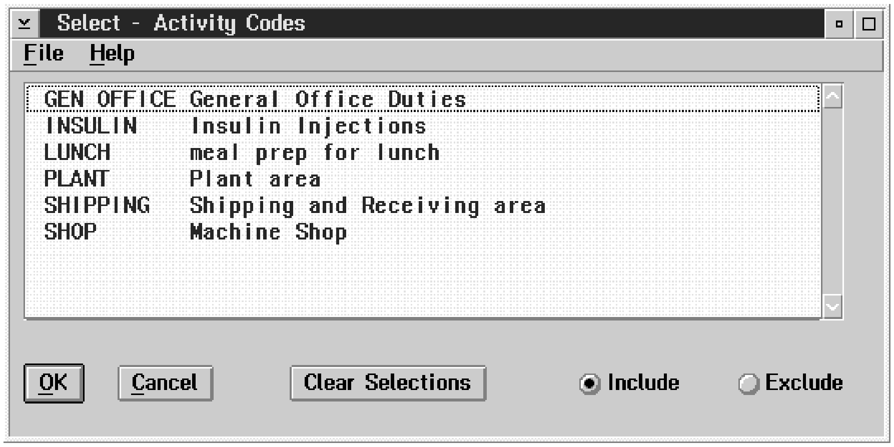
To de-select a single deduction simply click on the highlighted deduction and it will no longer be selected. To de-select all the selected activities click on the Clear Selection object.

When you are selecting certain deductions you may include or exclude all the selected activities in the report. This is done by clicking on the Include or Exclude object.

Select Activity Selection

The Select Activity Selection screen allows you to select activities from the list of activities displayed.

The dialog box for the Activity Selection appears as follows:



The activities are selected by clicking on the desired activities with the mouse once, this activity will now be highlighted. Any number of activities may be selected by repeating this procedure.

When all the desired activities are selected click on the OK button.

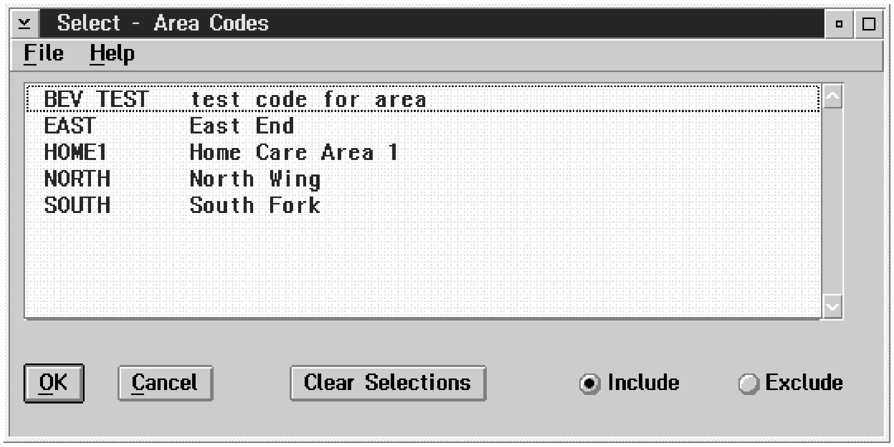
To de-select a single activity simply click on the highlighted activity and it will no longer be selected. To de-select all the selected activities click on the Clear Selection object.

When you are selecting certain activities you may include or exclude all the selected activities in the report. This is done by clicking on the Include or Exclude object.

Select Area Selection

The Select Area Selection screen allows you to select areas from the list of areas displayed.

The dialog box for the Area Selection option appears as follows:



The areas are selected by clicking on the desired area with the mouse once, this area will now be highlighted. Any number of areas may be selected by repeating this procedure.

When all the desired areas are selected click on the OK button.

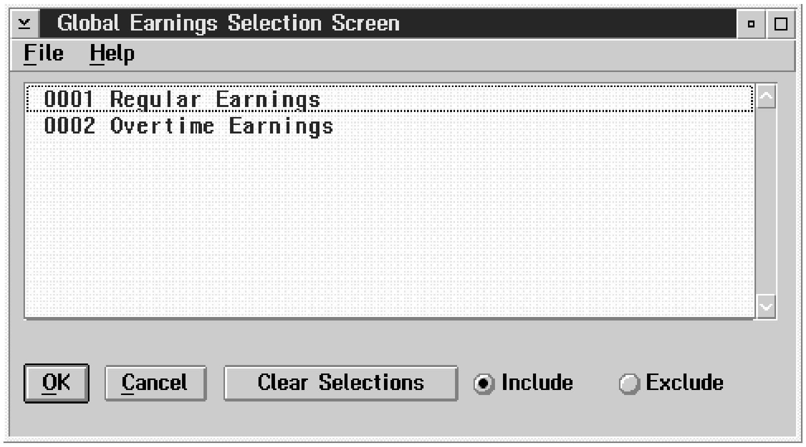
To de-select a single area simply click on the highlighted area and it will no longer be selected. To de-select all the selected areas click on the Clear Selections object.

When you are selecting certain areas you may include or exclude all the selected areas in the report. This is done by clicking on the Include or Exclude object.

Select Earnings Selection

The Select Earnings selection allows you to select earnings from the list of earnings displayed.

The dialog box for the Earnings Selection appears as follows:



The earnings are selected by clicking on the desired earnings with the mouse once, the earning will now be highlighted. Any number of earnings may be selected by repeating this procedure.

When all the desired earnings are selected click on the OK button.

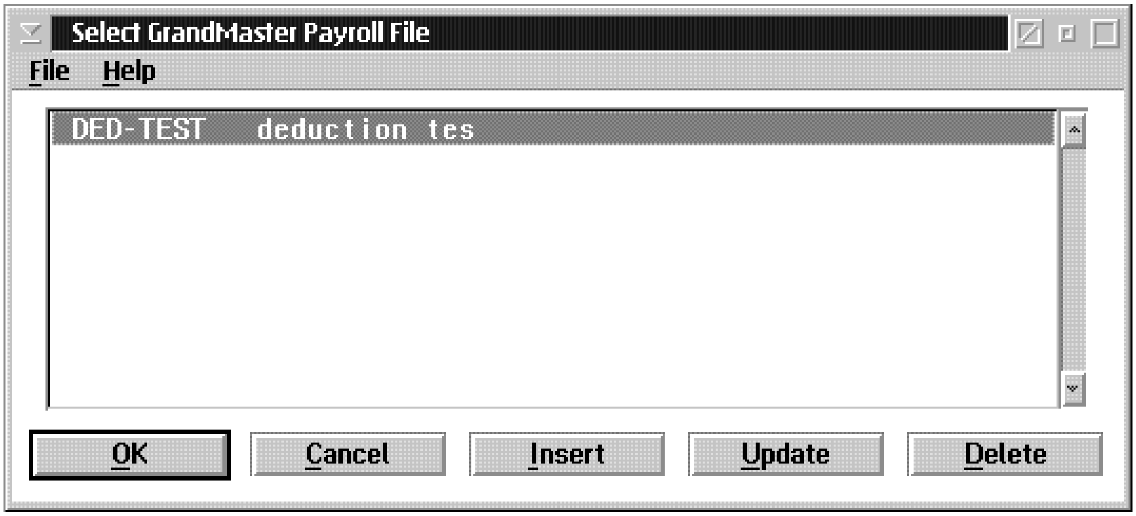
To de-select a single earning simply click on the highlighted earning and it will no longer be selected. To de-select the all selected earnings click on the Clear Selection object.

When you are selecting certain earnings you may include or exclude all the selected earnings in the report. This is done by clicking on the Include or Exclude object.

Select Grand Master Payroll File

One of these payrolls must be selected for scheduling. The payroll is selected by placing the cursor over the payroll and clicking on the left-hand mouse button. The payroll selected will appear in the main menu screen.

The following dialog box appears:



Inserting a New Payroll

The INSERT button will allow the user to add a new payroll to the list of available payrolls. To insert a new payroll the following steps should be taken:

1. Select the INSERT button.
2. Type in the name of the new payroll in the dialog box that appears and select the OK button.
3. In the new dialog box type in the name, description, and path to payroll in the proper fields.
4. In the payroll password if you click on the enable password the set password button will be available.
5. Select the **Save** option from the **File** menu and then select the OK button.
6. Your new payroll will now be displayed on the screen.

Updating an Existing Payroll

If the UPDATE button is selected the user will be able to update the name, description, and/or path to the payroll. To update the payroll follow these steps:

1. Select the UPDATE button.
2. A dialog box will appear which displays the name, description, and path to payroll. Make changes to the necessary fields.
3. Select the Save option from the File menu and then select the OK button.
4. In the payroll password if you click on the enable password the set password button will be available.

Deleting an Existing Payroll

If the DELETE button is selected the user will be able to delete the payroll.

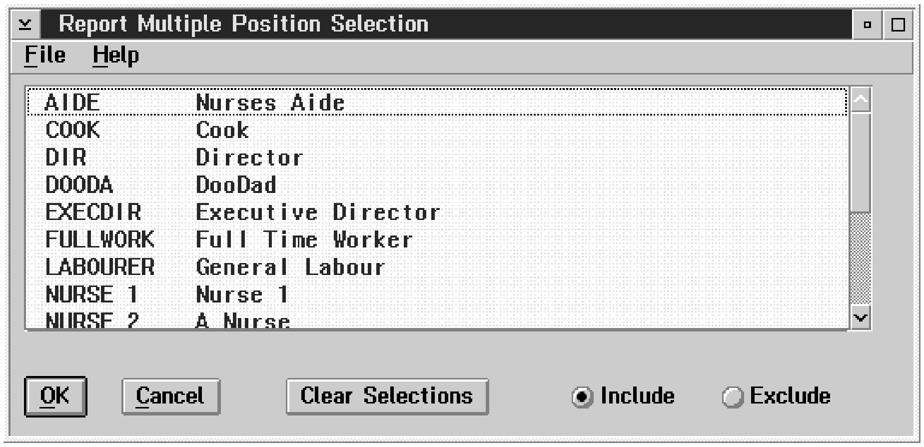
To delete the payroll follow these steps:

1. Select the DELETE button.
2. You are asked to confirm the delete. Click on yes to delete the payroll.

Select Positions Selection

The Select Positions Selection screen allows you to select positions from the list of positions displayed.

The dialog box for the Position Selection appears as follows:



The positions are selected by clicking on the desired position with the mouse once, this position will now be highlighted. Any number of positions may be selected by repeating this procedure.

When all the desired positions are selected click on the OK button.

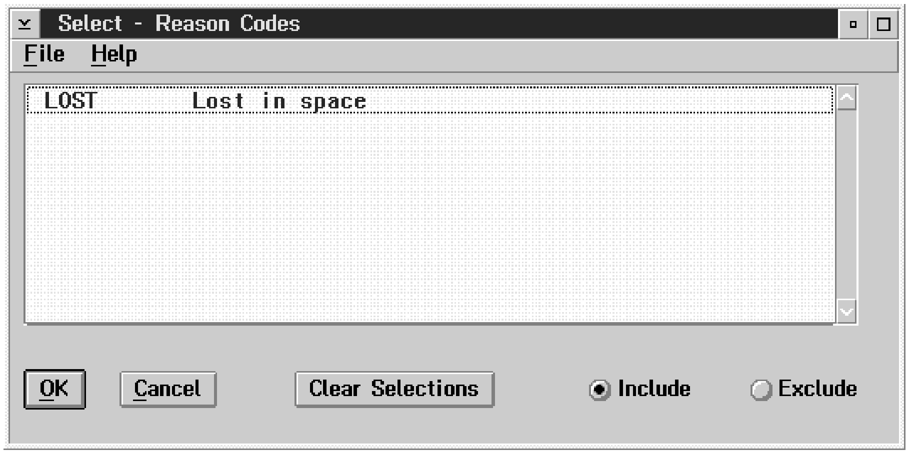
To de-select a single position simply click on the highlighted position and it will no longer be selected. To de-select all the selected positions click on the Clear Selections object.

When you are selecting certain positions you may include or exclude all the selected positions in the report. This is done by clicking on the Include or Exclude object.

Select Reasons Selection

The Select Reasons Selection screen allows you to select reasons from the list of reasons displayed.

The dialog box for the reason selection appears as follows:



The reasons are selected by clicking on the desired reason with the mouse once, the reasons will now be highlighted. Any number of reasons may be selected by repeating this procedure.

When all the desired reasons are selected click on the OK button.

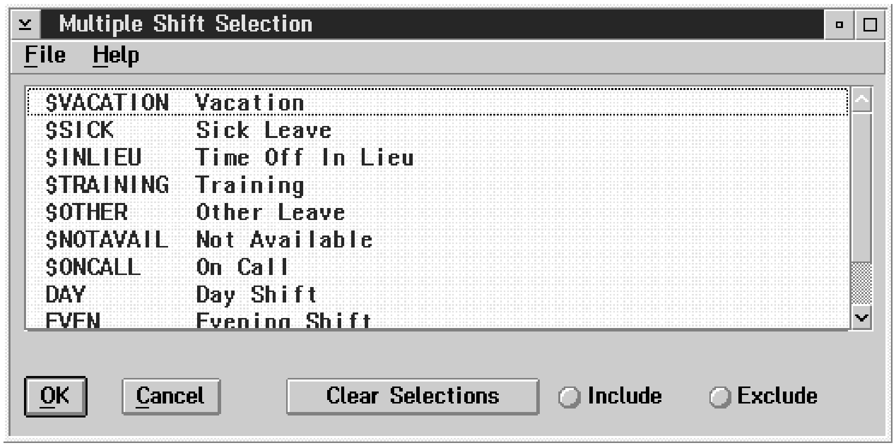
To de-select a single reason simply click on the highlighted reason and it will no longer be selected. To de-select all the selected reasons click on the Clear Selection object.

When you are selecting certain reasons you may include or exclude all the selected reasons in the report. This is done by clicking on the Include or Exclude object.

Select Shifts Selection

The Select Shifts Selection screen allows you to select shifts from the list of shifts displayed.

The dialog box for the Shift Selection appears as follows:



The shifts are selected by clicking on the desired shifts with the mouse once, the shift will now be highlighted. Any number of shifts may be selected by repeating this procedure.

When all the desired shifts are selected click on the OK button.

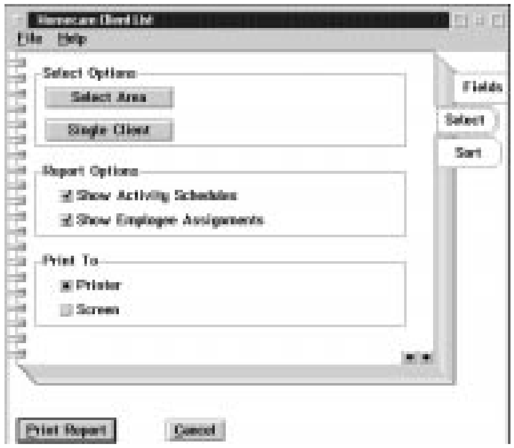
To de-select a single shift simply click on the highlighted shift and it will no longer be selected. To de-select the all selected shifts click on the Clear Selections object.

When you are selecting certain shifts you may include or exclude all the selected shifts in the report. This is done by clicking on the Include or Exclude object.

Select Single Client Selection

The Select Single Client Selection screen allows you to choose to select only one client from the list of clients displayed.

The dialog box for the client selection appears as follows:



Next Client Pressing the next button or selecting the next client option from the File menu will bring up the next client in the list.

Previous Client Pressing the previous client button or selecting the previous client option from the File Menu will go back to the previous client in the list.

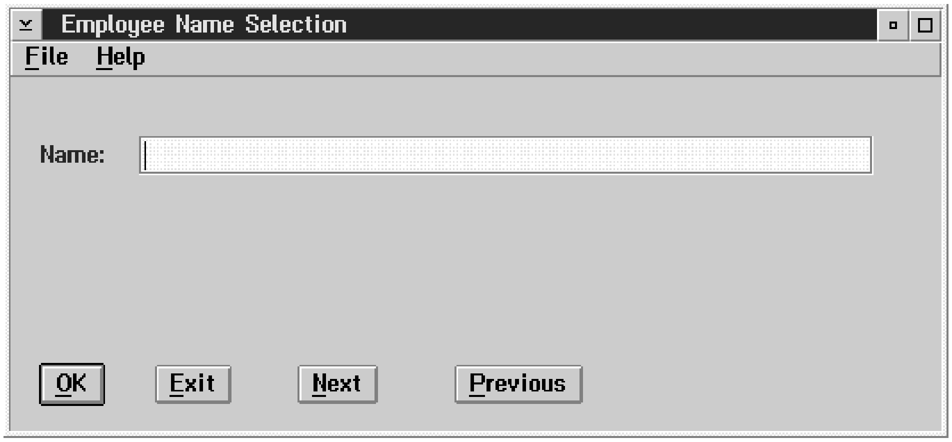
F8 (List) Pressing the F8 key or selecting the list client option from the file menu will bring up a list of clients.

ESC (Exit) The ESC key will exit the user from the current screen.

Select Single Employee Selection

The Select Single Employee Selection screen allows you to select only one employee from the list of employees displayed.

The dialog box for the employee selection appears as follows:



Next Employee Pressing the Next button or selecting the next employee option from the File menu will bring up the next employee in the list.

Previous Employee Pressing the Previous button or selecting the previous employee option from the File Menu will go back to the previous employee in the list.

F8 (List) Pressing the F8 key or selecting the list employee option from the file menu will bring up a list of employees. The list will vary depending on whether or not a payroll has been selected. If no payroll is selected all employees will appear in the list . However if a payroll is selected only the employee in that payroll will appear in the list.

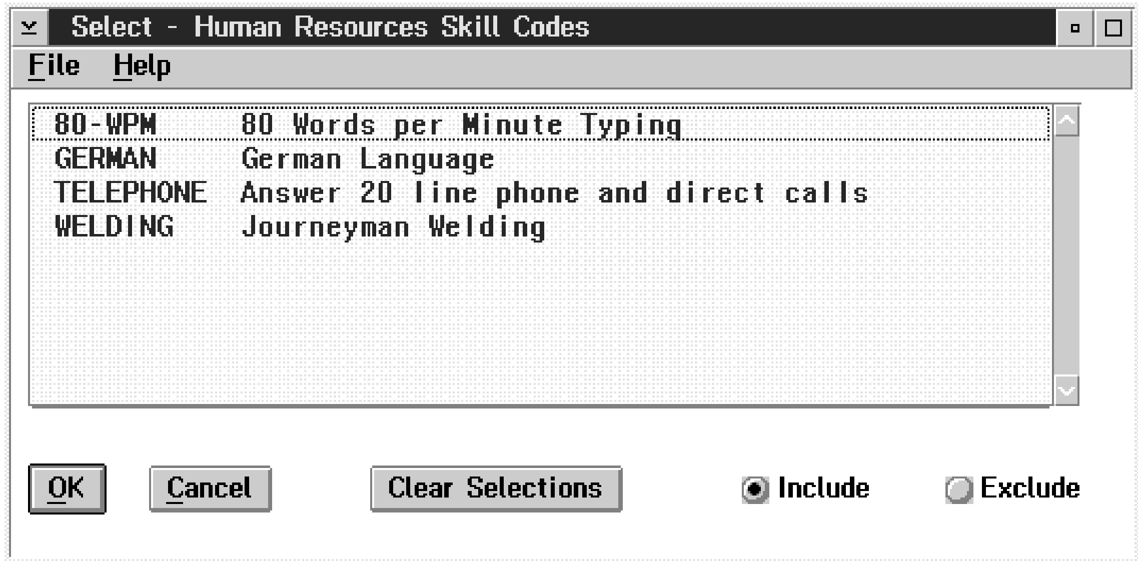
ESC (Exit) The ESC key will exit the user from the current screen.

The search technique that is set will change the order that the employees appear in the list.

Select Skill Selection

The Select Skills Selection screen allows you to select skills from the list of skills displayed.

The dialog box skill selection appears as follows:



The skills are selected by clicking on the desired skill with the mouse once, this skill will now be highlighted. Any number of skills may be selected by repeating this procedure.

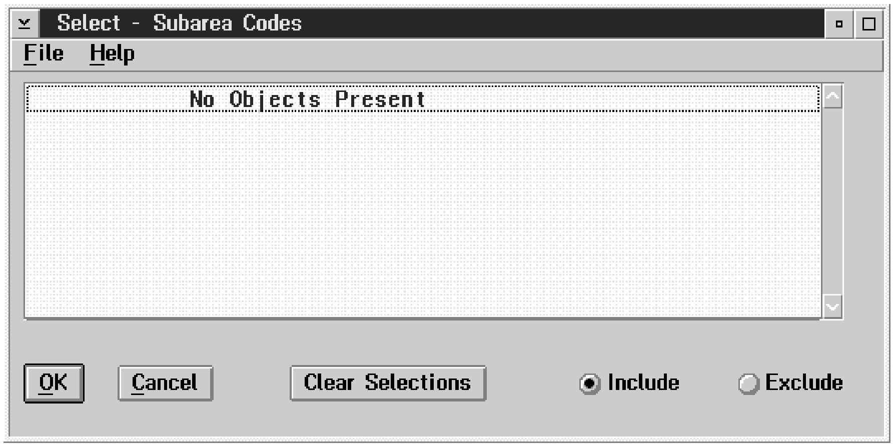
To de-select a single skill simply click on the highlighted skill and it will no longer be selected. To de-select all the selected skills click on the Clear Selections button.

When you are selecting certain skills you may include or exclude all the selected skills in the report. This is done by clicking on the Include or Exclude objects.

Select Subactivity Selection

The Select Subactivity Selection screen allows you to select subactivities from the list of sub activities displayed.

The dialog for the Subactivity selection appears as follows:



The subactivities are selected by clicking on the desired subactivity with the mouse once, this subactivity will now be highlighted. Any number of subactivities may be selected by repeating this procedure.

When all the desired subactivities are selected click on the OK button.

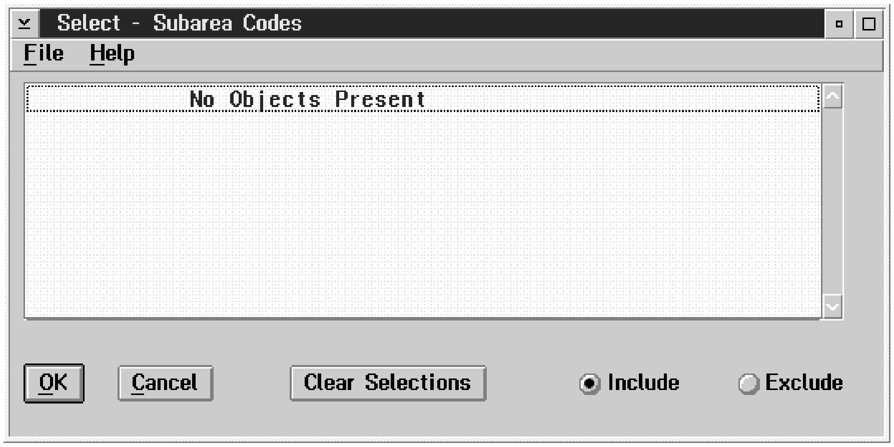
To de-select a single subactivity simply click on the highlighted subactivity and it will now longer be selected. To de-select all the selected subactivites click on the Clear Selections object.

When you are selecting certain subactivities you may include or exclude all the selected sub activities in the report. This is done by clicking on the Include or Exclude object.

Select Subarea Selection

The Select Subarea Selection allows you to select sub areas from the list of sub areas displayed.

The dialog box for the Subarea selection appear as follows:



The subareas are selected by clicking on the desired subareas with the mouse once, this subarea will now be highlighted. Any number of subareas may be selected by repeating this procedure.

To de-select a single subarea simply click on the highlighted subarea and it will no longer be selected. To de-select all the selected subareas click on the Clear Selections object.

When you are selecting certain subareas you may include or exclude all the selected subareas in the report. This is done by clicking on the Include or Exclude object.