

Crew Scheduler 3.0 – Release Notes

Doc Rev (3.0.37) RD

Crew Scheduler version 3.0 has been released.

Important:

After upgrading to 3.0, no users will have access to the following items:

- **Biometric Setup screen**
- **[Approve all] button in Review Timesheets screen.**

Once you upgrade, you must grant explicit permissions for users who need access to the above items. See the "Permissions" section of this document for more details.

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Browser compatibility

Commonly-used Crew Scheduler screens have been upgraded so that they no longer require the Internet Explorer browser. These screens should work on all popular browsers, but in particular we have tested them with the following:

- Firefox
- Chrome
- Safari
- Internet Explorer

Note that none of the screens has been optimized for mobile browsers, such as Safari Mobile. In general, the screens will work on a mobile device, but may require zooming and scrolling in order to navigate the smaller screen size. True mobile-optimized screens will be added in a future version of Crew Scheduler.

Most of the rarely-used administration screens still require Internet Explorer. These screens will be upgraded in a future version of Crew Scheduler.

Cross-browser screens

The following screens are cross-browser compatible:

Scheduling

- Daily Schedule
 - Add To Schedule
- Calendar View
- Availability
- Find and Replace
- Daily Report
 - Daily Report Notes
- General Reports

Supervisor

- Time-Off Requests
- Review Shift Bids
- Shift Bid Setup
- Review Shift Trades
- Review Timesheets
 - Timesheet Override
 - Edit Timesheet
- Timesheet Reports
- Export Timesheets
- Audit Log
- General Reports
- Message Center
- Punch Status

Administration

- Resources
- Preferences
- Admin Console
 - Timeoff Policy Setup
 - Shift Bid Settings
 - Shift/Slot Status Setup
 - Admin Repair
 - Customer Logo
 - Punch Bulletin Setup
 - Point Policy Setup

Other

- Dashboard
- Shift Properties
 - Slot Resource Picker
 - Slot Contact Manager
 - Slot Replacement History
 - Edit Shift Times
 - Location Picker

My Schedule / Self-Serve

- My Calendar
- My Schedule
- My Availability
- My Shift Bids
- My Trades
- My Trade Requests
 - Add Trade Request
- Public Trades
- My Timesheet
- My Time Entry
 - Shifts
 - Shift Details
 - PTO
 - Mileage
 - Other Earnings
 - Other Hrs
 - Adjusted Hrs
 - Summary
- Browse Schedule
- Daily Report
- Calendar View

NON cross-browser screens

The following screens require Internet Explorer for full functionality:

- Templates
- Template Resources
- Template Locations/Times
- Rotations
- Shift Types
- Slots
- Attributes
- Regions
- Divisions/Locations
- Codes
- Pay Periods
- Users
- Groups
- Admin Console
 - Holiday setup
 - Bonus rule setup
 - Bonus rule slots/constraints
 - PTO rule setup
 - Event setup
 - Message group setup
 - Downtime rule setup
 - Import schedule data

- Biometric setup
- Sync setup
- Sync items
- Availability Types
- Pay Policies
- Payroll Code Types
- Report Configuration

Bonus Rule – OT Payroll Code

A new property, "OT Payroll Code", has been added to Bonus Rules. When this property is enabled, the rule creates two separate bonus items: one for regular hours, and one for OT (overtime) hours.

Overview

When a bonus rule has "OT Payroll Code" enabled, the rule creates two separate bonus items: one for regular hours, and one for OT (overtime) hours. Bonus items for regular hours use the rule's "Payroll Code" property, while bonus items for OT hours use the rule's "OT Payroll Code".

How are OT bonus hours determined?

1. A bonus item is created. The bonus rule's settings determine the length of the bonus item.
2. The system checks the number of regular and OT hours for the timesheet item (typically a shift) that created the bonus.
3. If the hours are all regular, then no OT bonus is created.
4. If the hours are all OT, then an OT bonus is created, and no regular-hour bonus is created.
5. If the timesheet item contains both regular and OT hours, the system creates two bonus items: one for regular hours and one for OT hours.
 - a. The regular-hour bonus is the length of regular hours that overlap the bonus period.
 - b. The OT-hour bonus is the length of OT hours that overlap the bonus period.
6. When an OT bonus is created, it is exactly the same as a regular-hour bonus, except:
 - a. It uses the rule's "OT Payroll Code" rather than the "Payroll Code".
 - b. The item name has " (OT)" appended to it.
 - c. When both a regular and an OT bonus exist, the OT bonus's start-time pertains to the time where OT "kicked in", rather than the time where the bonus begins. See the example below.

Example:

- A "graveyard shift" bonus pays for all hours worked between 0000 and 0800.
- I work 37 hours on shifts Mon, Tues, and Weds.
- On Thursday, I work a 12-hr shift from 0000 to 1200. At 0300 my 40-hr overtime threshold kicks in.
- For my Thursday shift, I have two graveyard bonuses:
 - 3-hr regular bonus from 0000 to 0300, using paycode "BonReg".
 - 5-hr OT bonus from 0300 to 0800, using paycode "BonOT".

Timesheet details for the example above:

Stat.	Start Date	Item Name	Type	Reg hrs	OT hrs	Sched.	Actual	Codes	Comments
	Mon 10/15/2012 09:30	233 Violet	Shift	12		12	12	FLD,ST	
	Tue 10/16/2012 09:30	233 Violet	Shift	12		12	12	FLD,ST	
	Wed 10/17/2012 09:30	233 Violet	Shift	13		12	13	FLD,ST	[sup] late call
	Thu 10/18/2012 00:00	ALS 1	Shift	3	9	12	12	FLD,ST	
	Thu 10/18/2012 00:00	ALS 1	Bonus	3			3	FLD,BonReg	[Sys] Graveyard
	Thu 10/18/2012 03:00	ALS 1	Bonus	5			5	FLD,BonOT	[Sys] Graveyard (OT)

Notes for rules with OT Payroll Code enabled:

- "Straight Hours" pay modifier:

- The bonus length is constrained to this number of hours. Regular and OT hours are determined based on overlap between the shift and the bonus period.
- If the bonus length is not enough to spill into the OT hours, then an OT bonus will not be created.
- "% Actual Hours", "% Scheduled Hours" pay modifiers:
 - The bonus length depends on the "Pay Value" setting. Regular and OT hours are determined based on overlap between the shift and the bonus period.
 - If the bonus length is not enough to spill into the OT hours, then an OT bonus will not be created.
- Hours per day/week rules:
 - For rules of type hours-per-day and hours-per-week, regular and OT bonus hours are taken from the sibling timesheet item. This is the item where the bonus rule's threshold value was hit.
- CS does not store the exact time when a shift changes from regular to OT. It is assumed that, within a shift, OT hours occur after regular hours.

Troubleshooting

- My shift has OT hours, but there is no bonus for the OT hours.
 - Check the bonus rule's "Pay Modifier" and "Pay Value" settings. If the rule is set to use straight hours, or some fraction of the shift hours (such as "50% of actual hours"), then the total bonus period might not be large enough to spill over into the OT hours.

Bonus rule – must start in period

A new option for bonus rules allows the bonus to be restricted to cases where the shift starts inside the holiday or time-range period.

Overview

For bonus rules of type Holiday or Time-Range, you have the following options for the "Applies to" setting:

- **Overlap**
 - Bonus is paid for the time period where the shift overlaps the holiday or time-range.
- **Entire Shift**
 - Bonus is paid for all hours worked on the shift.
- **Overlap – must start in period**
 - Bonus is paid for the time period where the shift overlaps the holiday or time-range.
 - Bonus is NOT paid unless the scheduled shift starts inside the holiday or time-range.
- **Entire Shift – must start in period**
 - Bonus is paid for all hours worked on the shift.
 - Bonus is NOT paid unless the scheduled shift starts inside the holiday or time-range.

Forced punches

A forced punch has no associated scheduled shift. In this case, the punch-in time is considered the scheduled-start time.

Examples

Let's say you have a New Year's Eve (NYE) holiday defined for the time period **16:45 to 23:59**. The following examples describe how various scheduled shifts and punches would work with a holiday bonus rule using the "Entire Shift – must start in period" setting:

Scheduled shift: Dec 31 08:00 to Dec 31 19:00

- This shift will NOT pay the NYE bonus, because it starts outside of the 16:45 to 23:59 holiday period.

Scheduled shift: Jan 1 00:00 to Jan 1 08:00

- This shift will NOT pay the NYE bonus, because it starts outside of the 16:45 to 23:59 holiday period.

Scheduled shift: Dec 31 16:45 to Jan 1 08:00

- This shift will pay the NYE bonus, because it starts within the 16:45 to 23:59 holiday period.

- If I punch in early, at 15:30, this shift will still pay the bonus, because it is tied to the scheduled start time (16:45), not my punch-in time (15:30).

Scheduled shift: Dec 31 23:00 to Jan 1 11:00

- This shift will pay the NYE bonus, because it starts within the 16:45 to 23:59 holiday period.
- If I punch in late, at 00:30 on Jan 1, this shift will still pay the bonus, because it is tied to the scheduled start time (23:00), not my punch-in time (00:30).
 - If the bonus was set to "Overlap – must start in period", then this punch would NOT pay the bonus, because the worked hours do not overlap the NYE bonus period (16:45 to 23:59).

Bonus rule – Ignore on-call hours

A new option for holiday-not-worked bonus rules allows the bonus to ignore any on-call hours scheduled for the holiday. This option only applies to bonus rules of type "holiday not worked".

By default, the presence of on-call hours on a holiday will prevent a holiday-not-worked bonus from occurring. To ignore on-call hours when computing the bonus, do the following:

1. Main > Administration > Admin Console > Bonus Rule Setup
2. Select the desired holiday-not-worked rule.
3. Enable "Ignore On-Call".
4. Click [Save Settings]

When "Ignore On-Call" is enabled, the system will only look at the following types of hours when evaluating holiday-not-worked:

- Shifts that are NOT on-call.
- Other Hours items.
- PTO hours.

Payroll Export – double-time adjustment

This feature allows exported payroll hours to be adjusted based on a double-time bonus.

Overview

Some jurisdictions, such as California, require that double-time be paid for hours worked over 12 in a single day. Crew Scheduler handles this with an hours-per-day bonus rule. The double-time adjustment feature adjusts the payroll export data so that regular, overtime, and double-time hours sum to the total number of worked hours. This allows paychecks to display more meaningful values for total regular, overtime, and double-time hours.

When Crew Scheduler is configured for a California double-time pay policy, the timesheet shows total OT hours that include the double-time bonus period.

Example: Employee works a 15-hr shift. The Crew Scheduler timesheet shows the following:

- 8 hrs Regular
- 7 hrs OT
 - Total shift length: 8 reg + 7 OT = 15 hrs.
- 3 hrs DT bonus item (coded with a 12-hours-per-day Bonus Rule)
 - DT bonus: hrs worked over 12.

Without double-time adjustment, the above hours are exported to payroll exactly as shown. The payroll application is configured to pay half-time for the DT bonus, plus time-and-a-half for the OT hours. The net result in pay is 3 hours of double-time (0.5x time for the DB bonus plus 1.5x time for the overlapping OT hours).

When double-time adjustment is enabled, the OT hours are reduced by the amount of any applicable double-time bonus item. So the example above would be exported as follows:

- 8 hrs Regular
- 4 hrs OT
- 3 hrs DT
 - Total shift length: 8 reg + 4 OT + 3 DT = 15 hrs.

Above, the OT hours were reduced by 3 hours, which is the length of the DT bonus. In this case, the payroll application must be configured to pay 2.0x time, rather than 0.5x time, for DT bonus hours. Instead of layering a double-time bonus over portion of extended overtime, the paycheck can show the actual number of regular, OT, and DT hours.

How does the double-time bonus appear on timesheets?

NOTE: The adjustment of OT hours does NOT occur in the Crew Scheduler timesheet. It occurs when payroll data are exported, using the Export Timesheets screen. Only the exported payroll data will have OT hours reduced by the amount of the double-time bonus.

When a bonus appears on a timesheet that is applicable for double-time adjustment, Crew Scheduler annotates the item with a system comment such as *"DT: Shift OT will be reduced by 1.75 hrs."* The screenshot below shows an example where two shifts have a double-time bonus. Note the system comments.

Status	Start	Item Name	Type	Reg	OT	Sched.	Actual	Codes	Comments
	Mon 2/25/2013 03:45	ALS 1 (M-Th)	Shift	8	5.75	12	13.75	FLD,ST,	
	Mon 2/25/2013 15:45	ALS 1 (M-Th)	Bonus	1.75			1.75	FLD,DT,	[Sys] [2/25/2013] 12 hr/day; DT: Shift OT will be reduced by 1.75 hrs.
	Tue 2/26/2013 05:15	ALS 1 (M-Th)	Shift	8	4.25	12	12.25	Fire,ST,	
	Tue 2/26/2013 17:15	ALS 1 (M-Th)	Bonus	.25			.25	Fire,DT,	[Sys] [2/26/2013] 12 hr/day; DT: Shift OT will be reduced by 0.25 hrs.
	Wed 2/27/2013 05:30	ALS 1 (M-Th)	Shift	8	4	12	12	Admin,ST,	
	Mon 3/4/2013 05:30	ALS 1 (M-Th)	Shift	8	4	12	12	Dispatch,ST,	
	Tue 3/5/2013 05:30	ALS 1 (M-Th)	Shift	8	4	12	12	C,ST,	
	Wed 3/6/2013 05:30	ALS 1 (M-Th)	Shift	8	4	12	12	FLD,ST,	

How to set up double-time adjustment

The double-time adjustment is triggered by a new Bonus Rule setting called "Double Time". The setup procedure is as follows:

1. Go to: Main > Administration > Admin Console > Bonus Rule Setup
2. If you don't already have a bonus rule set up as your double-time bonus, do that now:
 - a. [Add]
 - b. Rule Type: Hours per Day
 - c. Threshold: 720 minutes (12 hrs)
 - d. Is Active: checked.
 - e. Double Time: checked.
 - f. Pay Modifier: Percent of rate.
 - g. Pay Value: 200%
 - h. Applies to: Overlap
 - i. Code Type: your desired code type.

- j. Payroll Code: your double-time code.
- k. [Save Settings]
3. If you already have a bonus rule set up:
 - a. Select your rule (it should be of type "hours per day").
 - b. Check "Double Time".
 - c. [Save Settings]
4. Ensure that everyone eligible for this bonus has a Pay Policy that pays daily OT. The standard California pay policy pays OT for hours over 40 in the week, and for hours over 8 in a day.
5. Ensure that your payroll system is configured to pay double-time for hours tied to your double-time payroll code.
 - a. If you were already using a California double-time configuration in Crew Scheduler, then your double-time payroll code is currently paying half-time. You **MUST** change it to pay double-time, or your employees will not get paid correctly.
6. That's it. Once an active bonus rule is enabled for "Double Time", payroll exports will do the OT adjustment when the bonus exists.

How does the double-time bonus appear when I export payroll?

When double-time adjustment occurs during an export, the Export Timesheets screen shows details of what was done, in the message panel. Below is an example:

MESSAGES

Doing double-time OT adjustment...

Double-time adjustment: OT hrs reduced by 1.00 hrs; Emp: [Augustin, Charles, 170] Start: [2/26/2013 4:30:00 AM].
 Double-time adjustment: OT hrs reduced by 1.25 hrs; Emp: [Avogadro, Amedeo, 180] Start: [3/8/2013 5:30:00 AM].
 Double-time adjustment: OT hrs reduced by 0.75 hrs; Emp: [Avogadro, Amedeo, 180] Start: [3/7/2013 5:30:00 AM].
 Double-time adjustment: OT hrs reduced by 0.25 hrs; Emp: [Colfax, Schuyler, 48] Start: [2/26/2013 5:15:00 AM].
 Double-time adjustment: OT hrs reduced by 1.75 hrs; Emp: [Colfax, Schuyler, 48] Start: [2/25/2013 3:45:00 AM].
 Double-time adjustment: OT hrs reduced by 1.75 hrs; Emp: [Focault, Léon, 199] Start: [3/8/2013 3:45:00 PM].
 Double-time adjustment: OT hrs reduced by 1.00 hrs; Emp: [Focault, Léon, 199] Start: [3/7/2013 4:30:00 PM].
 Double-time adjustment: OT hrs reduced by 0.75 hrs; Emp: [Monroe, James, 5] Start: [3/1/2013 4:45:00 PM].
 Double-time adjustment: OT hrs reduced by 1.25 hrs; Emp: [Newton, Isaac, 164] Start: [3/6/2013 7:00:00 AM].
 Double-time adjustment: OT hrs reduced by 0.75 hrs; Emp: [Taft, William, 27] Start: [3/2/2013 4:45:00 AM].
 Double-time adjustment: OT hrs reduced by 0.75 hrs; Emp: [Watt, James, 172] Start: [3/4/2013 7:15:00 AM].
 Double-time adjustment: OT hrs reduced by 1.50 hrs; Emp: [Wilson, Henry, 51] Start: [2/26/2013 5:30:00 PM].
 Double-time adjustment: OT hrs reduced by 1.25 hrs; Emp: [Wilson, Henry, 51] Start: [3/4/2013 5:30:00 PM].
 Computing work-week...

Warnings during payroll export

If warnings appear in the Export Timesheets message panel, see below:

- "Only 6.0 of 11.5 OT hrs were adjusted for double-time bonus item; Emp: [Smith, John] Start: [2/20/2013 12:30 PM]."
 - Possible causes:
 - Person's pay policy is not paying daily OT. This means that not enough OT exists to cover the DT bonus time. Solution: put the person on a pay policy with daily OT.
 - A shift type has an override pay policy that does not pay daily OT. Solution: change the shift type's pay policy, or re-configure CS so that the shift type does not pay the DT bonus. Re-configuration involves disabling "pays bonus" on the shift type, or creating dedicated slots for that shift type and excluding them from the bonus. See the master CS documentation for details on this.
 - Overlapping items exist on the TS. This should not be possible in a production environment.
- "Multiple siblings found for double-time bonus item."
 - Probably a pathological case with a multi-type resource, where special-type attributes are set for non-personnel resource types. Solution: remove special-type designation from non-personnel resource types.

Payroll Export – Work week

This feature allows a work-week value to be exported with payroll data, in cases where overtime rates need to be computed according to the US Fair Labor Standards Act (FLSA).

Overview

Payroll export supports a new type of export column, called "Work Week". A "Work Week" column stores the week of the pay period where a payroll item starts. For example, if you are using a 2-week pay period, and a shift starts on the 9th day of the pay period, then the work week value would be "2", since the shift starts during the 2nd week of the pay period.

The work week column is intended for bi-weekly pay periods, where each pay period contains exactly two weeks. If you are using semi-monthly or monthly pay periods, you can still use a work week column, but the results will be inconsistent in the final week of the pay period, since your pay periods will have variable lengths.

How to add a work week column to a payroll export

1. Go to Main > Supervisor > Export Timesheets
2. Click [Add/Edit file formats] to bring up the File Format Editor.
3. Select "Work Week" in the dropdown next to the [Add Column] button.
4. Click [Add Column]. This adds the new column as the last column of your export.
5. In the lower panel, click the "Work Week" item to bring up the Column Editor.
6. Make any needed changes to the Work Week item:
 - a. Header name
 - b. Column position – click the up/down buttons.
 - c. Click [Update], then close the Column Editor.
7. When payroll is exported, hours and earnings are grouped/summed by payroll code (as usual), and also by work week.
8. If desired, you can disable aggregation of your export by enabling "Do NOT sum hrs by payroll codes" in the File Format Editor.
 - a. If you do this, your payroll items will not be grouped and summed by payroll code and work week. Instead you will get a "raw" output, where each timesheet item gets a separate line in the payroll export.

Details on the FLSA

Q: What is the FLSA workweek used for?

A: The default provision of the US Fair Labor Standards Act states that OT rates be computed as a weighted average of all hours worked in a single workweek, rather than an average of two or more weeks of work. Other provisions of the FLSA allow OT to be computed in other ways, such as simply using the pay rate in effect at the time the overtime was worked.

Resources:

- US Overtime Compensation; section 778:
 - <http://ecfr.gpoaccess.gov/cgi/t/text/text-idx?type=simple;c=ecfr;cc=ecfr;rgn=div5;idno=29;q1=778.115:sid=aa5c6b7f3a3f3010d3fdb79ea1ebbf6a:view=text;node=29%3A3.1.1.2.39>
- Default provision: OT based on weighted average of weekly hours: US Federal Regulation 778.115
 - http://www.twc.state.tx.us/news/efte/wh_part778.html#778_115
- Alternate provision: OT based on current rate during worked OT hours: US Federal Regulation 778.419
 - http://www.twc.state.tx.us/news/efte/wh_part778.html#778_419

Payroll export – raw output mode

Typically a payroll export sums employee hours by one or more types of payroll codes. Raw output mode allows timesheet items to be exported without being summed.

Overview

Raw output mode is intended for cases where you need to do special processing on your payroll data. You can also use raw mode if you want to more easily compare your exported data to your Crew Scheduler timesheets.

When you use raw output mode, you can optionally add an "Item Start Date" column, which contains the start date/time of the timesheet item. The "Item Start Date" column is not compatible with summed output mode, and you will get an error if you try to combine the two.

How to set up raw output mode:

1. Go to Main > Supervisor > Export Timesheets
2. Click [Add/Edit file formats] to bring up the File Format Editor.
3. Check the box "Do NOT sum hrs by payroll codes."
4. Click [Update]
5. If you want to add an "Item Start Date" column:
 - a. Select "Item Start Date" in the dropdown next to the [Add Column] button.
 - b. Click [Add Column]. This adds the new column as the last column of your export.
 - c. In the lower panel, click the "Item Start Date" item to bring up the Column Editor.
 - d. Make any needed changes to the column:
 - i. Header name
 - ii. Value: sets the date/time format. See <http://www.csharp-examples.net/string-format-datetime/> for details.
 - iii. Column position – click the up/down buttons.
 - e. Click [Update], then close the Column Editor.

Examples of summed vs raw output

The example below shows a typical 2-week pay period for one employee, using various summed and raw output formats. The employee has worked several shifts, across various departments.

Summed output

Hours are summed by earnings code and by department code.

Emp ID	Reg hrs	OT hrs	Earnings \$	Earnings Code	Dept Code
27	11.75	12.75	0	ST	Dispatch
27	20.25	7.5	0	ST	Admin
27	48	0	0	ST	FLD

Summed output, with Work Week

Hours are summed by earnings code, department code, and work week.

Emp ID	Reg hrs	OT hrs	Earnings \$	Earnings Code	Dept Code	Work Week
27	0	12.75	0	ST	Dispatch	1
27	16	0	0	ST	Admin	1
27	24	0	0	ST	FLD	1
27	4.25	7.5	0	ST	Admin	2
27	11.75	0	0	ST	Dispatch	2
27	24	0	0	ST	FLD	2

Raw output, with Work Week and Item Start

Hours are not summed at all. In addition, an "Item Start" column has been added in order to see the exact time when each item starts.

Emp ID	Reg hrs	OT hrs	Earnings \$	Earnings Code	Dept Code	Work Week	Item Start
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27	16	0	0	ST	Admin	1	2/24/2013 5:30
27	12	0	0	ST	FLD	1	2/28/2013 5:30
27	12	0	0	ST	FLD	1	3/1/2013 5:30
27	0	12.75	0	ST	Dispatch	1	3/2/2013 4:45
27	12	0	0	ST	FLD	2	3/3/2013 5:30
27	11.75	0	0	ST	Dispatch	2	3/7/2013 4:15
27	12	0	0	ST	FLD	2	3/8/2013 5:30
27	4.25	7.5	0	ST	Admin	2	3/9/2013 5:30

Timesheet item – exception mode

A new preference controls the way timesheet items are flagged as exceptions.

Overview

The timesheet item exception mode controls the way shifts are flagged as exceptions in the Review Timesheets screen (Main > Supervisor > Review Timesheets). When a shift item has an exception, the Scheduled and Actual Hours fields are highlighted with a red background. When an item with an exception is approved, the red background is removed, and the text is shaded red.

The new system preference is located here:

- Main > Administration > Preferences > Screen Settings > TS Item – Exception mode

The following modes are available:

- **Sched/Actual differ:**
 - An exception exists if scheduled hours differ from actual (worked) hours.
 - Note that even a very small difference will cause an exception here. To remove small time differences, use the punch-snap and punch-rounding preferences.
- **Early/Late punch:**
 - An exception exists if the shift has an early or late punch.
 - Early/Late punches are defined by the punch-grace-period preferences.
 - If the start/end times are manually edited on a timesheet, then those times, rather than the punch times, are compared to the punch grace periods in order to check for an early/late status.

Examples of exception highlighting

In the timesheet below, the Tuesday and Wednesday shifts have exceptions. The Tuesday shift is approved, so the red highlighting is downplayed to just the red text. The unapproved Wednesday shift has a red background.

Status	Start	Item Name	Type	Reg	OT	Sched.	Actual	Codes	Comments
appr.	Mon 2/25/2013 05:30	ALS1 (M-Th)	Shift	11.95		12	11.95	EMS,ST,	[Sup] ok
appr.	Tue 2/26/2013 05:30	ALS1 (M-Th)	Shift	11.2		12	11.2	EMS,ST,	[Sup] ok
	Wed 2/27/2013 05:30	ALS1 (M-Th)	Shift	10.1		12	10.1	EMS,ST,	[Sup] Not approved
	Mon 3/4/2013 05:30	ALS1 (M-Th)	Shift	12		12	12	EMS,ST,	[Sup] on time

Regional shift bid settings

In the shift bidding system, all settings and options are now available per-region. This includes the Bid Automation Service.

Overview

All shift bidding settings are available per-region. A set of global settings pertains to all regions. If desired, you can enable one or more regions to have specific settings that differ from the global set.

When Crew Scheduler 3.0 is installed, the system will contain only global bid settings. If you want to enable regions for custom settings, use the Shift Bid Settings screen.

For a full description of the Shift Bidding system, and Bid Automation, see the Crew Scheduler Reference Manual.

Shift Bid Settings screen

This screen is where all bid settings, global and regional, are managed:

- Main > Administration > Admin Console > Shift Bid Settings

The following tasks can be performed:

1. Manage global and regional bid settings.
2. Enable or disable a region for regional settings.
3. Run Shift Bid Automation.
4. Show a summary of some key global and regional settings.

What settings are included?

General settings

Setting	Description
OT max increase (hrs):	Bids are NOT allowed if a person's OT increases by more than X hours.
Closing date (hrs):	Slots that start within X hours of NOW are closed for bidding.
Auto-enable (days):	When slots are emptied, those that start within the next X days are auto-enabled for bidding. To disable, set to 0.
Enable after scheduling:	When true, empty slots are bid-enabled when a schedule is published or continued.
Max bids per month	Max bids per calendar month (per person). NOTE: This setting is tied to the home region of the employee, not to the region of the shift bid.
Max pending bids	Max total pending bids (per person). NOTE: This setting is tied to the home region of the employee, not to the region of the shift bid.
Stay biddable:	When true, a slot remains biddable (but not visible to bidders) after a bid is awarded.

Automation settings

Setting	Description
Enable Automation:	If True, bid automation will be run once per day by the Daily Service utility.
OT approval threshold (hrs):	Require manual approval if a bid would cause a person's OT to increase by more than X hours.
Approval period:	Run automation against shifts that begin within X days from today.
Sorting rule 1:	Primary rule for sorting bids:
Sorting rule 2:	Rule to break ties in rule 1
Sorting rule 3:	Rule to break ties in rule 2
Utilities	Run Once - Run bid automation one time, using current settings.

How do I enable regional settings?

1. Main > Administration > Admin Console > Shift Bid Settings
2. Select desired region.
3. Click [Enable Regional Settings].
 - o If regional settings have never been set, the region will be initialized with the global settings.
 - o If regional settings existed in the past, they will be restored.
4. Set your desired values.

5. Click [Save Changes].

How do I switch a region back to global settings?

1. Main > Administration > Admin Console > Shift Bid Settings
2. Select desired region.
3. Click [Use Global Settings].
 - o The regional settings are saved in case you want to go back to them later.

How do I run Bid Automation manually?

Bid automation must be enabled before you can run it manually. If desired, you can enable it temporarily, run the automation, then disable it.

1. Main > Administration > Admin Console > Shift Bid Settings
2. Select desired region, or global.
3. If bid automation is not enabled:
 - o Enable bid automation.
 - o Set other desired automation settings.
 - o Click [Save Changes].
4. Click the "Run Once" link.
5. A detailed summary of the bid automation process is shown in the message panel. DO NOT refresh the screen until you are finished viewing this information. Once you refresh the screen, the message panel will be cleared. If desired, copy the summary text and paste it into a document for review.
6. If you temporarily enabled automation in step 3, disable it and click [Save Changes].

How do I see a summary of global/regional settings?

1. Main > Administration > Admin Console > Shift Bid Settings
2. Click the "Region Summary" link.

Supervisor Groups – by location

Employees can be added to Supervisor Groups in two ways: by direct assignment, and by shift template location.

Overview

Location-based Supervisor Groups allow employees to be assigned to groups based on the locations they are working in the schedule. When employees are moved to new shifts in the template, they automatically become members of the supervisor group associated with the locations of their template shifts. The two modes for creating supervisor groups are described below:

Direct-assignment mode

- Employees are assigned directly to a supervisor group.
- To change to a new group, employees must be manually assigned to the new group.

Location mode

- Supervisor groups are built up as sets of locations. Locations, rather than employees, are assigned to the groups.
- Employees are tied to a supervisor group based on their shift-template assignment.
 - o Only templates that are currently-scheduled are considered.
 - o If an employee is working shifts in multiple locations, she will belong to all groups tied to those locations.
 - o Only the template locations are used. If a scheduled shift has its location changed manually, this has no effect on the employee's location-group membership.
- When an employee is moved to new shifts on the template, he becomes a member of the group tied to those shift locations.
- Template locations are assigned and managed here:

- Main > Scheduling > Template Locations & Times

Notes

- If desired, you can mix location mode and direct-assignment mode.
- For assigning supervisors to groups, there is only the direct-assignment mode. Location-mode applies to employees, not to supervisors.
- If multiple templates are currently-scheduled, any and all employee locations are used to determine group membership. This may result in employees appearing in multiple groups.

Supervisor Group Setup screen

The supervisor group setup screen (Main > Administration > Admin Console > Supervisor Group Setup) handles the following tasks:

- Add, delete, or rename a group.
- Add/remove group supervisors.
- Add/remove group employees.
- Add/remove group locations.
- Validate the setup of the current group.
- Validate the setup of all groups.

This screen shows group membership in two modes: personnel and location. Use the left-side dropdown to switch between the modes. When in Personnel mode, the lower-center panel highlights any location-based employees in yellow, and also displays the name of the location through which the employee is tied to the supervisor group. When in Location mode, the lower-center panel shows locations assigned to the group.

How to set up location-based supervisor groups

1. Main > Administration > Admin Console > Supervisor Group Setup.
2. Set the "Membership Mode" dropdown to "Locations".
3. Use the filter/region/search controls to find the locations you want in the right panel.
4. Select one or more locations in the right panel.
5. Select the desired supervisor group in the left panel.
6. Click the arrow button to add the selected locations to the current supervisor group.
7. To remove locations, select one or more in the center panel and click the arrow button to remove them.

How to validate group setup

1. Main > Administration > Admin Console > Supervisor Group Setup
2. Click "Validate" to validate the current group. The following information is displayed:
 - Total number of direct-assigned and location-based employees.
 - Details on location-based employees: location and shift template name.
3. Click "Validate All" to validate all groups. The following information is displayed:
 - Total number of direct-assigned and location-based employees.
 - Details on location-based employees: location and shift template name.
 - Employees who belong to multiple groups.
 - Employees assigned in both direct-mode and location-mode.
 - Employees not assigned to any group.

How to rename a supervisor group

In version 3.0, this task was moved from the grid to a panel below the grid.

1. Main > Administration > Admin Console > Supervisor Group Setup
2. Select desired group in the left panel.
3. Enter new group name in the "Change group name" box.
4. Click [Go].

Reports for viewing template personnel and location assignments

The following reports can be helpful for reviewing supervisor groups and employee template locations. These are general reports, located here:

- Main > Scheduling > General Reports

Supervisor Groups

- Shows members of supervisor groups. Sorted by group name, then member name, with supervisors at the top of each group. The final section shows employees who are not assigned to any group.
- For location-assigned employees, the Location and Template columns show the location(s) that tie the employee to the group.
- For direct-assigned employees, the Location and Template columns are blank.

Templates – current schedules

- Shows details for currently-scheduled templates.
- Rotation-level information is flagged with "(rot)". Shift-level information is flagged with "(shift)".
- The Search box searches Template, Resource, and Location names.
 - To show info on just a single template, enter the template name into the Search box.
 - To find all occurrences of an employee or location, enter all or part of the employee/location name.

Templates – all schedules

- Shows details for all templates, including templates that are no longer scheduled, or that were never scheduled.
- Rotation-level information is flagged with "(rot)". Shift-level information is flagged with "(shift)".
- The Search box searches Template, Resource, and Location names.
 - To show info on just a single template, enter the template name into the Search box.
 - To find all occurrences of an employee or location, enter all or part of the employee/location name.

Punch mode – per-person

A punch mode can be assigned to individual employees that overrides the global punch mode setting.

Overview

A built-in personnel attribute called "Punch Mode" controls the punch modes that are available to an employee. This attribute only needs to be used when you want to override the global punch mode setting. If the punch module is not enabled, the Punch Mode attribute is not visible.

The following Punch Mode values are available on the Resources screen (Main > Admin > Resources):

- Use Global Default – the current global setting is used.
- Password – employee must punch with username/password.
- Biometric – employee must punch with a biometric device.
- Any – employee may use any available method.

The global default punch mode is located here:

- Main > Admin > Preferences > Punch > Punch - Login Mode

Punch snap-to-shift mode

A new preference provides finer control over the punch snap-to-shift feature.

Overview

The snap-to-shift mode allows on-time punches to be snapped to the exact start or end time of the shift.

The new system preference is located here:

- Main > Administration > Preferences > Punch > Punch – Snap to Shift mode

The following modes are available:

- **Off:**
 - No snapping will occur.
- **IN and OUT:**
 - Snapping will occur for punch IN and OUT.
- **IN only:**
 - Snapping will occur for punch IN.
- **OUT only:**
 - Snapping will occur for punch OUT.

Notes:

1. Early or late punches are never snapped. If punch-rounding is enabled, those times will be rounded.
2. For reference, the original (un-rounded and un-snapped) punch times are always stored in the system. These times are displayed as "raw" punch times.
3. Prior versions of Crew Scheduler used a true/false value for snap-to-shift. If you were using "true" prior to upgrading to 3.0, your snap-to-shift mode will be migrated to "IN and OUT".

Calendar, Daily Schedule: clicking slot opens resource picker

On screens Calendar View and Daily Schedule, clicking a slot opens Resource Picker rather than Shift Properties.

Overview

This is a minor feature that streamlines the workflow for making changes to the schedule.

Calendar View screen:

- Clicking a shift name opens the Shift Properties screen, as usual.
- Clicking a slot opens the Resource Picker, for making a schedule change to that slot.
 - If you don't have edit permission, clicking a slot has no affect.
 - Slots are only shown if you are using one of the "personnel" display modes.
- Drag-and-drop works as usual.

Daily Schedule screen:

- Shift mode ("Show Slots" not checked):
 - Double-clicking a shift opens the Shift Properties screen, as usual.
 - If you don't have edit permission, double-click is disabled, so you'll need to use the [Shift Details] button to see shift properties.
- Slot mode ("Show Slots" checked):
 - Double-clicking a slot opens the Resource Picker, for making a schedule change to that slot.
 - If you don't have edit permission, double-clicking a slot has no affect.
 - If you want to see the Shift Properties while in slot mode, use the [Shift Details] button.

Permissions

Several changes were made in the area of security permissions.

Biometric Setup

The Biometric Setup screen now has a dedicated security setting. Previously it was tied to the permission level of screens Resources and Admin Console. The new security setting allows you to grant access to biometric setup without granting edit permission for Resources or Admin Console. Note that in order for users to get to the Biometric Setup screen, they must have at least read-only permission on Resources or Admin Console.

How to grant access to Biometric Setup

1. Main > Administration > Security > Groups
2. Create or select the desired Group in the left panel..
3. Select "**Setup Res/Reg – Biometric**" in the right panel.
4. Click [Add] to add the permission item.
5. In the dropdown lists, set the desired View and Edit permissions; then click [Set Permission].
6. Ensure that this group has at least read-only permission for one of these screens:
 - a. Setup Res/Reg – Resources
 - b. Setup Other – Admin Console
7. Now users who belong to this security group can access Biometric Setup from one of these paths:
 - a. Main > Administration > Resources > [Bioscan] button.
 - b. Main > Administration > Admin Console > Biometric Setup.

Note on region permissions:

A user may have higher region permissions for the Resources screen than for the Biometric Setup screen. In this case, Biometric Setup will correctly detect this, and will snap to read-only mode if a user from a read-only region is requested.

Approve-all Timesheets

The task of approving all timesheets in the Review Timesheets screen has been moved to an independent permission setting. This allows finer-grained control when granting permissions for timesheet approval. Users with edit permission for screen Review Timesheets will, by default, NOT have access to the [Approve-all] button. To grant this access, you need to explicitly add permission for the approve-all-timesheets task.

How to grant access to the task: Approve-all Timesheets

1. Main > Administration > Security > Groups
2. Create or select the desired Group in the left panel..
3. Select "**TASK – Approve-all timesheets**" in the right panel.
4. Click [Add] to add the permission item.
5. In the dropdown lists, set the desired Edit permission; then click [Set Permission].
6. Ensure that users with approve-all-timesheets permission also have some level of edit permission on screen "**Supervisor – Timesheet Review**". The [Approve All] button will not be enabled unless edit permission exists for both the screen and the task.

Notes on task-based permission items

- View permission for task-based security items is not applicable, so the view permission for these items is fixed at "N/A".

Resource names – up to 4 attributes.

Resource names can be made up of up to 4 different attributes. This also applies to names on the Daily Report, where you have additional formatting options.

Resource names

It can be helpful to add additional information, such as an employee number or EMT level, to the personnel names displayed by Crew Scheduler. You can build your employee names with up to four attributes. Typically the first two attributes would be Last Name, then First Name. This can also be done with other resource types, such as vehicles.

How to set a multi-part resource name

1. Main > Administration > Attributes.
2. Select the desired resource type (e.g. Personnel) in the top panel.

3. In the lower panel, select the attribute you want to use for the first part.
4. The Attribute Setup screen pops up.
5. Select one of "1st, 2nd, 3rd, 4th part" in the "Resource name part" dropdown.
6. Click [Save Settings].
7. In the "Attribute" dropdown, select the attribute you want to use for the next name part.
8. Repeat steps 5-7 above for your 2nd, 3rd, and 4th name parts.
9. When all your desired attributes are set, close the Attribute Setup screen and go back to the Attributes screen.
10. Click [Update Resource Names].
 - a. All resources of the current type will have their names updated to reflect your new naming convention.
 - b. If duplicate names occur, you will see a warning that reports the number of duplicates. Duplicate names will have a number appended to the name. The first duplicate has "(1)", the second has "(2)", and so on.
 - c. To find the duplicate resources, look at the general report "Resources – active and inactive". You may have inactive resources with duplicate names.

Daily Report names

The naming options for the Daily Report screen are the same as for resource names, but you have additional formatting options. You can elect to use only the first part of an attribute. For example, you can use the first initial of the first name, rather than the entire first name.

How to set a multi-part Daily Report resource name

1. Main > Administration > Attributes.
2. Select the desired resource type (e.g. Personnel) in the top panel.
3. In the lower panel, select the attribute you want to use for the first part.
4. The Attribute Setup screen pops up.
5. Select one of "1st, 2nd, 3rd, 4th part" in the "Daily report name part" dropdown.
6. Set the desired value in "Daily report format":
 - a. The first 2 characters define the length, and the 3rd character is an optional separator.
 - b. "00," means "use all characters followed by a comma".
 - c. "01." means "use first character followed by a period."
7. Click [Save Settings].
8. In the "Attribute" dropdown, select the attribute you want to use for the next name part.
9. Repeat steps 5-8 above for your 2nd, 3rd, and 4th name parts.
10. Open the Daily Report screen and verify your naming system.

What's new in 3.0?

Installation

- Crystal Reports Installer: When you first install or upgrade to CS 3.0, a Crystal Reports installer will be launched: "Crystal Reports runtime engine for .NET Framework". Follow the prompts of the Crystal installer.
- The 3.0 installation adds several indexes to the database. This can take a long time for large databases. If you get a timeout error during the DB update, proceed with the rest of the installation, then re-run your database update manually as shown in the procedure below:
 1. On the web server machine, open the update utility by clicking:
Start > Programs > RescueNet > Crew Scheduler Utilities > Database Updater
 2. The utility program will appear.
 3. In the upper-right panel, check the box with your database name (Crewsked_yourcompany).
 4. Click the red [Update] button. The update should succeed with no errors this time.

New General Reports

- Main > Scheduling > General Reports

Templates – current schedules

- Shows details for currently-scheduled templates.
- Rotation-level information is flagged with "(rot)". Shift-level information is flagged with "(shift)".
- The Search box searches Template, Resource, and Location names.
 - To show info on just a single template, enter the template name into the Search box.
 - To find all occurrences of an employee or location, enter all or part of the employee/location name.

Templates – all schedules

- Shows details for all templates, including templates that are no longer scheduled, or that were never scheduled.
- Rotation-level information is flagged with "(rot)". Shift-level information is flagged with "(shift)".
- The Search box searches Template, Resource, and Location names.
 - To show info on just a single template, enter the template name into the Search box.
 - To find all occurrences of an employee or location, enter all or part of the employee/location name.

Security – group permissions

- Shows permissions for each security group.
- To see which users are in which security groups, use the general report "User Accounts".

New Timesheet Reports

- Main > Supervisor > Timesheet Reports

[grid] Worked Hour Weekly Totals

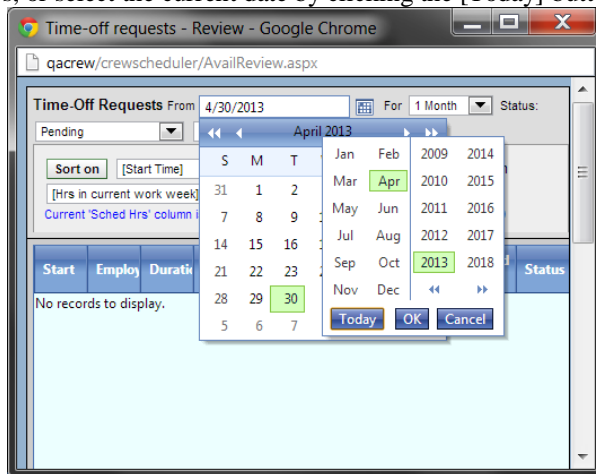
- This report should be helpful in determining part-time status of your employees for various look-back periods.
- Shows worked hours, totalled by week. Worked hrs include shifts and "other hrs" items.
- The start-day of the week is defined by the system preference "Reports - weekly start day".
- The start-time of the week is 00:00.
- All shift hrs are counted in the week where the shift starts.
- An additional employee attribute, such as hire-date or work-status, can be selected using the "Attribute" dropdown list.

What's different in version 3.0:

This section describes changes in behavior or look-and-feel.

- New permission settings
 - Biometric Setup has a dedicated permission setting. You must explicitly grant access to this screen in your security groups.
 - Review Timesheets > [Approve All] button: This task has a dedicated permission setting. You must explicitly grant access to this task in your security groups.
- Timesheet Override screen:
 - When using [Set as actual time] or [Override], you can now enter hours two ways:
 1. With a decimal point to indicate decimal hours, for example "12.5", or twelve point five hours.
 2. With a colon to indicate hours:minutes, for example "12:30", or twelve hours, thirty minutes.
- Timesheet export:
 - After export, a link to the exported file is displayed, along with any messages associated with the export. Click the link to open or save the export file.
 - The default number of decimal places for hours/earnings was changed from 2 to 6. If your payroll export has problems with the new default, you need to specifically set the decimal places for your export columns. Follow the procedure below:
 1. Main > Supervisor > Export Timesheets > [Add/Edit File Formats]
 2. In the lower panel, click items containing hours or earnings.
 3. Enter 2 next to "Decimal Places" and click [Update].
 4. Close the Column Editor screen, and repeat step 2 for all remaining hours/earnings items.

- Daily Schedule screen:
 - Handles "all region" mode when user has those permissions.
 - In "show slots" mode, double-click of a grid row pops up the Resource Picker rather than Shift Properties.
- Calendar View screen:
 - Clicking a slot pops up the Resource Picker rather than Shift Properties.
- Message Center screen:
 - Handles "all region" mode when user has those permissions.
 - Search mode searches only the current region (or all regions if in all-region mode).
 - The "All rows", "Selected Rows" radio buttons were removed in favor of "Select all", "Clear all" links underneath the Recipient and Message Group grids.
- Find & Replace screen:
 - The [Replace] action has been moved to the Preview screen. Now you always see a preview of the replacements before you can execute them.
 - From the Find & Replace screen, click [Continue] to go to the Preview screen. From there you can make the replacements, if desired.
- Audit Log: The following actions are now logged, as message type "audit":
 - Proxy punch: search for the phrase "proxy punch".
 - User opens screen "My Timesheets".
 - User opens screen "My Time Entry".
- Add-shift dialog – region dropdown
 - Now handles the parent screen being in "all-region" mode. When the parent screen (typically Calendar View or Daily Schedule) is in all-region mode, the add-shift dialog appears, set to your home region. The region dropdown contains all regions where you have edit permission.
 - When "Leave this screen open" is enabled, you can add shifts to multiple regions by changing the region dropdown. Note that when you change regions, the list of available shift types is reloaded, and the previously-selected shift type may no longer be available.
- Self-serve screens are now targeting a minimum screen size of 1024x768, rather than 800x600.
 - http://www.w3schools.com/browsers/browsers_display.asp
- Grid controls: cross-browser screens use a new data-grid control, as the previous control was not working correctly across all browsers.
- Date picker controls: CS is using new controls for date selection, as the previous controls are not cross-browser compliant. The newer controls are lighter-weight, and should boost performance.
 - When the date box has focus, use the left/right arrow keys to move the cursor between the day, month, and year portion of the date.
 - When the cursor is in the day, month, or year portion of the date, use the up/down arrow keys to increase/decrease the value.
 - Click the calendar icon to get a calendar popup.
 - Click the month/year header of the calendar popup to get an additional popup where you can select months and years, or select the current date by clicking the [Today] button:



1.

- Time picker controls: CS is using new controls for time selection, as the previous controls are not cross-browser compliant. The newer controls are lighter-weight, and should boost performance.

- When the time box has focus, use the left/right arrow keys to move the cursor between the hour and minute portion of the time.
- When the cursor is in the hour or minute portion of the time, use the up/down arrow keys to increase/decrease the value.
- Click the clock icon to get a popup menu of times.
- Permission fix on Shift Details screen:
 - This screen is found in the Item Details panel of Timesheet Override.
 - This screen is also located here: My Time Entry > Shift Tab > Details.
 - Shift Details was wrongly using the permission setting from "My Time Entry – Main", rather than "My Time Entry – Shift Tab". It is now using the correct permission setting. If users of Timesheet Override have lost permission, they need to be granted edit permission on "My Time Entry – Shift Tab". CS 3.0.33.
 - Now employees with read-only permission on My Time Entry – shifts are able to view shift details.
- Dashboard:
 - Normal dashboard view will only show the first 200 items of each type.
 - To see all items, click the "Open in new window" link.
- Punch Bulletin Setup
 - added a "show all items" option, to allow management of items sent more than one year ago.
- My Time Entry, Timesheet Override: maximum limits are enforced when adding/editing timesheet items. Entered values must be less than the following limits:
 - Hours: 200
 - Miles: 3,000
 - Earnings: \$20,000
 - Special rate: \$1,000
 - Break minutes: 1,000

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We welcome your comments and feedback on the new release.

Thank you for your support.

CrewScheduler Team
ZOLL Data Systems