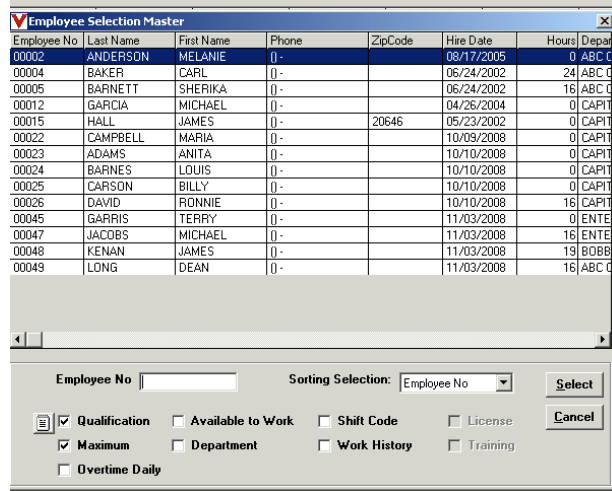


Filtering the Employee Selection List

The selection of employees that can be assigned to a schedule time slot can be limited based on certain criteria. It is possible to list only those employees that meet certain post qualifications or maximum hour restrictions. Other restriction options are discussed later in this document..

To Filter the Employees that display on the Selection List:

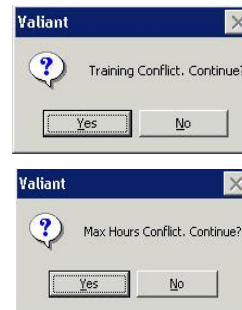
1. Right-click opening and select **Assign Employee**
2. Check desired Filter(s)
 - *Selecting multiple filters will limit the employee selection list to those employees that meet EACH one of the filter requirements COMBINED.*
 - *System Users must have the applicable Security Permissions to override the filter selections*
 - *The example shows only those employees that meet both the **Qualification and Maximum Hours** requirements.*



Filter Warnings

Filtering restrictions are not utilized when the Click & Drag or Copy & Paste features are used. Warnings will be presented if an employee does not meet the defaulted schedule requirements.

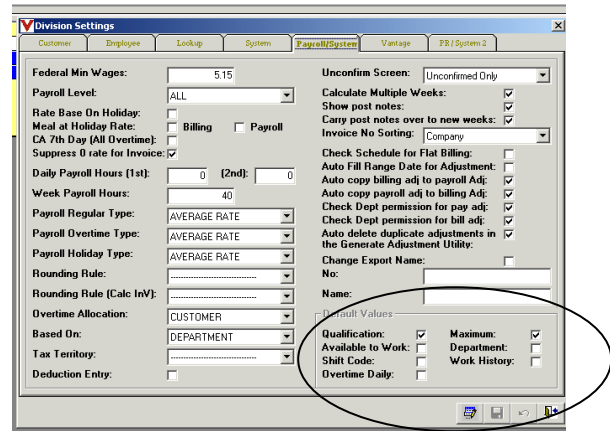
Depending on Security Permissions, the user will have the option to override the warning and continue to schedule the employee.



Division Settings for Filters

The **Default Values** set on the Division Settings **Payroll/System** tab will automatically be checked when the Employee Selection Master is displayed.

If the **License and Training** requirements have been established on the **Division Settings – Lookup** tab, then those filters will automatically display as well.

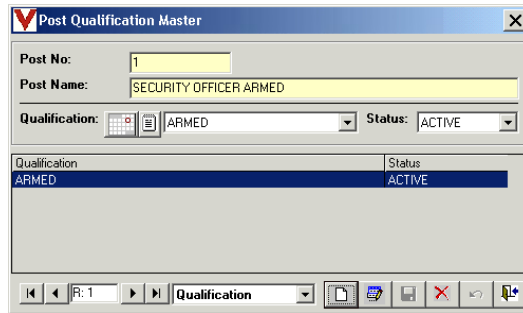


Qualification

Qualifications necessary for an employee to work at a specific Post/Position are set at the Post level and in the Employee Qualification Master.

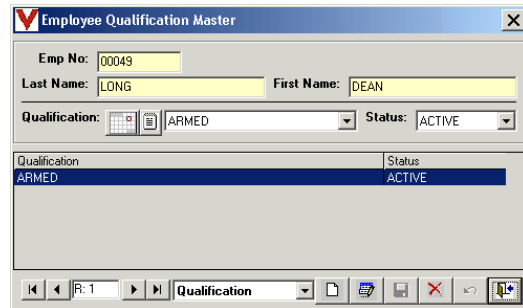
Setting Qualifications at the Post Master

1. Open Post Master
2. Select **Qualification** from bottom drop-down
3. Select **Qualification**
4. **Save**



Setting Qualifications at the Employee Master

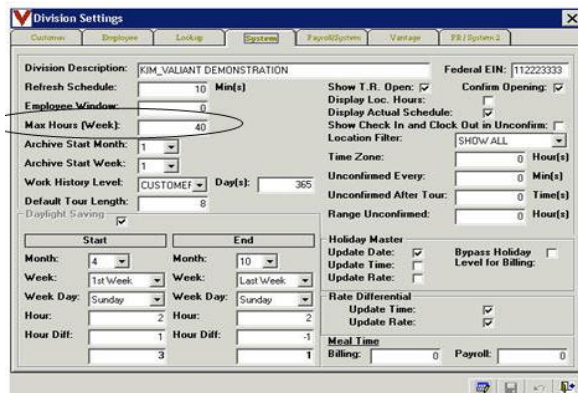
1. Open Employee Master
2. Select **Qualification** from bottom drop-down
3. Select **Qualification**
4. **Save**



Maximum

The **Max Hours (Week)** amount is set on the **Division Setting - System** tab. This indicates the maximum scheduled hours that an employee must not exceed for the week.

When selecting this filter, employees who would have been scheduled over XX hours in the week will not be displayed on the Employee Selection Master.

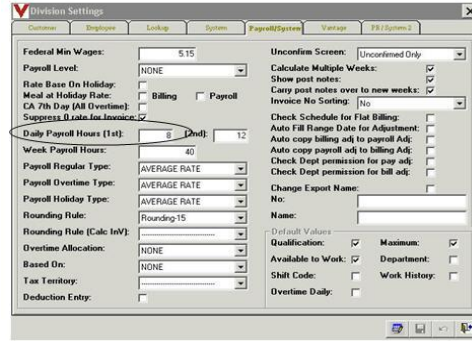


Overtime Daily

The **Daily Payroll Hours** amount is set on the **Division Settings–Payroll/System** tab.

When selecting this filter, employees who would have been scheduled over XX hours in a single day will not be displayed on the selection list.

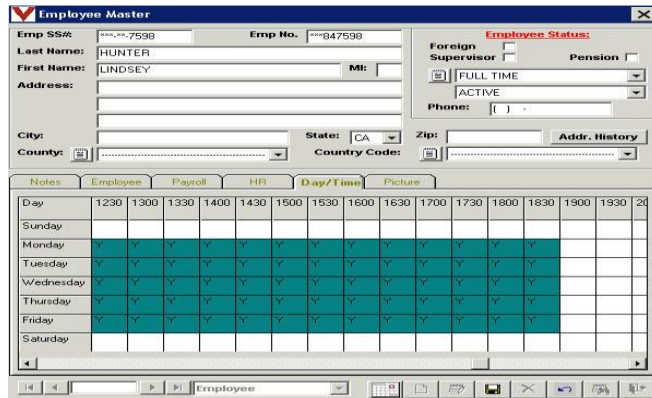
Set for 1st and 2nd shifts and are definable by the client.



Available to Work

The days and times that an employee is available to work are set on the **Employee Master Day/Time** tab.

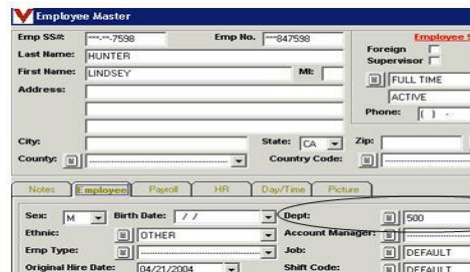
Selecting this filter will display only employees that are available on the day and time for the selected schedule time slot.



Department

Departments are set on the **Customer Master Customer** tab and on the **Employee Master Employee** tab.

Selecting this filter will list only those employees with the *same* department as the Customer to which they are being scheduled.



Shift Code

Shift Codes are set on the **Tour Master** and on the **Employee Master-Employee** tab.

Selecting this filter will list only those employees with the *same* shift code as the Tour to which they are being scheduled.

The screenshot shows the 'Tour Master' window with the following details: Post Name: FRONT DOOR, Time In: 23:00, Time Out: 07:00, Tour Type: DEFAULT, Tour Status: PERMANENT, and Shift Code: GRAVEYARD. A red circle highlights the 'Shift Code' dropdown menu.

The screenshot shows the 'Employee Master' window for employee RANDY MOSS. The 'Shift Code' dropdown menu is highlighted with a red circle and set to 'GRAVEYARD'. Other fields include Emp No. 640084, Dept: DEFAULT, and Job: DEFAULT.

Work History

Work History Levels are set on the **Division Settings System** tab. The specific level and time frame (amount of days) are entered.

Selecting the Work History filter will display only those employees who have worked at the specific Customer, Location or Post to which they are being scheduled.

The screenshot shows the 'Division Settings' window on the 'System' tab. The 'Work History Level' dropdown menu is highlighted with a red circle and set to 'CUSTOMER'. Other settings include Refresh Schedule: 10 Min(s), Employee Window: 0, and Max Hours (Week): 40.

License and Training

The License and Training Requirements are set on the **Division Settings-Lookup** tab. Indicating that an employee meets these requirements is set on the **Employee License and Training Masters**.

IMPORTANT:

- If License filtering is V as follows, the system **REQUIRES** that **ALL** employees have the selected license entered in their Employee Master, even if they do not possess the license.
- If ALL employees do not have the appropriate license, the filter does not work.

It is recommended to utilize the Operations Audit Report and license & training reports for monitoring warnings & expirations.

Division Settings - Lookup

Customer Employee **Lookup** System PayrollSystem Vantage PR / System 2

Acct. Mgr Label: Account Manager
 Acquisition Label: Acquisition
 Dealer Label: Dealer
 GroupA Label: GroupA
 GroupB Label: GroupB
 GroupC Label: GroupC
 Industry Label: Industry
 Rank Label: Rank
 SalesPerson Label: Sales Person
 Source Label: Source
 Supervisor Label: Supervisor
 Cust Type Label: Cust Type
 Loc. Type Label: Location Type
 Tour Type Label: Tour Type
 Emp Type Label: Emp Type

Date Format: MM/dd/yyyy
 Phone Format: (###) ###-####
 Currency Symbol: \$

License

Display Warning Date Properties

- 453456 - NH S/D LIC (Warning)
- CPR - CPR CERTIFIED (Warning)
- DEFAULT - DEFAULT (Warning)
- DL - DRIVERS LICENSE (Warning)
- FA - ARMS LICENSE (Warning)
- INS - INS CERTIF (Warning)

Training

Display Warning Date Properties

- DEF - DEFENSIVE DRIVING COURSE (Warning)
- DEFAULT - DEFAULT (Warning)
- OJT - 8HR OJT (Warning)

Employee License Master

Emp No: 242673
 Last Name: FLEMING First Name: JOHN
 License: DRIVERS LICENSE Expiration: / /
 License No: 2323446 Warning: / /
 Renewal: / /

License	License No	Expiration	Warning	Renewal
DRIVERS LICENSE	2323446			

License
 Forbidden
 License
 Matrix
 Others
 Qualification
 Taxes
 Training
 Work Location