

**Core Package Tutorials #1-4: Getting Started with ScheduleSource**

Click this link to view the employee tutorials:

<http://www.optimal-internet.com/ScheduleSource/employeetutorial/>

**A. How to Logon**


Step 1: Bookmark, under Favorites, the URL that leads you to the logon page:

<https://www.schedulesource.com/version2/teamwork/>

Step 2: Select the Employee Portal.

- Click on this button which will lead you to the logon page.



<p> <b>Employee</b></p> <p>Account Code: <input type="text" value="tutorial"/></p> <p>User Name: <input type="text" value="support"/></p> <p>Password: <input type="password" value="••••••••"/></p> <p><input checked="" type="checkbox"/> Remember Me</p> <p><input type="button" value="Log On"/></p>	<p><u>Recommended Browsers:</u></p> <ul style="list-style-type: none"><li>- Mozilla Firefox 2.0+</li><li>- Internet Explorer 7.0+</li></ul> <p>Your browser must support JavaScript and allow cookies from this site.</p>
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**System Messages:**  
None.

Step 3: Check to be sure that you are using a Recommended Browser.

- These are listed on the logon page: Mozilla Firefox 2.0+ or Internet Explorer 7.0+
- These are free and can be downloaded from the Internet at [www.mozilla.com](http://www.mozilla.com) or [www.microsoft.com](http://www.microsoft.com)

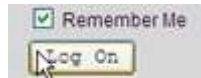
Step 4: Check to see that your browser is set to support JavaScript and to allow Cookies.

- These are required settings in order to logon to ScheduleSource Teamwork.
- These settings are found in Internet Options under the Tools link at the top of the browser.

Step 5: Enter all three pieces of logon information correctly.

- These are assigned to you by your organization. Contact your scheduler for access.
  - 1) Account Code: \_\_\_\_\_
  - 2) User Name: \_\_\_\_\_
  - 3) Password: \_\_\_\_\_

- The logon codes are not case sensitive. They are space sensitive.
- If you are using your own computer: Check the box 'Remember Me' if you want the computer you are using to remember your account code and user name. Then you will only need to type in your password in the future from this computer. If other people will be logging on from this same computer, do not check the 'Remember Me' box.



- Click the Log On button to enter the application.

**Note:**

- Too many attempts to logon with incorrect information - will result in a **LOCKOUT**. This security measure takes effect when too many failed logon attempts will lock the IP address of the computer you are on.
- Therefore you should **STOP** trying to log on if you fail in two or three attempts to logon.

**SECURITY NOTICE**

Log on failure count exceeded.

All persons attempting to gain unauthorized access to ScheduleSource will be prosecuted to the fullest extent of the law.

Schedulers:

If you have a valid account and have simply forgotten your password, please contact [support@schedulesource.com](mailto:support@schedulesource.com) and explain the situation. Be prepared to provide account information including address, phone number, and license codes.

Employees:

If you have forgotten your logon credentials, please contact your schedule administrator.

- If you continue and are locked out, you will not be able to logon until your organization administrator authorizes this IP address to be unlocked.
- You need to contact your organization administrator to request an IP address unlock.

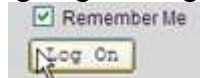
Step 6: Note any system messages. These are posting from ScheduleSource concerning the application.

Step 7: Need support?

- Contact your Scheduler within your organization.
- **DO NOT** contact ScheduleSource. Only your organization or scheduler can assign the logon information. ScheduleSource, for security reasons, will not respond to employee requests for any type of support needed.

## B. The Employee Home Page

Step 1: Clicking Logon brings you to the 'Opening Screen' or 'Home Page'.



Step 2: The Home Page contains blue links which allow you access to specific information.

- Your name appears in the top left corner and top menu bar.
- Your organization name appears in the top menu bar as location.
- The Home page shows the current day and the current week schedule.
- The blue links allow you access to more specific information for any day schedule, days off, or collaboration pack information.

Step 3: Returning to the Home Page.

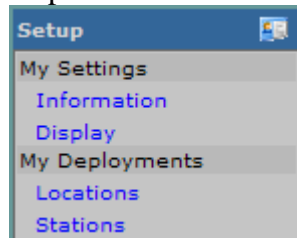
- You can return to the Home Page screen anytime by clicking on your name in the left menu.



- The 7-Day Schedule shows you a summary for the next 7 days of your current schedule.

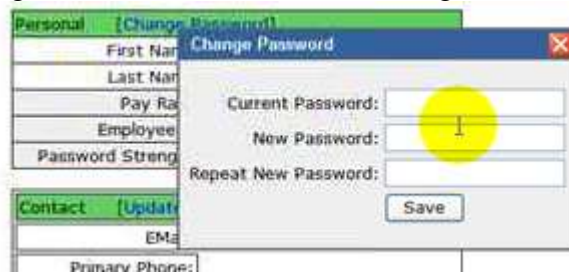
### C. Setting up your employee account

Step 1: Click on the Setup Tab in the left menu to open the setup options list.



Step 2: Click on the 'Information' link.

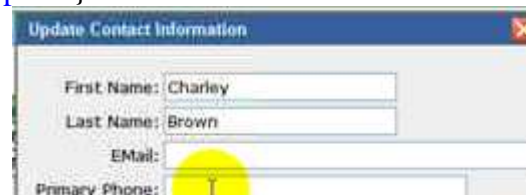
A) Change Password. Click on the [Change Password] link.




- You need to type in your new password twice.
- 'OK' Passwords have a minimum of 6 characters mixing letters and numbers.
- Click the SAVE button to change the password.
- You are encouraged to change your password frequently to make your account more secure.
- Passwords can not be looked up. However, your organization can reset your password to something new.

B) Update Information. This privilege is determined by your organization.

- If your organization is allowing you to update your own information, an [Update] link appears in the Contact Box.
  - 1) Click [Update] to access the edit screen.



- 2) On the edit screen pop-up, changes can be made to any field box.
  - 3) Click the  button to record the new information.
  - 4) All changes will also be made on the organization account, so the updated information is immediately visible to your scheduler.
- If there is no link, contact your scheduler who can update your information so that your information is always current.

C) Schedule Summary

- This is for your information.
- It is based on the current week schedule.

Schedule	Min	Max
Hours/Week:		40
Days/Week:		6
Shifts/Day:	-	2
Hours/Day:	-	8

Step 3: Click on the 'Display' link.

- Allows you to set your display to the font and size you prefer.

Typeface: Verdana Size: 10pt SET

How does this text look on your computer? This will be the default text from now on. To change to a different typeface or size, resubmit the form above.

**Example Schedule:**

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
1	2	3	4	5	6	
7	8	9	10	11	12	13
14	15 TEST 9:00am-4:00pm	16	17	18	19	20 Front Desk 9:00am-2:00pm

- 1) Choose font and size from the drop-down list options.
- 2) Click **SET** to save your new display options.
- 3) An Example Schedule changes so you can see what your view looks like.
- 4) This will remain your default text, unless you set a different display.

**D. Viewing Deployments: Information Only**

Step 1: View Locations.

- This shows the locations within your organization that you have been deployed to as eligible to work.

- 1) Click on the 'Locations' link in the left menu.

Locations		
Location	Active From	Active To
Organization Name		

- 2) You may have one or more locations.
- 3) The active time period is displayed for each separate location.
- 4) You can only be scheduled into a location that appears on this list, during the active time period shown.
- 5) If you feel this list is incorrect, contact your Scheduler immediately.

Step 2: View Stations.

- This shows the stations (or jobs) within your organization that you have been made eligible to work at with an assigned skill level.

1) Click on the ‘[Stations](#)’ link in the left menu.

Stations	
Name	
Task 1	
Task 2	

- 2) You can only be scheduled into a job station that appears on this list.
- 3) If you feel this list is incorrect, contact your Scheduler immediately.

### E. View your Schedule

Step 1: Click on the Schedule Tab in the left menu bar, to open the options list.

Schedule
My Schedule
<a href="#">Week</a>
<a href="#">Month</a>
<a href="#">List</a>
<a href="#">Totals</a>
Enterprise
<a href="#">SwapBoard</a>
<a href="#">Full Schedule</a>

- You can view your schedule by Week or Month.
- You can view your schedule in either a list or grid view.
- You can view the Totals summary of hours and estimated pay.

Step 2: To View schedule by Week.

- Click on the ‘[Week](#)’ link to open your Weekly Schedule.
- Note that in the heading, the [Grid](#) layout is underlined, showing the Grid view is displayed.

Layout: [Grid](#) | [List](#) Range: [Week](#) | [Month](#) || [Totals](#)

◀ March 9, 2008 - March 15, 2008 ▶

SUN Mar-9	MON Mar-10	TUE Mar-11	WED Mar-12	THU Mar-13	FRI Mar-14	SAT Mar-15
8am		8:00am - 12:00pm Task 1	8:00am - 12:00pm Task 1	8:00am - 12:00pm Task 1 [Swap...]	8:00am - 12:00pm Task 1 [Swap...]	

- You can change weeks by using the < or > arrows at the top of the Schedule.
- You can change to List view either by the ‘[List](#)’ link in the top menu bar or by the ‘[List](#)’ link in the left menu bar.

◀ March 9, 2008 - March 15, 2008 ▶

Date	Day	Station	Group	Note	Start	End	Break	Hours	Actions
03/11/2008	Tue	Task 1			8:00am	12:00pm	9:45am - 10:15am	3.50	
03/12/2008	Wed	Task 1			8:00am	12:00pm	9:45am - 10:15am	3.50	
03/13/2008	Thu	Task 1			8:00am	12:00pm	9:45am - 10:15am	3.50	[Swap...]
03/14/2008	Fri	Task 1			8:00am	12:00pm	9:45am - 10:15am	3.50	[Swap...]

Step 3: To View schedule by Month.

- Click on the '[Month](#)' link to open your Monthly Schedule.

< March, 2008 >

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
24	25	26	27	28	29	01
02	03	04	05	06	07	08
09	10	11	12	13	14	15
		8:00am - 12:00pm Task 1	8:00am - 12:00pm Task 1	8:00am - 12:00pm Task 1 [Swap...]	8:00am - 12:00pm Task 1 [Swap...]	

- You can change months by using the < or > arrows at the top of the Schedule.
- You can change to List view if desired.

Step 4: View schedules by Grid or List.

- When you first open a schedule, it is displayed in Grid layout. Note that in the heading, the [Grid](#) layout is underlined, showing the Grid view is displayed
- You can change to List view either by the '[List](#)' link in the top menu bar or by the '[List](#)' link in the left menu bar.

Step 5: View Totals Summary of Schedule.

- Click on the '[Totals](#)' link in the Schedules page menu bar.

Layout: [Grid](#) | [List](#) Range: [Week](#) | [Month](#) | [Totals](#)

< 2008 >

Location	Week Of	Shifts	Hours	Pay Estimate
Organization Name	03/09/2008	4.00	14.00	\$115.50
Organization Name	03/16/2008	4.00	14.00	\$115.50

- The pay estimate is based on the hourly rate for you listed by your organization.

## F. Need Support?

- Contact your Scheduler within your organization.
- DO NOT contact ScheduleSource. Your organization controls all employee access, information, and privileges through the employee portal. ScheduleSource, for security reasons, will not respond to employee requests for any type of support needed.