Osan Scheduler How-To

1. Summary

This web-based application was developed to ease the burden on administrators in providing a comprehensive team/site/employee schedule and produce the required reports required by the various customers. A team is the overall group that is usually divided into sites with a leadership element. A site also has a small leadership team and broken down into work centers where most of the employees are assigned.

This tool will allow each user to see various aspects of the application depending on their role within the team and site. The roles include:

1. Employee – Everyone with a access account on this application is initially an employee. This is the lowest common denominator and is given the least privilege to updating necessary data.
2. Site Scheduler - The site leader will select this individual who will be responsible setting all site employee’s schedules and variations (these terms explained later). He/She will also prepare the site’s reports and email it out to the various recipients. They will also be able to edit employee data to include their profiles, change passwords, unlock accounts, edit company information, assign primary labor codes, edit approved leave, edit leave starting balances and submit leave requests for the employee.
3. Site Company Lead – Since the team is probably composed of a main company plus a portion of the team composed of personnel from other companies. Work completed and leaves taken require are included in the timecard ingest/manual entry and this is the responsibility of the site’s company leads. They ensure their timecard system data is ingested or manually entered, so this is the area the site company lead has access to.
4. Site Leader – Site leadership isn’t just the site lead, but also anyone assigned a leadership position where assignment actions are decided, and leaves approved. A Site Leader has all the permissions of the Site Scheduler plus leave approval.
5. Team Leader – Team leadership are the overall decision makers deciding on team composition and contract maintenance. Because of this, they are granted the capability to add/edit/delete sites and their employees.
6. Application Admin – This is the highest role in the application and granted only to the application administrator(s). They have full permissions to add/edit/delete teams plus purge old data by date.
7. Terms:
   1. Assignment – This refers to the normal work schedule over a period of time. All employees have at least one assignment which also annotates when the employee started working for the team/site and when their last day of work was. An assignment can have multiple schedules. If multiple schedules are to be used and rotated through, the assignment can designate a date to rotate upon and the number of days between changes. The selection of the assignment workday by date is checking for a rotation period and date, finding which schedule to use, then determine with days within that schedule to provide.
   2. Schedule – The schedule is defined as a group of days (must be a multiple of 7) to be used to define the workdays for the assignment. All schedule days start on a Sunday (first day of the week) and include a multiple of 7 days.
   3. Workday – A workday contains the work code for a particular day numbered within the schedule, the work center assigned for that work and the number of hours expected to be worked. A blank workday includes a blank code, a blank work center and zero hours.
   4. Variation – A variation is defined as a temporary alteration in the employee’s normal work schedule. As an example: The employee works Tuesday through Saturday, 8 hours per day, working day shift in the GEOINT work center, but you need them to work Mid Shift for 4 weeks. You create a variation with the scheduled start and end dates for the variation, plus assign the variation’s schedule to the proper mid work code, work center and number of hours. If the site is using a mid-rotation, you should set the IsMids flag of the variation to true. A variation only has one schedule and can be set to whatever multiple of 7-day period to use.
   5. Leave – A leave is any non-workday. It could be vacation time, a holiday, military or jury duty, or a few other options. These are started by completing a leave request and the individual’s supervisor approving the leave. All leaves include a leave code to show what type of leave it is and the number of hours to be used. The system automatically add a leave status (Actual, Approved, or Requested) to show where the leave is in the process.
      1. Actual Status – This is normally determined by ingestion of the timecard data or from the company lead’s timecard manual input.
      2. Approved Status – This signifies that the supervisor has approved the leave request and will remain in this status until the timecard data modifies the status that the leave was actual taken.
      3. Requested Status – This signifies that the employee has requested the leave, but the supervisor hasn’t approved it yet.
8. Procedures:
   1. View Layout

Note: The view below is after log in

A screenshot of a computer

Description automatically generated

* + 1. Top/Toolbar

At the top of the window/browser is the toolbar. IT provides the place to make the menu visible/hidden, shows the Team Name and Site Name the logged individual is assigned to. The other end of the toolbar shows the logged individual’s first name, the Icon to be used to log out, plus a button to access the on-line help.

* + 1. Menu

The menu provides the access to the various view and editing options the logged in user’s permissions allow.

* + 1. Main View Area

The menu choice’s display will show in this area

* + 1. Bottom/Status Bar

The blue area at the bottom will display error messages and/or other status messages from the server.

* 1. Logging In/Out

A screenshot of a login screen

Description automatically generated with low confidence

* + 1. Logging In

Only authorized individuals can access the data associated with this web application, so you must log into the system for access.

1. Type in the user’s registered email address into the space provided as show above.
2. The next text entry area is for the account’s password. It doesn’t display, but display’s only a string of asterisks for each character typed in.
3. Click the “Login” button below the password entry area to send the login information to the server to log in.

If the information sent is accurate, the employee calendar portion of the application will be shown, otherwise you may see a login status message to the left of the log in button.

* + 1. Logging Out

Once you are logged into the application, you will stay logged in, for a period of time, even if you refresh your browser. To remove this capability, log out of the application by clicking the lock in the toolbar. This will log you out and return the browser display to the log in screen.

* 1. Employee
     1. Schedule

A picture containing text, screenshot, number, square

Description automatically generated

This schedule is provided in calendar format showing all the employee’s work assignments and approved leave during the selected month. To change the displayed month:

1. Click the “<<” button at the top-left to go back one year.
2. Click the “<” button at the top-left to go back one month.
3. Click the “>” button at the top-right to go forward one month.
4. Click the “>>” button at the top-right to go forward one year.

The display is view only, so other than selecting the month to view, no other actions are possible. Grayed out areas are for previous and next month’s days. Each work or leave day displays with the assigned color scheme for the large code in the middle of each day. The box in the upper-right of each day block reflects the day of the month, today is colored in a red tint, while weekends are cyan. The large 1–2-character code in the middle of the day block shows the work or leave code. The word(s) at the bottom of the day block are the only for workdays and show the work center within the site the individual is to work at. The system determines which code to display by finding the individual’s current work assignment for the day, then checks for any workday variations annotated, and lastly looks for approved leave. The priority of display is the reverse or leave-variation-assignment data is displayed.

* + 1. PTO/Holiday Listing
    2. Profile
    3. Leave Requests
  1. Site Schedules
     1. Schedule
     2. Coverage
     3. Mid Rotation Listing
  2. Editing
     1. Employee Editor
     2. Leave Approval
     3. Site Editor
     4. Timecard Ingest/Manual Timecard Entry
     5. Team Sites Editor
     6. Team Editor
     7. Teams Editor
     8. Data Purge
  3. Report Creation
     1. Report Creator
        1. Team Schedule
        2. PTO/Holiday Listing
        3. Charge Number Status
        4. Mid-Shift Rotation
        5. Certificate of Service (CofS)