

Enterprise - Tracking Employee Availability Using Activity Tracker

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What is the Activity Tracker?

Do you have employees whose schedules are ever changing? They have a limited window of availability, or a strict time frame to work? You can track these nuances using the activity tracker within the employee record. Not only will this be useful within Enterprise, employees may also add their own availability within [WebCenter](#) or [Buzz](#).

This Article Covers:

1. [Locating the Activity Tracker](#)
2. [Assigning Information in Activity Tracker](#)
3. [Managing Employee Availability](#)
4. [Searching for Employees by Availability](#)

Locating the Activity Tracker in Enterprise

1. Navigate to the employee record
2. Select Details
3. Select Activity Tracker

Andrew Woodbury
 12 Maple Lane ID: 4295080431
 Saint Paul, MN 55123 SSN: xxx-xx-5872
 Branch: New Brighton

Call Andrea Back
 Don't forget about lunch

Call Ben
 Luke Dane Background check

Currently viewing 4 of 491141 tasks. View more...

tasks appointments social email

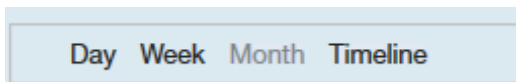
visifile details aca activity tracker assignment restrictions contact methods candidacy direct hire education interpersonal interview questionnaire past jobs required docs test scores

Day Week Month Timeline December 2019 12/8/2019

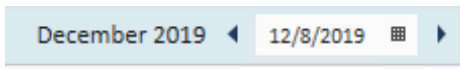
	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
December 1-7 Dec	1 8:00 AM - 1:00 PM	2 8:00 AM - 1:00 PM 3:00 PM - 7:00 PM	3 8:00 AM - 1:00 PM	4 ●	5 3:00 PM - 7:00 PM	6 8:00 AM - 1:00 PM 3:00 PM - 7:00 PM	7 3:00 PM - 7:00 PM
December 8-14 Dec	8 ● 8:00 AM - 1:00 PM	9 8:00 AM - 1:00 PM 3:00 PM - 7:00 PM	10 ● 8:00 AM - 1:00 PM	11 ●	12 ● 3:00 PM - 7:00 PM	13 8:00 AM - 1:00 PM 3:00 PM - 7:00 PM	14 3:00 PM - 7:00 PM

Navigation Tips

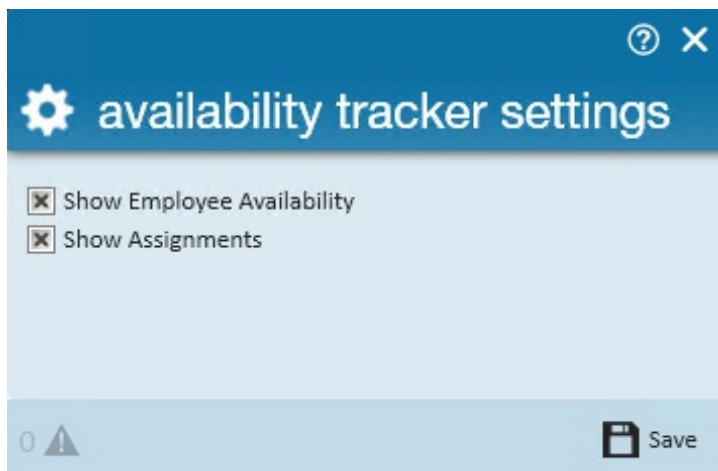
- In the upper left you will have options to view the availability information in either day, week, month, or timeline format.



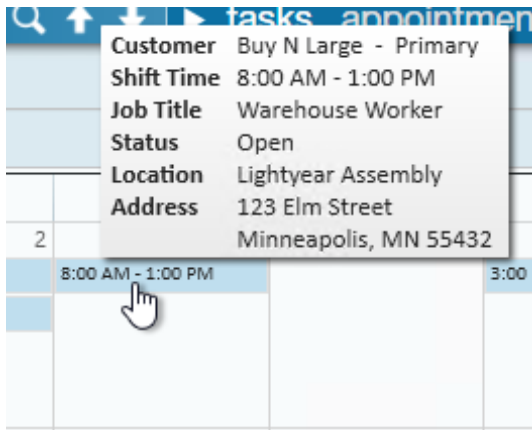
- Change the date range you are viewing in the upper right



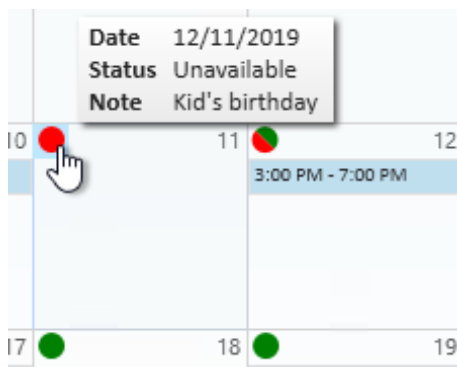
- Select the  in the upper right to change what information you are viewing



- There are 2 types of Availability information shown:
 - **Assignment Information** - shows shift start and end time on the days they are expected to report



- **Called-in Availability** - shows a colored dot on the days the employee specified they were available, partially available, or not available



Assignment Information in the Activity Tracker

You can see the employee's current assignment information within Activity Tracker to help manage when an employee might already be working. This option only works if you fill out the start time, end time, and days of the week on the assignment record.

job information

Job Title: Warehouse Worker

Business Code: Production

Start Date: 1/1/2019

Expected End Date: Original Start: 1/1/2019

Actual Date Ended:

Shift: AM shift

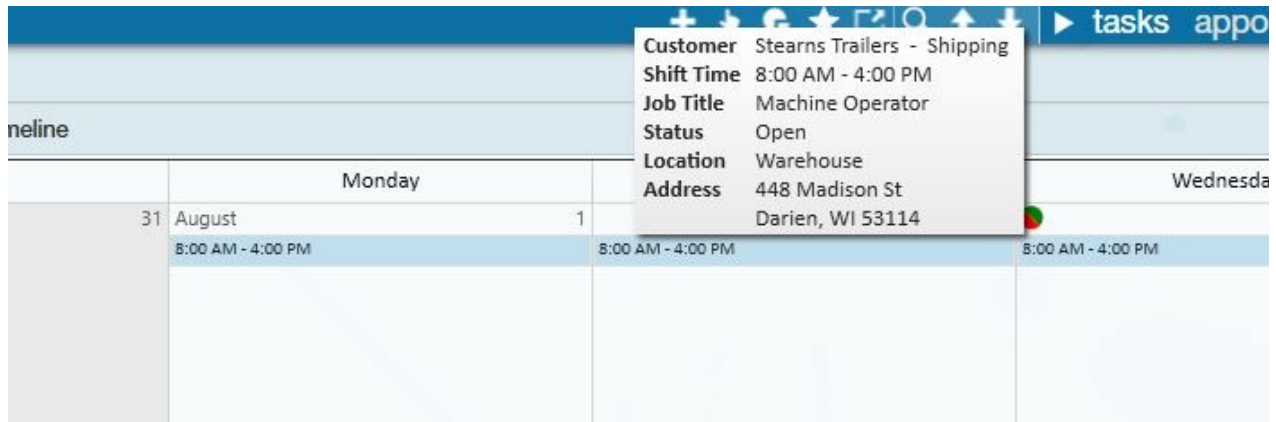
Start Time: 8:00 AM End Time: 1:00 PM

Shift Notes:

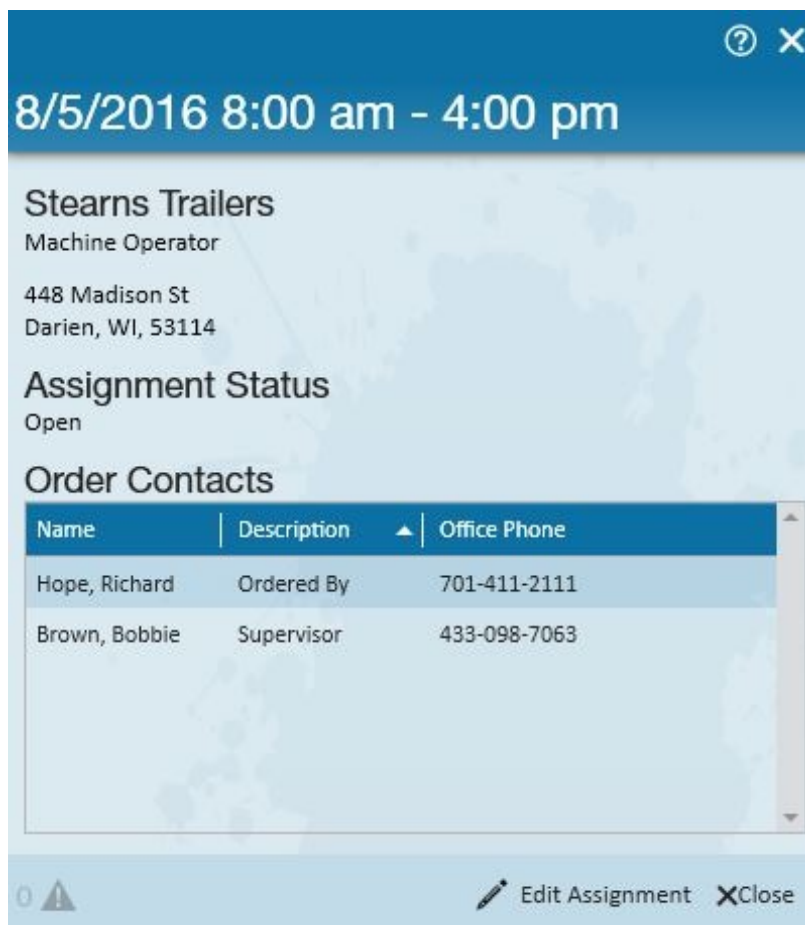
Sun Mon Tue Wed Thu Fri Sat

To Review Assignment Information

Hover over the assignment within the calendar to preview a quick popup list of basic information about the assignment:



Double-click the assignment to preview the details including job title, assignment status, order contacts, company and address information:



Selecting the edit assignment option allows for quick updates to the assignment without having to move away from the activity tracking screen:

? X

assignment details

assignment information		financial details	
Employee	PEACH, JIM	Multiplier	1.58 Iverson Tech
Aident	4295003914	Bill Rate	\$31.60
Customer	Stearns Trailers	Salary Bill	\$0.00
Department	Shipping	Unit Bill	\$0.00
Order ID	4295012473	Overtime Bill	\$47.40
Assignment ID	4301323503	Doubletime Bill	\$63.20
Burden		Company	High Tech Staffing
Temp Phone	() - -	EINC	0 <input checked="" type="checkbox"/> W2
Status	Open	Worker Comp Code	MN 8810
Replaces		Payroll Notes	
<input type="checkbox"/> Customer DNA <input type="checkbox"/> Employee DNA		PO Number	
job information		other information	
Job Title	Machine Operator	Sales Team	Default
Business Code		Assigned	4/14/2016 10:03:00 AM
Start Date	4/28/2016	Service Rep	Lindsey Schneider
Expected End Date		Entered By	lindsey.schneider
Original Start	7/1/2015	Referred by	
Actual Date Ended		<input type="checkbox"/> No Auto Close	
Shift		Branch	Memphis SE
Start Time	8:00 AM	Perf Note	
End Time	4:00 PM		
Shift Notes			
<input type="checkbox"/> Sun <input type="checkbox"/> Mon <input type="checkbox"/> Tue <input type="checkbox"/> Wed <input type="checkbox"/> Thu <input type="checkbox"/> Fri <input type="checkbox"/> Sat			

X Cancel Save

Managing Employee Availability

When an employee calls in to let you know they are available or you call them to find out they aren't, you can use the activity tracker to manage that information. If you are talking with an employee, we recommend you also log a message to keep track of the conversations you have. See [Tips for Message Logging](#) for more information.

Adding Availability Information

1. Double-click within the calendar area on any given date to open the availability section.
2. Choose between available, partially available, and unavailable and include any notes correlating to the availability status.

8/2/2016 availability

availability

Available

Partially Available

Unavailable

note

0 Cancel Save

3. If you choose partially available, select the + icon to indicate the start and end time related to the status.

8/3/2016 availability

availability

Available

Partially Available

Unavailable

available between

Start Time	End Time
10:00 AM	3:00 PM

note

Physical Therapy

Cancel Save

4. Optionally, enter any notes correlating to the status
5. Select Save

Adding a Reoccurring Availability

When an employee is always available or not available a certain day of the week or month, etc. you can set up recurring availability information. When setting up recurring availability, keep in mind that it will only affect items from the current day moving forward.

1. Within the activity tracker view select the actions menu and choose "+ New Recurring Availability"



2. This will open the edit recurrence window, enter the following information:

- Start and end date
- Recurrence information and days
- Availability status (available, partially available, or unavailable)

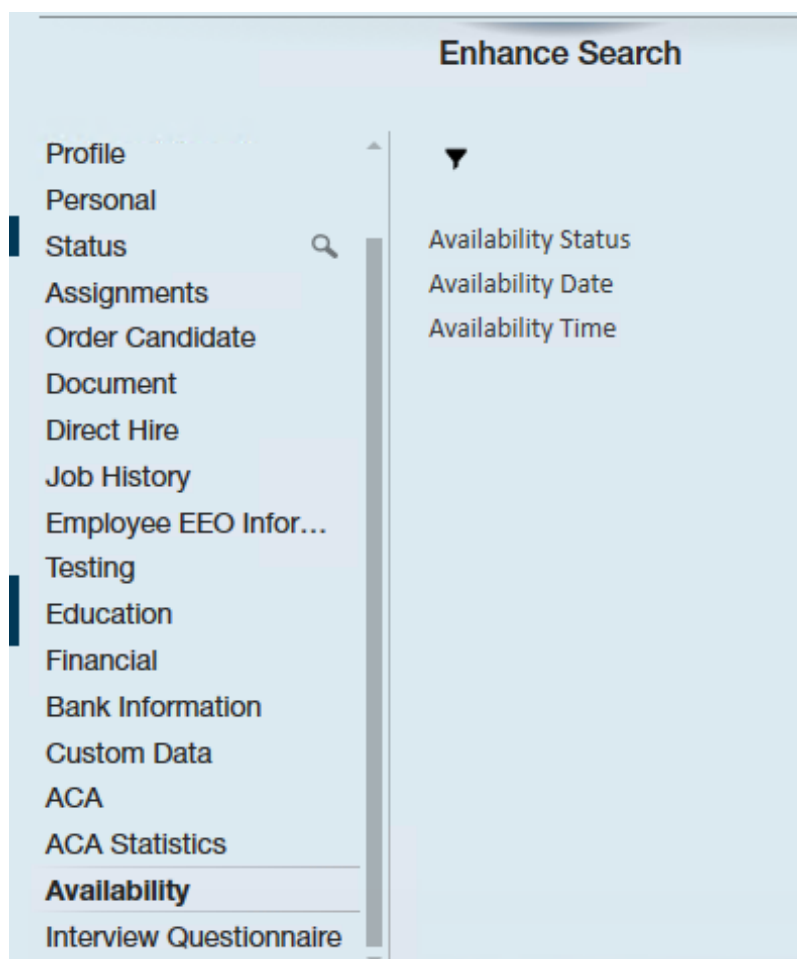
The image shows the "edit recurrence" window. The window has a blue header with a gear icon and the text "edit recurrence". Below the header is a section titled "recurrence rules" with a close button. The "recurrence rules" section contains the following fields: "Start Date" (8/5/2016), "End Date" (9/5/2016), "Recurs every" (1) week(s) on, and a row of checkboxes for days of the week: Sun, Mon, Tue, Wed, Thu, Fri, Sat. Below the "recurrence rules" section is a section titled "availability" with three radio button options: "Available" (represented by a green circle), "Partially Available" (represented by a circle split diagonally from top-left to bottom-right, with green on the top-left and red on the bottom-right), and "Unavailable" (represented by a red circle). Below the "availability" section is a "note" section with a large empty text area. At the bottom of the window are three buttons: a warning icon, "Cancel", and "Save".

3. Add any additional notes
4. Select Save

Note Recurrences start from the specific day indicated, not the start of the week. Therefore, if you setup a recurring availability to repeat Monday, Wednesday, Friday every two weeks and have it start on a Wednesday, the following Monday will be set as it is the first Monday of the recurrence.

Searching for Availability in Enterprise

Within the candidate enhanced search section, availability category, search based on the availability information created within the activity tracker area.



Note If searching for specific times, the search results will return employees who have partial time within that range or those who say they were available on that day.

Related Articles