



ComVida Corporation
SOFTWARE SOLUTIONS THAT FIT

EMS Enterprise Settings User Manual

October 2013

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1 INTRODUCTION

Welcome to the ComVida Corporation EMS Enterprise Settings User Manual. This manual has been developed to assist you, a user of EMS, in using the system to its full potential.

This document is designed as a reference guide to the Enterprise Settings in EMS. It explains the "reason for" and "use of" each page and report. User manuals for the other areas of EMS are also available in the EMS Help menu, along with a link to the Help that covers procedures, tips and techniques for all areas of the system.

We have made every effort to ensure that the information provided in this manual is correct. We hope that you find it a useful tool. Should you have any comments about this manual, please direct them to

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Or contact us through our website

www.comvida.com

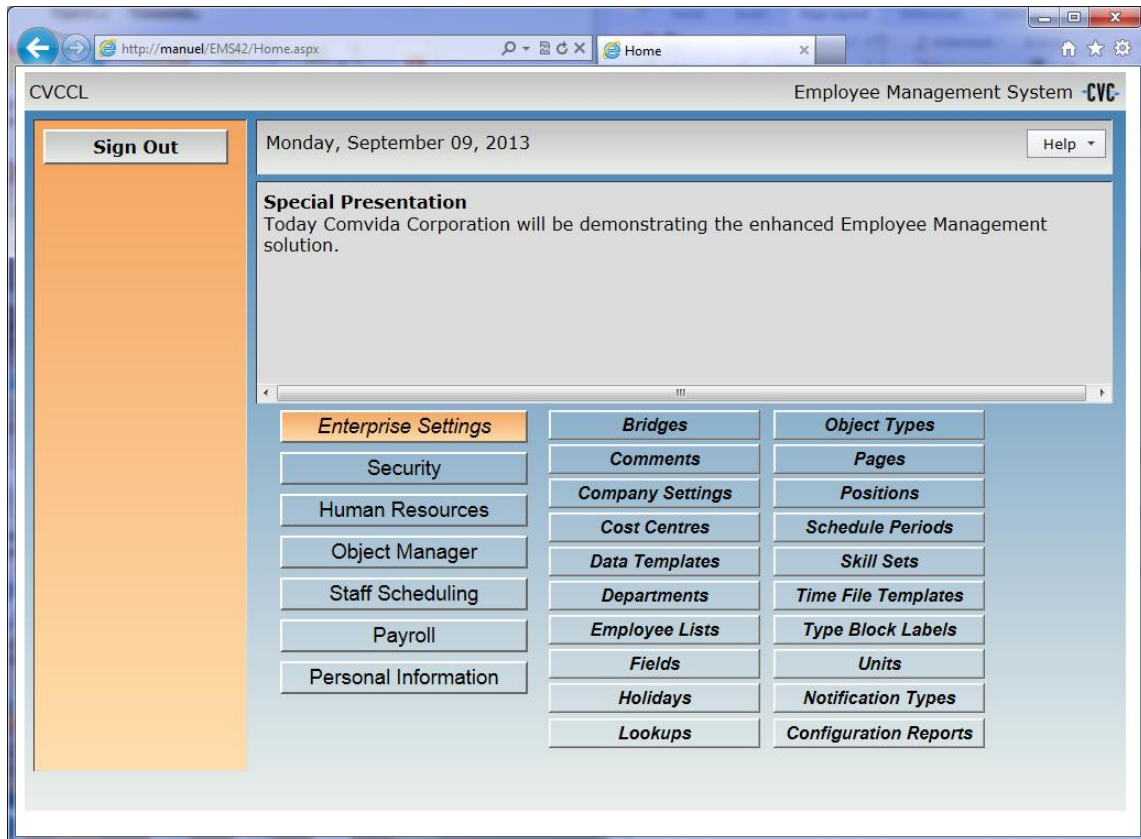
Based on user feedback this manual will continue to evolve, so from time to time, please check the Help menu for an updated copy.

2 ENTERPRISE SETTINGS

The Enterprise Settings section is accessed from the main menu. This is where system settings and configuration tables are defined and maintained.

Tables are displayed in a list format that includes all available details as well as Created By/When and Modified By/When information for improved change control.

Reports can be printed from each table or by clicking the Configuration Reports button in the Enterprise Settings menu on the Home page.



3 BRIDGES

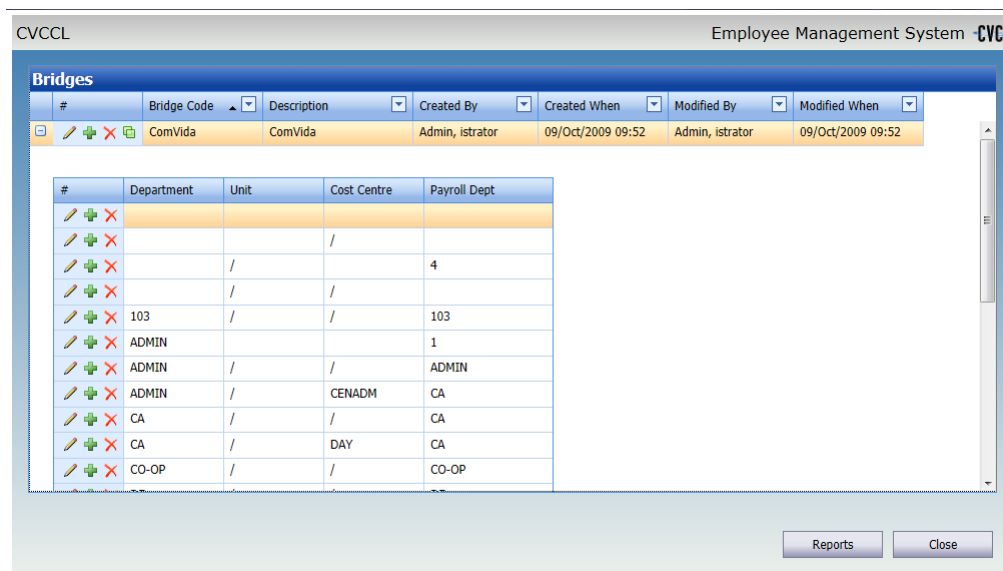
Bridge tables are only set up when you are using a Payroll program other than ComVida.


Bridges define the payroll translation table to export scheduling information into a third-party payroll system. The translation equates the Scheduling system’s Department, Unit, Cost Centre combinations to the payroll system’s Department codes. This mapping between the two systems must be setup before scheduling can export the data to payroll.

Different sets of Bridge codes can be created when multiple payroll systems are used.

Note: Cost Centres, Departments, and Units must be defined prior to setting up this table.

From the Home page, select **Enterprise Settings | Bridges**.



If you are using two or more different payroll programs, a Bridge will need to be defined for each payroll. To add a new Bridge, click the New () button in the upper or master grid table.

Adding a Entry

To add an entry to the existing Bridge table:

Expand the Bridge table by clicking on the plus sign at the far right of the Bridge row.

Click the New () button in the lower grid table.

In the new row, select the Department, Unit, and Cost Centre from each of the dropdown list and enter the Payroll department.


Click the OK () button on the new row to add this entry to the list.

Updating a Entry

To update an entry in the table:

Select the row in the lower grid table.

Click the Edit () button **to** make the necessary changes.

When your changes are completed click the OK () button to save the corrected entry to the list.

Note: If a Bridge table entry has <BLANK> in the **Payroll Dept**, then the exports will recognize this and output "" in the export file for the Department, i.e. blank Department.

Bridge Report

A list of Bridge Tables and entries can be printed by clicking the Reports button and selecting Bridge Tables in the Reports list. Reports are also available through the Configuration Reports button from the Enterprise Settings menu on the Home page.

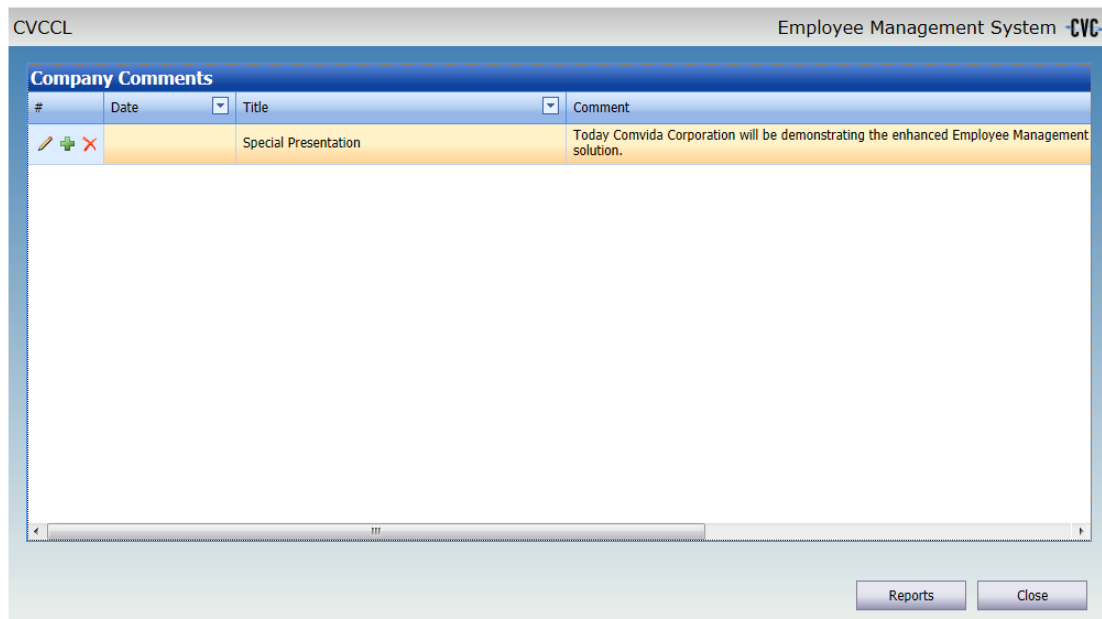
4 COMMENTS

Comments are site-specific messages that appear at the top of the Home page either every day or on a specific date.


Comments can be used as notes or reminders to users throughout the system. They are entirely user-defined and specific to a particular company.


Comments can be date specific (if a date is entered in the **Date** field) or displayed on all dates until the Comment is deleted.

From the Home page, select **Enterprise Settings | Comments**.

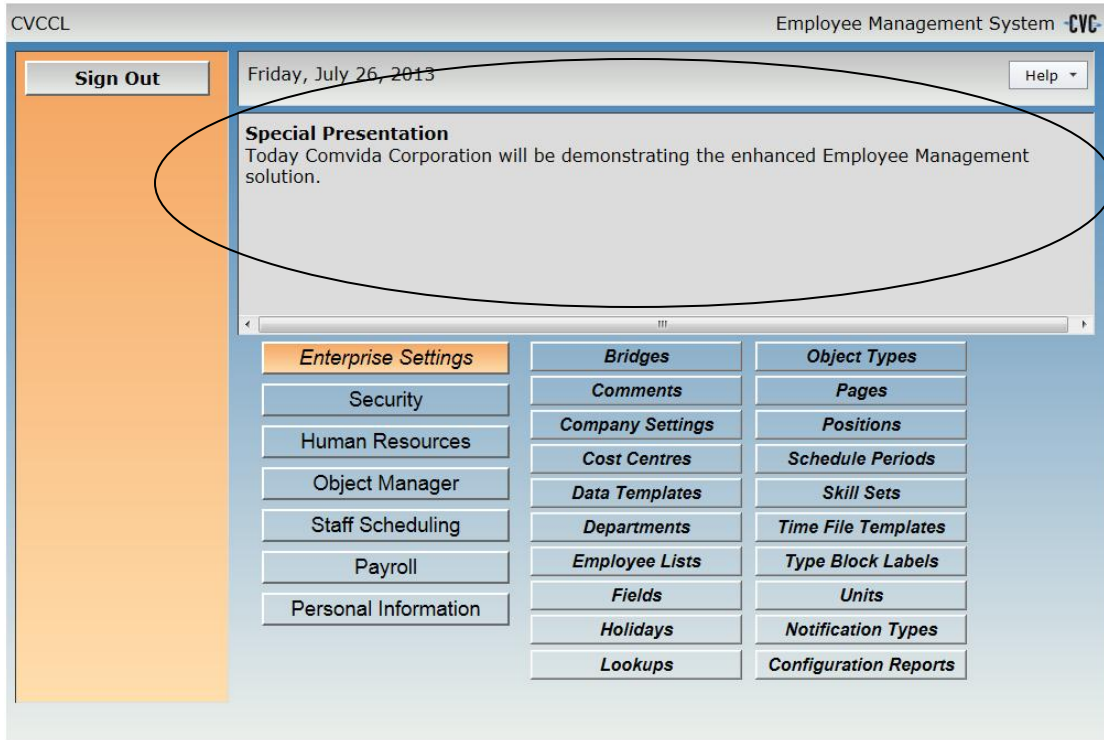


To add a new Comment click the green plus sign ().

To edit an existing Comment click the brown pencil ().

To delete a Comment click the red X ().

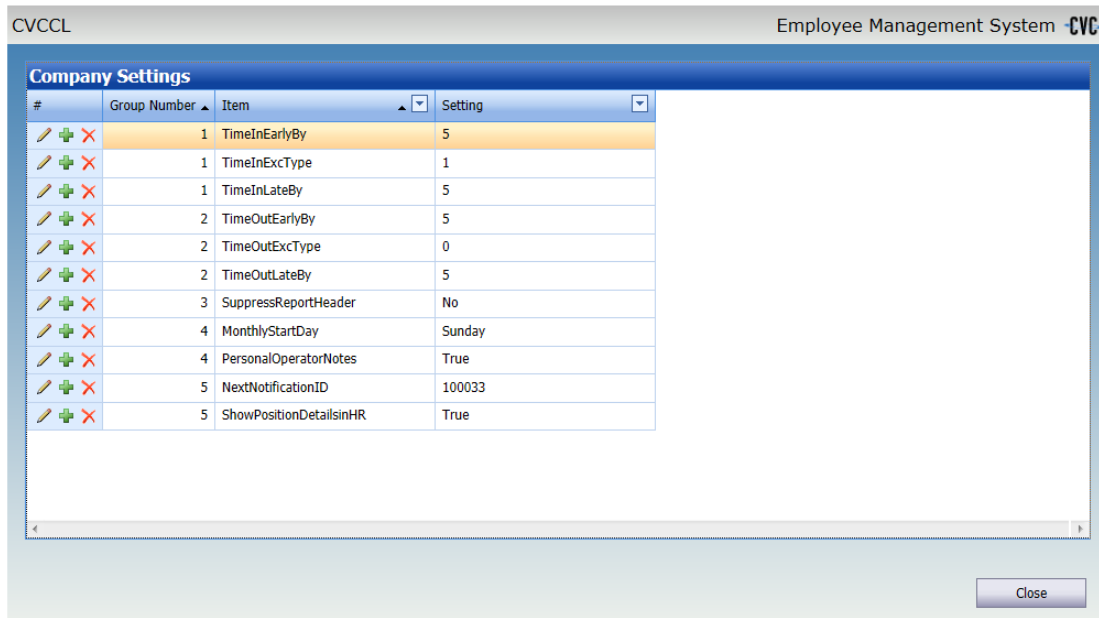
Comments will be displayed on the Home page and will display for any user who is logged on.



5 COMPANY SETTINGS

Company Settings define default parameters and behaviour at a system-wide level , including Time file import specifications and report format.

From the Home page, select **Enterprise Settings | Company Settings**.



To add a new Setting click on the green plus sign ().

To edit an existing Setting click on the brown pencil ().

To delete a Setting click on the red X ().

The Group Number column simply organizes the Settings for display purposes, it doesn't affect the value.

Settings

Item	Setting
TimeInEarlyBy	The number of minutes used for early In swipe checks. This value is maintained automatically through the Time File Import tool in Scheduling and should not normally need to be modified directly.
TimeInExcType	The type of exception check to perform on In swipes.

	<p>This value is maintained automatically through the Time File Import tool in Scheduling and should not normally need to be modified directly.</p>
TimeInLateBy	<p>The number of minutes used for late In swipe checks.</p> <p>This value is maintained automatically through the Time File Import tool in Scheduling and should not normally need to be modified directly.</p>
TimeOutEarlyBy	<p>The number of minutes used for early Out swipe checks.</p> <p>This value is maintained automatically through the Time File Import tool in Scheduling and should not normally need to be modified directly.</p>
TimeOutExcType	<p>The type of exception check to perform on Out swipes.</p> <p>This value is maintained automatically through the Time File Import tool in Scheduling and should not normally need to be modified directly.</p>
TimeOutLateBy	<p>The number of minutes used for late Out swipe checks.</p> <p>This value is maintained automatically through the Time File Import tool in Scheduling and should not normally need to be modified directly.</p>
SuppressReportHeader	<p>A Yes/No flag indicating that the report first page header (which includes the logo and company address) should be excluded on all reports printed in EMS.</p>
MonthlyStartDay	<p>The day of the week on which the Employee Monthly calendar in Scheduling and Personal Information starts, normally Sunday or Monday.</p>
PersonalOperatorNotes	<p>A True/False flag indicating that employees can create page notes within Personal Information.</p> <p>A page note that is added within Personal Information can be set to All Users, allowing the employee to create a note for schedulers and other employees.</p>
NextNotificationID	<p>The next sequential number to be used for Notification. This number is maintained automatically and should not be modified</p>

	directly.
ShowPositionDetailsInHR	<p>A True/False flag indicating that the Position field in HR should automatically show the rate and description of the Position for verification purposes.</p> <p>A user must also have View or higher access to Positions in order to view the Position rate and description. Refer to the Security Rights section of the Security User manual for more details.</p>

6 COST CENTRES

Cost Centres are a way of dividing your organization into working groups. Cost Centres can be used to identify such things as different funding sources, different areas of operations or even different sites or programs.

Cost Centres are used for filtering as well as part of the criteria for reporting. Each employee must be assigned a Cost Centre in the Employee Work Profile I.


From the Home page, select **Enterprise Settings | Cost Centres**.


#	Code	Description	TB Code	Type Block	Unit Production	Created By	Created When	Modified By
	/	/		- - -	0	Admin, istrator	08/Oct/2009 08:54	CV CPRConversion
	CENADM	Central Administration	C	C - A - -	0	Admin, istrator	14/Oct/2009 10:28	Anders, Sonia
	DAY	Day Program	D	D - C - -	100	Admin, istrator	14/Oct/2009 10:27	Anders, Sonia
	RES	Residential	R	R - C - -	100	Admin, istrator	14/Oct/2009 10:27	Anders, Sonia
	SIL	Semi Independent Living	S	S - C - -	100	Admin, istrator	08/Oct/2009 08:58	Anders, Sonia


Field Name	Description/Usage
Code	A unique code identifying the Cost Centre or working group (max length: 6 characters).
Description	A description of the Cost Centre.
TB Code	An alpha-numeric character linked to the Cost Centre and used for grouping and filtering purposes. The Cost Centre TB Code will be automatically applied to the 4th position of the Employee and Shift Type blocks for easier filtering.
Type Block	A set of twelve alpha-numeric characters that represents the Cost Centre.

	Sites with several Cost Centres may also find the Type Block helpful for filtering on a group of cost centres in Scheduling, Payroll Reports and Item Variables.
Unit Producing	<p>The percentage of an employee's time (0 - 100) that is considered unit producing (UPP) when working in the Cost Centre. The remaining percent is consider management or operating services (MOS).</p> <p>Unit Producing percentages for the Department, Unit, Position, Cost Centre and Employee are used in Payroll Report Writer reports that have a column of ACTV to determine percentages of activity in the two areas.</p>

To add a new Cost Centre click on the green plus sign ().

To copy an existing Cost Centre click on the double-page icon ().

To edit an existing Cost Centre click on the brown pencil ().

To delete a Cost Centre click on the red X ().

Cost Centre Report

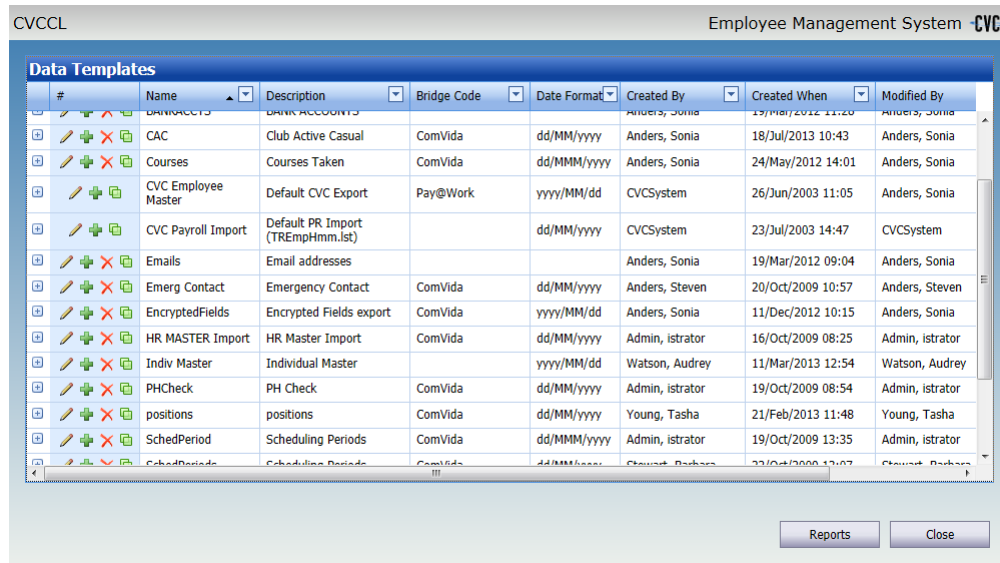
A list of Cost Centres can be printed by clicking the Reports button and selecting Cost Centres in the Reports list. Reports are also available through the Configuration Reports button from the Enterprise Settings menu on the Home page.

7 DATA TEMPLATES

Data Templates are used to define the layout of an import or export file (identifying which fields are being imported or exported and their location in the file). Employee data can be imported and exported through Human Resources. Object data can be imported and exported through the Object Manager.



Note: The sequence order in the Template must match that of the import/export file.

From the Home page, select **Enterprise Settings | Data Templates**.





Field Name	Description/Usage
Name	A unique code identifying the Data Template (max length: 20 characters).
Description	A description of the Data Template.
Bridge Code	The Bridge table to use when the Template includes CVCPRDept. The CVCPRDept field in the Template will contain the Payroll Department in the Bridge table row that matches the employee's Department, Unit and Cost Centre.
Date Format	The format to be used for all date fields in the Template. If the file will be edited in Excel, use either yyyy/MM/dd or dd/MMM/yyyy for clarity.

To add a new Data Template:



Click the green plus sign () or the double-page icon () to copy an existing Template.

Enter the Name and a Description, select a Bridge table, if applicable, and choose the appropriate Date Format.

Click the green checkmark () to save the new Data Template.

Click the plus sign () at the far left of the new Data Template to view the Items. Refer to the sections below for details on adding, modifying and deleting Items.

To close the page, click **Close**.


To edit an existing Data Template's Description, Bridge Table or Date Format, click the brown pencil (). Click the green checkmark () to save the changes.

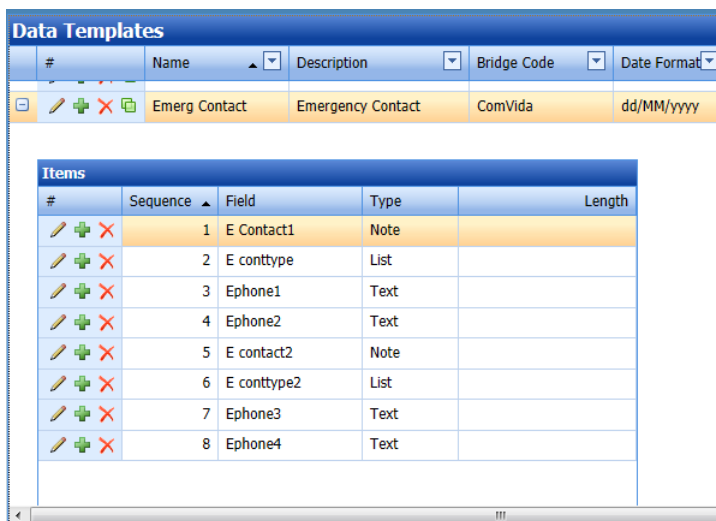
To delete a Data Template, click the red X ().

Adding Items

To add Items (fields) to a Data Template:

Select the Data Template.

Click the plus sign () at the far right of the row to view the Items (fields).



#	Name	Description	Bridge Code	Date Format
1	Emerg Contact	Emergency Contact	ComVida	dd/MM/yyyy

#	Sequence	Field	Type	Length
1	1	E Contact1	Note	
2	2	E conttype	List	
3	3	Ephone1	Text	
4	4	Ephone2	Text	
5	5	E contact2	Note	
6	6	E conttype2	List	
7	7	Ephone3	Text	
8	8	Ephone4	Text	

Click the green plus sign () to create a new row.

Set the **Sequence** to the position of the Item (field) in the file. The employee (or object) code is *automatically included* at the beginning of each row preceded by a RowID (number) column.

Note that Duplicate Sequence numbers are not allowed, so some Items (fields) may need to be deleted and re-added to change the order of the Items (fields).

Select the name of the **Field** to be imported or exported. If a Field contains no value for the employee (or object), an empty placeholder should be included instead.

The **Type** and **Length** are set automatically.


Click the green checkmark () to save the new Item.

To close the page, click **Close**.

Inserting or Moving Items

To insert a new item (field) in a Data Template:

Select the Data Template.

Click the plus sign () at the far right of the row to view the Items.


Duplicate Sequence numbers are prohibited, so if the new Item is to be inserted before an existing Item (or Items), the Sequence number of subsequent Item(s) will need to be incremented (increased) to accommodate the new Item.


For example, AddressCity needs to be placed at Sequence 3 and the Data Template already has AddressProvince as Sequence of 3 and AddressPostal as 4:


Click the brown pencil () on the AddressPostal row and change the Sequence to 5.

Click the green checkmark () to save the new AddressPostal Sequence.

Click the brown pencil () on the AddressProvince row and change the Sequence to 4.

Click the green checkmark () to save the new AddressProvince Sequence.

Then click the green plus sign () on any row, set the Sequence to 3 and the Field to AddressCity.

Click the green checkmark () to save the new AddressCity item.

To close the page, click **Close**.

Data Templates Report

A list of Data Templates can be printed by clicking the Reports button and selecting Data Templates in the Reports list.

8 DEPARTMENTS

Department Codes are the key method of separating an organization's employees into groups.


Departments are also used for filtering as well as part of the criteria for reporting. Each employee must be assigned a Department in the Employee Work Profile I.


From the Home page, select **Enterprise Settings | Departments**.


#	Code	Description	TB Code	Type Block	Sched Period	Unit Product	Department Head	Notification
	ADMIN	Administration	a	a??-M??-??-??	37.5/wk	0	Anders, Sonia (ANDER,S)	Both
	CA	Carson	A	A??-C??-??-??	40hrs/wk	80	Chetwynd, Patty (CHET,P)	Departme Head
	CO-OP	CoOp	C	C??-R??-??-??	40hrs/wk	75	Hegges, Sylvia (HEGG,S)	Departme Head
	DE	Dempster	D	D??-C??-??-??	40hrs/wk	80	Anderson, Darlene (ANDER,D)	Departme Head
	DU	Dunbar	U	U??-C??-??-??	40hrs/wk	80	Alajane, Sylvie (ALAJ,S)	Departme Head
	HA	Harvey	H	H??-C??-??-??	40hrs/wk	80	Brand, Robert (BrandB)	Departme Head
	HI	Hillside	I	I??-C??-??-??	40hrs/wk	80	Neypes, Helena (NEYP,H)	Departme Head
	LCS	Ladner Community Share	2	2??-R??-??-??	40hrs/wk	75	Puni, Pardeep (PUNI,P)	Departme Head
	ME	Mender	M	M??-C??-??-??	40hrs/wk	80	Johnson, Brent (JOHNS,B)	Departme Head
	MGMT	Management	m	m??-M??-??-??	37.5/wk	0	Decker, Erma-Joan (DFCK,F)	Departme Head


Field Name	Description/Usage
Code	A unique code identifying the Department or organizational group (max length: 6 characters).
Description	A description of the Department.
TB Code	An alpha-numeric character linked to the Department and used for grouping and filtering purposes. The Department TB Code will be automatically applied to the 1st position of the Employee and Shift Type blocks for easier filtering.
Type Block	A set of twelve alpha-numeric characters that represents the Department. Sites with several Departments may also find the Type Block helpful for filtering on a group of Departments in Scheduling, Payroll Reports and

	Item Variables.
Sched Period	<p>The Department's default Schedule Period for overtime calculations in Scheduling.</p> <p>If specified, this Schedule Period will be used to determine when employees in this Department are in an overtime situation. The Department's Schedule Period can be overridden for individual employees in the Work Profile II page in HR.</p>
Unit Producing	<p>The percentage of an employee's time (0 - 100) that is considered unit producing (UPP) when working in the Department. The remaining percent is consider management or operating services (MOS).</p> <p>Unit Producing percentages for the Department, Unit, Position, Cost Centre and Employee are used in Payroll Report Writer reports that have a column of ACTV to determine percentages of activity in the two areas.</p>
Department Head	The employee responsible for this Department, normally a manager or supervisor.
Notification	<p>A flag indicating that the employee specified as the Department Head, the Employee Group, or both can be selected as a Recipient when Notifications are created.</p> <p>See Notification Types for more information.</p>
Group	An optional Employee Group associated with this Department. Only Employee Groups that have been flagged as Notification Groups will be available in this list.

To add a new Department click on the green plus sign ().

To copy an existing Department click on the double-page icon ().

To edit an existing Department click on the brown pencil ().

To delete a Department click on the red X ().

Department Report

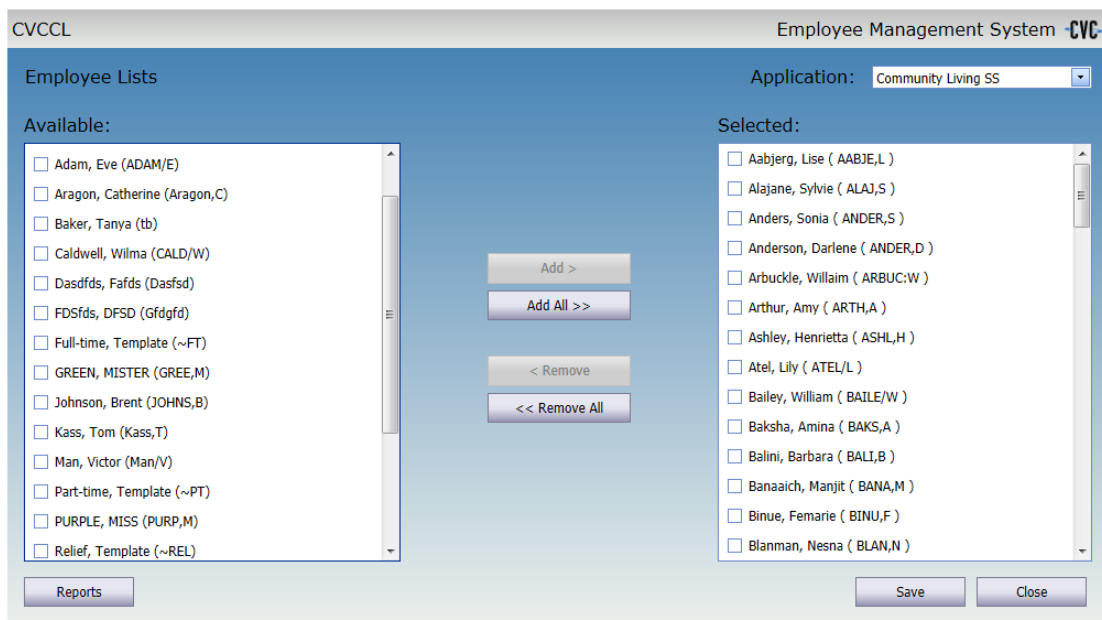
A list of Departments can be printed by clicking the Reports button and selecting Departments in the Reports list. Reports are also available through the Configuration Reports button from the Enterprise Settings menu on the Home page.

9 EMPLOYEE LISTS

Employee Lists define which employees will appear in each application overall. Employee Lists work together with Employee Groups to determine which employees an operator will be able to view within the application. In fact, an employee must be in the application's Employee List and the operator's Employee Group(s) in order for the operator to access the employee.

In addition, an operator must have access to an application in order to view employees and/or pages within the application.

From the Home page, select **Enterprise Settings | Employee Lists**.





When employees are imported or added to the system, they will need to be added to the Employee Lists of the appropriate applications.

If an employee is in the **Selected** group, he/she has will appear in the application. An employee in the Available group will not appear in the application.

To add an employee to an application:

Select an **Application** from the list at the top right (e.g. Community Living SS) to view the employees currently within that application.

Click on the employee in the **Available** list. Additional employees may also be selected and moved at the same time.

Click the **Add** button () to move one employee (or selected employees) or click the Add All button () to move all employees into the application.



When complete, click **Save**.

To close the page, click **Close**.

To remove an employee from an application:

Select an **Application** from the list at the top right (e.g. Community Living SS).

Click on the employee in the **Selected**. Additional employees may also be selected and moved at the same time.

Click the **Remove** button () to remove one employee (or selected employees) or click the Remove All button () to remove all employees in the list.

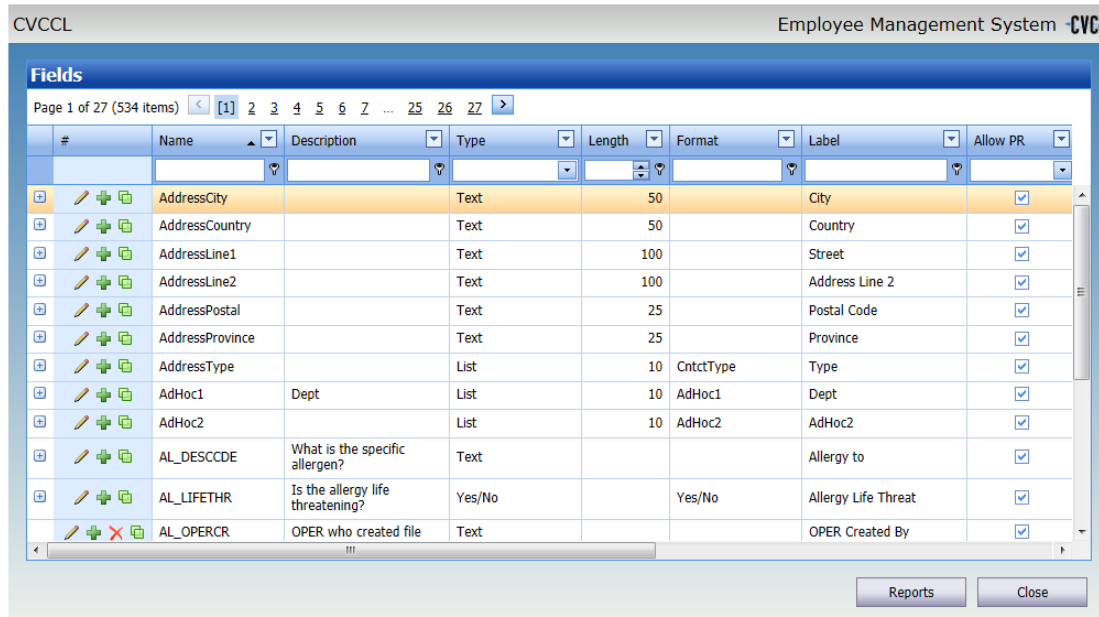
When complete, click **Save**.

To close the page, click **Close**.


10 FIELDS

Fields identify each data item stored in EMS for employees and objects. Fields are located on one or more [Pages](#) in Human Resources and the Object Manager, and are also used to create [Data Templates](#).

From the Home page, select **Enterprise Settings | Fields**.




Use the empty filter boxes at the top of the list to find a Field or a group of Fields by typing in all or part of a Field Name or Label, or by selecting a specific Type, or Format.

Note that System Fields are also listed and may be copied or edited but not deleted, so the red X () will not appear on those rows.

Field Name	Description/Usage
Name	A unique code identifying the Field (max length: 20 characters).
Description	A description of the Field (max length: 50 characters).
Type	The type of the Field which indicates how the Field will be displayed and used. Text: a free-form text Field List: a user-defined Lookup Field

	<p>System List: a system-defined lookup Field</p> <p>Note: a free-form memo Field</p> <p>Number: a numeric Field represented as a whole number</p> <p>Date: a date Field</p> <p>Time: a time Field</p> <p>Timestamp: a date & time Field</p> <p>Yes/No: a flag Field</p> <p>Decimal: a numeric Field with one or more decimal places</p> <p>Object Code: an employee or object code lookup</p> <p>Object Name: an employee or object name lookup</p> <p>Encrypted: a free-form text Field stored using encryption</p> <p>Hyperlink: a website, email address or shared document</p>
<p>Length</p>	<p>The maximum length of the Field. Setting the length is optional.</p>
<p>Format</p>	<p>The format to be used for the Field's values. The available format options will vary depending on the type of the Field:</p> <p>Text Fields: an optional format to apply to the value, where # indicates a numeric value and special characters (-){+}={}, etc.) will be treated as a mask, so (###) ###-#### might be used for a phone number</p> <p>List: the actual Lookup type to be used for the list</p> <p>System List: the system-defined lookup type to be used for the list, i.e. Canada will display a list of provinces, USA will display a list of states</p> <p>Note: not applicable</p> <p>Number: an optional range for validation, e.g. 0-100 would only allow numbers from 0 to 100 to be entered in the Field</p> <p>Date: the format in which the date is entered and displayed</p> <p>Time: the format in which the time is entered and displayed</p> <p>Timestamp: the format in which the date & time are entered and displayed</p> <p>Yes/No: the format in which the Field is displayed, e.g. Yes/No,</p>

	<p>True/False or 1/0.</p> <p>Decimal: an optional format to apply to the number, e.g. #####.##### for values with up to 5 decimal places</p> <p>Object Code: select Employee for a list of employee codes or select an Object Type for a list of the object codes</p> <p>Object Name: select Employee for a list of employee names or select an object type for a list of the object names</p> <p>Encrypted: as with a standard text Field, an optional format to apply to the value, where # indicates a numeric value and special characters (-()+=}, etc.) will be treated as a mask, so (###) ###-#### might be used for a phone number</p> <p>Hyperlink: not applicable</p> <p>The format of the Field will be displayed in a tool-tip when data is being added or edited.</p>
Label	The text displayed next to a Field to describe the Field's purpose or contents (max length: 20 characters).
Allow PR	A flag indicating that the Field will be available for use in Payroll , specifically as a Field on pay slips and in the Report Writer.
Allow SS	A flag indicating that the Field will be available for use in the Shifts to be filled page in Scheduling .

Click the plus sign () at the far left of a Field to view the Pages on which this Field is used and whether or not the Field is editable on each Page.

#	Name	Description	Type	Length
	Phone1			
	Phone1		Text	25

Object	Page	Sequence	Allow Edit	Created By
Employee	Address	8	<input checked="" type="checkbox"/>	CVCSYSTEM
Employee	PHONE LIST	2	<input checked="" type="checkbox"/>	Anders, Sonia
Personal	PHONE LIST	2	<input checked="" type="checkbox"/>	Anders, Sonia

[Name] Equals 'Phone1'

To add a new Field:

Click the green plus sign () or the double-page icon () to copy an existing Field.

Enter the Name and description, select a Type and enter the Length and Format, if applicable. Enter a descriptive Label and select Allow PR and/or Allow SS as appropriate.

Click the green checkmark () to save the new Field.

To close the page, click **Close**.

To edit an existing Field, click the brown pencil (). Click the green checkmark () to save the changes. Use caution when changing a Field's Type or Format as there may be unexpected results if existing data does not match the new Type or Format.

To delete a Field, other than system-defined Fields, click the red X ().

To close the page, click **Close**.

Field Report

A list of Fields can be printed by clicking the Reports button and selecting Fields in the Reports list. Reports are also available through the Configuration Reports button from the Enterprise Settings menu on the Home page.

11 HOLIDAYS


Holidays are used in [Scheduling](#) and [Personal Information](#) to identify days of the year designated as Stats or holidays.


Statutory Holidays will be indicated in blue on the Employee Monthly page in both Scheduling and Personal Information. Holidays will also be displayed at the top of every page in Scheduling when the current working date is included in the Holiday table. The Stat Not Worked tool in Scheduling also lists the Holidays.

From the Home page, select **Enterprise Settings | Holidays**.

#	Region	Holiday Date	Description	Stat Code	Created By	Created When	Modified By
	CAN	26/Dec/2013	2013 Boxing Day	Stat	Watson, Audrey	19/Mar/2013 12:30	Watson, Audrey
	CAN	25/Dec/2013	2013 Christmas Day	Stat	Watson, Audrey	19/Mar/2013 12:29	Watson, Audrey
	CAN	11/Nov/2013	2013 Remembrance Day	Stat	Watson, Audrey	19/Mar/2013 12:29	Watson, Audrey
	CAN	14/Oct/2013	2013 Thanksgiving Day	Stat	Watson, Audrey	19/Mar/2013 12:29	Watson, Audrey
	CAN	01/Sep/2013	2013 Labour Day	Stat	Watson, Audrey	19/Mar/2013 12:28	Watson, Audrey
	CAN	05/Aug/2013	2013 BC Day	Stat	Watson, Audrey	19/Mar/2013 12:27	Watson, Audrey
	CAN	01/Jul/2013	2013 Canada Day	Stat	Watson, Audrey	19/Mar/2013 12:26	Watson, Audrey
	CAN	20/May/2013	2013 Victoria Day	Stat	Watson, Audrey	19/Mar/2013 12:26	Watson, Audrey
	CAN	31/Mar/2013	2013 Easter	Stat	Watson, Audrey	19/Mar/2013 12:26	Watson, Audrey
	CAN	29/Mar/2013	2013 Good Friday	Stat	Watson, Audrey	19/Mar/2013 12:25	Watson, Audrey
	CAN	18/Feb/2013	2013 Family Day	Stat	Watson, Audrey	19/Mar/2013 12:25	Watson, Audrey
	CAN	01/Jan/2013	2013 New Years Day	Stat	Watson, Audrey	19/Mar/2013 12:24	Watson, Audrey
	CAN	26/Dec/2012	Boxing Day	Stat	Watson, Audrey	19/Mar/2013 12:30	Watson, Audrey
	CAN	25/Dec/2012	Christmas Day	Stat	Watson, Audrey	19/Mar/2013 12:29	Watson, Audrey

Field Name	Description/Usage
Region	The country that recognizes or celebrates the Holiday, for informational purposes only.
Holiday Date	The date of the Holiday.
Description	A description of the Holiday (max length: 50 characters).
Stat Code	A flag indicating that the Holiday is a Stat, Super Stat or Non Stat, for informational purposes only.

To add a new Holiday click on the green plus sign ().

To copy an existing Holiday click on the double-page icon (). Note: this is a quick way to create Holidays in new years since the copy feature automatically increments the year by 1.

To edit an existing Holiday click on the brown pencil ().

To delete a Holiday click on the red X ().

Holiday Report

A list of Holidays for a range of dates can be printed by clicking the Reports button and selecting Holidays in the Reports list. Reports are also available through the Configuration Reports button from the Enterprise Settings menu on the Home page.

12 LOOKUPS

Lookups are lists of related values. Some Lookups are automatically configured with pre-defined values, for example the AssignType Lookup contains a list of Assignment types, while others are completely user-defined.

Lookups are used in List Type [Fields](#) and can be displayed on [Pages](#) in both Human Resources and the Object Manager.

From the Home page, select **Enterprise Settings | Lookups**.

#	Type	Description	Created By	Created When	Modified By	Modified When
	Acdnt Hist	Accident History	Admin, istrator	14/Oct/2009 08:41	Admin, istrator	14/Oct/2009 08:41
	Adhoc1	Adhoc 1	CVCSytem	01/Jan/2000 00:00	MAARS, JAMES	25/Jul/2001 15:02
	Adhoc2	Adhoc 5	CVCSytem	01/Jan/2000 00:00	Anders, Sonia	04/Jan/2013 16:10
	AL_PROTOCO	Allergy Protocol	Anders, Sonia	18/Mar/2010 09:07	Anders, Sonia	18/Mar/2010 09:07
	AL_TYPECDE	Type Code	Anders, Sonia	17/Mar/2010 09:54	Anders, Sonia	17/Mar/2010 09:54
	AssignType	Assignment Type	CVCSytem	01/Jan/2000 00:00	CVCSytem	01/Jan/2001 00:00
	AttendType	Attendance Type	CVCSytem	01/Jan/2000 00:00	CVCSytem	01/Jan/2001 00:00
	BillCode	Billing Code	CVCSytem	01/Apr/2004 11:37	CVCSytem	01/Apr/2004 11:37
	CntctType	Contact Type	CVCSytem	01/Jan/2000 00:00	CVCSytem	01/Jan/2001 00:00
	ContType	E Contact Type	Admin, istrator	14/Oct/2009 14:15	Admin, istrator	14/Oct/2009 14:16
	CP_GOALS	Care Plan Goals	Alajane, Sylvie	17/Mar/2010 10:49	Alajane, Sylvie	17/Mar/2010 10:49
	CRRresponse	Call Record Response	CVCSytem	01/Jan/2000 00:00	CVCSytem	01/Jan/2001 00:00
	CRTtype	Call Record Type	CVCSytem	01/Jan/2000 00:00	CVCSytem	01/Jan/2001 00:00
	DG_DIAGCDE	Diagnosis Code	Anders, Sonia	17/Mar/2010 10:25	Anders, Sonia	17/Mar/2010 10:25
	DG_DOCNUM	Dr. Code	Anders, Sonia	17/Mar/2010 10:28	Anders, Sonia	17/Mar/2010 10:28


Field Name	Description/Usage
Type	A unique code identifying the Lookup list (max length: 10 characters).
Description	A description of the Lookup.

To create a new Lookup list:



Click the green plus sign () or the double-page icon () to copy an existing Lookup.


Enter the Type and a description.

Click the green checkmark () to save the new Lookup.

Click the plus sign () at the far left of the new Lookup to view the Codes. Refer to the sections below for details on adding, modifying and deleting Codes.

To close the page, click **Close**.


To edit an existing Lookup's description, click the brown pencil (). Click the green checkmark () to save the changes.






To delete a Lookup and all of its Codes, click the red X () next to the Lookup in the upper table. You will be prompted for confirmation. Note that Fields that contain deleted Codes will continue to display correctly, however when edited, they may need to be changed to a new value.






















Adding Codes


To add Codes (values) to a Lookup List:

Select the Lookup.

Click the plus sign () at the far right of the row to view the Codes.

Lookups						
#	Type	Description	Created By	Created When	Modified By	
	   	Eval Outco	Evaluation Outcome	Admin, istrator	15/Oct/2009 09:40	Admin, istra

Codes						
#	Code	Description	TB Code	Created By	Created When	Mod
  	Adequate	Adequate		Admin, istrator	15/Oct/2009 10:00	Adm
  	Exp Letter	Expectation Letter		Admin, istrator	15/Oct/2009 09:59	Adm
  	Improve	Needs Improvement		Admin, istrator	15/Oct/2009 10:00	Adm
  	Outstand	Outstanding		Admin, istrator	15/Oct/2009 10:01	Adm
  	Probation	Probation		Admin, istrator	15/Oct/2009 09:59	Adm
  	Superior	Superior		Admin, istrator	15/Oct/2009 10:01	Adm
  	Suspension	Suspension		Admin, istrator	15/Oct/2009 09:42	Adm

Click the green plus sign () to create a new row.

Set the **Code** to a unique value for this Lookup (max length: 10 characters).

Enter the Code's Description and, if applicable, an associated Type Block Character to be used for filtering and reporting purposes.


Click the green checkmark () to save the new Code.


To close the page, click **Close**.

Editing Codes

To edit an existing Code's Description or TB Char:

Select the Lookup.

Click the plus sign () at the far right of the row to view the Codes.

Click the brown pencil () on the Code row to be edited. Note that Code itself cannot be changed.

Click the green checkmark () to save the new Code.

To close the page, click **Close**.




Assignment Type Codes

Assignment Type Lookup codes are uniquely configured to highlight exceptions in an employee's assignments in Scheduling. Each Assignment Type code can be assigned a colour and that colour will be displayed in the Employee Annual page in both Scheduling and Personal Information.






















When assigning colours to Assignment Types, identify the types of assignments that need to be flagged as an exception and/or highlighted for further review, and assign colours to those Assignment Types first. If a colour is assigned to every Assignment Type, the results may be difficult to review.

CVCCLE Employee Management System CVC

Lookups

#	Type	Description	Created By	Created When	Modified By	Modified When
  	AssignType	Assignment Type	CVCSYSTEM	01/Jan/2000 00:00	CVCSYSTEM	01/Jan/2001 00:00

Codes

#	Code	Description	TB Code	Back Colour	Created By	Created When	Modified By
  	#Stat	Stat Holiday	t	SandyBrown	Admin, istrator	08/Oct/2009 14:18	Stewart, Barbara
  	.Sched	Scheduled Shift	c		Admin, istrator	08/Oct/2009 14:18	Stewart, Barbara
  	avail	Available	a	LightGreen	Admin, istrator	08/Oct/2009 14:19	Anders, Steven
  	float	float day		SteelBlue	Anders, Steven	20/Oct/2009 22:16	Anders, Steven
  	GiveAway	Give Away Shift		Khaki	Anders, Steven	21/Oct/2009 09:14	Anders, Steven
  	Leave	Leave	L	Gold	Admin, istrator	08/Oct/2009 14:19	Anders, Steven
  	MODIFIED	MODIFIED			Young, Tasha	22/Aug/2013 09:18	Young, Tasha

Reports Close

Lookups Report

A list of Lookups can be printed by clicking the Reports button and selecting Lookups in the Reports list. Reports are also available through the Configuration Reports button from the Enterprise Settings menu on the Home page.

13 OBJECT TYPES

The Object Manager in EMS supports objects in much the same way as Human Resources supports employees. Each of the Object Types maintained in the Object Manager will display as a different application page and the data maintained for each Object will be stored and managed independently.

Object Types might range from Clients or Supported Individuals to Fixed Assets, and the Pages and Fields created for each Object are completely user-defined to support virtually any type of information, both current and historical.

A license is required to use the Object Manager. For information on this feature, contact the Sales and Marketing Department at ComVida Corporation.

The screenshot shows a web application window titled "CVCCCL Employee Management System - CVC". The main content area is titled "Object Types" and contains a table with the following data:

#	Name	Description	Created By	Created When	Modified By	Modified When
	Assets	Fixed Assets	Anders, Sonia	11/Sep/2013 09:30	Anders, Sonia	11/Sep/2013 09:30
	Employee	EMS Employee Object	CVCSytem	25/Aug/2004 10:13	CVCSytem	25/Aug/2004 10:13
	Individual	Individual Centred Plan	Anders, Sonia	15/Mar/2010 14:34	Anders, Sonia	15/Mar/2010 14:34
	Payroll	Payroll	CVCSytem	02/Sep/2011 11:01	CVCSytem	02/Sep/2011 11:01
	Personal	Personal Information	CVCSytem	14/Sep/2009 00:42	CVCSytem	14/Sep/2009 00:42
	Scheduling	Staff Scheduling	CVCSytem	07/Oct/2008 13:02	CVCSytem	07/Oct/2008 13:02

At the bottom right of the window, there are two buttons: "Reports" and "Close".

Note that the Employee, Payroll, Personal and Scheduling Object Types are system-defined and cannot be deleted, however their descriptions can be changed.

To create a new Object Type (once an appropriate license has been purchased):



Click the green plus sign ().


Enter the Type and a description.

Unless instructed otherwise, leave the **Create Admin Security Group** box and the **Create Admin Object Group** box checked.

Click the green checkmark () to save the new Object Type.

To close the page, click **Close**.

To edit an existing Object Type description, click the brown pencil (). Click the green checkmark () to save the changes.

To delete an Object Type, click the red X () next to the Object Type in the table. You will be prompted for confirmation.

Object Access

After a new Object Type is created, at least one operator must be given access to the new Object Type as well as security rights of View or higher rights to the Object Page(s), refer to the Security Rights and Object Access sections of the [Security manual](#) for details.

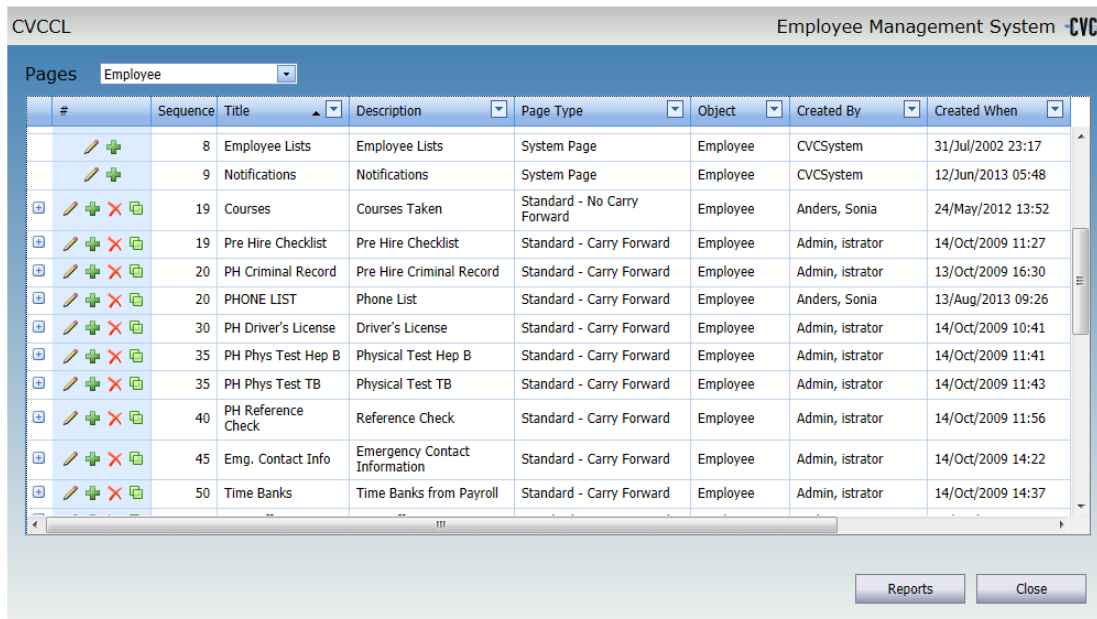
[Fields](#) and [Pages](#) can be defined for the new Object Type and, with appropriate security settings, operators can create Objects and record pertinent information for each Object.

14 PAGES

Pages are essentially containers and presenters of information related to an employee, an object or an area EMS.

User-defined Pages can be created for use in Human Resources, Personal Information and the Object Manager, in which case each page has a set of [Fields](#) to be displayed and/or edited on the page.

Pages in Payroll and Scheduling, as well as system-defined pages in Human Resources, Personal Information and the Object Manager, contain application-specific information that cannot be modified, however they can be re-ordered by changing the page sequence, and the page titles can be modified to reflect an organization's unique terminology.





To view the Pages in each area of EMS, select an area in the Pages dropdown at the top of dialog.

Field Name	Description/Usage
Sequence	The numeric position of the page within the Pages menu. To simplify re-ordering and the insertion of new pages, use a Sequence pattern that increments in 5's or 10's. i.e. 5, 10, 15... or 10, 20, 30.
Title	The Title that is displayed in the Pages menu.
Description	A description of the Page. The Description is displayed as a tool tip in the

	Pages menu.
Page Type	<p>The way Fields are displayed and edited on the Page.</p> <p>Note that historical information is <i>maintained for all Fields regardless of the types of Pages on which they're displayed</i>, so use a Page Type that reflects the type of data being displayed on that Page.</p> <p>System Page: a page that is set up and maintained automatically.</p> <p>Master: the default Master page for the selected Object Type.</p> <p>Current Values: a page that displays the current value for each Field. Use this type when historical values do not need to be viewed.</p> <p>Standard - Carry Forward: a page on which values are carried forward until specifically changed. For example, on the Employee's Work Profile I page, if the Department is not changed when a row is added, the Department remains the same.</p> <p>Standard - No Carry Forward: a page with values that are unique to each row or occurrence. For example, a Courses page lists the courses that an employee has taken and the values entered on each row do not relate to the values in prior or subsequent rows.</p>
Object	<p>The area of EMS in which the Page will be used.</p> <p>Employee: a page containing employee-specific information, displayed in Human Resources.</p> <p>Personal: a page containing employee-specific information, displayed in the Personal Information area.</p> <p>Object: a page containing information specific to the selected Object, displayed in the Object Manager.</p>

To create a new Page for an Employee, the Personal Information area, or an Object:

Select the Pages type for the appropriate area and click the green plus sign () to create a new Page from scratch.

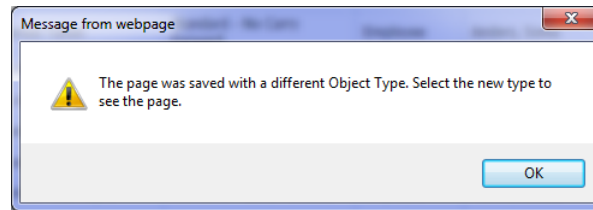
Or select a Pages type that contains a similar Page and click the double-page icon () to copy the existing Page. (This will save time when creating multiple Pages of a similar style.)

Select a Sequence that positions the Page appropriately in the Pages menu.

Enter the Title and a Description of the Page.

Select the Page Type that best reflects the way this Page will be used.

Choose the Object for which this Page is being created. Note that when an Object other than the currently selected Pages/Object (at the top of the dialog) is chosen, a message will be displayed indicating that the Page has been saved with a different Object Type:



Click the green checkmark (✓) to save the new Page.

Click the plus sign (+) at the far left of the new Page to view the Fields. Refer to the sections below for details on adding, modifying and deleting Fields on a Page.

To close the page, click **Close**.

To edit an existing Page's Description or Type, click the brown pencil (✎). Click the green checkmark (✓) to save the changes.

To delete a user-defined Page, click the red X (✖) next to the Page in the upper table. You will be prompted for confirmation. Note that Fields contained on that Page will not be deleted.

Adding Fields to a Page

To add a Field to a Page:

Select the Pages area at the top of the dialog and then select the Page to be updated.

Click the plus sign (+) at the far right of the row to view the Fields on the Page.

Pages Employee

#	Sequence	Title	Description	Page Type	Object
	60	RCE Information	RCE Information	Standard - Carry Forward	Employee
	65	Evaluation	Evaluation	Standard - Carry Forward	Employee

#	Sequence	Field	Allow Edit	Created By
	1	e_Date of Eval	<input checked="" type="checkbox"/>	Admin, istrator
	2	e_Eval Type	<input checked="" type="checkbox"/>	Admin, istrator
	3	e_name	<input checked="" type="checkbox"/>	Admin, istrator
	4	e_prog	<input checked="" type="checkbox"/>	Admin, istrator
	5	e_outcome	<input checked="" type="checkbox"/>	Admin, istrator
	6	e_Next Eval	<input checked="" type="checkbox"/>	Admin, istrator
	7	e_Comments	<input checked="" type="checkbox"/>	Admin, istrator
	8	e_file	<input checked="" type="checkbox"/>	Anderson, Sonia Marie

Click the green plus sign () to create a new row.

Set the **Sequence** to the position of the Field on the Page. Note that Fields are displayed across and then down, so odd numbered Fields will appear in the left column on the Page and even numbered Fields will appear in the right column.

Note that *duplicate Sequence numbers are not allowed*, so some Fields may need to re-ordered before a new Field can be inserted.

Select the name of the **Field** to be included on the Page.

Check **Allow Edit** if operators with appropriate Security Rights can edit the Field value. Uncheck the box if the Field is display-only on this Page.


Click the green checkmark () to save the new Item.

To close the page, click **Close**.

Inserting or Moving Fields


To insert a new Field on a Page:


Select the Page.

Click the plus sign () at the far right of the row to view the Fields.


Duplicate Sequence numbers are prohibited, so if the new Field is to be inserted before an existing Field, the Sequence number of subsequent Fields will need to be incremented (increased) to accommodate the new Field.


For example, e_Goal needs to be placed at Sequence 7 and the Data Template already has e_Comments as Sequence of 7 and e_file as 8:


Click the brown pencil () on the e_file row and change the Sequence to 9.

Click the green checkmark () to save the new e_file Sequence.

Click the brown pencil () on the e_Comments row and change the Sequence to 8.

Click the green checkmark () to save the new e_Comments Sequence.

Then click the green plus sign () on any row, set the Sequence to 7 and the Field to e_Goal.

Click the green checkmark () to save the new e_Goal Field.

To close the page, click **Close**.

Pages Report

A list of Pages can be printed by clicking the Reports button and selecting Pages in the Reports list. Reports are also available through the Configuration Reports button from the Enterprise Settings menu on the Home page.

15 POSITIONS

A position describes a specific job or related group of tasks that an employee performs within the company, such as a receptionist or a cook, along with the rate of pay associated with the job.


Positions are also used for filtering as well as part of the criteria for reporting. Each employee must be assigned a Position in the Employee Work Profile I.

From the Home page, select **Enterprise Settings | Positions**.


#	Code	Description	TB Code	Type Block	Work Cod	Rate	Unit Product	GL Account	Pay Equity	Created B
/	NA		---		/	0.00000	0		0.00000	Admin, ist
AccAsc	Accounting Associate	a	A ---	ACCASC	16.59000	0		0.00000	Admin, ist	
AdmAst	Administrative Assistant	a	A ---	ADMAST	15.50000	0		0.00000	Admin, ist	
AFTSW	Adult FT Support Worker	W	WA -F --	AFTSW	19.52000	100		0.00000	Admin, ist	
APTSW	Adult PT Support Worker	W	WA -P --	APTSW	17.30000	100		0.00000	Admin, ist	
ARELSW	Adult Relief Support Worker	W	WA -R --	ARELSW	15.50000	100		0.00000	Admin, ist	
CEO	CEO	1	E ---	CEO	0.00000			0.00000	Alajane, S	
CFTSW	Child FT Support Worker	W	WC -F --	CFTSW	19.52000	80		0.00000	Admin, ist	
Contra	Contract	A	C ---	CONTRA	0.00000	100		0.00000	Admin, ist	
Coor-A	Co-ordinator Adult Services	O	OA -F --	COOR-A	22.59000	50		0.00000	Admin, ist	
Coor-B	Co-ordinator Children's Service	O	OA -C --	COOR-B	22.59000	50		0.00000	Admin, ist	
CPTSW	Child PT Support Worker	W	WC -P --	CPTSW	17.30000	100		0.00000	Admin, ist	
CRFISW	Child REL Support	W	WC -R --	CRFISW	15.50000	100		0.00000	Admin, ist	

Field Name	Description/Usage
Code	A unique code identifying the Position or job (max length: 6 characters).
Description	A description of the Position.
TB Code	An alpha-numeric character linked to the Position and used for grouping and filtering purposes. The Position TB Code will be automatically applied to the 3rd position of the Employee and Shift Type blocks for easier filtering.
Type Block	A set of twelve alpha-numeric characters that represents the Position. Sites with several Positions may also find the Type Block helpful for filtering on a group of Positions in Scheduling, Payroll Reports and Item

	Variables.
Work Code	An alternate code (max length: 10 characters) representing the Position. The Work Code may be used instead of the Position code in custom imports and exports.
Rate	The actual dollar amount paid to employees when working in this Position. The Rate may be hourly or a salary depending on how Earning Items are configured in Payroll.
Unit Producing	The percentage of an employee's time (0 - 100) that is considered unit producing (UPP) when working in the Position. The remaining percent is considered management or operating services (MOS). Unit Producing percentages for the Department, Unit, Position, Cost Centre and Employee are used in Payroll Report Writer reports that have a column of ACTV to determine percentages of activity in the two areas.
GL Account	A GL Account code to be used in Payroll Report Writer reports with a column of ACCT or ACRV when the Item's GL Account is blank.
Pay Equity	An optional dollar amount that is applied to this Position in Payroll when a Pay Equity agreement is in place.

To add a new Position click on the green plus sign ().

To copy an existing Position click on the double-page icon ().

To edit an existing Position click on the brown pencil ().

To delete a Position click on the red X ().

Position Report

A list of Positions can be printed by clicking the Reports button and selecting Position in the Reports list. Reports are also available through the Configuration Reports button from the Enterprise Settings menu on the Home page.

16 SCHEDULE PERIODS (FOR OVERTIME RULES)

Schedule Periods are used to check for a potential Overtime situation in [Scheduling](#). The Overtime check is performed when displaying the Shifts to be filled page in Scheduling, as well as in Shift Handling and Assignment Add/Edit to alert that an employee is (or will be) in an Overtime situation.

Schedule Periods also determine the number of assignments shown in the lower assignment table of the Shifts to be filled page in Scheduling.

A Schedule Period is assigned to each [Department](#) (as applicable). For exceptions, the Department's Schedule Period can be overridden by setting a Schedule Period in the Work Profile II of an individual employee. A Schedule Period assigned to an employee will override the one assigned to the employee's Department.


From the Home page, select **Enterprise Settings | Schedule Periods**.






#	Code	Description	Schedule Start	Period Type	Daily OT	Daily2OT	Weekly O	Weekly2O	Period OT	Period2OT
	37.5/wk	37.5 hrs per week	01/Jan/2010	Weekly	7.50	12.00	37.50	75.00	75.00	0.00
	PT Employees	PT Employees not over 22 hrs wk.	19/Oct/2009	Weekly	0.00	0.00	22.00	0.00	0.00	0.00
	40hrs/wk	40 hours in a week	19/Oct/2009	BiWeekly	8.00	12.00	40.00	0.00	80.00	0.00
	80Period	80 hrs in period (casuals)	19/Oct/2009	BiWeekly	0.00	0.00	0.00	0.00	80.00	0.00

Field Name	Description/Usage
Code	A unique code identifying the Schedule Period (max length: 20 characters).
Description	A description of the Schedule Period.
Schedule Start	The date the Schedule Period starts. The Schedule Start date must coincide with the first day of an actual



	<p>period. For example, a Weekly Schedule period might start on a date that falls on a Sunday.</p> <p>This date should also be set to a date prior to the earliest assignments in Scheduling.</p>
<p>Period Type</p>	<p>The period of time for which the Overtime check should be performed and for which rows are displayed in the Shifts to be filled assignment list.</p> <p>Daily: a 1 day period.</p> <p>Weekly: a 7 day period commencing the day of the Schedule Start Date. This is useful when the week starts on a day other than Sunday.</p> <p>4on4off: an 8 day period commencing the day of the Schedule Start Date. This is useful when employees work 4 days followed by 4 days off (Rolling 8).</p> <p>BiWeekly: a 14 day period commencing the day of the Schedule Start Date.</p> <p>SemiMonthly: a 15 or 16 day period (depending on the # of days in the month).</p> <p>Monthly: a 28 - 31 day period (depending on the # of days in the month).</p> <p>Monthly28: a 28 day period commencing the day of the Schedule Start Date.</p>
<p>DailyOT</p>	<p>The number of hours an employee may work in one 24-hour day before triggering Overtime. Only Counted hours are included in the Overtime check.</p> <p>Setting the value to 0.00 indicates that no Daily Overtime check should be performed.</p>
<p>Daily2OT</p>	<p>The number of hours an employee may work in one 24-hour day before triggering Double-Overtime. Only Counted hours are included in the Overtime check.</p> <p>Setting the value to 0.00 indicates that no Daily Double-Overtime check should be performed.</p>

WeeklyOT	<p>The number of hours an employee may work in one week, <i>Sunday to Saturday</i>, before triggering Overtime. Only Counted hours are included in the Overtime check.</p> <p>Setting the value to 0.00 indicates that no Weekly Overtime check should be performed.</p>
Weekly2OT	<p>The number of hours an employee may work in one week, <i>Sunday to Saturday</i>, before triggering Double-Overtime. Only Counted hours are included in the Overtime check.</p> <p>Setting the value to 0.00 indicates that no Weekly Double-Overtime check should be performed.</p>
PeriodOT	<p>The number of hours an employee may work in one period before triggering Overtime. The period to be checked is determined by the Schedule Period Type and Schedule Start. Only Counted hours are included in the Overtime check.</p> <p>Setting the value to 0.00 indicates that no Period Overtime check should be performed.</p>
Period2OT	<p>The number of hours an employee may work in one period before triggering Double-Overtime. The period to be checked is determined by the Schedule Period Type and Schedule Start. Only Counted hours are included in the Overtime check.</p> <p>Setting the value to 0.00 indicates that no Period Double-Overtime check should be performed.</p>
Days Off	<p>The number of non-worked (24 uncounted hours) days the employee must have in the Days Off Period.</p> <p>Setting the Days Off to 0 (zero) indicates that no Days Off check should be performed.</p>
Days Off Period	<p>The number of days for which the Days Off check should be performed.</p> <p>Setting the Days Off Period to 0 (zero) indicates that no Days Off check should be performed.</p>
Consecutive DO	<p>A flag indicating that the Days Off must be consecutive.</p>

Click the plus sign () at the far left of a Schedule Period to review the Start and End dates that were generated automatically using the Period Type and the Schedule Start. If the Start and End dates are incorrect, update the Schedule Start or the Period Type and save the changes to adjust the dates.

Schedule Periods				
#	Code	Description	Schedule Start	Period Type
    	37.5/wk	37.5 hrs per week	01/Jan/2010	Weekly
Period Start		Period End		
01/Jan/2010		07/Jan/2010		
08/Jan/2010		14/Jan/2010		
15/Jan/2010		21/Jan/2010		
22/Jan/2010		28/Jan/2010		
29/Jan/2010		04/Feb/2010		
05/Feb/2010		11/Feb/2010		
12/Feb/2010		18/Feb/2010		
19/Feb/2010		25/Feb/2010		
26/Feb/2010		04/Mar/2010		
05/Mar/2010		11/Mar/2010		
12/Mar/2010		18/Mar/2010		
19/Mar/2010		25/Mar/2010		


To add a new Schedule Period:


Click the green plus sign () or the double-page icon () to copy an existing Schedule Period.

Enter the Code and Description, set the Schedule Start to the first day of the first period generated in Scheduling.



Set the Period Type to the appropriate period for the Overtime check.


Enter the number of hours for each applicable Overtime check, as well as the Days Off settings, if applicable.

Click the green checkmark () to save the new Schedule Period.

Click the plus sign () at the far left of the new Schedule Period to view the generated Period Start and End Dates.

To close the page, click **Close**.

To edit an existing Schedule Period, click the brown pencil (). Click the green checkmark () to save the changes. Use caution when changing a Schedule Period Type or Schedule Start Date as there may be unexpected results if the generated Start and End dates do not line up to the actual periods.

To delete a Schedule Period, other than system-defined Schedule Periods, click the red X ().

To close the page, click **Close**.

Schedule Period Report

A list of Schedule Periods can be printed by clicking the Reports button and selecting Schedule Periods in the Reports list. Reports are also available through the Configuration Reports button from the Enterprise Settings menu on the Home page.

17 SKILL SETS









































Skill Sets are qualifications, training and/or courses an employee might possess and which may be used to determine an employee's ability to perform their duties.

Each employee's Skills Sets are entered in the Skill Sets page in [Human Resources](#). Skill Sets can also be attached to Shifts in Scheduling to help identify qualified employees in the Shifts to be filled page.

The extent to which each organization tracks Skill Sets will depend on their internal, as well as industry, requirements.


From the Home page, select **Enterprise Settings | Skill Sets**.

ComVida Community Living Employee Management System CVC

#	Code	Description	Created By	Created When	Modified By	Modified When
   	CPR	CPR	Admin, istrator	08/Oct/2009 14:07	Admin, istrator	08/Oct/2009 14:07
   	CPR1	CPR Level 1	Anderson, Sonia	15/Jul/2013 13:55	Anderson, Sonia	15/Jul/2013 13:55
   	CPR2	CPR Level 2	Anderson, Sonia	15/Jul/2013 13:55	Anderson, Sonia	15/Jul/2013 13:55
   	First Aid	First Aid	Admin, istrator	08/Oct/2009 14:09	Admin, istrator	08/Oct/2009 14:09
   	Food Safe	Food Safe	Admin, istrator	08/Oct/2009 14:07	Admin, istrator	08/Oct/2009 14:07
   	GTube	GTube Feeding	Anders, Steven	23/Oct/2009 10:26	Anders, Steven	23/Oct/2009 10:26
   	NVCI	Non Violent Crisis Intervention	Admin, istrator	08/Oct/2009 14:09	Admin, istrator	08/Oct/2009 14:09
   	SeizureMan	Seizure Management	Stewart, Barbara	07/Jan/2010 10:22	Stewart, Barbara	07/Jan/2010 10:22
   	WCB-1st	WCB 1st Aid Certificate	Anders, Sonia	12/Jul/2010 13:09	Anders, Sonia	12/Jul/2010 13:09
   	WHIMS	Dangerous Goods	Admin, istrator	08/Oct/2009 14:08	Admin, istrator	08/Oct/2009 14:08

Reports Close

Field Name	Description/Usage
Code	A unique code identifying the Skill Set or course (max length: 10 characters).
Description	A description of the Skill Set.

To add a new Skill Set click on the green plus sign ().

To copy an existing Skill Set click on the double-page icon ().

To edit an existing Skill Set click on the brown pencil ().

To delete a Skill Set click on the red X ().

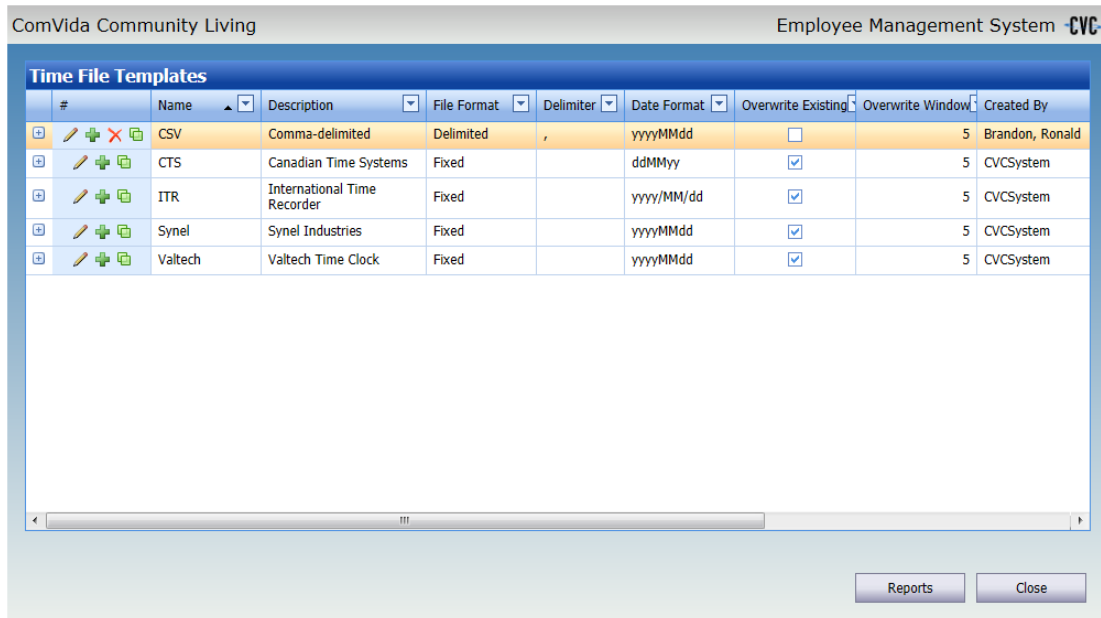
Skill Set Report

A list of Skill Sets can be printed by clicking the Reports button and selecting Skill Sets in the Reports list. Reports are also available through the Configuration Reports button from the Enterprise Settings menu on the Home page.

18 TIME FILE TEMPLATES


Time File Templates define the format of an time clock swipe file (identifying which fields are being imported and their location in the file).


From the Home page, select **Enterprise Settings | Time File Templates**.



Field Name	Description/Usage
Name	A unique code identifying the Time File format (max length: 20 characters).
Description	A description of the Time File format.
File Format	The style or format of the file. Delimited: The fields in the file are separated by a specific character or delimiter. Fixed: The fields in the file are of a fixed length and located at specific position.
Delimiter	The character used to separate fields in a Delimited file. Not used for Fixed file types.
Date Format	The format used for dates in the file.

Overwrite Existing	<p>A flag indicating that duplicate swipes will be overwritten within a specified window of time.</p> <p>For example, when an employee inadvertently swipes in twice within a 2 minute period of time, if this flag is checked, only the earlier of the two swipes will be stored. For duplicate out swipes, the later swipe will be stored.</p>
Overwrite Window	<p>The number of minutes for which two (or more) swipes of the same type will be overwritten when the Overwrite Existing flag is checked.</p>

To add a new Time File Template click on the green plus sign ().

To copy an existing Time File Template click on the double-page icon ().

To edit an existing Time File Template click on the brown pencil ().


To delete a Time File Template click on the red X ().

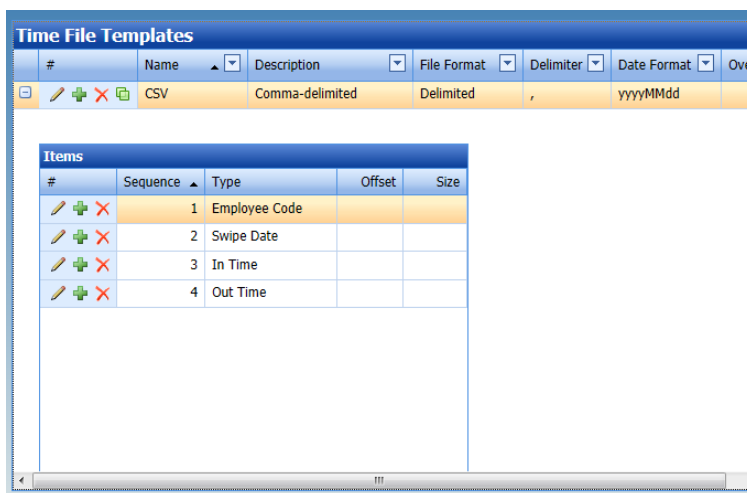
Adding Fields to a Time File Template


Note that the Fields in the default system-defined Templates cannot be modified. However, the Templates can be copied and modified to suit each organization's import requirements.

To add an Item (field) to a Template:

Select the Template to be updated.

Click the plus sign () at the far right of the row to view the Items (fields) in the Template.



Click the green plus sign () to create a new row.

Set the **Sequence** to the position of the field in the Template.

Note that *duplicate Sequence numbers are not allowed*, so some fields may need to re-ordered before a new field can be inserted.

Select the **Type** or name of the field to be included on the Page.

For Fixed format files, enter the position of the field in the **Offset** and the length of the field in the **Size**.

Click the green checkmark (✓) to save the new Item.

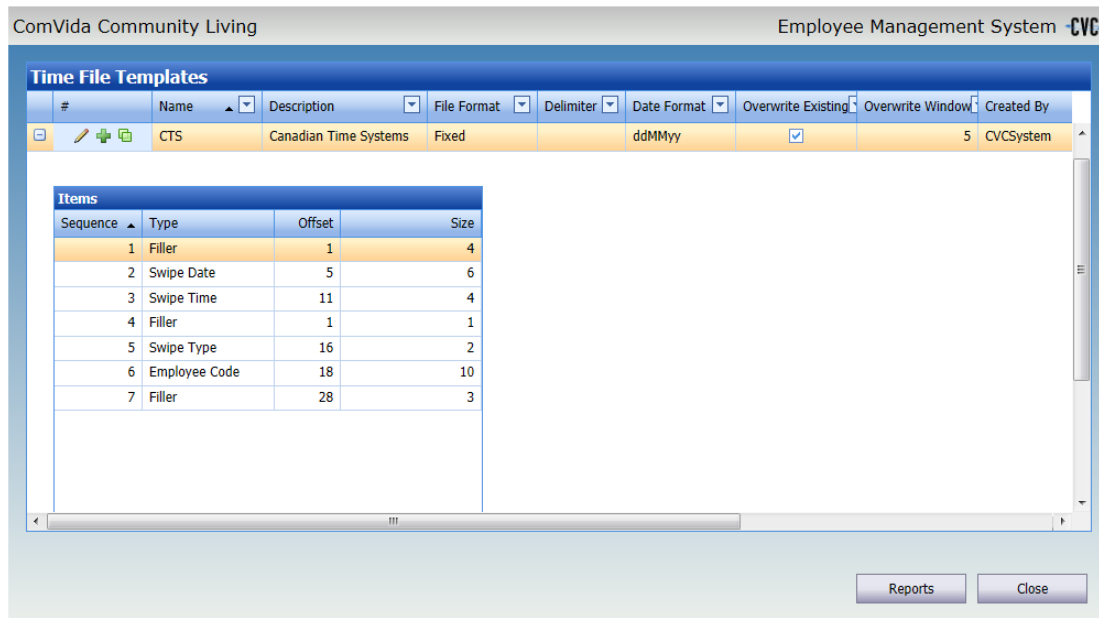
To close the page, click **Close**.

Time File Template Report

A list of Time File Templates can be printed by clicking the Reports button and selecting Time File Templates in the Reports list. Reports are also available through the Configuration Reports button from the Enterprise Settings menu on the Home page.

Default Time File Templates

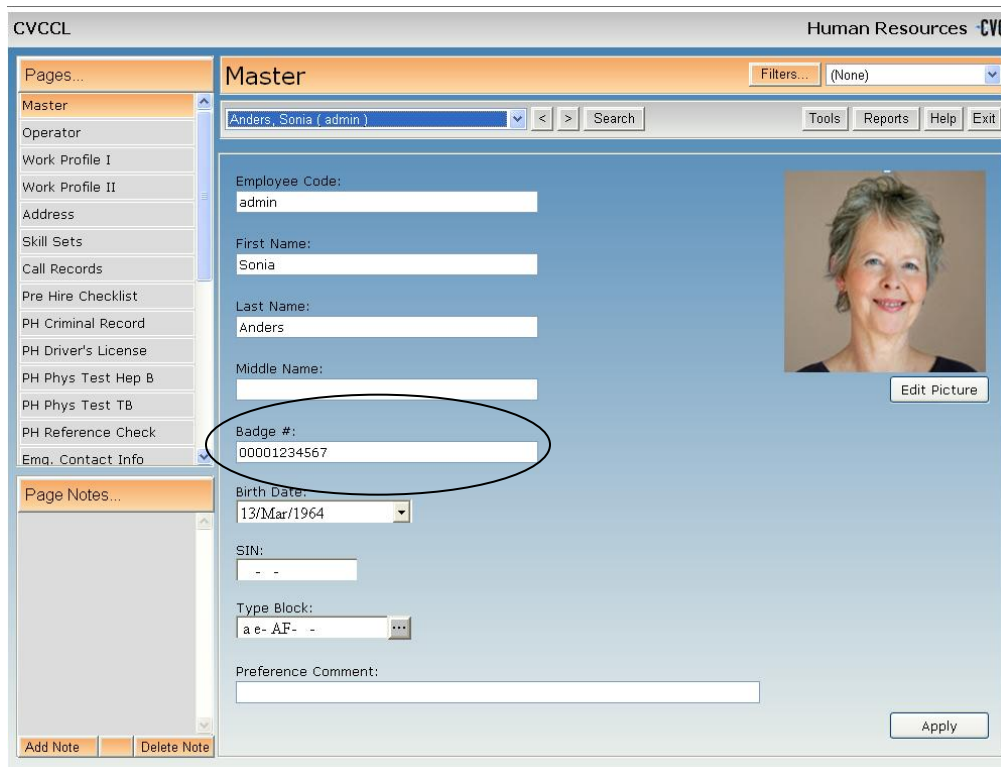
EMS comes with five system-defined templates: Canadian Time Systems (CTS), International Time Recorder (ITR), Synel Industries (Synel), Valtech Time Clock (Valtech), and Advanced Tracker Time Clock (AT).



The fields in the default templates cannot be changed, however the **Description**, **File Format**, **Delimiter**, **Date Format**, **Overwrite Existing**, and **Overwrite Window** fields may be modified to suit each organizations import requirements.

Do not change the **Date Format** unless the format of the incoming dates in the time file has been modified.

Note: If you are using the **International Time Recorder** system, you must have the employee Badge # entered in the HR Master page. The Badge # must be entered exactly as it appears on the badge, including any leading zeros. Otherwise the imported time file from ITR may not be able to associate the imported swipes with the correct employees.




19 TYPE BLOCK CONCEPTS & LABELS

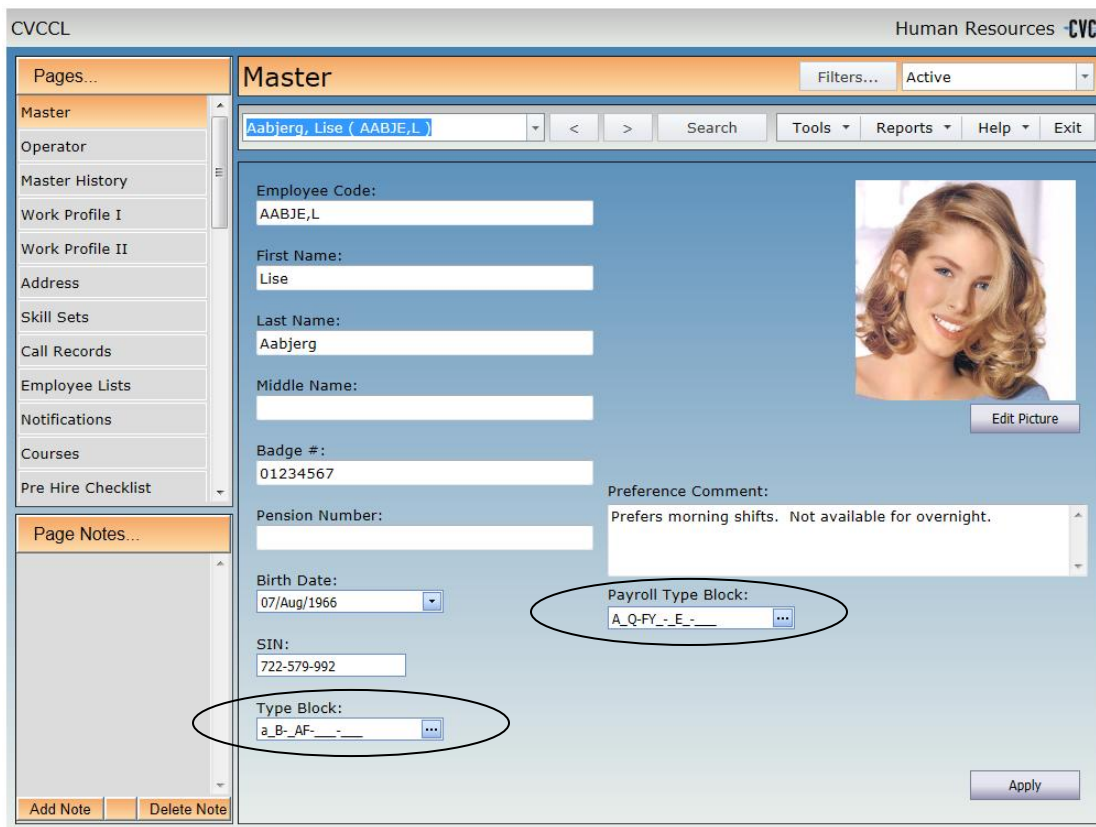
Type Blocks are a very simple but powerful concept. **EMS** allows users to select groups of Scheduling, Payroll and HR data that are of a common “type”. Selection of groups of data of a common type is based on the “Type Block”. The most commonly used method of specifying selection criteria is the “Filter”.

19.1 Type Blocks

Type Blocks exist for all HR, Payroll and Scheduling “master tables”, i.e. Employee Master, Department Master, Unit Master, Position Master, Cost Centre Master, and Shift Master. Each Type Block consists of twelve (12) “type fields”. Each type field is one (1) character.

Editing Type Blocks

On each of the master tables, the Type Block can be viewed in summary form on the main page, or edited in detail by clicking on the Edit button and then on the **ellipsis button**  to the right of the field.

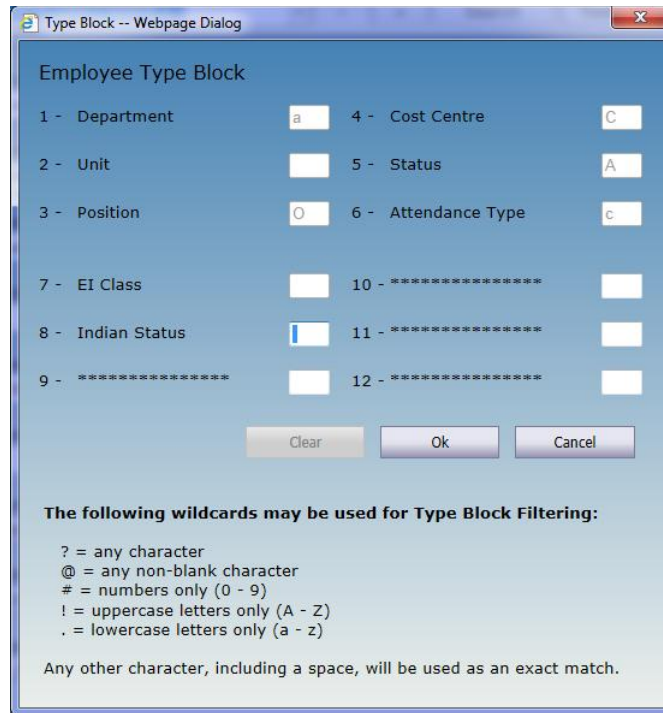


The screenshot shows the CVCCCL Human Resources interface. The main window is titled "Master" and displays the details for an employee named "Aabjerg, Lise (AABJE,L)". The form includes the following fields:

- Employee Code: AABJE,L
- First Name: Lise
- Last Name: Aabjerg
- Middle Name: (empty)
- Badge #: 01234567
- Pension Number: (empty)
- Birth Date: 07/Aug/1966
- SIN: 722-579-992
- Type Block: a_B_-AF-_-_- (circled in red)
- Payroll Type Block: A_Q-FY_-E-_-_- (circled in red)
- Preference Comment: Prefers morning shifts. Not available for overnight.

The interface also features a sidebar with navigation options like "Master", "Operator", "Master History", etc., and a "Page Notes" section at the bottom left. An "Apply" button is located at the bottom right of the form.

Each character corresponds to a Type field in a column of the Type Block, as can be seen by comparing the values in the Summary above with the values in the Detail below.



Reserved Type Fields

Some of the Type fields are reserved on the Employee and Shift Type Blocks. These reserved fields are linked to actual fields on the master and are updated automatically – they cannot be modified directly.

Consider the Employee Type Block. The first seven (7) Type fields are:

- 1 - Department
- 2 - Unit
- 3 - Position
- 4 - Cost Centre
- 5 - Status
- 6 - Attendance Type
- 7 - EI Class

These seven (7) Type fields are linked directly to corresponding fields in the Work Profile I.

When one of fields in an employee's Work Profile I is changed, its associated Type field will be updated automatically. See [Auto-Updated Type Block Characters](#) below.

Custom Type Fields

There are five (5) unreserved Type fields on the Employee Type Block, seven (7) on the Shift Type Blocks and twelve (12) on each of the other Type Blocks. These unreserved fields can be used to track other types of information.

To create new Custom Type Fields:

From the Home page, select **Enterprise Settings | Type Block Labels**.

In the **Objects** list on the left, choose the Object.

In the enabled **Label** fields (those with a white background), enter a short description of the field.

Click **OK** to save the changes and close the page.

Note: Follow the steps in the [Plan the Type Blocks](#) section to plan out the Type Blocks. Keep in mind that while each Type Block field is only one character, it can be any character, A – Z, a - z, and 0 – 9, as well as blank.

19.2 Auto-Updated Type Block Characters

There are seven (7) reserved Type fields in the Employee Type Block and five (5) reserved Type fields in the Shift Type Block. These reserved Type fields are automatically updated with the TB Char attached to the fields in the individual tables, i.e. the Department Type field in the Employee Type Block is automatically set to the TB Char of the employee's Department.

Setting Type Block Characters

For each of the auto-updated Type Block fields in the Employee and Shift Type Blocks, there is a “Type Block Character” field. It is this character that will automatically be placed in the associated Type Block field.

Consider the [Department](#) table:

Each Department in the table has a **TB Code** field.

#	Code	Description	TB Code	Type Block	Sched Period	Unit Product	Department Head	Notification
	ADMIN	Administration	a	a??-M??-??-??	37.5/wk	0	Anders, Sonia (ANDER,S)	Both
	CA	Carson	A	A??-C??-??-??	40hrs/wk	80	Chetwynd, Patty (CHET,P)	Departme Head
	CO-OP	CoOp	C	C??-R??-??-??	40hrs/wk	75	Hegges, Sylvia (HEGG,S)	Departme Head
	DE	Dempster	D	D??-C??-??-??	40hrs/wk	80	Anderson, Darlene (ANDER,D)	Departme Head
	DU	Dunbar	U	U??-C??-??-??	40hrs/wk	80	Alajane, Sylvie (ALAJ,S)	Departme Head
	HA	Harvey	H	H??-C??-??-??	40hrs/wk	80	Brand, Robert (BrandB)	Departme Head
	HI	Hillside	I	I??-C??-??-??	40hrs/wk	80	Neypes, Helena (NEYP,H)	Departme Head
	LCS	Ladner Community Share	2	2??-R??-??-??	40hrs/wk	75	Puni, Pardeep (PUNI,P)	Departme Head
	ME	Mender	M	M??-C??-??-??	40hrs/wk	80	Johnson, Brent (JOHNS,B)	Departme Head
	MGMT	Management	m	m??-M??-??-??	37.5/wk	0	Decker, Erma-Joan (DFCK,F)	Departme Head

Notice that the “a” in the ADMIN TB Code field corresponds to the first position of the Employee’s Type Block as shown in [Editing Type Blocks](#) section above. This is because the employee on that page is in the **Administration** department.

Note: Changing a TB Code in the associated field’s table will automatically change the Type Block Character for all employees with that field value.

For example: If you change the TB Code in the ME department shown above from “M” to “N”, all employees in the Mender department will have an “N” in the first position of their Type Block.

19.3 Using Type Blocks in Filters

In EMS, Filters are used to create a distinct set of common data for viewing, maintaining and reporting. Filtering the data narrows the focus, allowing a user to work with the specific data (usually employees and/or assignments) needed.

Exact Matches

Filters can be used to find all employees, shifts, etc. that are an exact match to the filter by setting a Type Block Character in the filter to the matching TB Code.

Wildcard Characters

In addition to finding exact matches using A – Z, a – z and 0 – 9, filters can contain any of the following “wild card” characters, each of which has its own function. Placing one of these characters into a Filter, other than the question mark (?) will narrow the data that is returned.

Character	Filters	Returns
? (question mark)	Any character	A – Z, a – z, 0 – 9 and blank
@ (ampersand)	Any non-blank character	A – Z, a – z, 0 – 9
! (exclamation point)	Upper-case letter	A – Z
. (period)	Lower-case letter	a - z
# (pound sign)	Numbers	0 - 9

Note: Setting the Filter to all question marks (?) effectively removes the filter and displays all of the objects being filtered.

For example: The default Filter for Employees in both HR and Scheduling reports is ???-?A?-???-???. This will return all Active employees since the fifth (5th) position in the Employee Type Block is Status.

Creating and Using Type Block Filters


Type Block Filters can be used to find all employees’ shifts, etc. that are part of a group. For example, when working with one or a group of departments, or perhaps all Casual employees, you can set a Filter so that the only employees included in the employee list are ones that are part of the group.

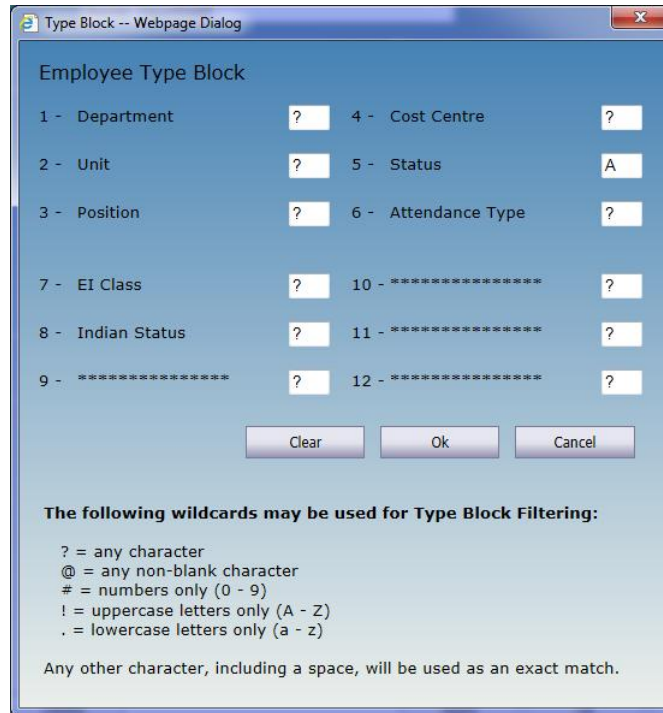
To create a new Filter:

From the Home page, select **Human Resources**.



On the HR toolbar, select **Filters...**

Click the **Add** button.

Field Name	Description\Usage
Name	The name used for this Filter will be displayed in the list of filters in the toolbar of HR, Payroll and Scheduling.
Description	Description of the Filter.
Shared?	A flag indicating that other users may access this filter.
Employee	<p>A specific employee or a filtered group of employees.</p> <p>Use either the dropdown list and select (All) to include all employees in this view or a specific employee or select the Filter option  and enter a Type Block filter so that only selected employees are included.</p> <p>Note: Click on the ellipsis button next to a Summary filter field to enter the Filter in Detail form:</p>



Click **Clear** to set all of the Type Block Filter fields to a question mark (?).

Department	Use either the dropdown list and select (All) to include All Departments in this view or a specific Department, or select the Filter option  and enter a Type Block filter so that only selected Departments are included.
Unit	Use either the dropdown list and select (All) to include All Units in this view or a specific Unit, or select the Filter option  and enter a Type Block filter so that only selected Units are included.
Position	Same as Department & Unit
Cost Centre	Same as Department & Unit
Attendance Type	Set the dropdown list to (All) to include all Attendance Types, or select a specific Attendance Type.

19.4 Sample Filters

Exact match with Wildcard Filter

The following is a sample filter used to view employees with a status of Active in the LCS department.

The screenshot shows a 'Webpage Dialog' window with the following fields and options:

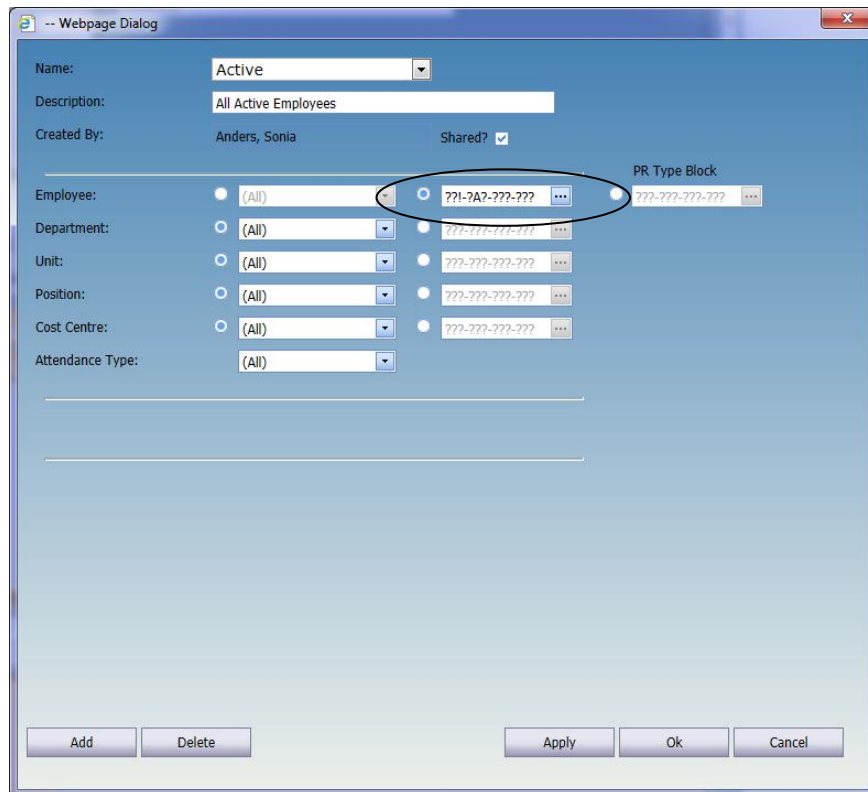
- Name: LCS Active
- Description: Active LCS Department
- Created By: (empty)
- Shared?:
- Employee: (All) L??-?A?-???-??? ???-???-???-??? PR Type Block
- Department: (All) ???-???-???-??? PR Type Block
- Unit: (All) ???-???-???-??? PR Type Block
- Position: (All) ???-???-???-??? PR Type Block
- Cost Centre: (All) ???-???-???-??? PR Type Block
- Attendance Type: (All)

Buttons at the bottom: Add, Delete, Apply, Ok, Cancel.

Wildcard Filter

The following is a sample filter used to view employees with a status of Active in a “Unit-producing position”, where in the [Position](#) table, all unit-producing Positions were given an upper-case letter as the TB Code, and all other Positions were given a lower-case letter. Refer to [Wildcard Characters](#) for more information on using wildcards.

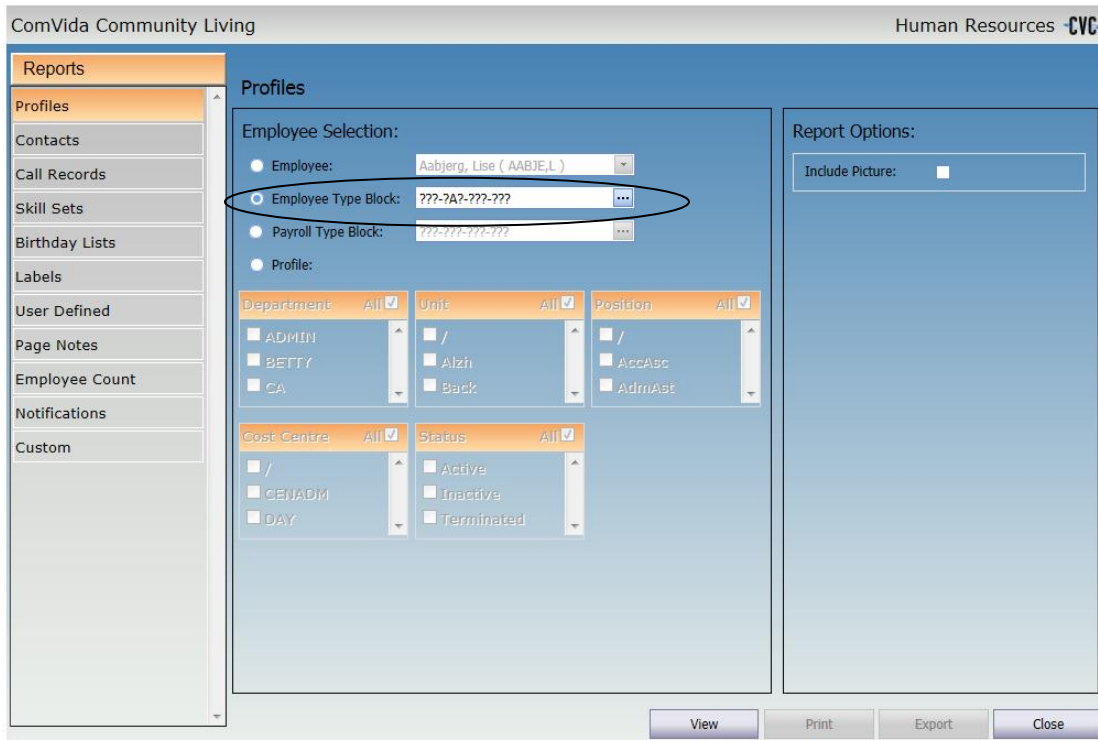
Notice the use of the exclamation point (!) in the third (3rd) position of the Employee Type Block (?!-?A?-???-???).



19.5 Filters in Reports

In all employee-based EMS Reports (HR, Payroll and Scheduling), a Filter can be applied to the employees to be included in the report.

Each report uses a default Type Block that includes all Active employees (???-?A?-???-???). This is the simplest form of filtering.



Note: To include all employees regardless of their status, change the Type Block filter to:

???-???-???-???

19.6 Plan the Type Blocks

There are many ways to use Type Blocks, and planning the set up in advance will simplify both the usage and maintenance of these powerful tools.

Defining Auto-update Type Block Characters

Both the Employee and Shift Type Blocks take advantage of the Auto-updated Type Block Characters from the Enterprise tables, so the first thing to plan is the Type Block Characters for each of the tables' codes:

In **Enterprise Settings | Configuration Reports**, select **Departments**.

Select **View** and then print the Departments Report.

Code	Description	Type Block Code / Type Block	Schedule Period	Created By	Created
ADMIN	Administration	a N _ _ _ _ _		Admin_istrator	Oct 07, 2009 4:24 PM
CA	Carson	A Y _ _ _ _ _		Admin_istrator	Oct 07, 2009 4:25 PM
CO-OP	CoOp	C N _ _ _ _ _		Admin_istrator	Oct 07, 2009 4:25 PM
DE	Dumpster	D Y _ _ _ _ _		Admin_istrator	Oct 07, 2009 4:25 PM
DU	Dunbar	U Y _ _ _ _ _		Admin_istrator	Oct 07, 2009 4:25 PM
HA	Harvey	H Y _ _ _ _ _	80Period	Admin_istrator	Oct 07, 2009 4:26 PM
HI	Hillside	I Y _ _ _ _ _		Admin_istrator	Oct 07, 2009 4:26 PM
LCS	Ladner Community Share	2 Y _ _ _ _ _		Admin_istrator	Oct 07, 2009 4:26 PM
ME	Mender	M Y _ _ _ _ _		Admin_istrator	Oct 07, 2009 4:26 PM
MGMT	Management	m N _ _ _ _ _		Admin_istrator	Oct 07, 2009 4:27 PM
OR	Orion	O Y _ _ _ _ _		Admin_istrator	Oct 07, 2009 4:27 PM
PA	Pacific	P A??-??-??-??	80Period	Admin_istrator	Oct 07, 2009 4:27 PM
RO	Rocky Point	R N _ _ _ _ _		Admin_istrator	Oct 07, 2009 4:27 PM

Identify **commonality and unique features** of the departments, and decide on a meaningful character to represent each.

For example, you might set all Adult departments to upper-case and all Children departments to lower-case characters (any that don't fall into either category could be set to a number). This provides the opportunity to use the following Type Blocks Filters for grouping employees:

Type Block Filter	Employees Included Based on Report in Figure 10
!??-??-??-??	Employees in Adult based departments
.??-??-??-??	Employees in Child based departments
#??-??-??-??	Employees in Volunteers
N??-??-??-??	Employees in departments with N in the first position

When you've determined the best groupings, go to **Enterprise Settings | Departments** and update each department with the Type Block character (TB Code) you've assigned.

Repeat steps 1 to 4 above for each of the other tables that is auto-linked: Units, Positions, Cost Centres, EI Classes (under Enterprise Settings | Lookups) and Attendance Types (also under Enterprise Settings | Lookups).

Creating Useful Type Blocks

After you've set up all of your auto-linked Type Block Characters, it's a good time to evaluate each Type Block. Over time, your Type Blocks will evolve, so it's important to keep them simple and intuitive.

Using a worksheet, list the existing Type Block Labels for each object. (Make a copy for each object) See [Custom Type Fields](#) section for more information on viewing and updating Labels.

Object	Employee
--------	----------

#	Field Name (Label)	Linked?	Allowed Values
1	Department	Yes	Not Applicable (See Dept List)
2	Unit	Yes	Not Applicable (See Unit List)
3	Position	Yes	Not Applicable (See Position List)
4	Cost Centre	Yes	Not Applicable (See Cost Centre List)
5	Status	Yes	Not Applicable (See Status List)
6	Attendance Type	Yes	Not Applicable (See AttendType List)
7	EI Class	Yes	Not Applicable (See EI Class List)
8	Pay Type	No	H = Hourly, S = Salary
9	Gender	No	F = Female, M = Male
10	Extra Hours?	No	Y = will accept extra hours, N = will not accept extra hours
11			
12			

In the **unused Type Block fields**, decide on Field Names (Labels) for other types of information that would be useful for grouping and/or separating employees. Note: Any unused Type Block fields can be left blank until needed.

For example: If your organization is unionized, especially if there’s more than one union, you might make one of the unused Type Block fields “**Union**”.

For each **unlinked Type Block field**, decide what values should be stored. The values can be as simple as “**Y**” for Yes and “**N**” or <blank> for No if the field is a Yes/No type.

Note: Don't forget about the wildcards you can use for filtering, take advantage of the uppercase and lowercase characters to group common values.

When you've completed the worksheets, you're ready to set up your Type Block Labels. See [Custom Type Fields](#) section for more information on updating Labels.

After the Type Block Labels are defined, you'll need to update each Object's Type Block to contain the appropriate values. Refer to the section on [Editing Type Blocks](#) section for more information.

Ensure that everyone in your organization that maintains or uses EMS is familiar with the values defined above. Consistency is a key part of maintaining useful Type Blocks.

20 UNITS

Units can be used to divide an organization into smaller components or sub-departments. A Unit may represent a subset of a department such as an intensive care unit within a long-term care facility or department, or a way to logically group duties or positions across departments or cost centres, such as a laundry unit.


Units are used for filtering as well as part of the criteria for reporting. Each employee must be assigned a Unit in the Employee Work Profile I.


From the Home page, select **Enterprise Settings | Units**.


#	Code	Description	TB Code	Type Block	Unit Producti	Created By	Created When	Modified By
	/	/		- - -	100	Admin, istrator	09/Oct/2009 09:51	CVCPRConversion
	Alzh	Alzheimer Care	A	A -C - -	100	Anderson, Sonia	13/Sep/2013 07:14	Anderson, Sonia
	Back	Back Office	b	o -b - -		Anderson, Sonia	13/Sep/2013 07:12	Anderson, Sonia
	Front	Front Office	f	o -f - -		Anderson, Sonia	13/Sep/2013 07:12	Anderson, Sonia
	ICU	Intensive Care	I	I -C - -	100	Anderson, Sonia	13/Sep/2013 07:13	Anderson, Sonia
	Lndry	Laundry	L	L - - -		Anderson, Sonia	13/Sep/2013 07:13	Anderson, Sonia
	Payroll	Payroll	p	o -p - -		Anderson, Sonia	13/Sep/2013 07:14	Anderson, Sonia


Field Name	Description/Usage
Code	A unique code identifying the Unit or sub-department (max length: 6 characters).
Description	A description of the Unit.
TB Code	An alpha-numeric character linked to the Unit and used for grouping and filtering purposes. The Unit TB Code will be automatically applied to the 2nd position of the Employee and Shift Type blocks for easier filtering.
Type Block	A set of twelve alpha-numeric characters that represents the Unit.

	Sites with several Units may also find the Type Block helpful for filtering on a group of Units in Scheduling, Payroll Reports and Item Variables.
Unit Producing	<p>The percentage of an employee's time (0 - 100) that is considered unit producing (UPP) when working in the Unit. The remaining percent is consider management or operating services (MOS).</p> <p>Unit Producing percentages for the Department, Unit, Position, Cost Centre and Employee are used in Payroll Report Writer reports that have a column of ACTV to determine percentages of activity in the two areas.</p>

To add a new Unit click on the green plus sign ().

To copy an existing Unit click on the double-page icon ().

To edit an existing Unit click on the brown pencil ().

To delete a Unit click on the red X ().

Unit Report

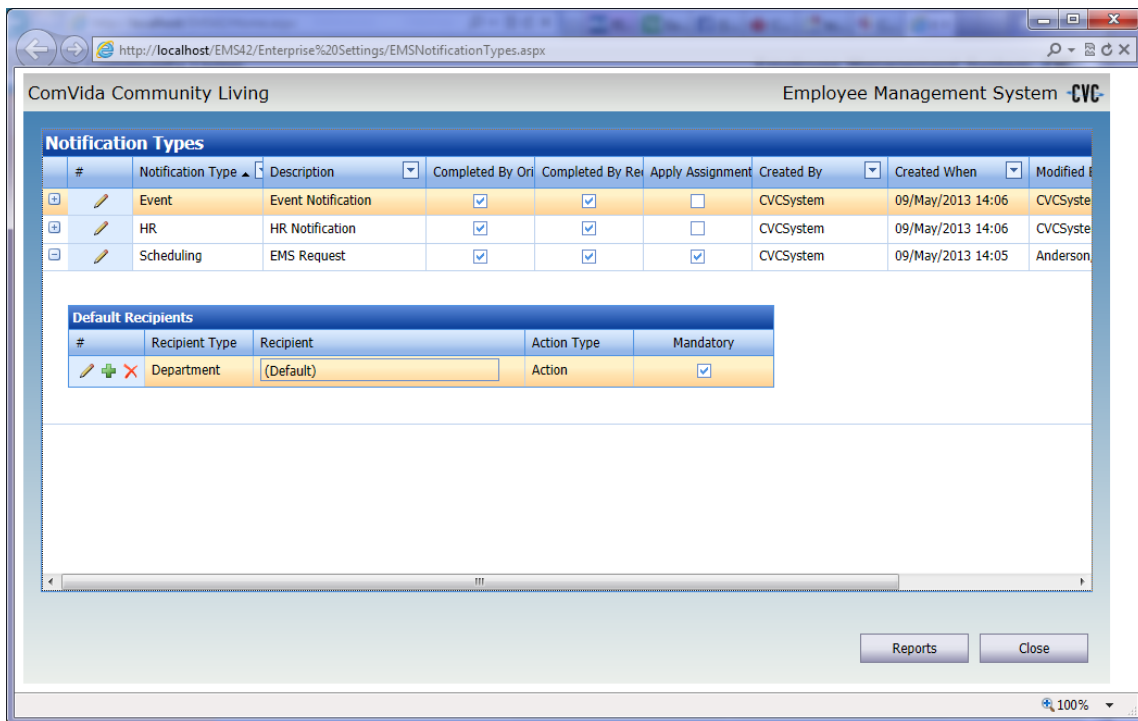
A list of Units can be printed by clicking the Reports button and selecting Units in the Reports list. Reports are also available through the Configuration Reports button from the Enterprise Settings menu on the Home page.

21 NOTIFICATION TYPES

Notifications in EMS are one of three distinct types: Scheduling changes (vacation requests, hours worked, etc), HR updates (expiring skill sets, upcoming reviews, etc.) and Events (meetings, policy changes, etc).

Notification Types define the usage and behaviour of Notifications as well as any default recipients.

From the Home page, select **Enterprise Settings | Notification Types**.



Field Name	Description/Usage
Notification Type	<p>The Type of notification.</p> <p>Event: Notifications that are not specific to an employee or a shift. These Types of Notifications could be used for announcements, meeting requests, or company events.</p> <p>HR: Notifications related to a specific employee. These Types of Notifications could be used for changes to an employee's benefit or contact information, performance review reminders, or upcoming courses.</p>


	Scheduling: Notifications related to a specific employee and shift. These types of Notifications could be used for vacation requests, shift exchanges, or hours worked reporting.
Completed By Originator	A flag indicating that a Notification of this Type can be completed by the employee that created it (the Originator).
Completed By Recipient	A flag indicating that a Notification of this Type can be completed by the employee(s) that received it (the Recipient(s)).
Apply Assignment Rules	<p>A flag indicating that the Department, Unit, Position and Cost Centre lists should be limited to the Originator's Assignment Rules in Scheduling.</p> <p>This flag only applies to the Scheduling Notification Type, and if checked only Departments, Units, Positions and Cost Centres listed in the Assignment Rules of the Focus Employee will be included in the dropdown lists of the Notification.</p> <p>Note that an asterisk in any of the Assignment Rules columns indicates that all codes of that type are to be included. For example, if an employee has an asterisk in the Unit column of his/her Assignment Rules, the Unit dropdown list will include all Units.</p>

Notification Types cannot be created or deleted.

To edit Notification Type's Description and default behaviour, click on the brown pencil ()

Creating Default Recipients

To save time and ensure accuracy when Notifications are created, default recipients can be added to each Notification Type.

Click the plus sign () at the far right of the row to view Default Recipients.

To add a Default Recipient:

Select the Notification Type to be updated.

Notification Types						
#	Notification Type	Description	Completed By Ori	Completed By Re	Apply Assignment	Cre
	Event	Event Notification	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	CVCS
	HR	HR Notification	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	CVCS

Default Recipients				
#	Recipient Type	Recipient	Action Type	Mandatory
	Department	(Default)	Action	<input type="checkbox"/>
	Group	HR Notify	Action	<input checked="" type="checkbox"/>

Field Name	Description/Usage
Recipient Type	<p>The Type of Recipient to be automatically included in a Notification of the selected Type.</p> <p>Single: Adds a selected employee to the Recipients list of each Notification.</p> <p>Department: Adds the Department Head or Employee Group of a specific Department or the Notification's Department to the Recipients list of each Notification.</p> <p>Group: Adds all employees in a selected Employee Group to the Recipients list of each Notification.</p>
Recipient	<p>The specific employee, Department or Employee Group to be added to each Notification's Recipient list.</p> <p>Hint: To automatically add the Department Head or Employee Group of the Notification's Department, set the Recipient to (Default).</p>
Action Type	<p>A flag indicating that the Recipient can take action on the Notification (i.e. they can Accept or Reject it) or should simply receive a copy of the email(s) regarding the Notification.</p>
Mandatory	<p>A flag indicating that the Recipient(s) may or may not be removed from the Notification.</p>

Click the green plus sign () to create a new row.

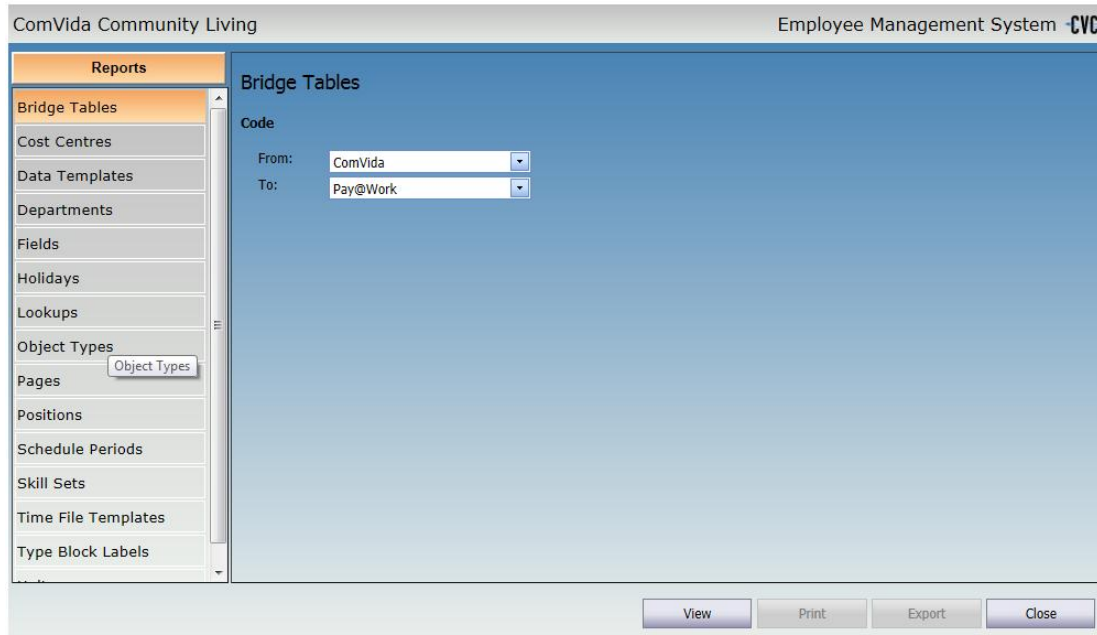
Set the **Recipient Type**, Action Type, and if applicable, check the Mandatory flag.

Click the green checkmark () to save the new row.

To close the page, click **Close**.

22 CONFIGURATION REPORTS

Configuration Reports are accessed from the Enterprise Settings menu as well as any Enterprise Setting page by clicking the Reports button. The reports can be viewed on screen, printed to a PDF, or exported to a variety of formats.



Printing Reports

To print a report:

Click the **Reports** button on any Enterprise Setting page and select a report.

Select the criteria.

Click the **View** button to display the report and then click the **Print** button.



http://localhost/EMS42/Reporting/dlgPrintReport.aspx - Windows Internet Explorer

ComVida Community Living
HR Fields

Name: AddressCity To: WC_YEAR

Field Name	Type	Description	Length	Label	Format	Allow PR	SS	Created By	Created	Modified By	Last Modified
AddressCity	Text		50	City		Y	N	CFCSystem	Apr 03, 2002 3:04PM	CFCSystem	Oct 15, 2009 9:31AM
AddressCountry	Text		50	Country		Y	N	CFCSystem	Apr 03, 2002 3:06PM	CFCSystem	Apr 03, 2002 3:06PM
AddressLine1	Text		100	Street		Y	N	CFCSystem	Apr 03, 2002 3:04PM	CFCSystem	Apr 03, 2002 3:04PM
AddressLine2	Text		100	Address Line 2		Y	N	CFCSystem	Apr 03, 2002 3:04PM	CFCSystem	Apr 03, 2002 3:04PM
AddressPostal	Text		25	Postal Code		Y	N	CFCSystem	Apr 03, 2002 3:06PM	CFCSystem	Apr 03, 2002 3:06PM
AddressProvince	Text		25	Province		Y	N	CFCSystem	Apr 03, 2002 3:05PM	CFCSystem	Apr 03, 2002 3:05PM
AddressType	List		10	Type	ContcType	Y	N	CFCSystem	Apr 12, 2002 1:31PM	CFCSystem	Apr 12, 2002 1:31PM
AdHoc1	List	Dept	10	Dept	AdHoc1	Y	Y	CFCSystem	Mar 07, 2002 2:33PM	Anderson, Sonia Marie	Apr 04, 2013 9:28AM
AdHoc2	List	AdHoc2	10	AdHoc2	AdHoc2	N	Y	CFCSystem	Mar 07, 2002 2:33PM	Anderson, Sonia Marie	Apr 26, 2013 11:51AM
AL_DESCCDE	Text	What is the specific allergen?		Allergy to		Y	N	Anders, Sonia	Mar 17, 2010 9:57AM	Ahjuua, Sylvia	Mar 18, 2010 1:27PM
AL_LIFETHR	True/False	Is the allergy life threatening?		Allergy Life Threat	Yes/No	Y	N	Anders, Sonia	Mar 18, 2010 9:04AM	Anders, Sonia	Mar 18, 2010 9:04AM
AL_OPERCR	Text	OPER who created file		OPER Created By		Y	N	Anders, Sonia	Mar 17, 2010 10:03AM	Anders, Sonia	Mar 17, 2010 10:05AM
AL_OPERUP	Text	OPER who updated file		OPER Updated By		Y	N	Anders, Sonia	Mar 17, 2010 10:04AM	Anders, Sonia	Mar 17, 2010 10:04AM
AL_PN	Note	Progress notes for allergy		Progress Notes		Y	N	Anders, Sonia	Mar 17, 2010 10:05AM	Anders, Sonia	Mar 17, 2010 10:05AM
AL_PROTOCOL	List	What protocol was followed?		Allergy Protocol	AL_PROTOCOL	Y	N	Anders, Sonia	Mar 18, 2010 9:09AM	Anders, Sonia	Mar 18, 2010 9:09AM
AL_REACTN	Note	What is the allergic reaction?		Allergy Reaction		Y	N	Anders, Sonia	Mar 17, 2010 9:59AM	Anders, Sonia	Mar 17, 2010 9:59AM
AL_REASON	Note	Reason for allergy stopped		Stop Reason		Y	N	Anders, Sonia	Mar 17, 2010 10:03AM	Anders, Sonia	Mar 17, 2010 10:03AM
AL_RPTDATE	Date	What date was the allergy rptg		Reported Date	dd/MM/yyyy	Y	N	Anders, Sonia	Mar 17, 2010 10:00AM	Anders, Sonia	Mar 17, 2010 10:03AM
AL_STOPDATE	Date	Allergy stopped date		Stopped Date	dd/MM/yyyy	Y	N	Anders, Sonia	Mar 17, 2010 10:02AM	Anders, Sonia	Mar 17, 2010 10:02AM
AL_TYPECDE	List	What type of allergy is it?		Allergy Type Code	AL_TYPECDE	Y	N	Anders, Sonia	Mar 17, 2010 9:56AM	Anders, Sonia	Mar 17, 2010 9:56AM
ALLOW	Decimal	ALLOW		ALLOW	#####.#####	Y	N	CVCPRConversion	Sep 02, 2011 12:32PM	CVCPRConversion	Sep 02, 2011 12:32PM
ANNVACHR	Decimal	ANNVACHR		ANNVACHR	#####.#####	Y	N	CVCPRConversion	Sep 02, 2011 12:32PM	CVCPRConversion	Sep 02, 2011 12:32PM
AttendType	List		10	Attendance	AttendType	Y	Y	CFCSystem	Mar 08, 2002 11:18AM	Anderson, Sonia Marie	Apr 04, 2013 9:29AM
b_1Name	Text	Name of 1st Beneficiary		1st Beneficiary Name		Y	N	Anders, Steven	Oct 20, 2009 9:56AM	Anders, Steven	Oct 20, 2009 9:56AM
b_1Percent	Text	1st Beneficiary's percent of B		1st Ben % of Benefit		Y	N	Anders, Steven	Oct 20, 2009 10:01AM	Anders, Steven	Oct 20, 2009 10:01AM
b_1Relation	Text	1st Beneficiary's Relationship		1st Ben Relationship		Y	N	Anders, Steven	Oct 20, 2009 9:59AM	Anders, Steven	Oct 20, 2009 9:59AM
b_2Name	Text	Name of 2nd Beneficiary		2nd Beneficiary Name		Y	N	Anders, Steven	Oct 20, 2009 9:57AM	Anders, Steven	Oct 20, 2009 9:57AM
b_2Percent	Text	2nd Beneficiary's percent of I		2nd Ben % of Benefit		Y	N	Anders, Steven	Oct 20, 2009 10:01AM	Anders, Steven	Oct 20, 2009 10:01AM
b_2Relation	Text	2nd Beneficiary's Relationship		2 Ben Relationship		Y	N	Anders, Steven	Oct 20, 2009 9:59AM	Anders, Steven	Oct 20, 2009 9:59AM
b_3Name	Text	Name of 3rd Beneficiary		3rd Beneficiary Name		Y	N	Anders, Steven	Oct 20, 2009 9:57AM	Anders, Steven	Oct 20, 2009 9:57AM
b_3Percent	Text	3rd Beneficiary's percent of I		3rd Ben % of Benefit		Y	N	Anders, Steven	Oct 20, 2009 10:02AM	Anders, Steven	Oct 20, 2009 10:02AM
b_3Relation	Text	3rd Beneficiary's Relationship		3 Ben Relation		Y	N	Anders, Steven	Oct 20, 2009 10:00AM	Anders, Steven	Oct 20, 2009 10:00AM
b_Comments	Note	Comments		Comments		Y	N	Anders, Steven	Oct 20, 2009 10:10AM	Anders, Steven	Oct 20, 2009 10:10AM
b_Trustee	Text	Trustee		Trustee		Y	N	Anders, Steven	Oct 20, 2009 10:03AM	Anders, Steven	Oct 20, 2009 10:03AM

Sep 13, 2013 8:07 am by Anderson, Sonia Page 1 of 16

The report will be displayed in a viewer window. Click the printer icon  (or **Ctrl+P**) to print the report. Alternatively, click the disk icon  (or **Shift+Ctrl+S**) to save a copy of the report as a pdf.

Exporting Reports

To export a report:

Click the **Reports** button on any Enterprise Settings page and select a report.

Select the criteria.

Click the **View** button to display the report and then click the **Export** button.



In the Export Report dialog that is displayed, select the appropriate format from the dropdown:

- MS Excel (XLS)
- MS Word (DOC)

- Portable Document (PDF)
- Rich Text (RTF)
- MS Excel – Data Only (XLS)
- XML File – Data Only (XML)

Click **Export** and choose an appropriate folder and name and click OK to save the file.

Click the **Cancel** button to close the Export Report dialog.