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# OC Labor Pro Manual

TracRite Software Inc.



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# Welcome

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Thank you for choosing  
OCLabor Pro.

OCLabor Pro is the visually  
intuitive Employee/Staff  
Scheduling application for small  
and medium-sized businesses.

OCLabor Pro is designed for the  
business-person who is looking  
for a no-nonsense,  
straightforward tool to assist  
them with day-to-day scheduling  
of their staff.

With OCLabor Pro you will maximize your planning efforts. You can print , email , and publish your schedule plans on the web.

And you can realize significant savings in your labor cost by scheduling your staff for the tasks that need to be accomplished rather than finding work for your staff.

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Web Site:	<a href="http://www.tracrite.net/">http://www.tracrite.net/</a>

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## What's new in this release



OCLabor Pro is designed with many new features and enhancements to give you a competitive advantage. With OCLabor Pro, you can plan your staff schedules faster and more efficiently than ever before. You can also increase your profit margins by accurately forecasting your labor costs and comparing them to your costs.

Among some of the new features, OCLabor Pro includes:

- Unpaid time (i.e. coffee and lunch breaks)
- Statutory Holidays
- Overtime
- Actual hours worked
- Export to payroll
- Staff Filtering (availability, experience, days-off, schedule exceptions, already scheduled)
- Back-up and Restore
- Copy time bars from one day to the next day
- Reports (New: Staff Hours, Daily sign-in sheet, Actual and Scheduled, Payroll and Staff-overtime, Attendance Exceptions)
- System Security (Three levels: Administrator, read/write, read only)
- Labor Burden - planned or actual (compare revenue to labor cost)

To learn more about all the features and functionality of OCLabor Pro, visit:

<http://www.tracrite.net/>

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# System Requirements



OCLabor Pro will run effectively on almost any current Windows system with few requirements.

However, the following are the minimum recommended requirements for using OCLabor Pro:

- Windows 98, Windows ME, Windows 2000, or Windows XP
- Minimum display: 1024 X 768, True Color (32 bit)

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# Notices



Optimum Control reserves the right to change any and all Information contained within this guide and all associated web site references, without notice. The examples contained herein are meant to be fictitious. Any reference to actual people, company, organizations or products is coincidental and is not intended.

The user of this product assumes the obligations of use under existing copyright laws.

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Optimum Control reserves the right to modify, upgrade, correct our software programs and publications without notice and assumes no liability in that event.

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Web Site:	<a href="http://www.tracrite.net/">http://www.tracrite.net/</a>

# Getting Started

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## Installing OCLabor Pro



The OCLabor Pro installation program automatically installs all the required components of the OCLabor Pro application.

OCLabor Pro may be installed in the following ways:

### To install OCLabor Pro from a CD:

1. Insert the OCLabor Pro CD into your CD Drive
2. Wait for OCLabor Pro to automatically begin the installation process, or
3. Click the Windows “Start” Menu,
  - a. Select “Run” and type the letter of your CD Drive (Usually D: or E:)
  - b. Followed by the file name OCLaborPro.exe (e.g. D:\OCLaborPro.exe)

## Run-mode



Use the Licensing Activation form to unlock (license) OCLabor Pro for unlimited use, to transfer the license to a different computer, or remove the license from a computer.

When you run OCLabor Pro for the first time, the Licensing Activation form is displayed

The screenshot shows a window titled "Optimum Control Labor Pro". At the top, there are two red boxes: "Site code" with the value "D38B2875" and "MID" with the value "8397-D695-91C2-3BA1". Below these are two more red boxes: "Days left: 59" and "Uses left: N/A". There are four radio buttons: "Enter application" (selected), "Unlock application", "Remove license", and "Transfer license". To the right of "Unlock application" is a text field for "Activation code". To the right of "Remove license" is a text field for "New Site code:". Below the radio buttons is a blue box labeled "Application status: EVALUATION". At the bottom, there are four buttons: "Email Site/MID", "Activate", "Cancel", and "Continue >>".

### Evaluation Mode

The licensing activation form will continue to display automatically, before OCLabor Pro begins, throughout the evaluation period. In trial mode, the form displays the number of days left in the evaluation period (up to 60 days). When the evaluation period has expired, OCLabor Pro will not start without being provided an activation code.

### Licensed Mode

When a valid activation code has been provided and OCLabor Pro runs in Licensed mode (unlocked), the licensing activation form will no longer display before OCLabor Pro begins. In Licensed Mode, the form can be displayed if desired holding down the "Scroll Lock" on the keyboard and simultaneously double-clicking the OCLabor Pro icon on your desktop.

### To run OCLabor Pro in Evaluation mode:

1. Ensure that the "Enter Application" option is selected.
2. Click the "Continue" button

### To run OCLabor Pro in Licensed mode:

1. Procure an Activation Code from Optimum Control:

- Click the "**Email Codes**" button to send an email message to Optimum Control. This email message contains your machine-specific site code and MID code that Optimum Control will use to generate your unique activation code.

2. When you receive your "Activation Code":
  - a. Click the "Unlock Application" option.
  - b. Copy / Paste or type your unique Activation code into the form (below the "Unlock Application" option).
  - c. Click the "Continue" button.  
Your copy of OCLabor Pro is now licensed and the Licensing Activation form will no longer display automatically when you start OCLabor Pro.



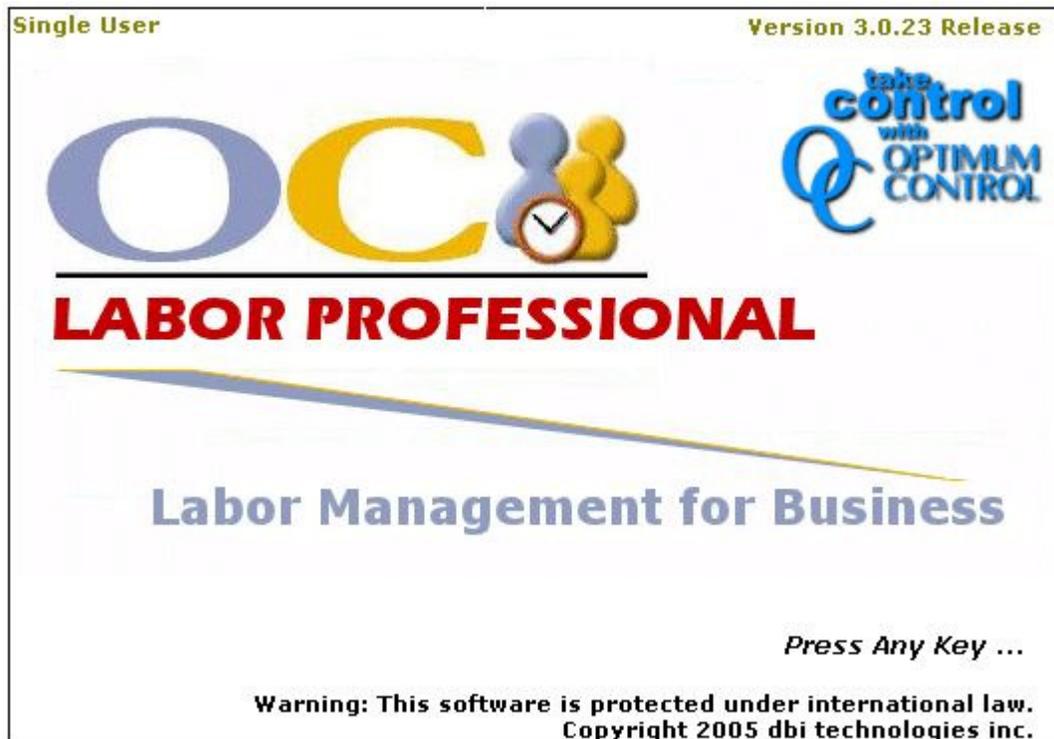
**Note:** If you have any difficulties with the Evaluation Mode or with licensing of OCLabor Pro, please contact Optimum Control support:

Email:	<a href="mailto:support@tracrite.net?subject=OCLabor%20Pro%20Support">mailto:support@tracrite.net?subject=OCLabor%20Pro%20Support</a>
Phone:	(204) 953-2272 (North America)

## Splash Screen



Whenever you start the Staff-Scheduler application, the "splash screen" will be displayed. This screen provides you with the version number of the application (top right of the screen).

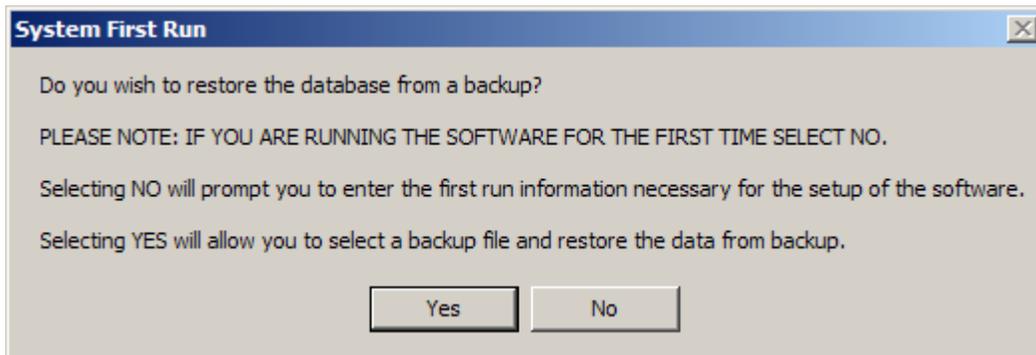


To continue, press any key or use your mouse to left-click anywhere on the screen.

## First-time Use



When OCLabor Pro detects that it is being run for the first time since installation or reinstallation, you are given the opportunity to skip the First-time setup process and select your data backup file.



### To setup OCLabor Pro for the first time (no backup to restore):

- Click "**No**"
- OCLabor Pro will guide you through a brief series of four forms so that you can provide the basic setup information that it needs to create and display your schedule plans.

[Click here to learn more.](#)

### To reinstall and restore your backup data:

- Click "**Yes**"
- A dialog box will prompt you to navigate to your backup file and select it.

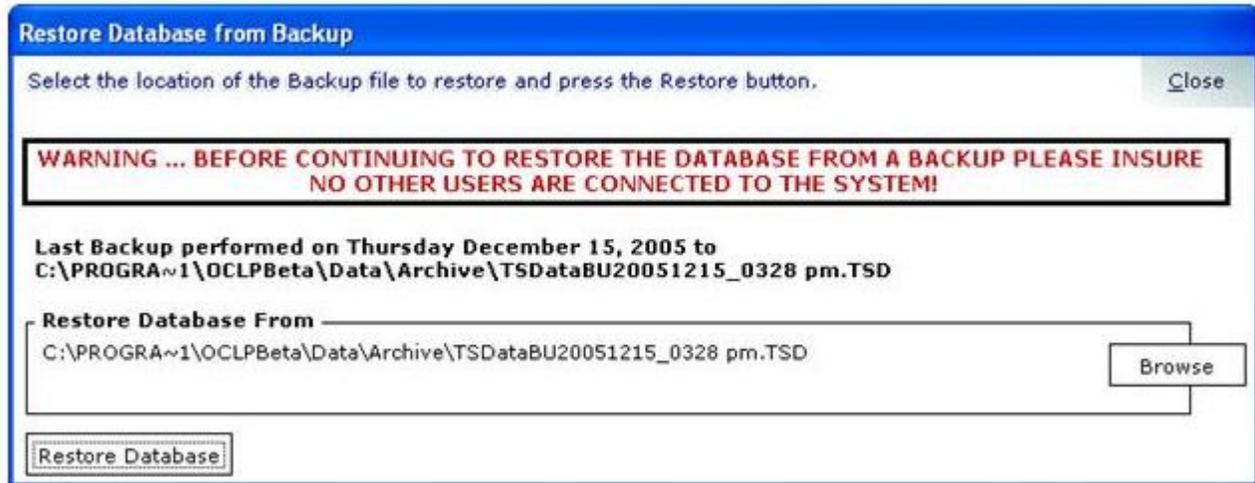
[Click here to learn more.](#)

**Note:** You will **not** be prompted to provide system "First-time Use" information.

## Restoring Data from Backup



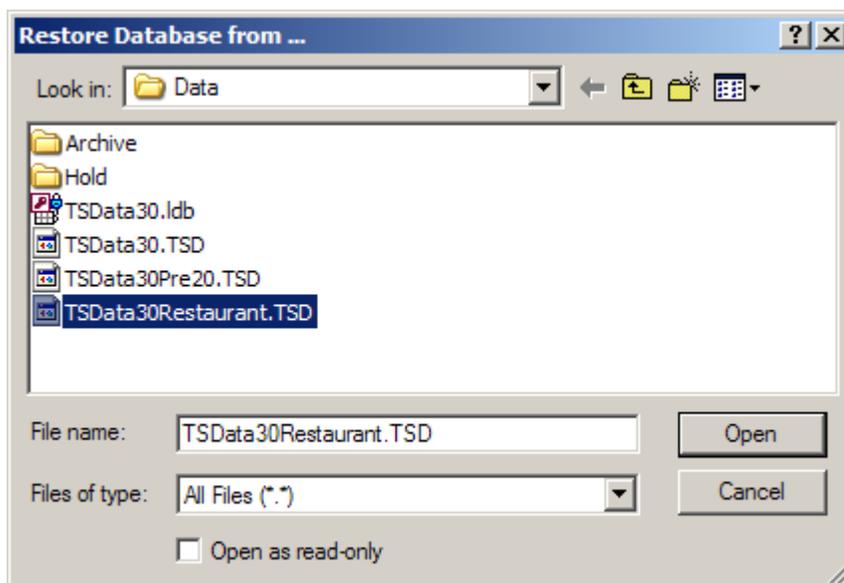
If you have been working with OCLabor Pro but you have needed to reinstall the application to your system, OCLabor Pro provides you with the opportunity to restore your data **without** asking you to provide all the first-time use information.



Restoring data from a backup resets OCLabor Pro with the same system, department, positions / tasks, and staff member information as at the time of that backup. Also, all your schedule plans are reinstalled so that you may continue working from the point at which you left off.

To restore data from a backup:

1. Click the "**Browse**" button  
A dialog window is displayed, allowing you to navigate to your backup file.

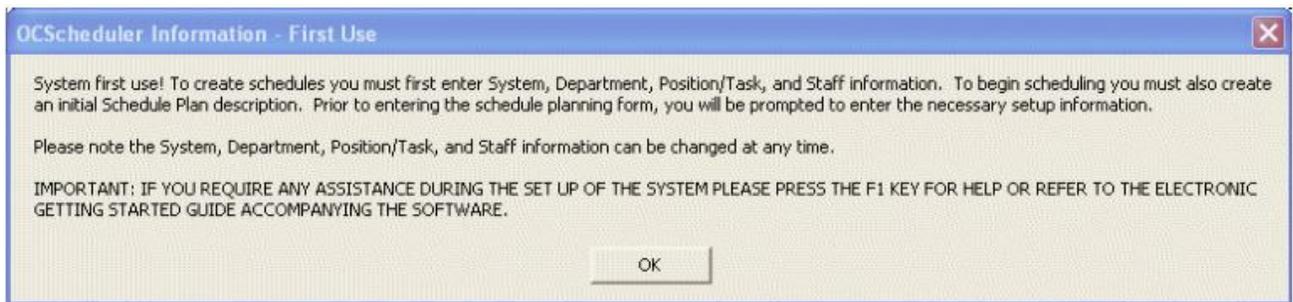


2. Navigate to and select your backup file.  
Your backup file may be located in the "Archive" folder. It will have a .TSD extension.
3. Click the "**Open**" button to load your backup file into OCLabor Pro.  
A message box will be displayed when OCLabor Pro has completed the restoration of your backup.
4. Click "**OK**" to continue.

## Setting up the System for the First Time



When OCLabor Pro is used for the first time, the application guides you through a series of forms so that you can provide some fundamental information that OCLabor Pro needs before it can be used to create schedule plans.



In a few steps, OCLabor Pro will gather information about:

1. The System (your company information and how you want your schedule plans to be displayed when you work with them).
2. The Departments under which your staff should grouped when they are scheduled.
3. The Positions / Tasks that need to be scheduled on a regular basis.
4. The Staff members themselves (their names and optional information about their contact information and availability).

To continue OCLabor Pro setup:

- Click "**OK**"  
OCLabor Pro will display each of the four setup forms, one at a time.

[Click here to learn more.](#)

# Setting Up OCLabor Pro



To create your scheduling plans, OCLabor Pro requires some information that is particular to your company and staffing operation.

When OCLabor Pro is used for the first time, you are given the opportunity to provide at least the minimum of information that is needed by the application.

You may, at any time, return to the Maintenance section of the application to add or modify the details of your general system settings or of your departments, positions and tasks, or your staff information.

# Setting up the System



The System setup form allows you to provide OCLabor Pro with the general information that will be used every time you start OCLabor Pro and work with your schedule plans.

**System**

Please enter the system settings and press the Save or Cancel button ... Save Cancel ? Close

\*Company Name:

**Security**

Enable System Security  User Management System Administrator Password:  (Maximum 10 characters, Letters and numbers only)

**Conflict Checking**

Conflict Check Staff Availability  Conflict Check Staff Experience

**Labor Cost**

Staff Default Hourly Rate:  Target Labor Cost: %

**New Schedule Plan Defaults**

Schedule By:  Position/Task  Staff \*Start:  \*End:  Schedule Length:  days

**Schedule Plan Default View**

Show Scheduler Bar  Schedule Bar Font Size:  Small  Large

Show Explorer  Scheduler Bar Icon Size:  Small  Large

Show List View

**Overtime and Statutory Holidays**

Overtime after  hours per day

Overtime after  hours per week starting on

Overtime Rate Multiplier:  Statutory Holiday Rate Multiplier:  Statutory Holidays

**Unpaid Time Defaults**

Set Unpaid Minutes to  when shift is less than or equal to  hours otherwise set unpaid minutes to

**Mail Server Setup (required for emailing schedules)**

SMTP Server:  Port Number:  Server Requires Authentication:

From Name:  Check Connection Account Name:

Return Address:  Account Password:

**Database Backup**

Warn if backup is not performed at least every  days

Last Backup performed on Wednesday December 14, 2005 to C:\PROGRA-1\OCLPBeta\Data\Archive\TSD\dataBU20051214\_1155 am.TSD



**NOTE:** When System Security (password protection) is enabled, this System form is available only to users that have been given System Administrator privileges.

## System - Company Name



Enter the name of your company or organization.

\*Company Name:

What you enter here will be shown on all reports.



**NOTE:** This field is required.

## System - Conflict Checking



When you assign staff to your schedule plans, OCLabor Pro can alert you, at the time of assignment, if a staff member is:

- already assigned to the plan at that same time, or is regularly unavailable at that time, or has a single scheduling exception for that time.
- not listed as experienced for a particular position / task.

### Conflict Checking

Conflict Check Staff Availability  Conflict Check Staff Experience

While conflict checking is optional, with only a little setup time, conflict checking can become a invaluable for getting your scheduling plans right the first time and avoiding the costs associated with reworking your plan because of unavailable or unqualified staff members.

#### To enable conflict checking for Staff Availability:

- Click the "Conflict Check Staff Availability" checkbox ON.
- In the Staff Maintenance area, set up staff availability and scheduling exceptions. (see the "Staff" option under the "Maintenance" menu)

#### To enable conflict checking for Staff Experience:

- Click the "Conflict Check for Staff Experience" checkbox ON.
- In the Staff Maintenance area, set up staff positions and wages. (see the "Staff" option under the "Maintenance" menu)

## System - Security



OCLabor Pro can be secured with a password protection.

Security			
Enable System Security <input checked="" type="checkbox"/>	User Management	System Administrator Password: <input type="text" value="DBIPASS"/>	(Maximum 10 characters. Letters and numbers only)

When System Security is enabled, OCLabor Pro will ask for a user ID and password each time it is started.

### To enable System Security and password protection:

1. Click the "**Enable System Security**" checkbox ON.
2. Click the "**User Management**" button  
A form is displayed to add user ID's and password, each with their own levels of system access.
3. Modify the default "**System Administrator Password**".

### To disable System Security and password protection:

- Click the "**Enable System Security**" checkbox OFF.  
When this checkbox is unchecked, OCLabor Pro will run for any user without asking for ID and password confirmation, regardless of any "User Management" security accounts that have already been established.  
 **NOTE:** "User Management" accounts that have been created are preserved, even when "Enable System Security" is checked OFF.



**IMPORTANT:** When System Security is enabled, OCLabor Pro will not run unless a valid login ID and password are provided. OCLabor Pro will allow three attempts to enter a valid combination after which OCLabor Pro will shut down.



**NOTE:** Passwords can contain numbers, letters or a combination of both. Password can be any length up to 10 characters. Passwords are case sensitive.



## To add User Security Accounts:

1. Click the "New" button in the command bar at the top of the form.  
The "account information" area at the bottom of the form is enabled for entry.

*Name:	<input type="text" value="Phil"/>	Authorization Level <input checked="" type="radio"/> Administrator <input type="radio"/> Read/Write <input type="radio"/> Read Only
*Login ID:	<input type="text" value="phil"/>	
*Password:	<input type="text" value="velvet"/> (Maximum 10 characters. Letters and numbers only)	

2. Enter the new user's name, a login ID and a password.  
Note that passwords are case-sensitive and may be of any length up to 10 characters.
3. Select an Authorization level for the new user.
4. Click the "Save" button to add this user's account to the list.

## ***System - Security:***

### **System Administrator Password**



The system administrator ID and password is always available to the system, regardless of the number of User Management ID's and passwords that have been created.

At any time, when System Security is enabled, you may login to OCLabor Pro with full administrative privileges using:

- user ID "Administrator" (*without quotation marks*)
- the System Administrator password you enter here.

**NOTE:** The System Administrative password is case sensitive and may of any length up to 10 characters.

## System - Labor Cost



Enter the default hourly wage and target labor cost.

<b>Labor Cost</b>	
Staff Default Hourly Rate: <input type="text" value="\$0.00"/>	Target Labor Cost: <input type="text" value="0.000"/> %

- **"Staff Default Hourly Wage"** is a default amount that is used when you add staff information to the system. This is merely a default figure and may be changed at the time that a staff person's wage details are entered.  
[Click here to learn more.](#)
- **"Target Labor Cost"** is your target labor burden as percentage of the revenue budget. This figure is used by OCLabor Pro as you work with the "Labor Cost" budgeting features of the system.  
[Click here to learn more.](#)

## System - Schedule Plan Default View



Enter default values for how you want OCLabor Pro to display various features when it starts up.

Schedule Plan Default View	
Show Scheduler Bar	<input type="checkbox"/>
Show Explorer	<input type="checkbox"/>
Show List View	<input type="checkbox"/>
Schedule Bar Font Size:	<input type="radio"/> Small <input checked="" type="radio"/> Large
Scheduler Bar Icon Size:	<input checked="" type="radio"/> Small <input type="radio"/> Large

### To set up default views:

1. Set the "Show Scheduler Bar" checkbox "ON" (checked) to display the Scheduler Bar when OCLabor Pro starts up.
2. Set the "Show Explorer" checkbox "ON" (checked) to display the Explorer when OCLabor Pro starts up.
3. Set the "Show List View" checkbox "ON" (checked) to display the List View when OCLabor Pro starts up.
4. Select "Scheduler Bar Font Size" option.
5. Select "Scheduler Bar Icon Size" option.

## System - New Schedule Plan Defaults



Enter default values for scheduling plans that reflect the way you want new plans to be set up when initially created.

New Schedule Plan Defaults				
Schedule By:	<input checked="" type="radio"/> Position/Task <input type="radio"/> Staff	*Start: 12:00 am	*End: 08:00 pm	Schedule Length: 7 days

These values will be used when you create new plans. When you create new plans, you can override these default values.

1. Select a "**Schedule By**" option.

If you will plan your schedules by **first scheduling positions / tasks** and then you will assign staff to those tasks, click the "Positions / Tasks" option button.

If you will plan your schedules by **first scheduling staff** and then you will assign positions / tasks to them, click the "Staff" option button.  
[Click here to learn more.](#)

2. Enter the "**Start**" time for the first day of your schedule.

[Click here to learn more about "Time Entry" in OCLabor Pro.](#)

**TIP:** Use a value that is a half hour or an hour less than the actual start of business. This will permit you comfortably view the earliest assignments.

3. Enter the "**End**" time for the last day of your schedule.

[Click here to learn more about "Time Entry" in OCLabor Pro.](#)

**TIP:** Use a value that is a half hour or an hour greater than the actual end of business. This will permit you comfortably view the latest assignments.

4. Enter the "**Schedule Length**".

The Schedule Length value is used by OCLabor Pro as the number of days used to calculate the start day of a new schedule when it is created with the "Copy Schedule" feature.  
If you want your copied schedule plans to begin on the same weekday, enter a value of "7".

## System - Unpaid Time Defaults



Enter default values for unpaid time.

**Unpaid Time Defaults**  
Set Unpaid Minutes to  when shift is less than or equal to  hours otherwise set unpaid minutes to

The default "Unpaid Time" values are automatically applied to time bars when they are created. Default values may be overridden for individual time bars by editing the time bar in the schedule planner.

## System - Overtime and Statutory Holidays



OCLabor Pro gives you the ability to account for additional labor costs in the event of scheduled overtime and scheduling on statutory holidays . Multipliers are used to factor additional overtime and holiday costs to your schedule plan's labor costs.

When scheduling, OCLabor Pro will warn you, as you assign a staff member to a position / task, if you are incurring daily or weekly overtime costs for that individual. Holiday and overtime costs are reflected in the budgeting features of OCLabor Pro.

## Overtime



OCLabor Pro uses the overtime rate multiplier to factor additional labor costs due to scheduled staff overtime.

Overtime and Statutory Holidays	
Overtime after	<input type="text" value="8.000"/> hours per day
Overtime after	<input type="text" value="40.000"/> hours per week starting on <input type="text" value="Sunday"/>
Overtime Rate Multiplier:	<input type="text" value="1.500"/>
Statutory Holiday Rate Multiplier:	<input type="text" value="2.000"/> <input type="button" value="Statutory Holidays"/>

Overtime is calculated after a set number of hours in a day and / or a set number of hours in a week.

To setup overtime calculations:

1. Enter the number of hours after which overtime is accrued in a day.
2. Enter the number of days after which overtime is accrued in a week.
3. Enter the day of the week on which the work week starts.
4. Enter an the rate at which a staff member's basic rate is multiplied (Overtime Rate Multiplier) when overtime has been scheduled.
5. Enter an the rate at which a staff member's basic rate is multiplied (Statutory Holiday Rate Multiplier) when staff are scheduled to work on a holiday.
6. Click the "**Statutory Holidays**" button to enter holidays into the schedule.  
The Statutory Holidays form is displayed.

## Statutory Holidays



OCLabor Pro uses the statutory holiday rate multiplier to factor additional labor costs due to staff being scheduled on those days that you add to this form.

Name	Date	Always on this day
------	------	--------------------

Holidays may be marked as always repeating on the same day of each year.

To add statutory holidays to your schedule plans:

1. Click the "New" button in the command bar at the top of the form.
2. Enter the "Name" of the holiday at the bottom of the form.
3. Enter the "Date" of the holiday.  
[Click here to learn more about date entry in OCLabor Pro.](#)
4. Set the "Always on this day ..." checkbox "ON" (checked) if the holiday always falls on the same date each year.
5. Click the "Save" button.  
Your holiday is added to list area with all holidays you have entered.
6. Repeat steps 1-5 to enter all holidays that impact on your scheduling and labor costs.
7. Click the "Close" button in the command bar at the top of the form when you are done.

## System - Mail Server Setup



To email your scheduling plans to your staff using OCLabor Pro, you will need to provide OCLabor Pro's system with your email server information.

Mail Server Setup (required for emailing schedules)	
SMTP Server:	<input type="text"/>
From Name:	<input type="text" value="Staff Scheduler"/>
Return Address:	<input type="text"/>
<input type="button" value="Check Connection"/>	
Port Number:	<input type="text" value="25"/>
Server Requires Authentication:	<input type="checkbox"/>
Account Name:	<input type="text"/>
Account Password:	<input type="password"/>

This information will likely be the same as the email server information found in your email client application (i.e. Outlook or Outlook Express).

### To setup OCLabor Pro for email capabilities:

1. Enter your "SMTP" server.  
This specifies the server for outgoing email messages. You can get this information from your Internet Service Provider or your LAN administrator.
2. Enter the "From Name" that will appear in the headers of email messages sent by you through OCLabor Pro.
3. Enter the your "Return" email address.
4. Enter the "Port" number of your Outgoing (SMTP) server (usually port 25).  
You can get this information from your Internet Service Provider or your LAN administrator.
5. Set "Authentication Required" checkbox "ON" if you need to provide a user ID and password to send through your email account.

If you select this option, you might be prompted to log on when you connect to this server. Logon information (user name and password) is usually supplied by your Internet / Content provider when you sign on for their services.

- Enter your user or account name.
- Enter your password.

6. Click the "Check Connection" button to verify the correctness of your settings.

If you have correctly entered all required information, the following message boxes are displayed:



... and ...



Click "OK" each time to close the messages.

If email setup information is inaccurate or missing, the following message is displayed:



Click "OK" to close the message and verify that all information correctly typed in and that no required fields have been left blank. Consult with your Internet service provider or LAN administrator for additional assistance.

## System - Database Backup



OCLabor Pro can backup your valuable data to an archive folder. However, OCLabor Pro will only do so after prompting you to do so.

### Database Backup

Warn if backup is not performed at least every  days

**WARNING: Database backup has not yet been performed.**

You can set OCLabor Pro to remind you periodically to backup your data to the archive folder..

### To set OCLabor Pro Database Backup Prompts:

- Enter the number of days since the last backup after which you want OCLabor Pro to remind you to backup.



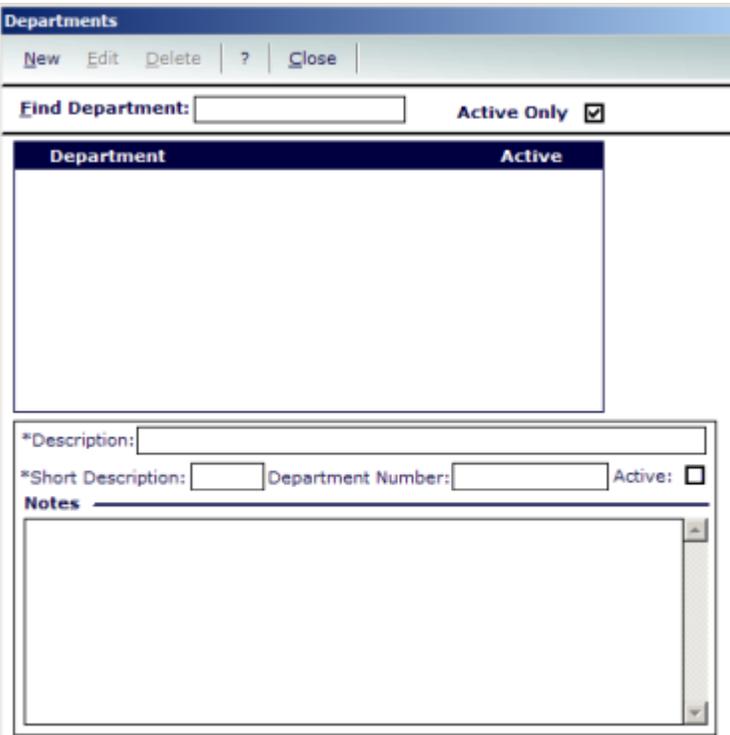
**NOTE:** Backup data is stored in separate files (with a TSD extension) in the archive folder (C:\Program Files\OCLaborPro\Data\Archive)

---

## Setting Up Departments



You can organize your plan by showing your scheduled staff members or positions / task under the particular department headings to which they belong.

	<p>Setting departments is important for filtering or calculating subtotals in some OCLabor Pro reports. You can print some reports for individual departments.</p> <p>The following OCLabor Pro reports can be filtered by department or can show subtotals by department :</p> <ul style="list-style-type: none"><li>• 7 Day Schedule</li><li>• 28 Day Schedule</li><li>• Daily Sign In Sheet</li><li>• Staff Hours Report</li><li>• Position Hours Report</li><li>• Staff Cost Report</li><li>• Staff Attendance Exceptions</li><li>• Payroll Report</li></ul>
--	--

Use the "Departments" form to add, edit or delete departments for your scheduling plans and reports.

## Adding Departments



Adding departments is quick and easy. Only the long and short descriptions are required.

\*Description:

\*Short Description:  Department Number:  Active:

**Notes**

### To add departments:

1. Click the "New" button in the command bar at the top of the form.
2. Enter a "Description" (full name) for the department.
3. Enter a "Short Description" for the department.  
The shorter description will be used to abbreviate department names in some reports.  
Provide a meaningful abbreviation using 5 characters or less.
4. Enter a "Department Number".  
This number is optional but it may be used to correspond with the number for a department as found in your accounting system.
5. Add any notes or comments about the department.
6. Leave the "Active" checkbox set "ON" (checked) to display the department in the list with the other active departments.
7. Click the "Save" button.  
The new department is added and displayed in the list of departments.



**TIP:** Note text is displayed as a pop-up in the "Departments " list. Moving your mouse pointer over a listed department (without clicking) will display a pop-up window that displays your notes. Use department notes to save and show important reminders while you schedule your plan.

## Editing Departments



At any time, you can change department set-up information.

\*Description:

\*Short Description:  Department Number:  Active:

**Notes**

Editing department set-up information is especially useful for setting the "Active" status of defunct or retired departments or for adding optional department information at a later time. Any detail can be modified and saved changes are instantly reflected in throughout the entire application.

### To edit a department:

1. Select a department by clicking on it.  
Click [here](#) to learn more about finding departments in the list.
2. Click the "Edit" button in the command bar at the top of the form.
3. Modify or add any details as desired.
4. Click the "Save" button.



**TIP:** Note text is displayed as a pop-up in the "Departments " list. Moving your mouse pointer over a listed department (without clicking) will display a pop-up window that displays your notes. Use department notes to save and show important reminders while you schedule your plan.

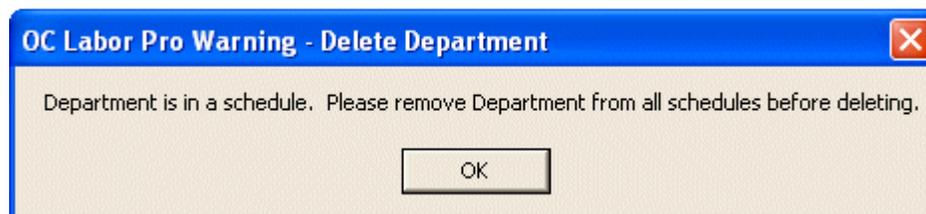
## Deleting Departments



You can permanently delete a department from OCLabor Pro. However, if the department that you want to delete is used in any saved schedule plan, you will need to remove all references to the department from those plans.

### To delete a department:

1. Select a department by clicking on it.  
Click here to learn more about finding departments in the list.
2. Click the "Delete" button in the command bar at the top of the form.  
If the selected department is
  - **not** referenced in any saved plan, OCLabor Pro displays a message box, asking you to confirm the permanent deletion of the department.
  - **is** referenced in any saved plan, OCLabor Pro displays a message box, informing you that the deletion will not be permitted.



3. Click "OK" to confirm deletion or to confirm that the department is scheduled.



**TIP:** Mark the Active checkbox "OFF" (unchecked) rather than trying to delete a department that is no longer used. In this way, you will not have to remove past scheduled references to delete the department. Inactive departments do not appear in lists of departments when creating new schedule plans.

# Setting Up Positions/Tasks



Positions/Tasks are the actual jobs to which you will assign your staff members in your schedule plan.

Position	Active
----------	--------

\*Description:

\*Short Description:  Position Number:  Active:

Notes

Depending on how you choose to work with your schedule plan, you will either:

- **Schedule by Position**  
You assign staff members to unassigned time bars for each position listed in each department.  
  
Click here to learn more.
- **Schedule by Staff**  
You assign positions/tasks to unassigned time bars for each staff member listed in each department.  
  
Click here to learn more.

**See also:** Schedule Plan Defaults

## Adding Positions/Tasks



Adding positions/tasks is quick and easy. Only the long and short descriptions are required.

\*Description:   
\*Short Description:  Position Number:  Active:   
**Notes**

### To add positions/tasks:

1. Click the "New" button in the command bar at the top of the form.
2. Enter a "Description" (full name) for the position/task.
3. Enter a "Short Description" for the position/task.  
The shorter description will be used to abbreviate position/task names in some reports.  
Provide a meaningful abbreviation using 5 characters or less.
4. Enter a "Position Number".  
This number is optional but it may be used to correspond with a code for a position/task as found in your accounting system.
5. Add any notes or comments about the position/task.
6. Leave the "Active" checkbox set "ON" (checked) to display the position/task in the list with the other active position/task.
7. Click the "Save" button.  
The new position/task is added and displayed in the list of position/tasks.



**TIP:** Note text is displayed as a pop-up in the "Positions/Tasks" list. Moving your mouse pointer over a listed Position/Task (without clicking) will display a pop-up window that displays your notes. Use position/task notes to save and show important reminders while you schedule your plan.

## Editing Positions/Tasks



At any time, you can change position/task set-up information.

\*Description:   
\*Short Description:  Position Number:  Active:   
**Notes**

Editing position/task set-up information is especially useful for setting the "Active" status of defunct or retired position/task or for adding optional position/task information at a later time. Any detail can be modified and saved changes are instantly reflected in throughout the entire application.

### To edit a position/task:

1. Select a position/task by clicking on it.  
Click [here](#) to learn more about finding position/tasks in the list.
2. Click the "Edit" button in the command bar at the top of the form.
3. Modify or add any details as desired.
4. Click the "Save" button.



**TIP:** Note text is displayed as a pop-up in the "Positions/Tasks " list. Moving your mouse pointer over a listed Position/Task (without clicking) will display a pop-up window that displays your notes. Use position/task notes to save and show important reminders while you schedule your plan.

## Deleting Positions/Tasks



You can permanently delete a position/task from OCLabor Pro. However, if the position/task that you want to delete is used in any saved schedule plan, you will need to remove all references to the position/task from those plans.

### To delete a position/task:

1. Select a position/task by clicking on it.  
Click [here](#) to learn more about finding position/task in the list.
2. Click the "Delete" button in the command bar at the top of the form.  
If the selected position/task is
  - **not** referenced in any saved plan, OCLabor Pro displays a message box, asking you to confirm the permanent deletion of the position/task.
  - **is** referenced in any saved plan, OCLabor Pro displays a message box, informing you that the deletion will not be permitted.



3. Click "OK" to confirm deletion or to confirm that the position/task is scheduled.



**TIP:** Mark the Active checkbox "OFF" (unchecked) rather than trying to delete a position/task that is no longer used. In this way, you will not have to remove past scheduled references to delete the position/task. Inactive position/tasks do not appear in lists of positions when creating new schedule plans.

## Viewing Position/Task Schedule



In addition to adding, editing, or deleting positions, you can view and, optionally, print a schedule of staff assignments for a particular position/task over a given period of time.

**Position Schedule - CASHR**

Please enter the report criteria and press the **Print** button ...

From:  To:

Sun.	Mon.	Tue.	Wed.	Thu.	Fri.	Sat.
<b>Dec. 4/2005</b> 9:00am-2:00pm M.Harrington 4:00pm-0:00am R.Barnett	<b>5</b> 11:30am-4:00pm J.Stanton 4:00pm-0:00am H.Garrison	<b>6</b> 11:30am-4:00pm J.Stanton 4:00pm-0:00am H.Garrison	<b>7</b> 11:30am-4:00pm J.Stanton 4:00pm-0:00am G.Robertson	<b>8</b> 11:30am-4:00pm J.Stanton 4:00pm-0:00am G.Robertson	<b>9</b> 11:30am-4:00pm J.Stanton 4:00pm-0:00am H.Garrison	<b>10</b> 11:30am-4:00pm Unassigned 4:00pm-0:00am H.Garrison
<b>11</b> 9:00am-3:00pm M.Harrington 4:00pm-0:00am Unassigned	<b>12</b> 11:30am-4:00pm J.Stanton 4:00pm-0:00am H.Garrison	<b>13</b> 11:30am-4:00pm J.Stanton 4:00pm-0:00am H.Garrison	<b>14</b> 11:30am-4:00pm J.Stanton 4:00pm-0:00am G.Robertson	<b>15</b> 11:30am-4:00pm J.Stanton 4:00pm-0:00am G.Robertson	<b>16</b> 11:30am-4:00pm J.Stanton 4:00pm-0:00am H.Garrison	<b>17</b> 11:30am-4:00pm Unassigned 4:00pm-0:00am H.Garrison
<b>18</b> 10:00am-1:00pm L.Arkinsian 2:00pm-8:00pm R.Allen	<b>19</b> 10:00am-4:00pm L.Arkinsian 2:00pm-8:00pm R.Allen	<b>20</b>	<b>21</b>	<b>22</b>	<b>23</b>	<b>24</b>
<b>25</b> 10:00am-4:00pm L.Arkinsian 2:00pm-8:00pm R.Bunningham	<b>26</b> 10:00am-4:00pm L.Arkinsian 2:00pm-8:00pm Unassigned	<b>27</b>	<b>28</b>	<b>29</b>	<b>30</b>	<b>31</b>

The calendar displays the time assignments and the staff name for the selected position/task for each day in the calendar. As a reminder, the short description of the selected position/task is displayed in the form's name (top-left).

### To view a schedule for a position/task:

1. Select a position/task by clicking on it.  
Click here to learn more about finding position/task in the list.
  2. Click the "View Schedule" button in the command bar at the top of the form.  
A form is displayed showing a schedule for the selected position/task.
- i NOTE:** By default, the current month's start and end dates are pre-selected.

3. Enter a "From" date.  
The calendar re-displays the calendar view according to the new date.  
  
Click here to learn more about entering dates in OCLabor Pro.
4. Enter a "To" date.  
The calendar re-displays the calendar view according to the new date.  
  
Click here to learn more about entering dates in OCLabor Pro.
5. Optionally, click the "Print" button to send the schedule to the printer.
6. Click the "Close" button to close the calendar and return to the Positions/Tasks setup form.



**NOTE:** While about one month's amount of information can be displayed at one time in the calendar view, you can extend the amount of information that is displayed in the calendar to many months worth of information. Use the vertical scroll bar on the right of the calendar to move backward and forward through the displayed schedule.

# Setting Up Staff Information



The heart of OCLabor Pro is the assignment of staff members to those tasks that they will perform at particular dates and times during the period of your schedule plan.

<div data-bbox="203 520 1156 1495"><p><b>Staff</b></p><p>New Edit Delete Schedule Schedule Exceptions Availability Position/Wage ? Close</p><p>Find Staff member: <input type="text"/> Active Only <input checked="" type="checkbox"/></p><table border="1"><thead><tr><th>Staff member</th><th>Employee #</th><th>Active</th></tr></thead><tbody></tbody></table><p>*Last Name: <input type="text"/> *First Name: <input type="text"/> Middle Initial: <input type="text"/></p><p>Employee #: <input type="text"/> Active: <input type="checkbox"/> *Gender: <input type="radio"/> NA <input type="radio"/> Male <input type="radio"/> Female</p><p><b>Address</b></p><p>Address: <input type="text"/> City: <input type="text"/></p><p>State/Prov: <input type="text"/> Country: <input type="text"/> Zip/Postal Code: <input type="text"/></p><p><b>Contact Information</b></p><p>Home Phone: <input type="text"/> Other Phone: <input type="text"/> Email: <input type="text"/></p><p>Emergency Name: <input type="text"/> Emergency Phone: <input type="text"/></p><p><b>Regular Days Off</b></p><p>Mon <input type="checkbox"/> Tue <input type="checkbox"/> Wed <input type="checkbox"/> Thu <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun <input type="checkbox"/></p><p><b>Cost</b></p><p>Default Hourly Rate: <input type="text" value="\$0.00"/></p><p><b>Notes</b></p><div style="border: 1px solid gray; height: 40px;"></div></div>	Staff member	Employee #	Active	<p>Depending on how you choose to work with your schedule plan, you will either:</p> <ul style="list-style-type: none"><li>• <b>Schedule by Position</b> You assign staff members to unassigned time bars for each position listed in each department.  Click here to learn more.</li><li>• <b>Schedule by Staff</b> You assign positions/tasks to unassigned time bars for each staff member listed in each department.  Click here to learn more.</li></ul>
Staff member	Employee #	Active		

With OCLabor Pro, you effectively manage the cost of each staff member and you make sure that they know when they need to be on the job.

## Adding Staff



Adding your staff information is quick and easy. Only the first and last names, and gender initially are required.

*Last Name:	<input type="text"/>	*First Name:	<input type="text"/>	Middle Initial:	<input type="text"/>			
Employee #:	<input type="text"/>	Active:	<input checked="" type="checkbox"/>	*Gender:	<input checked="" type="radio"/> NA <input type="radio"/> Male <input type="radio"/> Female			
<b>Address</b>								
Address:	<input type="text"/>			City:	<input type="text"/>			
State/Prov:	<input type="text"/>	Country:	<input type="text"/>	Zip/Postal Code:	<input type="text"/>			
<b>Contact Information</b>								
Home Phone:	<input type="text"/>	Other Phone:	<input type="text"/>	Email:	<input type="text"/>			
Emergency Name:	<input type="text"/>		Emergency Phone:	<input type="text"/>				
<b>Regular Days Off</b>			<b>Cost</b>					
Mon	Tue	Wed	Thu	Fri	Sat	Sun	Default Hourly Rate:	<input type="text" value="\$0.00"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
<b>Notes</b>						<input type="text"/>		

### To add staff:

1. Click the "New" button in the command bar at the top of the Staff form.
2. Enter the staff member's Last and First names.  
Optionally, you may enter a middle initial.
3. Enter an "Employee #".  
This is an optional field in the event that you make use of employee numbers or codes.
4. Leave the "Active" checkbox set "ON".  
If you intend to schedule this staff member into a current schedule plan, they need to be marked as "Active". However, if an employee leaves your employment, you may mark them as inactive to exclude them from being listed when creating new schedules.  
**TIP:** Mark the Active checkbox "OFF" rather than trying to delete an employee that has left your employment.
5. Enter the employee's "Address" information in the "Address" group of fields.  
This is optional information that will be displayed in the "Staff List " report if you provide it here.
6. Enter the employee's "Contact" information in the "Contact" group of fields.  
This is optional information. The "Phone" and "Other" information will be displayed in the "Staff List " report if you provide it here. The "Emergency" information is not displayed in any report but is available in this "Staff" form for your convenience.

7. Check "ON" each of the employee's "Regular Days Off".

 **TIP:** While this is optional information, we recommend that you provide this information to OCLabor Pro. Doing so allows OCLabor Pro to help you check for scheduling conflicts as you create your schedules.

8. Enter a "Default Hourly Rate" for the employee.

This information is optional. However, If you plan on using OCLabor Pro's cost-reporting features, you should provide a default hourly wage for each employee.

9. Enter any "Notes" about your employee.

The content of "Notes" can be anything you want such as first date of employment or any other information you want to keep that is not used by OCLabor Pro but that you may want to reference at a later time.



**TIP:** The text you enter in the "Notes" area is displayed as a pop-up in the "Staff " list. Moving your mouse pointer over a listed Staff name (without clicking) will display a pop-up window that displays your notes. Use staff notes to save and show important reminders (such as a start of employment date) while you schedule your plan.

## Editing Staff



At any time, you can change staff set-up information.

*Last Name:	<input type="text"/>	*First Name:	<input type="text"/>	Middle Initial:	<input type="text"/>			
Employee #:	<input type="text"/>	Active:	<input checked="" type="checkbox"/>	*Gender:	<input checked="" type="radio"/> NA <input type="radio"/> Male <input type="radio"/> Female			
<b>Address</b>								
Address:	<input type="text"/>		City:	<input type="text"/>				
State/Prov:	<input type="text"/>	Country:	<input type="text"/>	Zip/Postal Code:	<input type="text"/>			
<b>Contact Information</b>								
Home Phone:	<input type="text"/>	Other Phone:	<input type="text"/>	Email:	<input type="text"/>			
Emergency Name:	<input type="text"/>		Emergency Phone:	<input type="text"/>				
<b>Regular Days Off</b>			<b>Cost</b>					
Mon	Tue	Wed	Thu	Fri	Sat	Sun	Default Hourly Rate:	<input type="text" value="\$0.00"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
<b>Notes</b>						<input type="text"/>		

### To edit staff information:

1. Select a position/task by clicking on it.  
Click here to learn more about finding staff members in the list.
2. Click the "Edit" button in the command bar at the top of the form.
3. Modify or add any details as desired.
4. Click the "Save" button.



**TIP:** Note text is displayed as a pop-up in the "Staff" list. Moving your mouse pointer over a listed Staff name (without clicking) will display a pop-up window that displays your notes. Use staff notes to save and show important reminders (such as a start of employment date) while you schedule your plan.

## Deleting Staff



You can permanently delete a staff member's profile from OCLabor Pro. However, if the staff member that you want to delete is used in any saved schedule plan, you will need to remove all references to the staff member from those plans.

### To delete staff:

1. Select a staff member's profile by clicking on it.  
Click [here](#) to learn more about finding position/task in the list.
2. Click the "Delete" button in the command bar at the top of the form.  
If the selected staff member is
  - **not** referenced in any saved plan, OCLabor Pro displays a message box, asking you to confirm the permanent deletion of the position/task.
  - **is** referenced in any saved plan, OCLabor Pro displays a message box, informing you that the deletion will not be permitted.



3. Click "OK" to confirm deletion or to confirm that the staff member is scheduled.



**TIP:** Mark the Active checkbox "OFF" (unchecked) rather than trying to delete an employee that has left your employment. In this way, you will not have to remove past scheduled references to delete the employee profile. Inactive employee profiles do not appear in lists of staff when creating new schedule plans.

## Staff - Schedule



In addition to adding, editing, or deleting staff profiles, you can view and, optionally, print a schedule of scheduled assignments for a particular staff member over a given period of time.

Staff Schedule - Linda Arkinsian						
Please enter the report criteria and press the Print button ...						
From: Thu. December 1/2005 To: Sat. December 31/2005						
Thu.	Fri.	Sat.	Sun.	Mon.	Tue.	Wed.
Dec. 1/2005	2	3	4 11:00am-5:00pm KITCH/GRILL 11:00pm-2:00am DINRM/CLOSE 11:00pm-2:00am DINRM/LMNGR	5 11:00am-5:00pm KITCH/GRILL	6 11:00am-5:00pm KITCH/GRILL	7 11:00am-5:00pm KITCH/GRILL
8 11:00am-5:00pm KITCH/GRILL	9	10	11 11:00am-5:00pm KITCH/GRILL	12 11:00am-5:00pm KITCH/GRILL	13 11:00am-5:00pm KITCH/GRILL	14 11:00am-5:00pm KITCH/GRILL
15 11:00am-5:00pm KITCH/GRILL	16	17	18 10:00am-1:00pm DINRM/CASHR 4:00pm-6:00pm LOUNG/BARTD	19 10:00am-4:00pm DINRM/CASHR 8:00pm-10:00pm LOUNG/BARTD	20	21
22	23	24	25 10:00am-4:00pm DINRM/CASHR 4:00pm-6:00pm LOUNG/BARTD	26 10:00am-4:00pm DINRM/CASHR 8:00pm-10:00pm LOUNG/BARTD	27	28
29	30	31				

The calendar displays the time assignments and the assigned positions/tasks for each day in the calendar. As a reminder, the name of the selected staff profile is displayed in the form's name (top-left).

### To view a schedule for a staff member:

1. Select a staff profile by clicking on it.  
Click here to learn more about finding staff profiles in the list.
2. Click the "Schedule" button in the command bar at the top of the form.  
A form is displayed showing a schedule for the selected staff member.  
**NOTE:** By default, the current month's start and end dates are pre-selected.
3. Enter a "From" date.  
The calendar re-displays the calendar view according to the new date.  
Click here to learn more about entering dates in OCLabor Pro.

4. Enter a "To" date.  
The calendar re-displays the calendar view according to the new date.

[Click here to learn more about entering dates in OCLabor Pro.](#)

5. Optionally, click the "Print" button to send the schedule to the printer.
6. Click the "Close" button to close the calendar and return to the Staff profile setup form.



**NOTE:** While about one month's amount of information can be displayed at one time in the calendar view, you can extend the amount of information that is displayed in the calendar to many months worth of information. Use the vertical scroll bar on the right of the calendar to move backward and forward through the displayed schedule.

## Staff - Schedule Exceptions



You can create schedule exceptions for individual staff members. Schedule exceptions are singular dates and times that staff members will not be available during their usually available periods.

From	To	Description
Mon, Aug 15 2005	Fri, Aug 26 2005	Summer Vacation

Cancel  
Save

\*Description: Summer Vacation

From

\*Date: Mon. August 15/2005 \*Time: 12:00 am

To

\*Date: Fri. August 26/2005 \*Time: 11:59 pm

Vacation Request

Examples of scheduling exceptions are medical appointments, sick leave, or vacation time.

While assigning staff to your schedule, OCLabor Pro will inform you when you are scheduling someone with a scheduling exception at that same time.

Note that the selected employee's name is displayed as a reminder, in the form's title (top left-hand side of the form).

You can print a list of all schedule exceptions for all staff members through a given period of time the "Exception " report.

### To create a scheduling exception:

1. Select a staff profile by clicking on it.  
Click here to learn more about finding staff profiles in the list.
2. Click the "Schedule Exceptions" button in the command bar at the top of the form.  
A form is displayed showing all schedule exceptions for the selected staff member.
3. Click the "New" button in the command bar at the top of the form.
4. Enter a description of the exception.
5. Enter the "From" date of the exception.  
A default value of today's date is initially displayed.  
Click here to learn more about entering dates in OCLabor Pro.

6. Enter the "From" time of the exception.  
A default value of 12:00 AM (beginning of the say) is initially displayed.

[Click here to learn more about entering times in OCLabor Pro.](#)

7. Enter the "To" date of the exception.  
A default value of today's date is initially displayed.

[Click here to learn more about entering dates in OCLabor Pro.](#)

8. Enter the "To" time of the exception.  
A default value of 11:59 PM (end of the say) is initially displayed.

[Click here to learn more about entering times in OCLabor Pro.](#)

9. If the exception is a "Vacation Request", click the "Vacation Request" checkbox to set it "ON" (checked).

 **NOTE:** Vacation requests can be listed alone in the "Exception " report.

10. Click the "Save" button to add the scheduling exception to the list of exceptions for the selected employee.

11. Click the "Close" button in the command bar at the top of the form to close the "Schedule Exceptions" form and return to the Staff profiles form.

## Staff - Availability



You can tell OCLabor Pro when individual staff members are available to be scheduled. The Schedule Availability form allows you to quickly indicate which days and times in the week that a staff member is available to be scheduled.

	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
-12:00 AM				Available 0:00am - 12:00am	Available 0:00am - 12:00am		
-1:00 AM							
-2:00 AM							
-3:00 AM							
-4:00 AM							
-5:00 AM							
-6:00 AM							
-7:00 AM							
-8:00 AM	Available 8:00am - 7:00pm	Available 8:00am - 7:00pm	Available 8:00am - 7:00pm				
-9:00 AM							
-10:00 AM							
-11:00 AM							
-12:00 PM							
-1:00 PM							
-2:00 PM							
-3:00 PM							
-4:00 PM							
-5:00 PM							
-6:00 PM							
-7:00 PM							
-8:00 PM							
-9:00 PM							
-10:00 PM							
-11:00 PM							

You can mark a staff member as available for an entire day.

Alternatively, you can indicate discrete "to" and "from" times for each day of the week that an employee can be normally scheduled.

When assigning staff to your schedule plan, OCLabor Pro's conflict checking features will ensure that, barring any schedule exceptions, experience conflicts, or conflicting assignments, a particular staff member is free to be scheduled.

## Staff - Add Availability



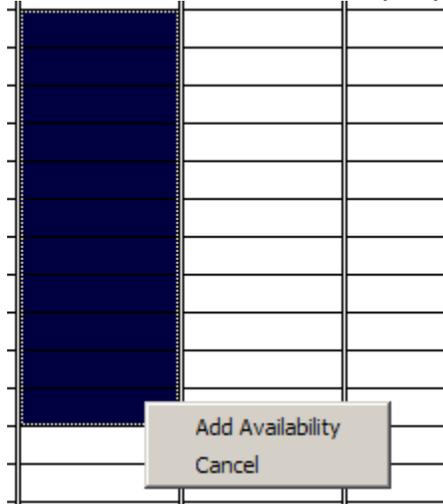
The "Staff Availability" displays a weekly calendar that represents any week of the year for the selected staff member. Adding availability is as easy as clicking and dragging with your mouse.

	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
12:00 AM	All Day	All Day	All Day	All Day	All Day	All Day	All Day
1:00 AM	All Day	All Day	All Day	All Day	All Day	All Day	All Day
2:00 AM	All Day	All Day	All Day	All Day	All Day	All Day	All Day
3:00 AM	All Day	All Day	All Day	All Day	All Day	All Day	All Day
4:00 AM	All Day	All Day	All Day	All Day	All Day	All Day	All Day
5:00 AM	All Day	All Day	All Day	All Day	All Day	All Day	All Day
6:00 AM	All Day	All Day	All Day	All Day	All Day	All Day	All Day
7:00 AM	All Day	All Day	All Day	All Day	All Day	All Day	All Day
8:00 AM	Available 8:00am - 7:00pm	All Day	All Day	All Day	All Day	All Day	All Day
9:00 AM	All Day	All Day	All Day	All Day	All Day	All Day	All Day
10:00 AM	All Day	All Day	All Day	All Day	All Day	All Day	All Day
11:00 AM	All Day	All Day	All Day	All Day	All Day	All Day	All Day
12:00 PM	All Day	All Day	All Day	All Day	All Day	All Day	All Day
1:00 PM	All Day	All Day	All Day	All Day	All Day	All Day	All Day
2:00 PM	All Day	All Day	All Day	All Day	All Day	All Day	All Day
3:00 PM	All Day	All Day	All Day	All Day	All Day	All Day	All Day
4:00 PM	All Day	All Day	All Day	All Day	All Day	All Day	All Day
5:00 PM	All Day	All Day	All Day	All Day	All Day	All Day	All Day
6:00 PM	All Day	All Day	All Day	All Day	All Day	All Day	All Day
7:00 PM	All Day	All Day	All Day	All Day	All Day	All Day	All Day
8:00 PM	All Day	All Day	All Day	All Day	All Day	All Day	All Day
9:00 PM	All Day	All Day	All Day	All Day	All Day	All Day	All Day
10:00 PM	All Day	All Day	All Day	All Day	All Day	All Day	All Day
11:00 PM	All Day	All Day	All Day	All Day	All Day	All Day	All Day

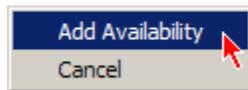
To add an availability:

1. Select a staff profile by clicking on it.  
Click here to learn more about finding staff profiles in the list.
2. Click the "Availability" button in the command bar at the top of the form.  
The Staff Availability form is displayed for the selected staff member.  
 Note that the selected employee's name is displayed, as a reminder, in the form's title (top left-hand side of the form).
3. You can indicate availability times of the selected member, for any day of the week, in one of two ways:

1. Click the "all Day" button at the top of any day to mark the selected staff member as available for the entire day.
2. Click-and-hold a start time in any day of the week and drag to an end time in that day.



A pop-up menu is displayed, allowing you to add the selected availability (shown in dark blue) or to cancel the operation.



Click the "Add Availability".

The selected area now shows an "Availability" at that time, on that day, for the selected staff member.

4. The Availability is displayed, indicating the start and end times of the availability.
5. You may adjust the start and end times of an availability by clicking and dragging (holding down the left mouse button) on either the top or bottom of the availability respectively and dragging the end to a new time.
6. Click "Close" in the command bar at the top of the form to close the "Schedule Availability" form and display the "Staff" profile form.

## Staff - Delete Availability



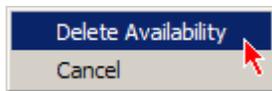
You can delete any availability that has been added to the "Schedule Availability" form for a selected employee.

To delete an availability:

1. Select a staff profile by clicking on it.  
Click [here](#) to learn more about finding staff profiles in the list.
2. Click the "Availability" button in the command bar at the top of the form.  
The Staff Availability form is displayed for the selected staff member.

 Note that the selected employee's name is displayed, as a reminder, in the form's title (top left-hand side of the form).

3. Right-click on an existing availability.  
A pop-up menu is displayed.

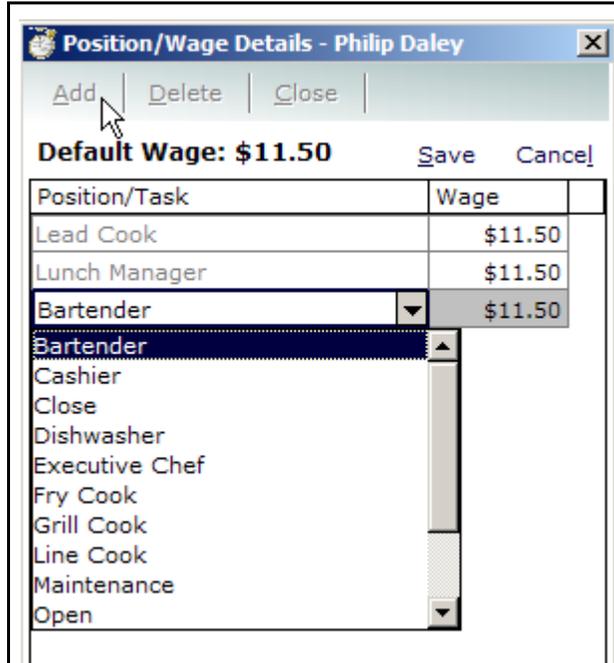


4. Click the "Delete Availability" option to remove the ability for the selected staff member.  
(Click "Cancel" to cancel the delete operation).
5. Click "Close" in the command bar at the top of the form to close the "Schedule Availability" form and display the "Staff" profile form.

## Staff - Position/Wage



OCLabor Pro can assist you in scheduling your staff into positions/tasks for which they are experienced.

	<p>You can also indicate that staff members are to be paid an hourly wage that is different from their default wage when they are assigned to certain positions / tasks.</p> <p>When assigning staff members to positions / tasks in your schedule plan, OCLabor Pro will verify that the staff member is qualified, by the experience you indicate, to fill the position.</p> <p> <b>NOTE:</b> In order to use this feature, you will have needed to setup Positions/Tasks in advance.</p>
--	--

### To add position / wage details:

1. Select a staff profile by clicking on it.  
Click here to learn more about finding staff profiles in the list.
2. Click the "Positions/Wage" button in the command bar at the top of the form.  
The Positions/Wage form is displayed for the selected staff member.  
  
 Note that the selected employee's name is displayed. as a reminder, in the form's title (top left-hand side of the form).
3. Click the "New" button in the command bar at the top of the form.  
A line is created, prompting you to select a position/task for the employee from a drop-down list.
4. Scroll the list and select the "Position/Task" that you wish to assign to the selected employee.
5. Enter the hourly "Wage" to be paid to the selected employee when they perform that task.  
The wage you enter will override the default wage you entered in the selected staff member's profile .
6. Click the "Save" button to add the "Position / Wage" to the list of all positions / wages for the selected employee.

7. Click "Close" in the command bar at the top of the form to close the "Positions / Wage" form and display the "Staff" profile form.



**NOTE:** If no Position/Wage details exist, the staff member's cost is calculated using the Default Hourly Rate as defined in the Staff Member's profile .

# Creating Schedule Plans



The heart of the OCLabor Pro system is the schedule planner.

Position	Sunday, December 4/2005												Monday, December 5/2							
	9a	10a	11a	12p	1p	2p	3p	4p	5p	6p	7p	8p	9p	10p	11p	12a	1a	2a	3a	4a
Dining Room																				
Kitchen																				
Executive Chef													Descartier, Alfonse 10:30a-7:00p							
Fry Cook													Richardson, Frederick 11:00a-5:00p				Stanton, David 5:00p-11:00p			
Grill Cook													Arkinsian, Linda 11:00a-5:00p				Indickers, Gary 5:00p-11:00p			
Lead Cook													Janzen, Stephen 11:00a-5:00p				Richardson, Frederick 5:00p-11:00p			
Line Cook													Windsor, Ewen 11:30a-2:30p				Unassigned 5:30p-8:00p			
Line Cook													Terrelli, Dean 11:30a-4:00p				Williams, Bethina 5:00p-10:00p			
Salad Prep													Carlson, Andrew 11:30a-4:00p				Bellow, Ron 4:00p-0:00a			
Sous Chef																	Verian, William 4:00p-0:00a			
Lounge																				
Bartender																	Christenson, Fred 4:00p-0:00a			
Bartender													Jimmison, Tori 11:30a-6:00p				Unassigned 9:00p-2:00a			
Wait Staff													Unassigned 3:00p-9:00p				Unassigned 9:00p-1:30a			
Wait Staff													Unassigned 4:00p-0:00a				Unassigned			
Wait Staff													Unassigned 1:00p-6:00p				Unassigned 6:00p-0:00a			

The schedule planner is the visual area where you create time bars for your positions and assign staff to those time bars .

Assigning staff to time bars is as simple as dragging and dropping a staff member's name from the staff list to a "unassigned" time bar.

Unassigned time bars display as dark blue bars. Time bars that have been assigned to staff members display as light blue bars and show the staff members name in the time bar.

All time bars display the start and end times of the assignment in the lower left-hand corner of the time bar.

When a time bar is selected (clicked on), you can also see the start and end times, indicated as red lines, in the time ruler at the top of the schedule planner.

Time bars can be moved , resized , copied to the next day, their content can be edited , and they can be deleted .

Depending on how you choose to work with your schedule plan, you will either:

- **Schedule by Position**

You assign staff members to unassigned time bars for each position listed in each department.

[Click here to learn more.](#)

- **Schedule by Staff**

You assign positions/tasks to unassigned time bars for each staff member listed in each department.

[Click here to learn more.](#)



**NOTE:** Schedule Plans are created and saved using the "Schedule Plans " form. You can load saved plans to view them and make changes at a later time. [Click here to learn more.](#)



**TIP:** You can "roll-up" departments so that their staff or positions and time bars are not displayed. Simply double-click on a department header on the left of the schedule planner to roll-up or roll-down the details for that department. Rolled-up department headers are displayed with an "Olive" background. Rolled-down department headers are dark blue.

---

## Scheduling by Position



When you schedule by position, positions that need to be scheduled are listed immediately to the left of the schedule planner area:

Depts	Posns	Staff	Budget	Available	Position	Sunday, December 25/2005																
						a	9a	10a	11a	12p	1p	2p	3p	4p	5p	6p	7p	8p	9p	10p	11p	12
Staff					Dining Room																	
					Cashier					Arkinsian, Linda 10:00a-4:00p												
					Kitchen																	
					Dishwasher					Barnett, Rhonda 10:00a-4:00p												
					Grill Cook					Bellow, Ron 10:00a-6:00p									Bellow, Ron 8:00p-2:00a			
					Lead Cook					Berenson, David 10:00a-6:00p												

1. Begin a "Schedule by Position" plan by dragging and dropping Departments into the list to the left of the scheduler planner.  
Click here to learn how to display the Departments list.
2. Then, continue by dragging and dropping appropriate positions into each department.  
Click here to learn how to display the positions / tasks list.
3. Create unassigned time bars for each position that requires scheduling.  
Click here to learn more about working with time bars .
4. You then assign staff members to unassigned time bars for each position listed in each department by dragging and dropping the staff member's name from the Staff List to a time bar.



**NOTE:** You may drag a staff member's name from the Staff List to a time bar that has already been assigned to another staff member. The time bar will be reassigned to the new staff name.



**TIP:** While OCLabor Pro's flexibility allows you to schedule by position or to schedule by staff , Optimum Control highly recommends that you schedule by position, assigning staff members to positions / tasks. Scheduling by position is best way to realize an increase to your profit margin as you assign staff to the work that must get done rather than making work for staff.

---

## Scheduling by Staff



When you schedule by staff, staff members that need to be scheduled are listed immediately to the left of the schedule planner area.

Staff	Sunday, December 25/2005
	a 9a 10a 11a 12p 1p 2p 3p 4p 5p 6p 7p 8
Dining Room	
Arkinsian, Linda	Cashier 10:00a-4:00p
Kitchen	
Barnett, Rhonda	Dishwasher 10:00a-4:00p
Bellow, Ron	Grill Cook 10:00a-6:00p
Berenson, David	Lead Cook 10:00a-6:00p

1. Begin a "Schedule by Staff" plan by dragging and dropping Departments into the list to the left of the scheduler planner.  
Click here to learn how to display the Departments list.
2. Then, continue by dragging and dropping staff members into each department.  
Click here to learn how to display the Staff list.
3. Create unassigned time bars for each staff member that requires scheduling.  
Click here to learn more about working with time bars .
4. You then assign positions to unassigned time bars for each staff member listed in each department by dragging and dropping the position from the Positions / Tasks List to a time bar.



**NOTE:** You may drag a position from the Position / Task List to a time bar that has already been assigned with another position. The time bar will be reassigned with the new position.



**TIP:** While OCLabor Pro's flexibility allows you to schedule by position or to schedule by staff, Optimum Control highly recommends that you schedule by position , assigning staff members to positions / tasks. Scheduling by position is best way to realize an increase to your profit margin as you assign staff to the work that must get done rather than making work for staff.

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## Working with Time Bars

Time bars are the basic scheduling elements of a schedule plan when working with OCLabor Pro. They are visual representations of a scheduled period of time in the schedule planner .

Newly created time bars are initially unassigned.

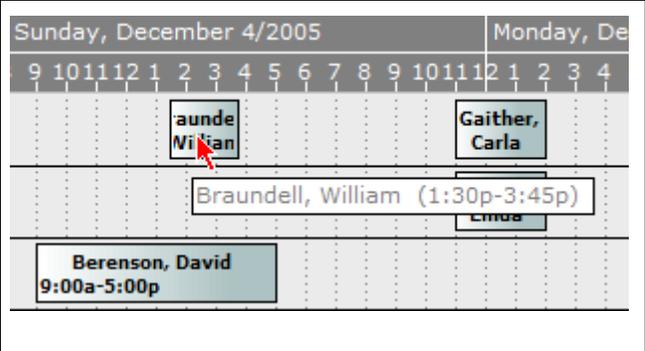
- **Schedule by Position :**  
Once a time bar has been created, you can assign a staff member to the time bar with a simple drag and drop from the staff list .  
  
Click here to learn more.
- **Schedule by Staff :**  
Or if you are scheduling by staff, you assign a position / task to the time bar with a simple drag and drop from the positions / tasks list .  
  
Click here to learn more.

Unassigned time bars display as dark blue bars. Time bars that have been assigned to staff members display as light blue bars and show the staff members name in the time bar.

All time bars display the start and end times of the assignment in the lower left-hand corner of the time bar.

When a time bar is selected (clicked on), you can see the start and end times, indicated as red lines, in the time ruler at the top of the schedule planner.

Time bars can be moved , resized, copied to the next day, their content can be edited , and they can be deleted.

 <b>TIP:</b> If you hover the mouse pointer over a time bar (without clicking), a pop-up window is displayed that details of the assigned staff member or the position / task and the start and end times for the time bar.  This is especially useful when the schedule planner is bring viewed "Zoomed Out " so that time bars are small and their content is too compressed to read.	
--	--

## Creating Time Bars



Creating time bars in the schedule planning area is quick and easy.

Position	Tuesday, December 27/2005											
	a	5a	6a	7a	8a	9a	10a	11a	12p	1p	2p	
Dining Room												
Cashier												
Kitchen												

### To create a time bar:

1. In an empty area of the schedule planner, click and hold the left mouse button at a point that will be the start time of the new time bar.
2. Slide (drag) the mouse pointer to the right.

An outline of the new time bar is displayed as you slide your mouse pointer.

**Note:** Red markers in the time ruler at the top of the schedule planner show the currently selected start and end times.

3. When the mouse pointer is at the point that will be the end time of the time bar, release the mouse button.

A time bar is displayed as "unassigned".

The start and end times are displayed in the lower left-hand corner of the time bar

Position	Tuesday, December 27/2005											
	a	5a	6a	7a	8a	9a	10a	11a	12p	1p	2p	
Dining Room												
Cashier												
Kitchen												

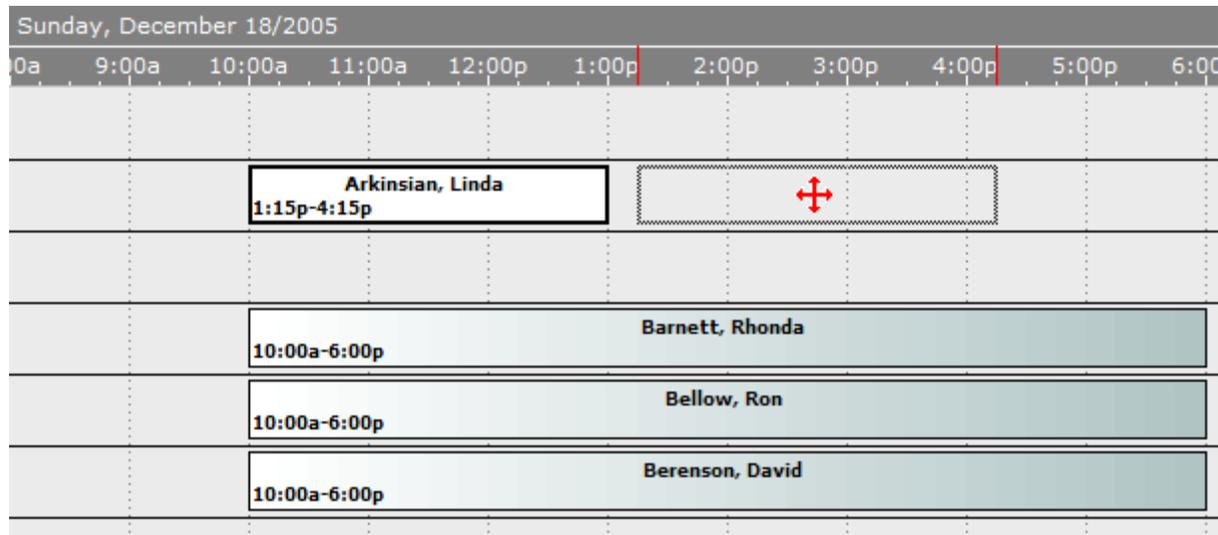


**TIP:** Absolute precision is not necessary when creating time bars. After being created, time bars can be adjusted by moving and resizing them. You can also delete time bars or edit their content.

## Moving Time Bars



Time bars can be easily moved horizontally or vertically in the schedule planner.



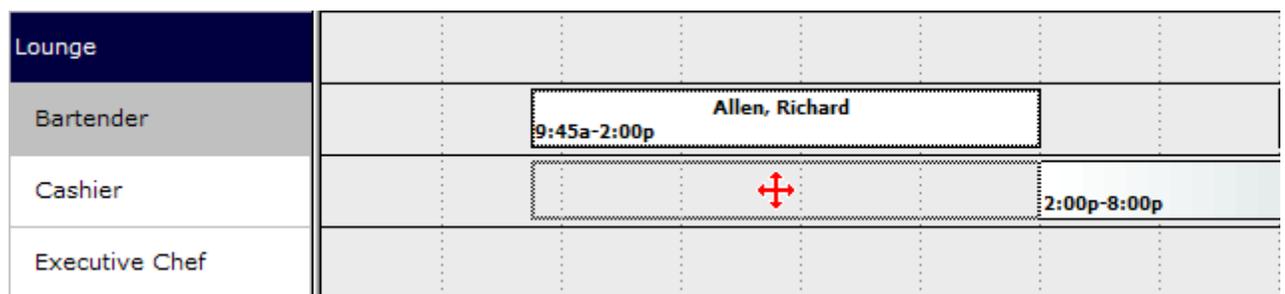
### To move a time bar:

1. Click and hold the left mouse button anywhere inside the edges of a time bar.

**Note:** The mouse pointer is displayed as a four-pointed cross of arrows.

2. Slide (drag) the mouse pointer left / right within a row or up / down across rows.

An outline of the time is displayed moving with the mouse pointer, indicating where the time bar will appear when the move is finished.



3. When the time bar outline is displayed where you want it to be in the scheduler planner, release the left mouse button.

The time bar is moved to the new location if there is no conflict with existing time bars .



**NOTE:** Time bars cannot be moved over existing time bars . In that event, OCLabor Pro displays a message box indicating that the move is disallowed and the move is cancelled.



**TIP:** While moving a time bar, you can drag the outline to any of the edges (left / right or top / bottom) of the schedule planner. OCLabor Pro will automatically scroll the viewing area of the planner for you.

## Resizing Time Bars



You can resize time bars to shorten or broaden it's duration or length..

Position	Sunday, December 4/2005
	a 9a 10a 11a 12p 1p 2p 3p 4p 5p 6p 7p 8p
Cashier	Unassigned 9:00a-2:00p
Close	Unassigned 9:00a-2:00p
Close	Braundell, William

### To resize a time bar:

1. Point (without clicking) the mouse pointer over either the leading or trailing edge of a time bar.

When properly positioned, the pointer is displayed as two arrows pointing left and right (see image, above)

2. Without moving the pointer, click and hold the left mouse button.

The mouse pointer is now displayed as cross-hairs. (see image, below)

Lounge	
Bartender	Allen, Richard 9:45a-2:30p
Cashier	2:00p-8:00p
Executive Chef	

3. While holding the left mouse button down, slide (drag) the mouse pointer left or right.

An outline of the time bar is displayed with the mouse pointer as you drag.

4. When the time bar is resized as desired, release the left mouse button.

The time bar is resized to its new length if there is no conflict with existing time bars .



**NOTE:** Time bars cannot be resized so that they overlap existing time bars . In that event, OCLabor Pro displays a message box indicating that the change to the time bar is disallowed and the resize is cancelled.



**TIP:** While resizing a time bar, you can drag the outline to any of the edges (left / right) of the schedule planner. OCLabor Pro will automatically scroll the viewing area of the planner for you.

## Copying Time Bars



To make your scheduling quick and easy, you can copy time bars you have created from one day to the next.



You can copy:

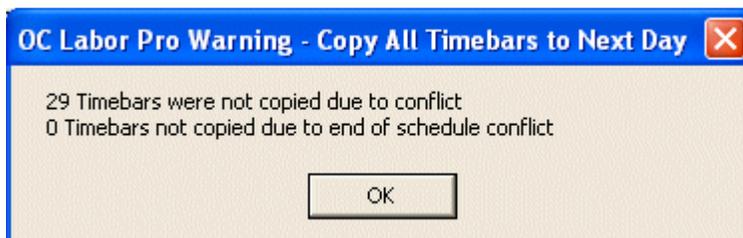
- an **individual** time bar **with** its assignment to the following day
- an **individual** time **without** its assignment to the next day
- **all** time bars on a given day, **without** their assignments, to the next day.

### To copy time bars:

1. Right-click an existing time bar.  
A pop-up menu is displayed.
2. Click one of top three copy options in the menu.  
OCLabor Pro will automatically display the following day to which the time bar(s) have been copied.



**NOTE:** OCLabor Pro will advise you with a message box of any conflicts whereby time bars were not copied.



Click "OK" to continue.

## Editing Time Bars



You can edit aspects of a time bar using the Time Bar edit form.

**Time Bar**

Unassign Time Bar:  Close

Notes

Start End

\*Date: Sun. December 4/2005 \*Date: Mon. December 5/2005

\*Time: 11:00 pm \*Time: 02:00 am

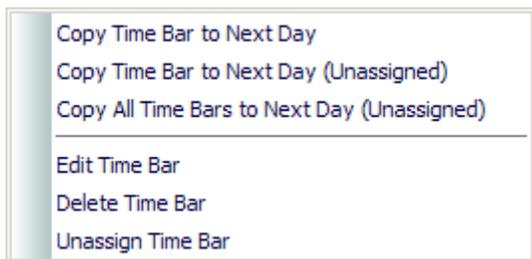
Show End Time as Time in schedule print outs

Unpaid Time 0 Minutes

### To edit a time bar:

1. Right-click on a time bar to select a time bar.

A pop-up menu is displayed showing various actions that may be performed on the selected time bar.



2. Click the pop-up menu's "Edit Time Bar" option.

The Edit Time Bar form is displayed.

3. If a time bar has been assigned to a staff member or a position, and you want to set the time bar as "unassigned", check the "Unassign Time Bar" checkbox "ON" to remove the assignment. Otherwise,

leave the checkbox set "OFF" (unchecked).

 **NOTE:** You can also unassign a time bar by clicking the "Unassign Time Bar " option in the pop-up menu.

4. Enter any information about the selected time that you would like to remember in the "Notes" area.

5. You may enter a new "Start Date".

[Click here to learn more about entering dates in OCLabor Pro.](#)

6. You may enter a new "Start Time".

[Click here to learn more about entering times in OCLabor Pro.](#)

7. You may enter a new "End Date".

[Click here to learn more about entering dates in OCLabor Pro.](#)

8. You may enter a new "End Time".

[Click here to learn more about entering times in OCLabor Pro.](#)

9. Click drop-down arrow of the "Show End Time As" item to display a list of default values. Select a value to be displayed when viewing or printing your schedule plans .

1. Click on a default value to select it.

2. Alternatively, type your own custom value into the text area of this item.

10. Enter a value for "Unpaid Time" in minutes to be applied to the selected time bar.

Unpaid time values are applied to overtime calculations and have an impact as you use OCLabor Pro's budgeting features to adjust your labour burden.

Examples of "Unpaid Time" are lunch or coffee break periods that take place during the scheduled period.

[Click here to learn more about default values for "Unpaid Time"](#)



**TIP:** Double-click a time bar as a shortcut to the "Edit Time Bar" form.

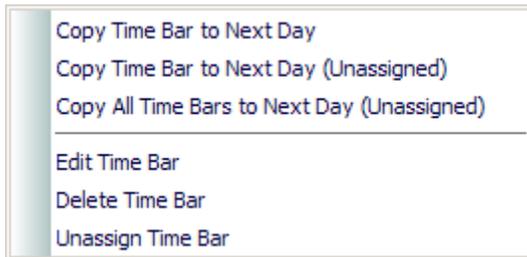


**Note:** Notes entered in time bars will be displayed with the scheduling assignment when printing staff members' schedules .

## Deleting Time Bars



You can delete a time bar from the schedule plan.



You can delete a time bar in one of two ways.

### To delete a time bar (method 1):

1. Click a time bar to select it.
2. Press the "Delete" key.  
The time bar is removed from the plan.

### To delete a time bar (method 2):

1. Right-click a time bar to select it.  
A pop-up menu is displayed.
2. Select the "Delete Time Bar" option in the menu.  
The time bar is removed from the plan.

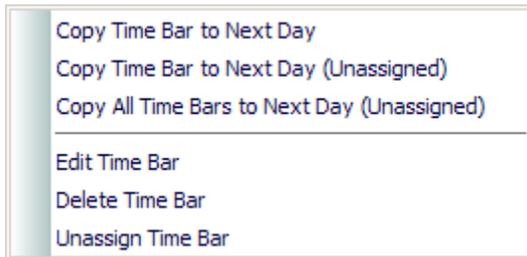


**IMPORTANT:** Deleting a time cannot be undone. Note also that OCLabor Pro will **not** ask for confirmation before deleting a time bar.

## Unassigning Time Bars



You can unassign a time bar so that any staff or position assignment is cleared.



### To unassign a time bar:

1. Right-click a time bar to select it.  
A pop-up menu is displayed.
2. Click the "Unassign Time Bar" option in the menu.  
The time bar displays as "unassigned".



**NOTE:** You can also unassign a time bar in the "Time Bar Edit " form.

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# Conflict Checking



As you schedule your staff members into your plan, OCLabor Pro can assist you by checking for conflicts in a staff member's:

- **Availability** - Is the staff member:
  - already scheduled at that time,
  - regularly unavailable at that time,
  - or has a single scheduling exception been set up for that staff member at that time?
- **Experience** - Is the staff member listed as experienced for the position / task into which they are being scheduled?

If a conflict is detected, a warning dialog box is displayed. When the dialog is displayed, you may override the conflict or cancel the scheduling assignment to schedule another staff member.

## To schedule with "Availability" conflict checking:

1. Set the System maintenance "Conflict Checking" for Availability option ON. ("System" option under the "Maintenance" menu)
2. Set up any "**Regular Days Off**" and **Cost** (default hourly rate) for each staff member in the "Staff" form. ("Staff" option under the "Maintenance" menu)
3. Set up "Availability" for each staff member.
4. Set up any "Scheduling Exceptions" for each staff member.

## To schedule with "Experience" conflict checking:

1. Set the System maintenance "Conflict Checking" for Experience option ON. ("System" option under the "Maintenance" menu)
2. Set up staff **Cost** (default hourly rate) for each staff member in the "Staff" form.
3. Set up appropriate "Positions & Wages" for each staff member.

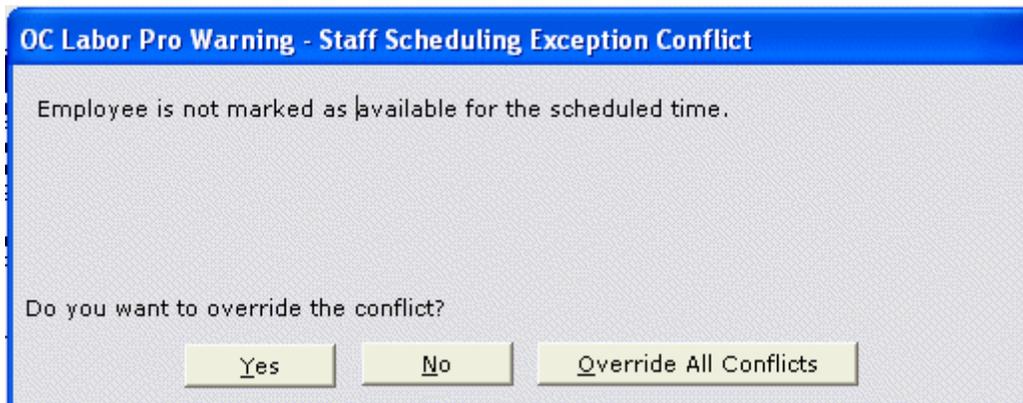


**TIP:** You can limit the extent to which OCLabor Pro checks for conflicts by turning conflict checking features OFF / ON using the "Available Filter Criteria " form.

## Checking for Availability



As you schedule your staff, OCLabor Pro can automatically check whether the staff member is available or not.



If the "Staff Availability " checking features have been turned on, staff availability is automatically checked by OCLabor Pro for one of several conditions:

1. Is the intended scheduling item conflicting with "Regular Days Off" as found in the staff member's profile?  
[Click here to learn more.](#)
2. Is the intended scheduling item conflicting with the staff member's regular availability as found in the staff member's profile?  
[Click here to learn more.](#)

3. Is the staff member already scheduled at the same time with another scheduling item?

**OC Labor Pro Warning - Staff Scheduling Conflict**

Employee is already scheduled in that time.

Schedule Description: Dec. Week 2  
Department: Kitchen  
Sunday, Dec 11/2005 From: 5:00pm To: 11:00pm  
Position: Grill Cook

Do you want to override the conflict?



**NOTE:** As in the example above, a staff member may be scheduled in another scheduling plan at the same time if these plans' days overlap. OCLabor Pro informs you in which schedule plan (description) the employee is already scheduled.

[Click here to learn more.](#)

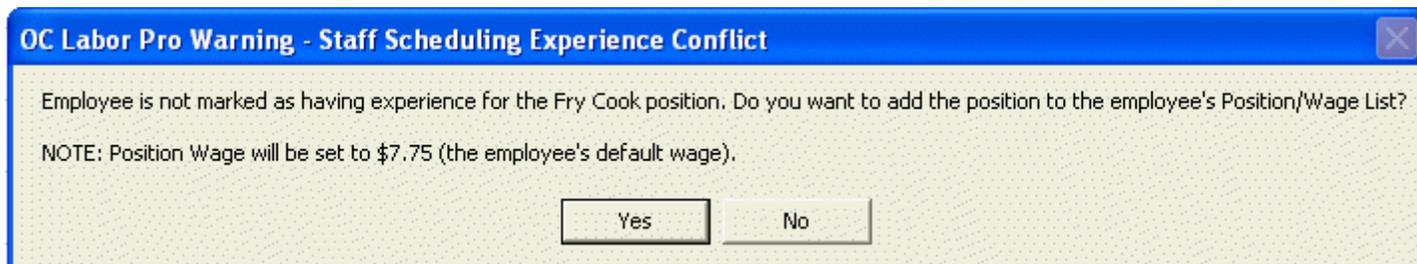


**TIP:** You can limit the extent to which OCLabor Pro checks for conflicts by turning conflict checking features OFF / ON using the "Available Filter Criteria " form.

## Checking for Experience



As you schedule your staff, OCLabor Pro can automatically check whether the staff member is experienced for the position / task or not.



If the "Staff Experience " checking features have been turned on, staff availability is automatically checked by OCLabor Pro. If so, when you assign a staff member to a task, OCLabor Pro will check the "Position / Wage " table for that staff member:

If the staff member is not listed as experienced for the particular task, a message box is displayed (see above) asking you if you want to add the position to the staff member's experience list:

- Click "**Yes**" to assign the staff member and to automatically add the position to their experience list of the "Position / Wage " table.

 **NOTE:** The employee's default wage will be used for the newly added experience item. You can modify the wage to be paid when they work in that position by making the change in the "Position / Wage " table.

- Click "**No**" to make no changes to the staff member's list of experience in "Position / Wage " table.

OCLabor Pro then asks you if you want to schedule the staff person anyhow or if you want to abandon the assignment for that staff member.

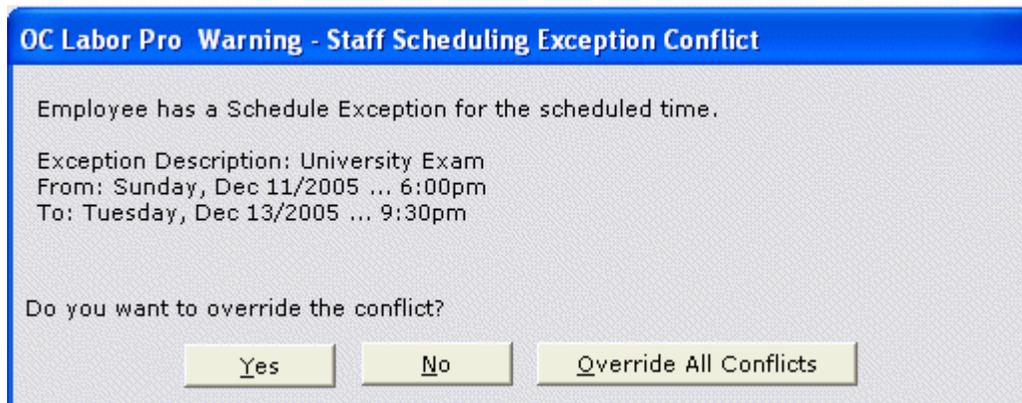


**TIP:** You can limit the extent to which OCLabor Pro checks for conflicts by turning conflict checking features OFF / ON using the "Available Filter Criteria " form.

## Checking for Schedule Exceptions



As you schedule your staff, OCLabor Pro can automatically check whether the staff member is available or not due to a scheduling exception.



Scheduling exceptions are entered by you, one at a time, when a staff member has indicated that they need time off from their regular availability. Examples of scheduling exceptions are medical appointments or vacation time. Scheduling exceptions are found in the staff members "Schedule Exceptions " form from the "Staff Profile " form..

When a scheduling exception is detected, OCLabor Pro displays a message box with details of the conflict, asking you if you want to override the exception.

- Click "**Yes**" to override the exception and schedule the employee at that time.
- Click "**No**" to abandon the assignment and select another employee.
- Click "**Override All Conflicts**" to assign the staff member to the schedule item, regardless of the exception and any other conflicts that may arise from an "availability " conflict.



**TIP:** You can limit the extent to which OCLabor Pro checks for conflicts by turning conflict checking features OFF / ON using the "Available Filter Criteria " form.

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## Backing up your Data



Making backups of all your OCLabor Pro data is quick and easy.

**Backup Database**

Select the location to Backup the Database and press the Backup Database button. Close

Last Backup performed on Friday July 22, 2005 to C:\Program Files\DBISLPBeta\Data\Archive\TSDDataBU20050722\_0838 am.TSD

**Backup Database To**  
C:\Program Files\DBISLPBeta\Data\Archive\TSDDataBU20050725\_0235 pm.TSD Change

Backup Database



**IMPORTANT:** Optimum Control strongly urges OCLabor Pro users to backup their data on a regular basis. In the event of catastrophic computer failure, a backup of your data will save you hours of work and get you up and running again quickly. [Click here to learn more about restoring your data.](#)

### To receive automatic backup reminders:

1. In the "System Maintenance " form, set the number of days between backups after which you want to be reminded to backup. (see the "Maintenance" menu)

When shutting down OCLabor Pro and when the set number of days between backups has elapsed, OCLabor Pro will display a reminder that a backup is due.

**OC Labor Pro Database Backup Warning**

Database backup is overdue ... NOTE: The last database backup was performed Friday August 12, 2005 Do you want to backup the database now?

Yes No

2. Click "Yes" to display the "Backup Database" form.

### To backup your data:

1. Click the "Change" button on the "Backup Database" form to select a different location to save your backup file.

This procedure is optional.

If you want to accept the default location and file name, skip this step.

**i NOTE:** OCLabor Pro creates unique file names for each backup. Your backup will not overwrite a previous backup. Backup files are stored in the "Archive" subfolder of the OCLabor Pro application.

2. Click the "Backup Database" button to create an up-to-the-minute backup of all your OCLabor Pro data.

OCLabor Pro displays a dialog box to inform you that the backup process is complete.



**i NOTE:** You can backup your data at any time by clicking the "Backup" option under the "Maintenance " menu.

---

## Publishing Your Schedule Plan



OCLabor Pro offers you a variety of ways communicate your schedule plans to your staff or colleagues. You can:

- preview them on-screen
- send them to your printer
- save them to HTML files for viewing through a web browser
- email them to your staff

### **To publish the plan you have currently loaded, see:**

- the "View Plan " menu
- the "Print Plan " menu

### **To publish (including email) any of your schedule planning data, see:**

- the "Reports " menu

# Working with Actual Hours



You can save your schedule's planned as "Actual Hours". Actual hours are distinguished from planned hours in reports so that you can easily compare them.



**IMPORTANT:** Optimum Control recommends that you do not save your planned hours for a day to actual hours until your schedule plan has been executed for that day. Adding new time bars will not create actual hour records once a day's plan has been saved as "Actual" for a department. While you can add actual shifts manually, it is more time consuming than allowing OCLabor Pro to create the planned hours and convert them all automatically to actual hours when you are confident that the plan reflects closely the actual hours worked.

---

## Loading Actual Hours



To prepare planned hours for commitment as actual hours, the hours of a schedule plan are loaded through the "Actual Hours" option of the "Maintenance " menu.

---

Date:  Department:  Sort for:  Daily Sign In  Timecard entry by  Position/Task  Staff

---

### To load hours:

1. Enter a date for which you want to load the plans hours.

[Click here to learn more about date entry in OCLabor Pro.](#)

2. From the drop-down list, select a single department or "All Departments" to load the hours you want to view.
3. Click a "Sort" option by which to view the hours.

**i NOTE:** Only the "Daily Sign-In" option allows you to further view hours by Position/Task or by Staff.

4. If sorting by "Daily Sign-In", select on option to view by position / task or by staff .
5. Click the "Load" button in the command bar at the top of the form to load hours according to your selections.

# Maintaining Actual Hours



Once hours are loaded into the "Actual Hours Maintenance" form, you can make adjustments to the plan according to what actually happened.

Actual Hours Maintenance
X

Please enter Actual Hours Criteria and press Load ...
Load
Add Shifts
Delete Shift
Save
Cancel
Preview Report
?
Close

Actual Hours for: Kitchen - Sunday , December 04/ 2005

Source	Staff Member	Position	Department	Cancelled	No Show	Late	Start Time	End Time	Unpaid (Mins)	Total Hours
SP	Descartier, Alfonse	Executive Chef	Kitchen	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	10:30 am	07:00 pm	0	8.500
AS	Winston, Hermione	Line Cook	Kitchen	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	11:00 am	04:00 pm	0	5.000
SP	Richardson, Frederick	Fry Cook	Kitchen	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	11:00 am	05:00 pm	0	6.000
SP	Arkinsian, Linda	Grill Cook	Kitchen	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	11:00 am	05:00 pm	0	6.000
SP	Janzen, Stephen	Lead Cook	Kitchen	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	11:00 am	05:00 pm	0	6.000
SP	Windsor, Ewen	Line Cook	Kitchen	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	11:30 am	02:30 pm	0	3.000
SP	Torrelli, Dean	Line Cook	Kitchen	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	11:30 am	04:00 pm	0	4.500
SP	Carlson, Andrew	Salad Prep	Kitchen	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	11:30 am	04:00 pm	0	4.500
SP	Bellow, Ron	Salad Prep	Kitchen	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	04:00 pm	12:00 am	0	8.000
SP	Verian, William	Sous Chef	Kitchen	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	04:00 pm	12:00 am	0	8.000
SP	Williams, Bethina	Line Cook	Kitchen	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	05:00 pm	10:00 pm	0	5.000
SP	Stanton, David	Fry Cook	Kitchen	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	05:00 pm	11:00 pm	0	6.000
SP	Indickers, Gary	Grill Cook	Kitchen	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	05:00 pm	11:00 pm	0	6.000
SP	Richardson, Frederick	Lead Cook	Kitchen	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	05:00 pm	11:00 pm	0	6.000

**Total Items:** 
  
**Hours:**

You may mark a shift for an individual as:

- Cancelled
- No Show
- Late

You may also make changes to the details of a shift by modifying:

- Staff member's name
- Position filled in the shift
- Department for whom the staff member actually worked
- The start and end times that were worked
- Unpaid minutes

## **To modify actual hours:**

1. Click on any modifiable detail in any row.
2. Change details as needed.
3. Click the "Add Shifts" button in the command bar at the top of the form to add any additional shifts that may have occurred beyond the schedule plan.

[Click here to learn about adding shifts to actual hours.](#)

4. Click the "Save" button in the command bar to save your modifications.

[Click here to learn about saving actual hours.](#)

---

## Saving Actual Hours



Modifications that you make to actual hours are not reflected back in the schedule planner . Actual hours and the "planned" hours as found in the schedule planner are distinct.

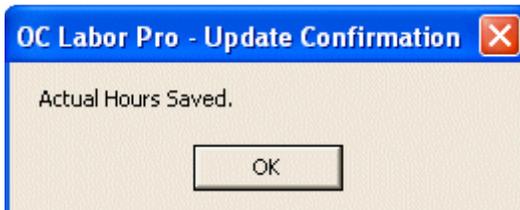
Until a day's planned hours for department are saved as "actual", modifications to the time bars schedule planner will automatically continue to be reflected in the actual hours form. However, once actual hours are saved as "actual", modifications to time bars in the schedule planner will not be reflected in the "Actual Hours" form. Once actual hours are saved, additions or other modifications to the planner must be manually made in the "Actual Hours" form.

[Click here to learn more about adding shifts to Actual Hours.](#)

### To save actual hours:

1. Click the "Save" button in the command bar at the top of the form.

A dialog is displayed to confirm that shifts' hours have committed as "actual".



2. Alternatively, click the "Cancel" button at the top of the command bar to cancel all changes to the shifts' hours.



---

## Adding Shifts to Actual Hours



You may add shifts that did not appear in your plan to your actual hours.

Staff Member	Position	Department	Late	Start Time	End Time	Unpaid (Mins)	Total Hours
Arkinsian, Linda	Bartender	Kitchen	<input type="checkbox"/>	12:00 am	12:00 am	0	0.000

### To add shifts to actual hours:

1. Click the "Add Shifts" button in the command bar at the top of the "Actual Hours Maintenance" form.
2. Select an employee for the shift from the drop-down list.
3. Select a position from the drop-down list.
4. Select a department from the drop-down list.
5. Check the "Late" checkbox if the employee was not on time.
6. Enter start and end times for the shift.

7. Enter any unpaid minutes for the shift.
8. Press the "TAB" key to add another shift.
9. Click the "Save New Shifts" to save your entries and return to the "Actual Hours Maintenance" form.

# Previewing Actual Hours Report

You may preview and optionally print an Actual Hours report for the displayed hours.

Actual Hours Entry Report										
Print Report		Close								
Actual Hours for: Kitchen - Sunday , December 04/ 2005										
Source	Staff Member	Position	Department	Cancelled	No Show	Late	Start Time	End Time	Unpaid (Mins)	Total Hours
SP	Descartier, Alfonse	Executive Chef	Kitchen	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	10:30 am	07:00 pm	0	8.500
AS	Winston, Hermione	Line Cook	Kitchen	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	11:00 am	04:00 pm	0	5.000
SP	Richardson, Frederick	Fry Cook	Kitchen	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	11:00 am	05:00 pm	0	6.000
SP	Arkinsian, Linda	Grill Cook	Kitchen	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	11:00 am	05:00 pm	0	6.000
SP	Janzen, Stephen	Lead Cook	Kitchen	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	11:00 am	05:00 pm	0	6.000
SP	Windsor, Ewen	Line Cook	Kitchen	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	11:30 am	02:30 pm	0	3.000
SP	Torrelli, Dean	Line Cook	Kitchen	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	11:30 am	04:00 pm	0	4.500
SP	Carlson, Andrew	Salad Prep	Kitchen	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	11:30 am	04:00 pm	0	4.500
SP	Bellow, Ron	Salad Prep	Kitchen	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	04:00 pm	12:00 am	0	8.000
SP	Verian, William	Sous Chef	Kitchen	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	04:00 pm	12:00 am	0	8.000
SP	Williams, Bethina	Line Cook	Kitchen	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	05:00 pm	10:00 pm	0	5.000
SP	Stanton, David	Fry Cook	Kitchen	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	05:00 pm	11:00 pm	0	6.000
SP	Indickers, Gary	Grill Cook	Kitchen	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	05:00 pm	11:00 pm	0	6.000
SP	Richardson, Frederick	Lead Cook	Kitchen	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	05:00 pm	11:00 pm	0	6.000
<b>Total for report ... Items: 14      Cancelled: 0      No Show: 0      Late: 0      Hours: 82.500</b>										

## To preview the actual hours report:

1. Click the "Preview Report" button in the command bar at the top of the "Actual Hours Maintenance " form.
2. Optionally, click the "Print Report" button to send the report to a printer.
3. Click the "Close" button to return to the "Actual Hours Maintenance" form.

# Improving Your Labor Costs



Once you have created a basic schedule plan, you can begin trying "what-if" scenarios that can reduce your labor costs and increase your profit margin.

The following recommendations will help you realize an improvement to your labor burden and increase your profitability within a short period of time.

- ***Schedule by Position / Tasks***

**IMPORTANT:** While OCLabor Pro is flexible and can easily be adapted to almost any business setting, Optimum Control strongly recommends scheduling by position rather than scheduling by staff . Scheduling by position is the best way to realize an increase to your profit margin as you assign staff to the work that must get done rather than making work for staff.

[Click here to learn more about Scheduling by Position / Task](#)

- **Setup OCLabor Pro's Budgeting Features**

- Set up the system's default "Labor Cost" values.  
(Default "Hourly Wage" and default "Target Labor Cost")

[Click here to learn more.](#)

- Set up the system's default Overtime and Statutory Holiday rates.

[Click here to learn more.](#)

- Set up your plan's anticipated revenue in the "Revenue Budget " form.
- Use the "Budget " list as you work with the schedule planner to refine your completed plans by:
  - reassigning less costly staff to positions for which they have experience.
  - Reducing unnecessarily early start times and late end times for staff.
  - Scheduling only those tasks that need to be accomplished.
  - Not creating work (positions / tasks) for staff unless they are necessary.

# Budgeting for Projected Revenue

The Revenue Budget form is an important feature of OCLabor Pro's cost-saving capabilities.



The screenshot shows a window titled "Revenue Budget" with a menu bar containing "Add", "Insert", "Delete", "?", and "Close". Below the menu is a "Go To:" field with the text "Sat. December 10/2005". The main area contains a table with three columns: "Budget Date", "Budget Revenue", and "Actual Revenue". The table has seven rows of data, with the last row highlighted in blue.

Budget Date	Budget Revenue	Actual Revenue
Sun Dec 04,2005	\$7,500.00	\$7,600.00
Mon Dec 05,2005	\$7,300.00	\$7,150.00
Tue Dec 06,2005	\$7,300.00	\$7,300.00
Wed Dec 07,2005	\$7,300.00	\$7,400.00
Thu Dec 08,2005	\$8,100.00	\$8,000.00
Fri Dec 09,2005	\$8,300.00	\$8,450.00
Sat Dec 10,2005	7900.00	\$8,200.00

Use the "Revenue Budget" form to Add, Edit, or Delete daily revenue projections for your plan.

The revenue budget is used to calculate the labor burden in the Budget list and the Staff Cost report. You can quickly enter and modify the budget of your anticipated revenues.

You can change values, You can use the "Up / Down" arrows to move from record to record. You can also simply select a row with your mouse.

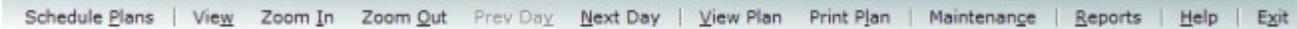
When the enter key is pressed on the last record a new record is automatically added to the list. The date is increased by one day and the previous day's revenue figure is used as a default value. Press "Enter" to accept the default value or change the value and press the enter key..

---

## Menu Commands



The menu bar, always available at the top of the schedule planner view, provides access to most of OCLabor Pro's functionality.

A screenshot of the menu bar from the OCLabor Pro software. It is a horizontal bar with a light gray background and a thin border. The menu items are: Schedule Plans | View | Zoom In | Zoom Out | Prev Day | Next Day | View Plan | Print Plan | Maintenance | Reports | Help | Exit. Each item is separated by a vertical bar and has a small underline under the first letter of each word.

Schedule Plans | View | Zoom In | Zoom Out | Prev Day | Next Day | View Plan | Print Plan | Maintenance | Reports | Help | Exit

From the main menu bar, you can access:

- Schedule Plans
- View
- Zoom In
- Zoom Out
- Prev Day
- Next Day
- View Plan
- Print Plan
- Maintenance
- Reports
- [Help](#)
- Exit

## Schedule Plans



Use the Schedule Plans form to create, edit or delete schedule plans. You can also copy existing plans to create new schedule plans.

Description	Start	End	Active
Schedule Dec. Week 1	12/4/2005	12/11/2005	Y
Schedule Dec. Week 2	12/11/2005	12/18/2005	Y
Schedule Dec. Week 3	12/18/2005	12/24/2005	Y
Schedule Dec. Week 4	12/25/2005	12/31/2005	Y

\*Description: Schedule Dec. Week 1      Schedule By:  Position/Task  
 Staff

Active:

**Start**  
\*Date: Sun. December 4/2005  
\*Time: 08:00 am

**End**  
\*Date: Sun. December 11/2005  
\*Time: 03:00 am

**Notes**  
Schedule for December Week 1. Starts on a Sunday.

The Schedule Plans form displays all plans that have been created. Click on a plan in the list to view details of its start and end periods.

### To display only "Active" plans:

- Click the "**Active Only**" check box above the top-right corner of the plans list. When checked, only lists marked as "Active" will be displayed.

### To quickly locate a plan in the list:

- Beginning typing the description of the plan in the "Find Plan" field. Click here to learn more.



**NOTE:** Schedule Plans cannot be edited or deleted if they loaded into the schedule plan worksheet of the main form. To edit or delete a plan, select another plan and click "Load". Now select the plan you wish to edit or delete.

## Creating New Schedule Plans



New schedule plans are empty plans. They have no assignments of departments, positions, or staff. Creating a new schedule plan allows you design your scheduling plan from scratch.

*Description: <input type="text" value="Schedule Dec. Week 1"/>		Schedule By: <input checked="" type="radio"/> Position/Task <input type="radio"/> Staff
Active: <input checked="" type="checkbox"/>		
<b>Start</b>	<b>Notes</b>	
*Date: <input type="text" value="Sun. December 4/2005"/>	<input type="text" value="Schedule for December Week 1. Starts on a Sunday."/>	
*Time: <input type="text" value="08:00 am"/>		
<b>End</b>		
*Date: <input type="text" value="Sun. December 11/2005"/>		
*Time: <input type="text" value="03:00 am"/>		

To create a new scheduling plan:

1. Click the **"New"** button in the command bar at the top of Schedule Plans form.  
The description area (lower half) of the Scheduling Plans form displays blank values to be filled in.
2. Enter a **"Description"** for the new plan.  
The description is used to locate a specific plan when you search the plan's name in the "Find Plan" field.
3. Select to schedule the new plan by **"Position/Task"** or by **"Staff"** by clicking the appropriate option button.  
[Click here to learn more.](#)
4. Leave the **"Active"** checkbox marked ON. The "Active" checkbox allows you to filter the list of schedule plans to show only the active plans.
5. Enter a **"Start Date"** for the new plan.  
By default, today's date is initially displayed.  
[Click here to learn more about Date Entry in OCLabor Pro.](#)
6. Enter a **"Start Time"** for the new plan.  
By default, the "System New Schedule Plan Defaults " start time is initially displayed.  
[Click here to learn more about Time Entry in OCLabor Pro.](#)
7. Enter an **"End Date"** for the new plan.  
By default, an end date is displayed that is the start date plus the number of days in the "Schedule Length" field in the "System New Schedule Plan Defaults ".

8. Enter an "**End Time**" for the new plan.  
By default, the "System New Schedule Plan Defaults " end time is initially displayed.
9. Enter any additional "**Notes**" that you may find helpful in describing this new plan.
10. Click the "**Save**" button to save your new schedule plan.  
Your new plan is now displayed in the list of existing plans.

## Deleting Schedule Plans



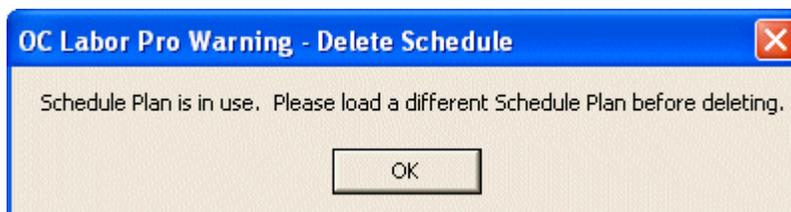
You may delete an existing schedule plan from the list of displayed plans.

Find Plan:		Active Only <input checked="" type="checkbox"/>	
Description	Start	End	Active
▶ Schedule Dec. Week 1	12/4/2005	12/11/2005	Y
Schedule Dec. Week 2	12/11/2005	12/18/2005	Y
Schedule Dec. Week 3	12/18/2005	12/24/2005	Y
Schedule Dec. Week 4	12/25/2005	12/31/2005	Y

To delete a schedule plan:

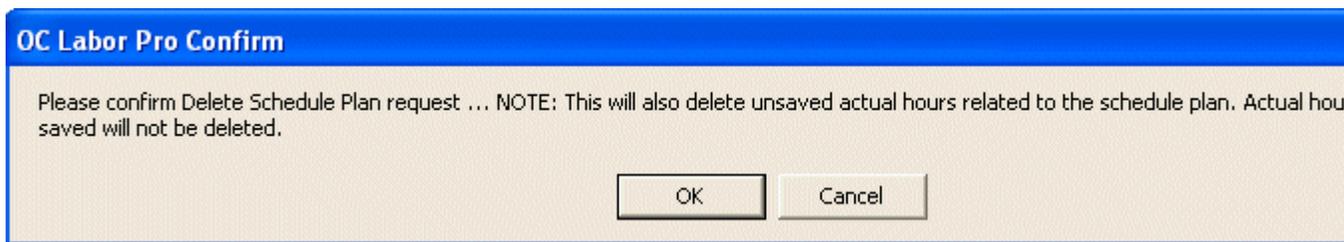
1. Click on a plan from the list of existing plans to select it.
2. Click the "**Delete**" button in the command bar:

**i NOTE:** If the plan you select is currently loaded, a warning will be displayed.



You must load a different plan before you can delete your plan.  
Click [here](#) to learn more.

3. A warning is be displayed, asking you to confirm the deletion of the plan.



**i** **NOTE:** Unsaved Actual Hours are deleted when a plan is deleted.

4. Click the "OK" button to delete the schedule plan and unsaved actual hours.

## Editing Schedule Plans



You may edit an existing schedule plan from the list of displayed plans.

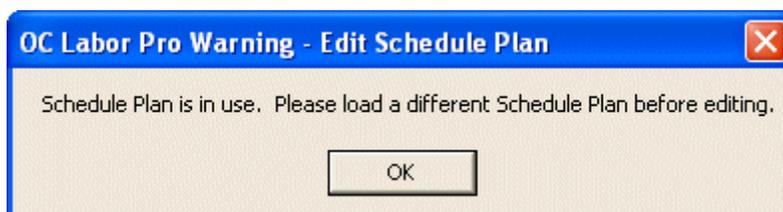
Find Plan:		Active Only <input checked="" type="checkbox"/>	
Description	Start	End	Active
▶ Schedule Dec. Week 1	12/4/2005	12/11/2005	Y
Schedule Dec. Week 2	12/11/2005	12/18/2005	Y
Schedule Dec. Week 3	12/18/2005	12/24/2005	Y
Schedule Dec. Week 4	12/25/2005	12/31/2005	Y

Changes made will be immediately reflected when you reload the plan.

To edit a schedule plan:

1. Click on a plan from the list of existing plans to select it.
2. Click the **"Edit"** button in the command bar:

**i NOTE:** If the plan you select is currently loaded, a warning will be displayed.



You must load a different plan before you can edit your plan.  
Click here to learn more.

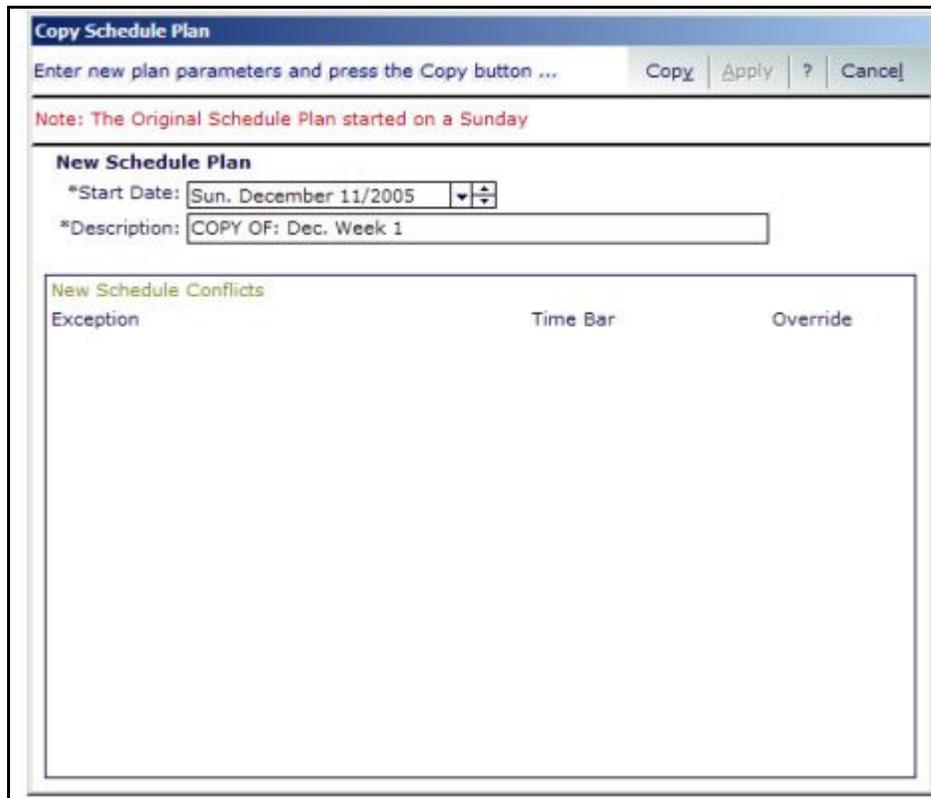
3. Modify any of the plans details as when you were creating a new schedule plan.  
Click here to learn more.
4. Click the **"Save"** button to save your modified schedule plan.

## Copying Schedule Plans



Once you have created and modified a schedule plan for a given period, you can copy that plan's content to a new plan for a new scheduling period.

The "copy Schedules" feature gives you the ability to quickly and easily use a successful plan as a template for new scheduling plans.



**i** **TIP:** Optimum Control recommends the "Copy Schedule Plan" feature as a powerful way to maximize your planning and budgeting efforts and to save you hours of time.

Using a successful plan as the basis for new plans gives you the opportunity to streamline the management of staff's schedule and to refine your labor costs.

To copy a schedule plan to a new plan:

1. Select a plan to copy from the "Schedule Plans " form.
2. Click the "**Copy**" button.  
The "Copy Schedule Plan" form is displayed.
3. Enter a **Start Date**  
You can accept the displayed default date or enter a new start date.  
Click here to learn more about entering dates.

**NOTE:** By default, the Start Date of the new plan is set to the Start Date of the original plan plus the number of days set in "Schedule Length" field in the "New Schedule Plan Defaults" of System Maintenance form.  
Click here to learn more.

4. Enter a **Description** for the new plan.  
You can accept the displayed default Description or enter your own.

**NOTE:** The description is used to locate a specific plan when you search the plan's name in the "Find Plan" field.  
Click here to learn more.

5. Click the **"Copy"** button.  
A copy of the original schedule plan is created, including its Departments, Positions/Tasks, and Staff is created. All the original time bars and their scheduling assignments are also copied to the new plan but these are offset to correspond to the new start date of the schedule.
  - If **no scheduling conflicts** are created in the new scheduling plan this step is omitted. A message box is displayed to inform you that there are no conflicts.



Press **"OK"** to continue. (*Skip the next step*)

- If **scheduling conflicts are found** in the new schedule, OCLabor Pro informs you that there are conflicts that must be resolved.



Press **"OK"** to continue.

6. Resolve scheduling conflicts.

Existing conflicts in the new schedule plan are displayed. Scheduling conflicts are generated when OCLabor Pro detects that a time bar is assigned to a staff member and that a conflict exists.  
Click here to learn more about "Conflict Checking",

For each item in the list, details of the conflict are provided such as the staff member's name, the reason for the exception, details for the time bar (including date / time and position / task).

Override All

Exception	Time Bar	Override
Descartier, Alfonse : Regular Day Off Sunday	12-11,2005-10:30am Executive Chef	<input type="checkbox"/>
Descartier, Alfonse : Employee unavailable.	12-13,2005-10:30am Executive Chef	<input type="checkbox"/>
Descartier, Alfonse : Employee unavailable.	12-15,2005-10:30am Executive Chef	<input type="checkbox"/>
Garrison, Helen : Employee unavailable.	12-16,2005-4:00pm Cashier	<input type="checkbox"/>
Stanton, David : Employee unavailable.	12-15,2005-9:00am Maintenance	<input type="checkbox"/>
Stanton, David : Employee unavailable.	12-16,2005-9:00am Maintenance	<input type="checkbox"/>
Finlayson, Linda : Regular Day Off Saturday	12-17,2005-10:00am Lunch Manager	<input type="checkbox"/>
Finlayson, Linda : Employee unavailable.	12-17,2005-10:00am Lunch Manager	<input type="checkbox"/>
D'Agostini, Richard : Regular Day Off Thursday	12-15,2005-5:00pm Supper Manager	<input type="checkbox"/>
D'Agostini, Richard : Employee unavailable.	12-15,2005-5:00pm Supper Manager	<input type="checkbox"/>

In the "Override" checkbox at the right of each item, click each conflict "ON" (checked) if you wish to override the exception. When you override a conflict, OCLabor Pro ignores the exception and copies the scheduling assignment as-is.

Leave the "Override" checkbox "OFF" (blank) if you want OCLabor Pro to copy the time bar without assigning it to that particular staff member. The time bar will be displayed as "Unassigned" in the new schedule plan .

**NOTE:** Click the "Override All" button to mark all "Override" checkboxes "ON".

**NOTE:** If all checkboxes are check "ON", the "Override All" button is replaced with a "Clear Overrides" button. Click this button to clear all checkboxes.

- Click the "Apply" button to finalize the new schedule plan with the "Override" settings you have provided.

A message box is displayed informing you that the new plan has been created.

Click "OK" to continue

The "Copy Schedule Plan" form is closed and the "Schedule Plans " form is displayed showing your newly created copy in the list of plans.

## Loading Schedule Plans



Before a schedule plan can be modified in the main planning area or published, you must load the plan.

Find Plan:				Active Only <input checked="" type="checkbox"/>
Description	Start	End	Active	
▶ Schedule Dec. Week 1	12/4/2005	12/11/2005	Y	
Schedule Dec. Week 2	12/11/2005	12/18/2005	Y	
Schedule Dec. Week 3	12/18/2005	12/24/2005	Y	
Schedule Dec. Week 4	12/25/2005	12/31/2005	Y	

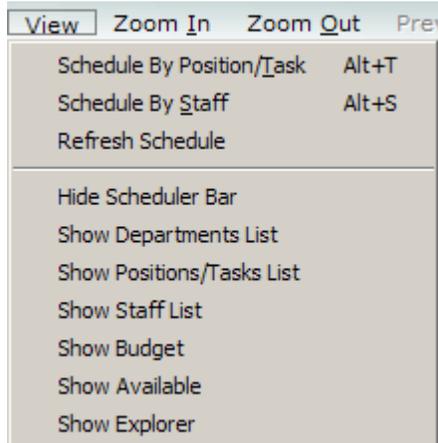
To load a schedule plan:

1. Click on a plan from the list of existing plans to select it.
2. Click the "**Load**" button in the command bar.  
The plan is now displayed in the main schedule planning area.

## View



Use the "View" menu options to customize what is displayed in the schedule planner form.



### Click a menu option to:

- **Schedule By Position/Task** – Sets the Schedule planner to display the Schedule Plan’s Positions/Tasks in the “Schedule By” List and displays the time bar assignments in terms of the staff member assigned to the position/task.
- **Schedule By Staff** – Sets the Schedule planner to display the Schedule Plan’s Staff members in the “Schedule By” List and displays the time bar assignments in terms of the position/task assigned to the staff member.
- **Refresh Schedule** – Reloads the schedule plan from the database. This is only required if more than one person is updating the schedule plan simultaneously (i.e. when multi-user changes to a schedule plan occur).
- **Hide/Show Scheduler Bar** – Menu item that toggles to allow hiding or showing of the scheduler bar object. This is useful if you require seeing more of the schedule plan simultaneously.
- **Hide/Show Departments List** – Menu item that toggles to allow hiding or showing of the list view object displaying the Departments list. This is useful if you require seeing more of the schedule plan simultaneously.
- **Hide/Show Positions/Tasks List** – Menu item that toggles to allow hiding or showing of the list view object displaying the Positions/Tasks list. This is useful if you require seeing more of the schedule plan simultaneously.
- **Hide/Show Staff List** – Menu item that toggles to allow hiding or showing of the list view object displaying the Staff list. This is useful if you require seeing more of the schedule plan simultaneously.

- **Hide/Show Budget** – Menu item that toggles to allow hiding or showing of the list view object displaying the labor burden budget list. This is useful when scheduling to monitor the labor burden and receive warning when the labor burden exceeds the target labor cost.
- **Hide/Show Available** – Menu item that toggles to allow hiding or showing of the list view object displaying the list of staff who are available for a selected time bar. This is useful when scheduling to provide a filtered list of staff members, displaying only those staff that are not already scheduled for any part of the selected time bar and who have been marked as available (if availability is enabled in the System setup) for the time bar in question.
- **Hide/Show Explorer** – Menu item that toggles to allow hiding or showing of the explorer object. This is useful if you require seeing more of the schedule plan simultaneously.

## Zoom In



Use the "Zoom In" menu option to expand the time line at the top of the schedule worksheet. You can see and work with a smaller section of the schedule and work more easily with short time bars .

## Zoom Out



Use the "Zoom Out" menu option to shrink the time line at the top of the schedule worksheet. You can see and work with a larger portion of the schedule.

## Prev Day



Use the "Previous Day" menu option to show the previous day in the schedule plan viewing area..

## Next Day



Use the "Next Day" menu option to show the next day in the schedule plan viewing area..

## View Plan



Use the "View Plan" menu option to preview scheduling assignments for the schedule plan that is currently loaded.

You can:

- View the Schedule Plan by Position/Task or by Staff
- Show Totals for the hours scheduled
- Show hours scheduled
- Show unassigned only

You can then:

- Print your plan
- Save it to an HTML file which you can send as an email attachment or publish to your web site.



**NOTE:** This is the only view/report that uses a single schedule plan. Only assignments from the currently loaded plan are displayed. All other views/reports/schedules use all schedule plans for a given period of time.



**TIP:** The Show unassigned only option is useful for determining what is left to schedule in a plan. [Click here to learn more.](#)

Previewing the Schedule Plan

## Previewing the Schedule Plan



The "View Plan" shows you a detailed list of your currently loaded plan.

	From	To	Hours	Unpaid Staff Break
<b>Sunday, December 04/ 2005</b>				
<b>Dining Room</b>				
Open	9:00am	12:00pm	3.00	Darbany, Crystal
Maintenance	9:00am	5:00pm	8.00	Berenson, David
Open	9:00am	12:00pm	3.00	Garrison, Helen
Cashier	9:00am	Long Volum	5.00	Harrington, Mark
Wait Staff	11:30am	6:00pm	6.50	Cosminson, Barbara
Wait Staff	11:30am	6:00pm	6.50	Cuthbertson, James
Wait Staff	12:00pm	7:00pm	7.00	Southeren, Mary
Wait Staff	12:00pm	7:00pm	7.00	Harrison, Tara
Close	1:30pm	3:45pm	2.25	Braundell, William
Cashier	4:00pm	0:00am	8.00	Barnett, Rhonda
Wait Staff	5:00pm	11:00pm	6.00	Gaither, Carla
Supper Manager	5:00pm	11:00pm	6.00	30 mins. Unassigned
Wait Staff	5:00pm	11:00pm	6.00	30 mins. Finlayson, Linda
Wait Staff	5:00pm	11:00pm	6.00	Unassigned
Wait Staff	6:00pm	11:00pm	5.00	Donaldson, Dennis
Wait Staff	6:00pm	11:00pm	5.00	Thorlackson, Terry
Lunch Manager	11:00pm	2:00am	3.00	Arkinsian, Linda
Close	11:00pm	2:00am	3.00	Gaither, Carla
Close	11:00pm	2:00am	3.00	Arkinsian, Linda
<b>Total Dining Room:</b>			<b>99.25</b>	
<b>Kitchen</b>				
Executive Chef	10:30am	7:00pm	8.50	Descartier, Alfonse
Grill Cook	11:00am	5:00pm	6.00	Arkinsian, Linda
Fry Cook	11:00am	5:00pm	6.00	Richardson, Frederick
Lead Cook	11:00am	5:00pm	6.00	Janzen, Stephen

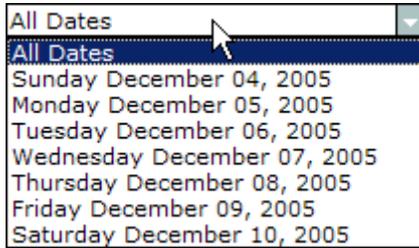
You can optionally print your plan or save your plan as an HTML file.

To view the schedule plan:

1. Select a "Schedule By" option.  
You choose to display the plan by Position / Task or by Staff .
2. Check options to display hours and totals.
3. Check "Show Unassigned Only" to display only those scheduled items for which no assignment has yet been made.

**TIP:** The Show unassigned only option is useful for determining what is left to schedule in a plan. Click here to learn more.

4. Select from the drop-down list to view a single day's plan or to view details all dates in the current plan.



5. Click the "Preview" button in the command bar to display the details of the plan according to your criteria.
6. Optionally, click the "Print" button to send the report to a printer.
7. Optionally, click the "Save as HTML " to save the report as HTML .  
An HTML file is suitable for emailing as an attachment or for posting to a web site.  
  
Click here to learn more.
8. Click the "Close" button to close the form and return to the Scheduler Planner .



**NOTE:** This is the only view/report that uses a single schedule plan. Only assignments from the currently loaded plan are displayed. All other views/reports/schedules use all schedule plans for a given period of time.



**TIP:** Save your plan as a supplemental attachment for your staff when you email them their schedules.  
Click here to learn more.

## Displaying Unassigned



When viewing the currently loaded schedule plan, you may choose to show only those scheduled items that are, as yet, unassigned.

Schedule Plan				
Please enter the schedule criteria and press the Preview button ...				
Schedule By: <input type="radio"/> Position/Task <input type="radio"/> Staff		<input checked="" type="checkbox"/> Show Totals	<input checked="" type="checkbox"/> Show Unassigned Only	
		<input checked="" type="checkbox"/> Show Hours	Date: All Dates	
Schedule Plan From: Sunday, December 04/ 2005 To: Saturday, December 10/ 2005				
	From	To	Hours	Unpaid Staff Break
<b>Sunday, December 04/ 2005</b>				
<b>Dining Room</b>				
Wait Staff	5:00pm	11:00pm	6.00	Unassigned
Supper Manager	5:00pm	11:00pm	6.00	30 mins. Unassigned
<b>Total Dining Room:</b>			<b>12.00</b>	
<b>Kitchen</b>				
Line Cook	5:30pm	8:00pm	2.50	Unassigned
<b>Total Kitchen:</b>			<b>2.50</b>	
<b>Lounge</b>				
Wait Staff	1:00pm	6:00pm	5.00	Unassigned
Wait Staff	3:00pm	9:00pm	6.00	Unassigned
Wait Staff	4:00pm	0:00am	8.00	Unassigned
Wait Staff	6:00pm	0:00am	6.00	Unassigned
Wait Staff	9:00pm	1:30am	4.50	Unassigned
Bartender	9:00pm	2:00am	5.00	Unassigned
<b>Total Lounge:</b>			<b>34.50</b>	
<b>Total Sun, Dec 04/ 2005:</b>			<b>49.00</b>	
<b>Monday, December 05/ 2005</b>				
<b>Dining Room</b>				
Open	9:00am	12:00pm	3.00	Unassigned
Open	9:00am	12:00pm	3.00	Unassigned
<b>Total Dining Room:</b>			<b>6.00</b>	
<b>Total Mon, Dec 05/ 2005:</b>			<b>6.00</b>	

Check "Show Unassigned Only" to display only those scheduled items for which no assignment has yet been made.

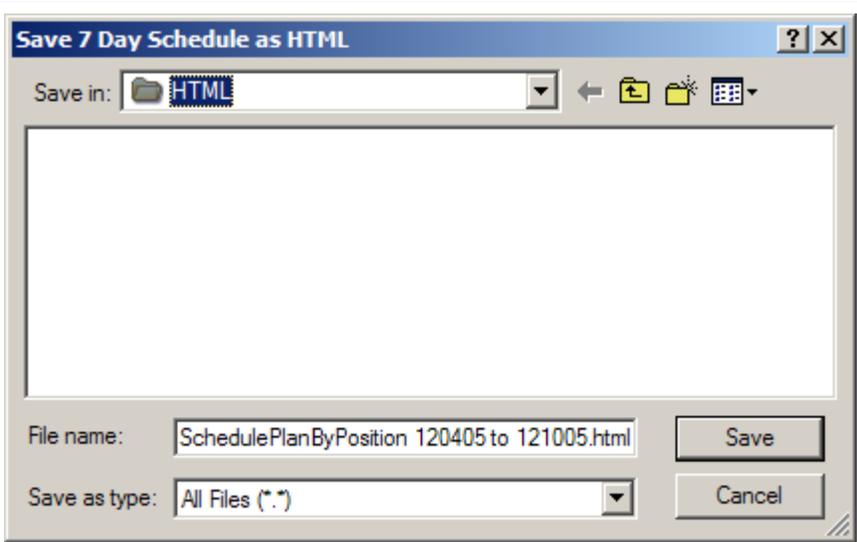


**TIP:** The Show unassigned only option is useful for determining what is left to schedule in a plan.

## Saving as HTML



When viewing the currently loaded schedule plan, you may save your report to an HTML file.

	<p>HTML pages are almost universally readable as the recipient need only have a web browser such as "Internet Explorer" to view its contents.</p> <p>The HTML format is suitable for sending plan details as an attachment to your employees at the time that you email their personal schedules to them.</p> <p><a href="#">Click here to learn more about emailing schedules.</a></p> <p>HTML is also suitable for posting as a web page if you manage a web site to which your staff have access.</p>
--	--

To save the schedule plan as HTML:

1. Click the "Save as HTML " button in the command bar at the top of the "View Plan " form.  
A "File Save" dialog is displayed.
2. Optionally, change the default system-generated file name and default HTML sub-directory
3. Click the "Save" button to save the HTML file.



**TIP:** You can attach the HTML file of all assignments in the plan to your staff when you email them their schedules. [Click here to learn more.](#)

## Print Plan



Use the "Print Plan" menu option to send the schedule plan to a printer.

## Maintenance Menu



Use "Maintenance" menu options to tailor OCLabor Pro for your business.



**NOTE:** The "System" menu option is not available to users if "System Security" has been enabled and the user's security account does not include administrative privileges. [Click here to learn more.](#)

## Reports



Use the "Reports" menu to select a report to view on-screen and optionally print.

OCLabor Pro provides you with a rich set of reports, allowing you to view and publish your schedule plans, budget and labor burden details with maximum convenience and efficiency.

## 7 Day Schedule



The 7 Day Schedule Report provides a seven-day calendar view of all staff assignments from all schedule plans over a 7-day period.

7 Day Schedule								
Please enter the schedule criteria and press the Preview button ...								
<input type="button" value="Preview"/> <input type="button" value="Print Schedule"/> <input type="button" value="Save as HTML"/> <input type="button" value="Close"/>								
Schedule From: Sun. December 11/2005		Department: All Departments						
7 Day Schedule From: Sunday, December 11/ 2005 To: Saturday, December 17/ 2005 - All Departments								
Staff	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Total
Allen, Richard					5:00p-11:00p KITCH/FCOOK 6.00 hrs	5:00p-11:00p KITCH/FCOOK 6.00 hrs	5:00p-11:00p KITCH/FCOOK 6.00 hrs	18.00 hrs
Arkinsian, Linda	11:00a-5:00p KITCH/GRILL 6.00 hrs			30.00 hrs				
Bellow, Ron	4:00p-0:00a KITCH/SALAD 8.00 hrs			40.00 hrs				
Berenson, David			5:00p-1:00a DINRM/SMNGR 8.00 hrs		10:00a-6:30p DINRM/LMNGR 8.50 hrs	10:00a-6:30p DINRM/LMNGR 8.50 hrs		25.00 hrs
Branson, Jakob				10:30a-3:00p DINRM/OPEN 4.50 hrs				4.50 hrs
Carlson, Andrew	11:30a-4:00p KITCH/SALAD 4.50 hrs							4.50 hrs
Christenson, Fred	4:00p-0:00a LOUNG/BARTD 8.00 hrs			40.00 hrs				
Coreston, Terry	5:00p-11:00p DINRM/WAITS 6.00 hrs			40.00 hrs				
	11:00p-1:00a DINRM/CLOSE 2.00 hrs							
Cosminson, Barbara	11:30a-6:00p DINRM/WAITS 6.50 hrs			32.50 hrs				
Cuthbertson, James	11:30a-6:00p DINRM/WAITS 6.50 hrs			32.50 hrs				
D'Agostini, Richard	5:00p-1:00a DINRM/SMNGR 8.00 hrs	5:00p-1:00a DINRM/SMNGR 8.00 hrs			5:00p-1:00a DINRM/SMNGR 8.00 hrs	5:00p-1:00a DINRM/SMNGR 8.00 hrs	5:00p-1:00a DINRM/SMNGR 8.00 hrs	40.00 hrs
Darbany, Crystal	9:00a-12:00p DINRM/OPEN 3.00 hrs							3.00 hrs

Based on your selection of the "Schedule From date", the 7-Day schedule displays:

- staff member,
- scheduled start time and end time,
- department,
- position/task,
- total hours for the period.

To show a 7-Day Schedule:

1. Select a "Schedule From" date (top left-hand corner)

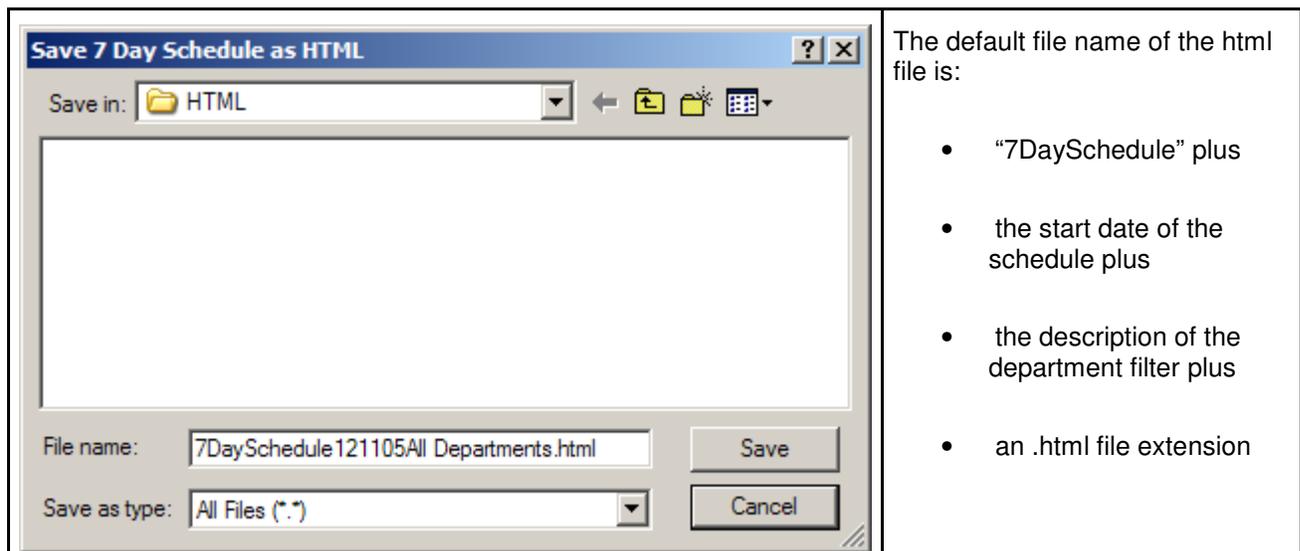
[Click here to learn more about selecting dates in OCLabor Pro.](#)

2. Select a "Departments" filter from the Department drop-down list.
3. Click the "Preview" button in the command bar at the top of the form.  
The 7-day schedule is displayed according to your selections.
4. Optionally, click "Print" to send the report to your printer.
5. Optionally, click "Save as HTML" to save your report to an HTML file on your computer.
6. Click the "Close" button to return to the schedule planner.

#### About "Save as HTML":

The "Save as HTML " feature allows you to save the schedule as an HTML file. HTML files can be published on a web site or distributed as attachments in emails.

By default, the HTML file is saved in the "HTML " directory which is found under OCLabor Pro's installation location .



## 28 Day Schedule



The 28 Day Schedule Report provides a twenty-eight day calendar view of all staff assignments from all schedule plans over a 28-day period.

**28 Day Schedule From Sunday , December 11/ 2005 To Saturday , January 07/ 2006 - All Departments**

11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	01	02	03	04	05	06	07
<b>Allen, Richard</b>																											
				05:00p	05:00p	05:00p	05:00p	09:45a	09:45a					10:00a													
				11:00p	11:00p	11:00p	02:00p	02:00p						03:30p													
							02:00p	02:30p																			
							08:00p	08:00p																			
<b>Arkinsian, Linda</b>																											
11:00a	11:00a	11:00a	11:00a	11:00a			10:00a	10:00a						10:00a	10:00a												
05:00p	05:00p	05:00p	05:00p	05:00p			01:00p	04:00p						04:00p	04:00p												
							04:00p	08:00p						04:00p	08:00p												
							08:00p	10:00p						08:00p	10:00p												
<b>Barnett, Rhonda</b>																											
							10:00a							10:00a													
							08:00p							04:00p													
<b>Bellow, Ron</b>																											
04:00p	04:00p	04:00p	04:00p	04:00p			10:00a							10:00a													
00:00a	00:00a	00:00a	00:00a	00:00a			08:00p							08:00p													
<b>Berenson, David</b>																											
		05:00p		10:00a	10:00a		10:00a							10:00a													
		01:00a		08:30p	08:30p		08:00p							08:00p													
<b>Brenson, Jakob</b>																											
				10:30a																							
				03:00p																							
<b>Bunningham, Rena</b>																											
														02:00p													
														08:00p													

Based on your selection of the "Schedule From date", the 28 Day schedule displays:

- staff member,
- scheduled start time and end time

To show a 28 Day Schedule:

1. Select a "Schedule From" date (top left-hand corner)  
Click [here](#) to learn more about selecting dates in OCLabor Pro.
2. Select a "Departments" filter from the Department drop-down list.
3. Click the "Preview" button in the command bar at the top of the form.

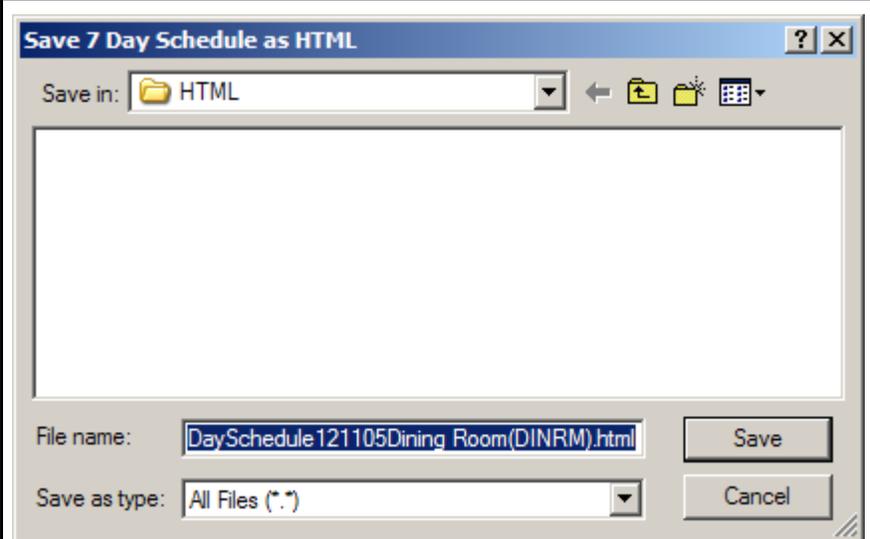
The 28-day schedule is displayed according to your selections.

4. Optionally, click "Print" to send the report to your printer.
5. Optionally, click "Save as HTML" to save your report to an HTML file on your computer.
6. Click the "Close" button to return to the schedule planner.

#### About "Save as HTML":

The "Save as HTML " feature allows you to save the schedule as an HTML file. HTML files can be published on a web site or distributed as attachments in emails.

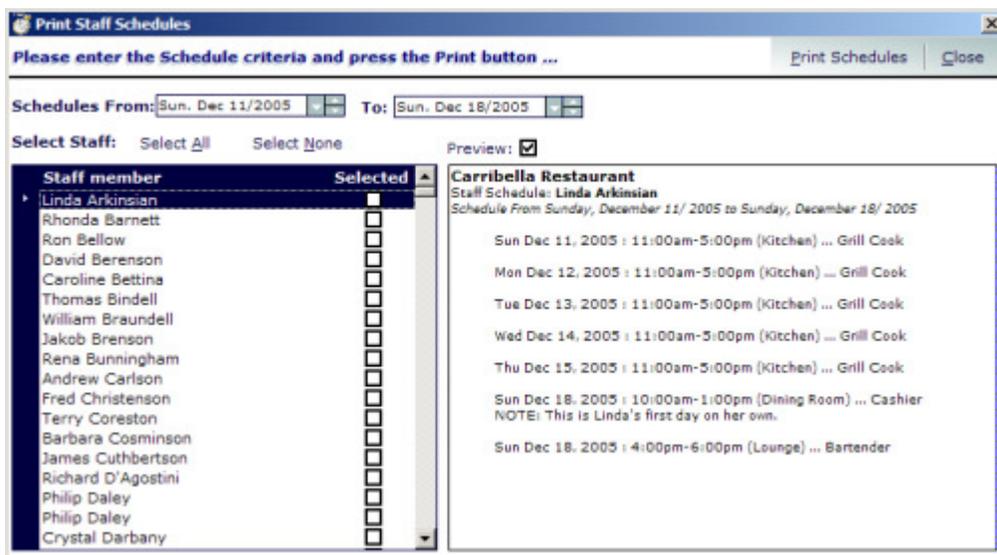
By default, the HTML file is saved in the "HTML " directory which is found under OCLabor Pro's installation location .

	<p>The default file name of the html file is:</p> <ul style="list-style-type: none"><li>• "28DaySchedule" plus</li><li>• the start date of the schedule plus</li><li>• the description of the department filter plus</li><li>• an .html file extension</li></ul>
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## Print Staff Schedules



Use the "Print Staff Schedules" option to print schedules for individual staff members.



Based on start and end dates that you select, you can print a schedule of that time period for a single individual, a selected group, or all staff members. The schedules that are produced draw on scheduling assignments from all the schedule plans that fall within the period of the start and end dates that you select.

When the "Preview" check box is set "ON" (checked), you can preview a particular staff member's schedule when you click on their name in the list.

To print staff schedules:

1. Select schedule "From" and "To" dates.

By default, the "From" date is set to today's date.

The "To" date is set to today's date plus the number of days you defined as "Schedule Length" in System Setup .

2. Select staff members.

- Click on the Selected check box to the right of the name
- or press the "Select All" button above the list of names.

Schedules will only be printed for those staff members who are marked as "Selected".

3. Click the "Print Schedules" button in the command bar at the bottom of the form to print schedules for selected staff members.
4. Click the "Close" button to return to the schedule planner.



**NOTE:** Time Bar notes (entered while editing time bars with the Time Bar edit form ) are displayed with scheduling assignments in the printed schedules.

## Daily Sign In Sheet



Use the Daily Sign-In Sheet report to create sign-in sheets that your staff or managers will use to manually record actual hours as staff report for their scheduled assignments.

For a given period of time, the report lists departments and scheduled assignments including:

- Scheduled start and end times
- Position / Task
- Staff name (or "Unassigned " if no staff assignment was given for a time bar)

Additionally, underlined spaces are printed to allow for entry by pen of:

- Actual start and end times
- Initials identifying the individual that records the information
- Any brief comments that may be helpful while processing actual hours .

The report also allows you to print any number of blank lines below each department to allow for recording of unscheduled actuals.

To display Daily Sign In sheet:

1. Select the date to display (top left-hand corner)

[Click here to learn more about selecting dates in OCLabor Pro.](#)

2. Click either "By Position / Task" or "Staff" option button to set which columns to show in the second and third places.
3. Select a "Departments" filter from the Department drop-down list.
4. Click the "Show Unassigned" checkbox "ON" (checked) to also display assignments to which no staff member has yet been assigned.
5. Select the number of blank lines to print after the assignments for each displayed department.
6. Click the "Preview" button in the command bar at the top of the form.
7. Optionally, click the "Print" button in the command bar at the top to send the list to the printer.
8. Click the "Close" command button to display the Schedule Viewer.

## Email Staff Schedules



Use the "Email Staff Schedules" option to email schedules to individual staff members.

Staff member	Email Address	Send
Linda Arkinsian	cc@net.com	<input type="checkbox"/>
Rhonda Barnett	cc@net.com	<input type="checkbox"/>
Ron Bellow	cc@net.com	<input type="checkbox"/>
David Berenson	cc@net.com	<input type="checkbox"/>
Caroline Bettina	cc@net.com	<input type="checkbox"/>
Thomas Bindell	cc@net.com	<input type="checkbox"/>
William Braundell		<input type="checkbox"/>
Jakob Brenson	cc@net.com	<input type="checkbox"/>
Rena Bunningham	cc@net.com	<input type="checkbox"/>
Andrew Carlson		<input type="checkbox"/>
Fred Christenson	cc@net.com	<input type="checkbox"/>
Terry Coreston	cc@net.com	<input type="checkbox"/>
Barbara Cosminson	cc@net.com	<input type="checkbox"/>
James Cuthbertson	cc@net.com	<input type="checkbox"/>
Richard D'Agostini	cc@net.com	<input type="checkbox"/>
Philip Daley	phildaley@shaw.ca	<input type="checkbox"/>
Philip Daley	phildaley@shaw.ca	<input type="checkbox"/>
Crystal Darbany		<input type="checkbox"/>

Based on start and end dates that you select, you can email a schedule for that time period for a single individual, a selected group, or all staff members. The schedules that are produced draw on scheduling assignments from all the schedule plans that fall within the period of the start and end dates that you select.

To email staff schedules:

1. Select schedule "From" and "To" dates.

By default, the "From" date is set to today's date.

The "To" date is set to today's date plus the number of days you defined as "Schedule Length" in System Setup .

2. Select staff members.

- Click on the Selected check box to the right of the name
- or press the "Select All" button above the list of names.

Schedules will only be emailed to those staff members who are marked as "Selected".

3. Enter an Email Subject Line.

By default, the subject line is displayed as "Schedule for" plus the "Schedules from" and "To" dates. You can enter any text you like for the subject line. The Email Subject Line is displayed as the "Subject" when received by your staff member's email program.

4. Click the "Send Schedules" button in the command bar at the bottom of the form to send schedules to selected staff members.
5. Click the "Close" button to return to the schedule planner.



**NOTE:** A staff member that has not been set up with an email address in the Staff Maintenance form is not eligible for selection in the list (the check box is disabled).

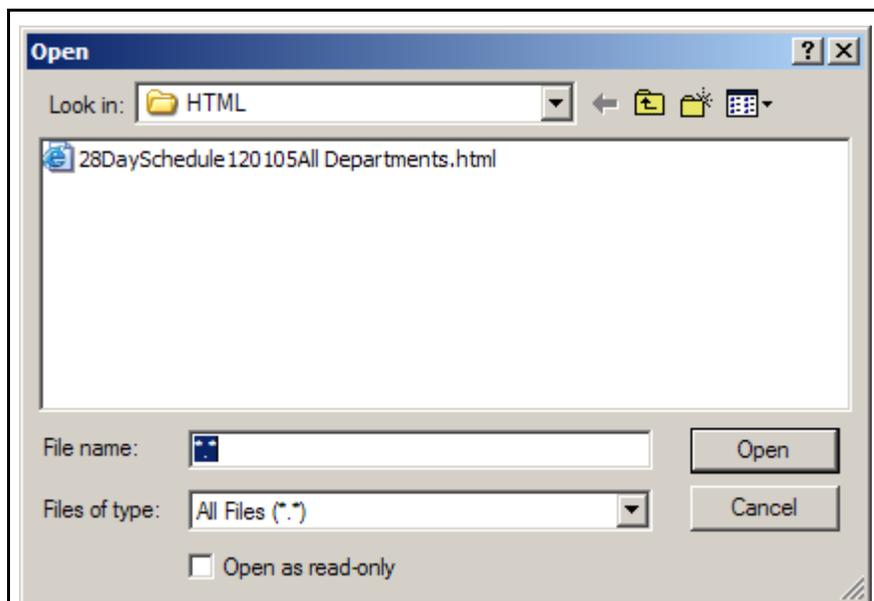
To receive a "Read Receipt":

- Click the "Request Read Receipt " check box "ON" (checked)
- When the staff member opens the email, you may receive an email message that the message has been viewed. However, there are several reasons why a read receipt acknowledgement may not be sent to you. [Click here to learn more.](#)
- When checked, all emails will be sent with a request for a read receipt .

To send a file attachment:

You may attach a file to all email messages you send such as a schedule plan that was saved as an HTML file or a Word Document or Excel Worksheet.

1. Enter the file name including the exact path to the file or press the Browse button to display the file browser.

	<p>Select the file to attach to the emails and press the Open button.</p> <p>You are returned to the Email Staff Schedules form and the name and path to the file are entered into the Attach File text box.</p> <p>Pressing the Cancel button cancels the browse action and returns to the Email Staff Schedules form without selecting a file.</p>
--	--



**Important:** If you have not set the “Mail Server Setup” values in the System maintenance form or if you have set them incorrectly you will receive errors when you click the Send Schedules button. [Click here to learn more.](#)

## Exception Report



Use the "Exception Report" to display requests from staff members of unique or exceptional times that they may not be scheduled.

Staff	From	To	Description	Vacation
Daley, Philip G.	Dec 27, 2005 0:00am	Dec 27, 2005 12:00pm	Christmas Vacattion	<input checked="" type="checkbox"/>

Schedule exceptions are singular dates and times that staff members will not be available during their usually available periods. Examples of common exceptions include vacation, personal days off, doctor appointments, and so forth.

Exceptions are entered in the "Staff" form of "Maintenance" menu. [Click here to learn more.](#)

You may also display the "Staff" maintenance form by double-clicking on a staff name in the Staff List view. [Click here to learn more.](#)

The exception report is useful in determining what staff is not available for a given schedule period. If you attempt to schedule a staff member into a time slot that has been identified as an exception, a scheduling conflict message will appear.

To create an Exception Report:

1. Select "From" and "To" dates for the period you wish to view.

[Click here to learn more about entering dates in OCLabor Pro.](#)

2. Optionally, click the "Vacation Requests Only" checkbox "ON" (checked) to display only those exceptions marked as vacation requests.

3. Click the "Preview Report" button in the command bar at the top of the form.

A list of exceptions is displayed according to your selections.

4. Optionally, click the "Print Report" button in the command bar at the top of the form to send the report to the printer.

5. Click the "Close" button to return to the Schedule Planner.

## Staff Hours Report



The Staff Hours Report provides the total hours scheduled for each staff member who is scheduled in the selected time period.

Staff	Hours Scheduled
<b>Dining Room</b>	
<b>Sunday December 11, 2005</b>	
Coreston, Terry	8.000
Cosminson, Barbara	6.500
Cuthbertson, James	6.500
D'Agostini, Richard	8.000
Darbony, Crystal	3.000
Donaldson, Dennis	5.000
Finlayson, Linda	9.000
Gaither, Carla	8.000
Garrison, Helen	3.000
Harrington, Mark	6.000
Harrison, Tara	7.000
Southeren, Mary	7.000
Stanton, David	8.000
Thorlackson, Terry	5.000
Total for Sunday December 11, 2005	90.000
<b>Monday December 12, 2005</b>	
Coreston, Terry	8.000
Cosminson, Barbara	6.500
Cuthbertson, James	6.500
D'Agostini, Richard	8.000
Donaldson, Dennis	5.000
Finlayson, Linda	8.500
Gaither, Carla	8.000
Garrison, Helen	8.000

The report also totals the hours for all staff members over that same period.

To change the period for the report change the “From:” and/or “To:” dates at the top of the form. The report can also be filtered to Show or Hide the detail for each staff member by toggling the Show Staff Detail check box above the report.

The report can also provide a subtotal for each day in the report by toggling the Subtotal By Day check box. The report can also provide a subtotal for each department in the report by toggling the Subtotal By Department check box.

Department	Select
Dining Room	<input checked="" type="checkbox"/>
Kitchen	<input checked="" type="checkbox"/>
Lounge	<input checked="" type="checkbox"/>

The drop down department list can be used to filter the report for one, a combination of selected, or all departments.

Click the check box beside a department to indicate you want it included in the filter selection.

Press the Print Report button to print the report to a selected printer.



**Tip:** To check for potential overtime scheduling, select an appropriate date range, i.e. one week, and show Staff Detail without Subtotal by Day or by Department. This will show the total numbers of hours the staff members are scheduled to work in the one week time period.

Pressing the Close button returns you to the main schedule planning worksheet form.

## Staff List



Use the Staff List report to display a list of staff and their contact information.

Name	Address	Phone	Other	Email
Descartier, Alfonso	882 Columbine Street, Warrington, CA 91117	(555) 555-1045	(555) 555-1345	ad@net.com
Donaldson, Dennis				
Finlayson, Linda				
Fiorella, Christine				

You can list all staff or only those that are marked as active. Staff are can be marked as active by checking the "Active" checkbox in the Staff Maintenance form. [Click here to learn more.](#)

To list staff:

1. Optionally, check the "Show Active Staff Only" checkbox "OFF" or "ON"
2. Click the "Preview Report" button in the command bar at the top of the form.  
A list of staff members and their contact information is displayed.
3. Optionally, click the "Print Report" button to send the list to the printer.
4. Click the "Close" button to return to the Scheduler Planner.

## Position Hours Report



The Position/Task Hours Report provides the total hours scheduled for each position/task that is scheduled in a selected time period.

Position	Hours Scheduled
Bartender	77.750
Cashier	85.500
Close	28.000
Dishwasher	8.000
Executive Chef	42.500
Fry Cook	84.000
Grill Cook	92.000
Lead Cook	92.000
Line Cook	87.500
Lunch Manager	60.000
Maintenance	40.000
Open	13.000
Salad Prep	44.500
Sous Chef	56.000
Supper Manager	56.000
Wait Staff	287.000
<b>Report Total</b>	<b>1,153.750</b>

The report displays totals the hours for all positions/tasks over that same period.

To display Positions / Hours report:

1. Click either the "Actual" or "Scheduled" option button (top left-hand corner) to select the source data for the report.
2. Select "Schedule From" and "Schedule To" dates (top left-hand corner)  
[Click here to learn more about selecting dates in OCLabor Pro.](#)
3. Optionally, click the "Show Position Detail" checkbox "ON" to show detail for each position/task.
4. Optionally, click the "Subtotal by Day" checkbox "ON" to show a subtotal of hours for each day.
5. Optionally, click the "Subtotal by Department" checkbox "ON" to show a subtotal of hours for each department.
6. Select departments to display:

Department	Select
Dining Room	<input checked="" type="checkbox"/>
Kitchen	<input checked="" type="checkbox"/>
Lounge	<input checked="" type="checkbox"/>

The drop down department list can be used to filter the report for one, a combination of selected, or all departments.

Click the check box beside a department to indicate you want it included in the filter selection.

7. Click the "Preview Report" button.  
A report is displayed according to your selections.
8. Click the "Print Report" button in the command bar at the top to send the report to the printer.
9. Click the "Close" button to display the Schedule Planner.

## Staff Cost Report



The Staff Cost Report provides the total cost of time scheduled for each staff member who is scheduled in the selected time period.

Staff Cost Report				
Please enter the report criteria and press the Preview button ...				
		Preview Report	Print Report	Close
<input type="radio"/> Actual	From: Sun. Dec 11/2005	To: Sun. Dec 18/2005	<input checked="" type="checkbox"/> Show Staff Detail	<input checked="" type="checkbox"/> Subtotal By Day
<input checked="" type="radio"/> Scheduled			<input checked="" type="checkbox"/> Subtotal By Department	Department List
<b>Actual Cost From: Sunday, December 11/ 2005 To: Sunday, December 18/ 2005</b>				
Staff	Position	Hourly Rate	Hours	Cost
<b>Dining Room</b>				
<b>Sunday December 11, 2005</b>				
Coreston, Terry	Close	\$7.50	2.000	\$15.00
Coreston, Terry	Wait Staff	\$6.85	6.000	\$41.10
Cosminson, Barbara	Wait Staff	\$8.50	6.500	\$55.25
Cuthbertson, James	Wait Staff	\$7.50	6.500	\$48.75
D'Agostini, Richard	Supper Manager	\$17.75	8.000	\$142.00
Darbany, Crystal	Open	\$7.50	3.000	\$22.50
Donaldson, Dennis	Wait Staff	\$7.50	5.000	\$37.50
Finlayson, Linda	Lunch Manager	\$14.50	9.000	\$137.75
Gaither, Carla	Close	\$6.85	2.000	\$13.70
Gaither, Carla	Wait Staff	\$6.85	6.000	\$41.10
Garrison, Helen	Open	\$6.85	3.000	\$20.55
Harrington, Mark	Cashier	\$6.00	6.000	\$36.00
Harrison, Tara	Wait Staff	\$6.85	7.000	\$47.95
Southeren, Mary	Wait Staff	\$7.75	7.000	\$54.25
Stanton, David	Maintenance	\$7.55	8.000	\$60.40
Thorlackson, Terry	Wait Staff	\$7.50	5.000	\$37.50
<b>Total for Sunday December 11, 2005</b>			<b>90.000</b>	<b>\$811.30</b>
Percentage of Actual Revenue: NA / Daily Revenue Actual: \$0.00				
<b>Monday December 12, 2005</b>				
Coreston, Terry	Close	\$7.50	2.000	\$15.00
Coreston, Terry	Wait Staff	\$6.85	6.000	\$41.10
Cosminson, Barbara	Wait Staff	\$8.50	6.500	\$55.25
Cuthbertson, James	Wait Staff	\$7.50	6.500	\$48.75
D'Agostini, Richard	Supper Manager	\$17.75	8.000	\$142.00
Donaldson, Dennis	Wait Staff	\$7.50	5.000	\$37.50
Finlayson, Linda	Lunch Manager	\$14.50	8.500	\$126.88

The report also totals the cost for all staff members over that same period. For each day in the report, and the report in total the labor burden is reported as the percentage of the revenue budget (for the day and in total for all days in the report) along with the revenue budget.

The report will provide a labor burden calculation where possible. When a report is created to show sub-total by day, the report shows a labor burden calculation for the day.

To display Staff Cost report:

1. Click either the "Actual" or "Scheduled" option button (top left-hand corner) to select the source data for the report.
2. Select "Schedule From" and "Schedule To" dates (top left-hand corner)

[Click here to learn more about selecting dates in OCLabor Pro.](#)

3. Optionally, click the "Show Position Detail" checkbox "ON" to show detail for each position/task.
4. Optionally, click the "Subtotal by Day" checkbox "ON" to show a subtotal of hours for each day.
5. Optionally, click the "Subtotal by Department" checkbox "ON" to show a subtotal of hours for each department.
6. Select departments to display:

Department	Select
Dining Room	<input checked="" type="checkbox"/>
Kitchen	<input checked="" type="checkbox"/>
Lounge	<input checked="" type="checkbox"/>

The drop down department list can be used to filter the report for one, a combination of selected, or all departments.

Click the check box beside a department to indicate you want it included in the filter selection.

7. Click the "Preview Report" button.  
A report is displayed according to your selections.
8. Click the "Print Report" button in the command bar at the top to send the report to the printer.
9. Click the "Close" button to display the Schedule Planner.



**NOTE:** If you choose to subtotal by department the labor burden is not reported.



**NOTE:** The cost is calculated as the number of hours scheduled multiplied by the cost per hour as captured in the staff member's profile or their Position/Wage details in the Staff maintenance form. Click here to learn more.



**Tip:** When department is used to break down the report, the summary line for the department will show

the cost as a percentage of the revenue budget when the report is sub-totaled by day. This is an excellent way to monitor the labor cost of an individual department against the budgeted revenue.

## Staff Attendance Exceptions Report



Use to display attendance exceptions over a given period of time.

Staff Member	Department	Position	Date	Start Time	End Time	No Show	Late
Darbany, Crystal	Dining Room	Open	Sun Dec 04, 2005	9:00am	12:00pm	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Finlayson, Linda	Dining Room	Lunch Manager	Sun Dec 04, 2005	10:00am	7:00pm	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Harrington, Mark	Dining Room	Cashier	Sun Dec 04, 2005	9:00am	2:00pm	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Total for report ... Attendance Exceptions: 3 No Show: 1 Late: 2

The Staff Attendance Exceptions report is an aid to analyzing deviances in staff attendance, from your scheduled plan, as found in your actual hours.

When you process scheduled assignments into actual hours, you have the opportunity to indicate where staff members deviated from your plan by no reporting (No Show) or by being tardy (Late). The Staff Attendance Exceptions report lists these deviations over a selected period of time.

[Click here to learn more about processing scheduled assignments into actual hours.](#)

To display Staff Attendance Exceptions:

1. Select "From" and "To" dates (top left-hand corner)

[Click here to learn more about selecting dates in Staff-Scheduler.](#)

2. Select a "Departments" filter from the Department drop-down list.
3. Click the "Preview Report" button in the command bar at the top of the form.

A list of attendance exceptions is displayed according to your selections.

4. Optionally, click the "Print Report" button in the command bar at the top to send the report to the printer.
5. Click the "Close" button to display the Schedule Planner.

## Payroll Report



Use the Payroll Report to display a list of hours and total wages, by employee and for each day in the selected period.

Payroll Report						
Please enter the report criteria and press the Preview button ...						
Report Payroll for <input type="text" value="7"/> days starting on <input type="text" value="Sun. Dec 04/2005"/>		Department: <input type="text" value="All Departments"/>		<input checked="" type="checkbox"/> Show Wages		
Payroll Report For All Departments From Sunday , December 04/ 2005 To Saturday , December 10/ 2005						
		Hours	Regular	Overtime	Stat	Total
<b>Allen, Richard (CR0124)</b>						
Dec 04, 2005	Bartender (\$8.15)	4.000	4.000	0.000	0.000	\$32.60
Dec 08, 2005	Fry Cook (\$7.45)	6.000	6.000	0.000	0.000	\$44.70
Dec 09, 2005	Fry Cook (\$7.45)	6.000	6.000	0.000	0.000	\$44.70
Dec 10, 2005	Fry Cook (\$7.45)	6.000	6.000	0.000	0.000	\$44.70
Total		22.000	22.000	0.000	0.000	\$166.70
<b>Arkinsian, Linda (CR0140)</b>						
Dec 04, 2005	Grill Cook (\$7.50)	6.000	6.000	0.000	0.000	\$45.00
	Close (\$4.00)	3.000	2.000	1.000	0.000	\$14.00
Dec 05, 2005	Grill Cook (\$7.50)	6.000	6.000	0.000	0.000	\$45.00
Dec 06, 2005	Grill Cook (\$7.50)	6.000	6.000	0.000	0.000	\$45.00
Dec 07, 2005	Grill Cook (\$7.50)	6.000	6.000	0.000	0.000	\$45.00
Dec 08, 2005	Grill Cook (\$7.50)	6.000	6.000	0.000	0.000	\$45.00
Total		33.000	32.000	1.000	0.000	\$239.00
<b>Barnett, Rhonda (CR0147)</b>						
Dec 09, 2005	Wait Staff (\$7.75)	7.500	7.500	0.000	0.000	\$58.13
Total		7.500	7.500	0.000	0.000	\$58.13
<b>Bellow, Ron (CR0143)</b>						
Dec 04, 2005	Salad Prep (\$7.50)	8.000	8.000	0.000	0.000	\$60.00

Using actual hours that you maintain, for each employee and for each day, hours worked are listed and broken down to show:

- Regular Hours
- Overtime Hours
- Hours worked during Statutory Holiday time
- Total wages.

Click here to learn more about maintaining Actual Hours.

To display Payroll report:

1. Select the number of days upon which to report from the start date of the report.
2. Select a starting date (top left-hand corner)

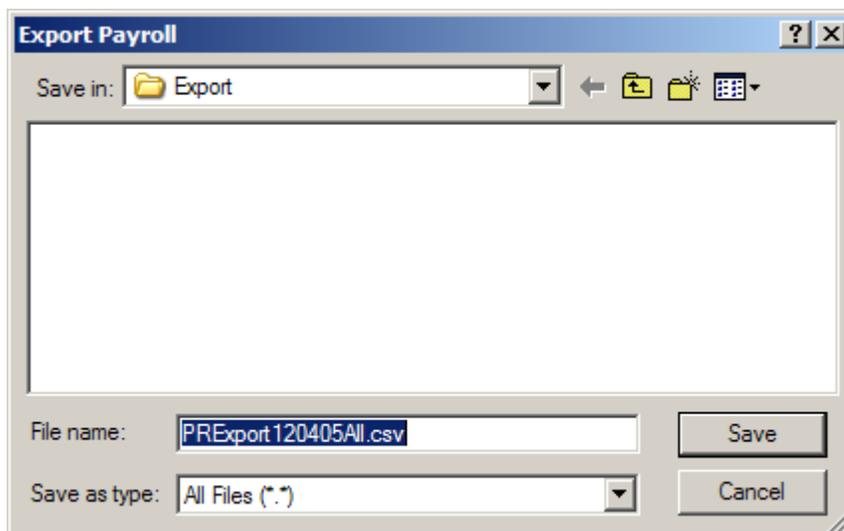
Click here to learn more about selecting dates in OCLabor Pro.

3. Select a "Departments" filter from the Department drop-down list.
4. Click the "Show Wages" checkbox "ON" (checked) to display wages in the final column of the report.
5. Click the "Preview Report" button in the command bar at the top of the form.

The Payroll Report is displayed according to your selections.

6. Optionally, click "Print" to send the report to your printer.
7. Optionally, click the "Export Payroll Data" button in the command bar at the top to create and save a CSV file of the displayed report:

The Export Payroll to File dialog is displayed.



By default, the name of the file is set to "PRExport" plus the date (month, day, & year) plus the ".CSV" file name extension.

Also by default, the location that the file will be saved is in the "Export" folder under OCLabor Pro's installation location .

8. Click the "Close" button in the command bar to display the Scheduler Planner.

## Staff Overtime Report



Use the Staff Overtime report to display a list of hours worked by staff over a given period of time.

Staff	Date	Hours	Regular	Daily OT	Weekly OT
Allen, Richard	12/15/05	6.000	6.000	0.000	0.000
	12/16/05	6.000	6.000	0.000	0.000
	12/17/05	6.000	6.000	0.000	0.000
	12/18/05	3.750	3.750	0.000	0.000
	12/18/05	6.000	4.250	1.750	0.000 *
		<b>27.750</b>	<b>26.000</b>	<b>1.750</b>	<b>0.000</b>
Arkinsian, Linda	12/11/05	6.000	6.000	0.000	0.000
	12/12/05	6.000	6.000	0.000	0.000
	12/13/05	6.000	6.000	0.000	0.000
	12/14/05	6.000	6.000	0.000	0.000
	12/15/05	6.000	6.000	0.000	0.000
	12/18/05	3.000	3.000	0.000	0.000
	12/18/05	2.000	2.000	0.000	0.000
		<b>35.000</b>	<b>35.000</b>	<b>0.000</b>	<b>0.000</b>
Barnett, Rhonda	12/18/05	8.000	8.000	0.000	0.000
		<b>8.000</b>	<b>8.000</b>	<b>0.000</b>	<b>0.000</b>
Bellow, Ron	12/11/05	8.000	8.000	0.000	0.000
	12/12/05	8.000	8.000	0.000	0.000
	12/13/05	8.000	8.000	0.000	0.000
	12/14/05	8.000	8.000	0.000	0.000
	12/15/05	8.000	8.000	0.000	0.000

For each staff member, the report displays, by day, scheduled or actual hours as:

- Total All Hours
- Regular Hours
- Daily Overtime
- Weekly Overtime

[Click here to learn more about overtime hours.](#)

To display Staff Overtime report:

1. Click either the "Actual" or "Scheduled" option button to select the source data for the report.
2. Select schedule "From" and "To" dates.

[Click here to learn more about selecting dates in OCLabor Pro.](#)

3. Click the "Preview Report" button in the command bar at the top.

The Staff Overtime report is displayed according to your selections.

4. Optionally, click the "Print Report" button in the command bar at the top to send the report to the printer.
5. Click the "Close" button to display the Schedule Planner.

## **Export Schedule**



The Export Schedule option is only available when a custom export module has been created for you by Optimum Control for your specific payroll or accounting software package.

Please contact Optimum Control for more information:

Sales:	1-888-798-5555 (within North America) 1-204-953-2272
Technical Support:	<a href="mailto:support@tracrite.net">support@tracrite.net</a>
Web Site:	<a href="http://www.tracrite.net/">http://www.tracrite.net/</a>

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