PRACTICE CS

Staff Management WalkThrough

version 2014.x.x

TL 27718a (1/16/2015)

Contents

Introduction

This walkthrough introduces you to the Staff Management module of Practice CS. After you have completed the walkthrough, you will have a good understanding of how to set up staff management features, monitor and adjust staff workloads and schedules, and administer staff benefits.

Note: This walkthrough assumes you are familiar with using Practice CS or that you have read chapter 3, Program Overview, in the *Practice CS Getting Started* guide.

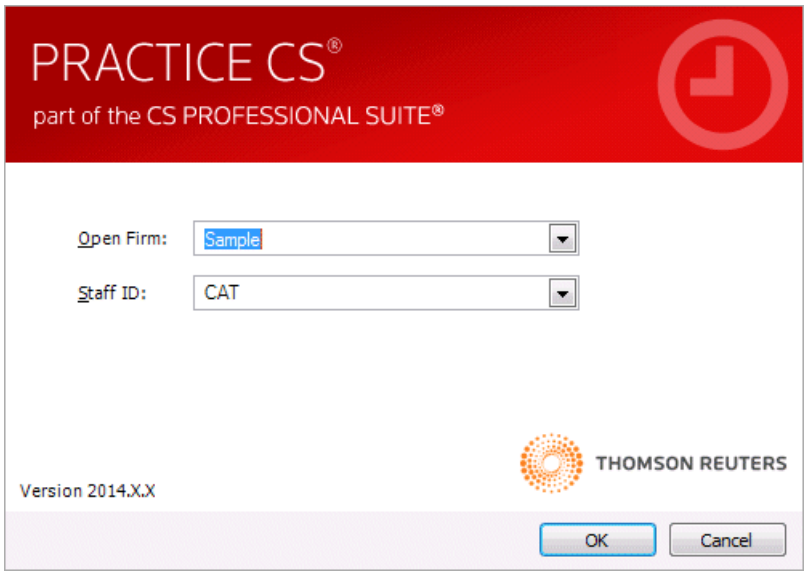
Opening the sample database

To perform the exercises in this walkthrough, you will start Practice CS and log in to the sample database as staff member CAT. To log in, follow these steps.

1. Start Practice CS.
2. On the Login dialog, select **Sample** in the *Open Firm* field.
3. In the *Staff ID* field, enter **CAT**.

   Note: If you previously marked the *Remember login information* checkbox, press and hold the SHIFT key as you double-click the Practice CS icon. Continue to hold the SHIFT key until the login dialog appears.

4. Click OK.



Backing up the sample database

Data that you enter while performing the exercises in this walkthrough will affect the sample database. Therefore, we recommend that you back up the sample database before you begin so that it is available for use in other Practice CS walkthroughs.

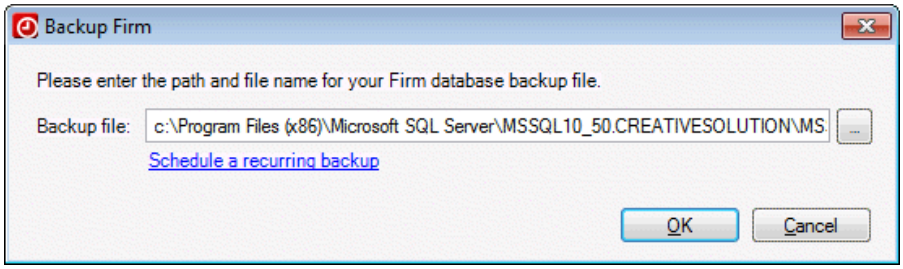
Note: If you are running Practice CS through Virtual Office CS,® the Backup menu command is not available. We recommend that you install Practice CS locally so that you can back up the sample database. For instructions on installing the program, please see chapter 2, Installation Instructions, in the *Practice CS Getting Started* guide.

To back up the sample database, follow these steps.

1. In Practice CS, choose File > Backup.

2. Click the button next to the *Backup file* field and if necessary, navigate to the folder where you want to save the backup file. The backup file will have a file extension of BDF.

Note: The backup file is created on the computer where the data resides. The path specified here must be a valid path on that computer.



3. Click OK.

4. When prompted that the backup is complete, click OK.

Note: After you complete this walkthrough, you can restore the sample database. For instructions, see “Restoring the sample database” on page 78.

Staff Management Overview

The Staff Management module of Practice CS provides numerous features to assist you in managing your firm's staff. **Target hours** enable you to set targets for each staff member's billable and total hours, which can be used to monitor staff performance. **Scheduling** features enable you to manage staff workloads by assigning work items according to predetermined qualifications and staff availability, and provide a work queue from which qualified staff members can choose items to work on. You can also use the Staff Management module to administer staff **benefits** such as holidays, vacations, and comp time.

For more information about using the screens, tabs, and dialogs described in this chapter, see the subsequent chapters of this walkthrough, or refer to the topic Staff Management overview in the Help & How-To Center.

The Manage Staff screen

Staff members with sufficient security privileges can use the Manage Staff screen to monitor the firm's workflow, view staff availability, assign work items, view benefit balances, and assess how staff members are progressing toward their targets. The screen is comprised of five tabs: **Assignments, Schedules**, **Schedule Items**, **Benefit**, and **Targets**.

Note: For these tabs to display relevant information, you must first perform the setup tasks for the Staff Management module. See the "Setting Up Staff Management" chapter of this walkthrough, which begins on page 17.

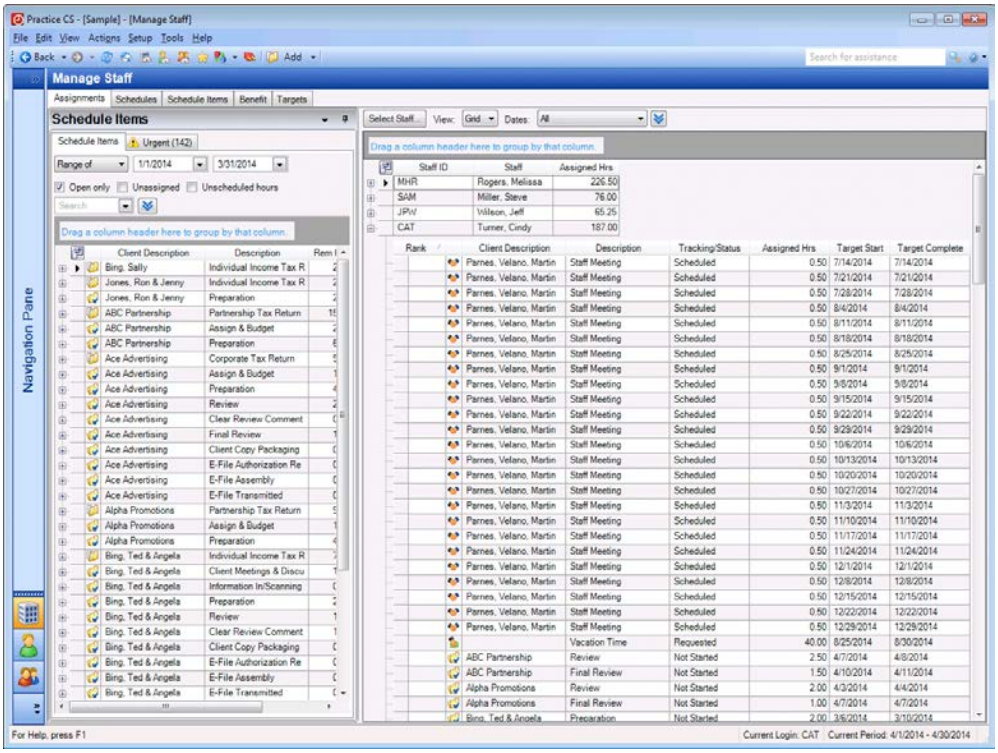
- To open the Manage Staff screen, choose Actions > Manage Staff.

Assignments tab

The Assignments tab is designed for managers to assign, order, and loosely schedule work for their staff. Depending on your workflow, your firm may need to use this tab for only some of these activities. It is important to identify first how your firm would like to schedule staff assignments, and then determine if using the Assignments tab is the best way to do it.

The Assignments tab can be useful when you want to do the following:

- See which schedule items are already assigned to staff members
- See a summary of assigned hours for each staff member and then drill down to see the actual schedule items
- Indicate in which order you want your staff to work on assigned schedule items
- Balance assignments across your staff
- See how many assigned hours each staff person has scheduled over a particular time frame



Schedules tab

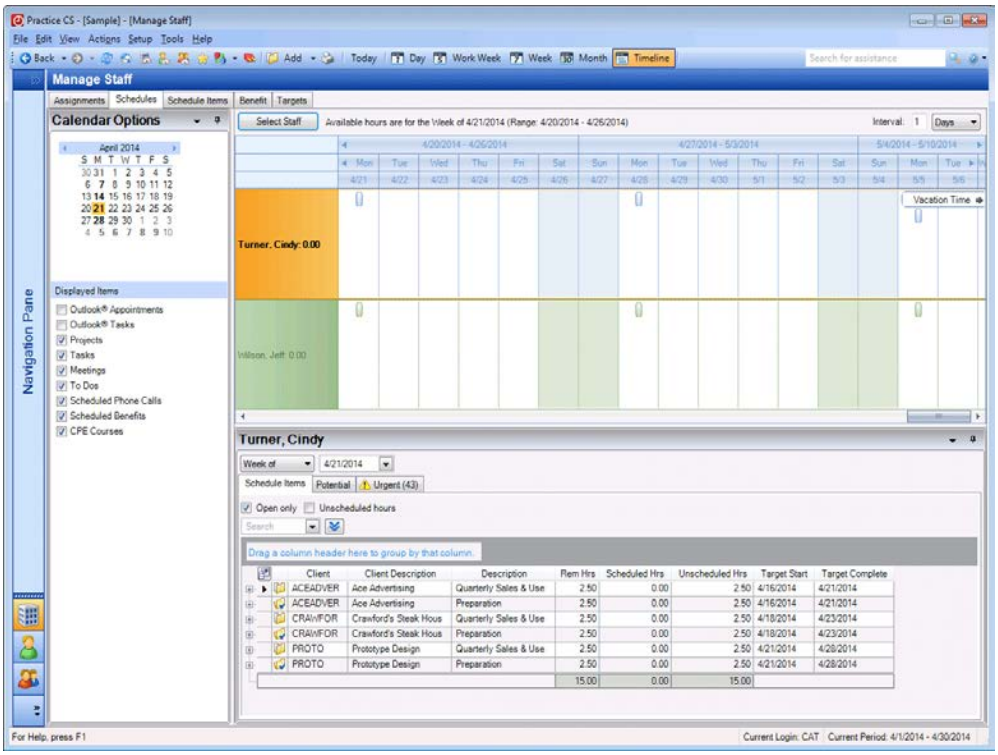
The Schedules tab provides a way to schedule items from a staff-based view. This view provides a way to view and schedule work that has already been assigned, potential work, and urgent items for the selected staff.

Use the Schedules tab when you would like to:

- Schedule a staff member's assignments
- Find more work that a staff member is qualified for
- See urgent items for a specific staff member
- Avoid overscheduling staff
- Reschedule work from one staff member to another

The staff calendar or timeline shows any schedule items for the selected staff and time interval. The staff items pane shows schedule items, potential items, and items marked as urgent. The calendar options pane allows you to select which schedule items to display.

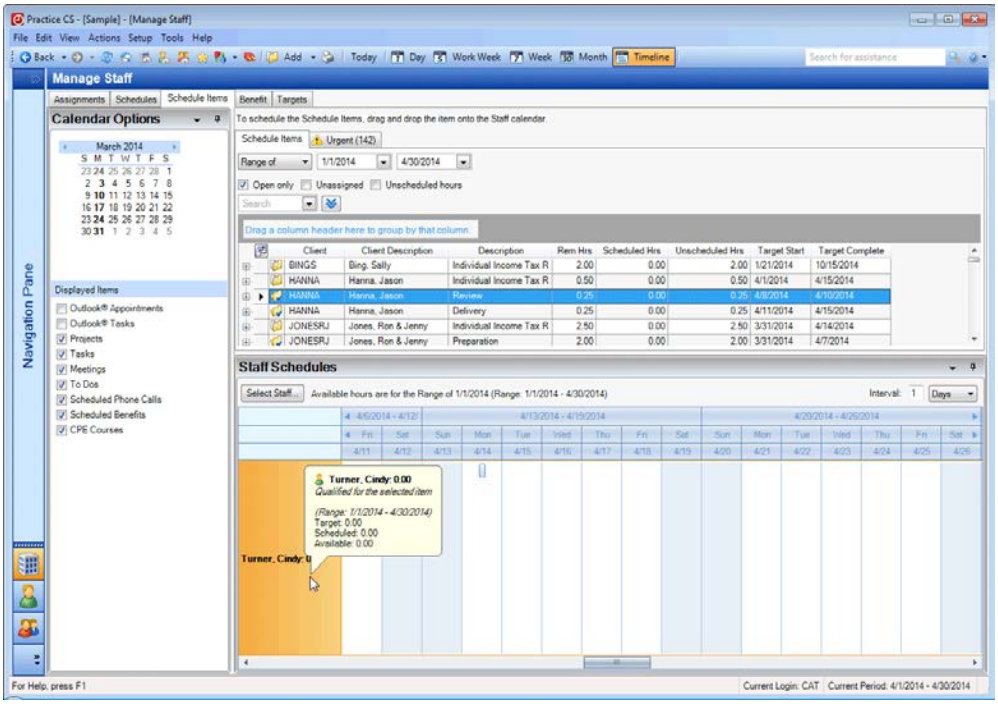
You can open a schedule item by double-clicking it.



Schedule Items tab

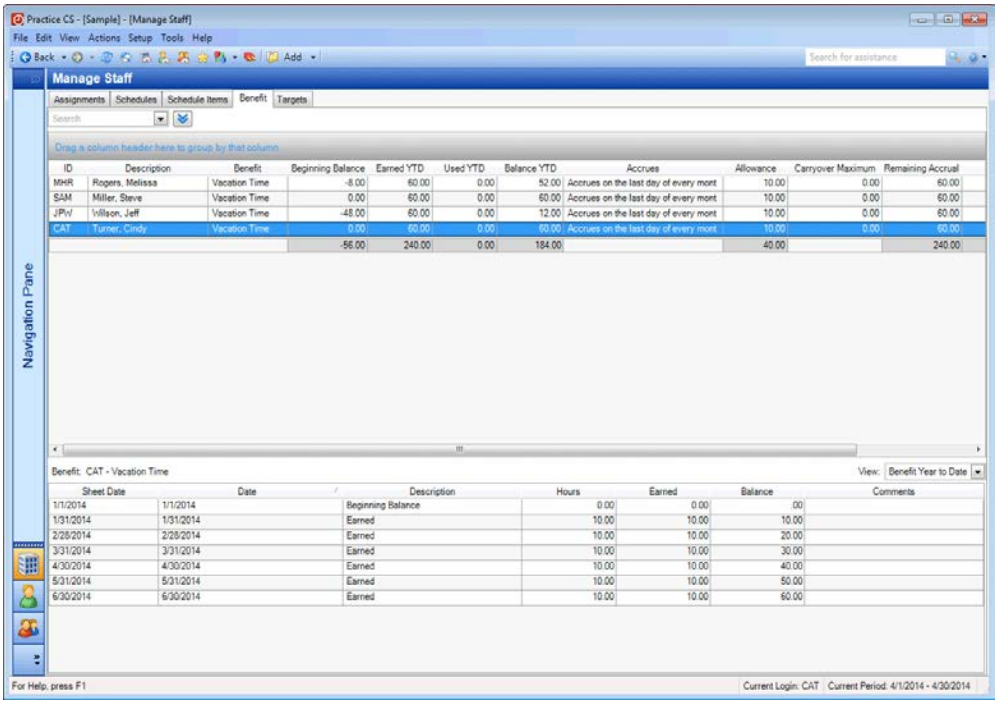
The Schedule Items tab helps you to look for schedule items that are unassigned, not fully scheduled, or flagged as Urgent. You can then assign the items to staff based on their availability and qualifications. Hold your mouse pointer over a staff member's name for an Infotip that shows whether they are qualified to work on a selected item.

You can open schedule items on this tab by double-clicking them.



Benefit tab

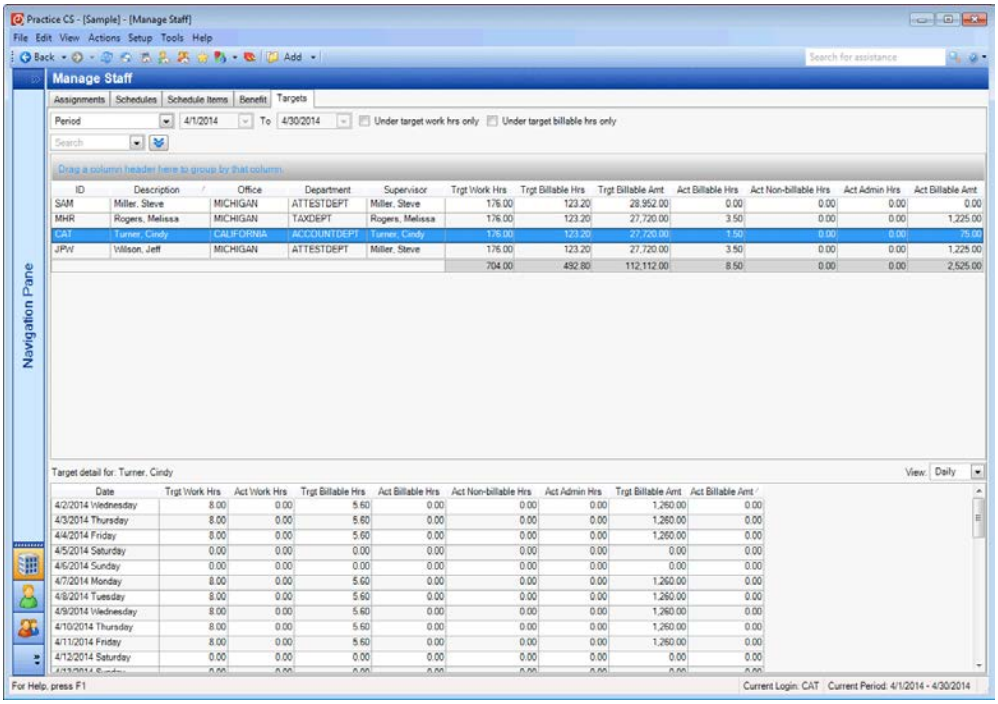
The Benefit tab enables you to view benefit balances for your staff. When you select an item in the top pane, details of the benefit's accrual and usage are displayed in the bottom pane.



You can filter the list of staff and choose to view details for all entries, the current benefit year, or the benefit year to date.

Targets tab

The Targets tab enables you to monitor your staff's progress toward the targets set for them. Select a staff member in the top pane to see target details in the bottom pane.



You can choose a time period, filter the staff list, and limit the display to staff who are under their target work or billable hours. You can also control the level of detail displayed in the bottom pane.

Other screens and portlets

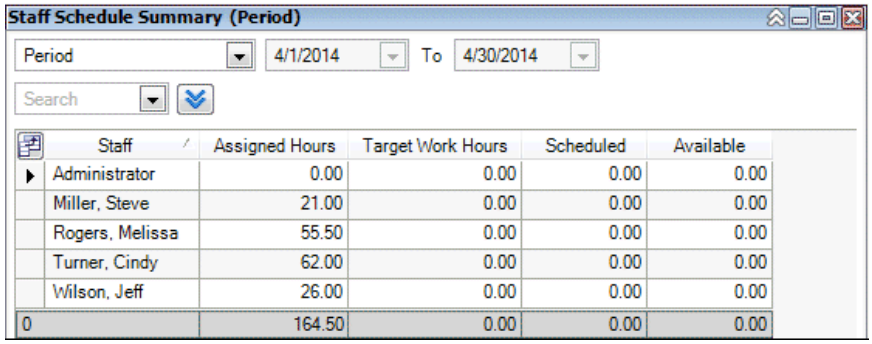
Firm Dashboard

The Firm Dashboard features two portlets with Staff Management-related information.

1. Click the Firm Dashboard button  in the toolbar.
2. In the Firm Dashboard, click the Staff Summary view.

Staff Schedule Summary portlet

This portlet provides an overview of staff target work hours, assigned hours, and available hours.



Staff Schedule Summary (Period)

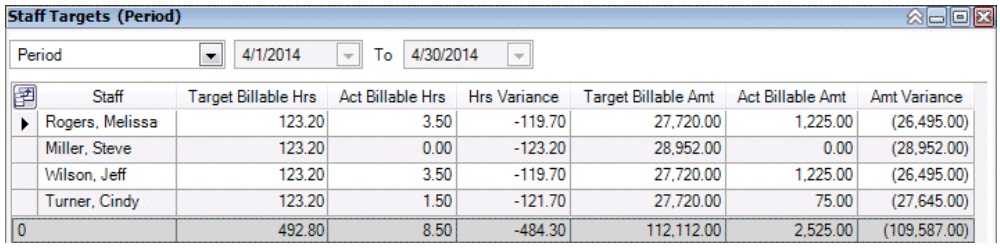
Period 4/1/2014 To 4/30/2014

Search

Staff	Assigned Hours	Target Work Hours	Scheduled	Available
Administrator	0.00	0.00	0.00	0.00
Miller, Steve	21.00	0.00	0.00	0.00
Rogers, Melissa	55.50	0.00	0.00	0.00
Turner, Cindy	62.00	0.00	0.00	0.00
Wilson, Jeff	26.00	0.00	0.00	0.00
0	164.50	0.00	0.00	0.00

Staff Targets portlet

This portlet provides a way to compare staff members' billable hours with their target hours.



Staff Targets (Period)

Period 4/1/2014 To 4/30/2014

Staff	Target Billable Hrs	Act Billable Hrs	Hrs Variance	Target Billable Amt	Act Billable Amt	Amt Variance
Rogers, Melissa	123.20	3.50	-119.70	27,720.00	1,225.00	(26,495.00)
Miller, Steve	123.20	0.00	-123.20	28,952.00	0.00	(28,952.00)
Wilson, Jeff	123.20	3.50	-119.70	27,720.00	1,225.00	(26,495.00)
Turner, Cindy	123.20	1.50	-121.70	27,720.00	75.00	(27,645.00)
0	492.80	8.50	-484.30	112,112.00	2,525.00	(109,587.00)

Staff Dashboard

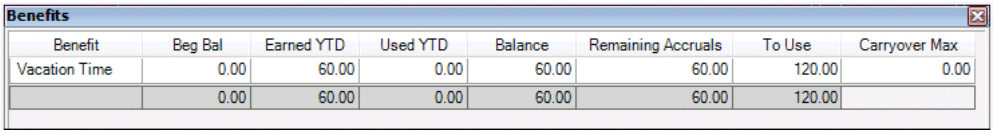
The Staff Dashboard features several portlets related to Staff Management.

- Click the Staff Dashboard button in the toolbar.

Benefits portlet

1. In the Staff Dashboard, click the Benefits view.
2. If necessary, right-click, choose Select Portlets, and then mark the *Benefits* checkbox.

This portlet allows staff to view their benefit balances, including hours earned, used, and remaining.



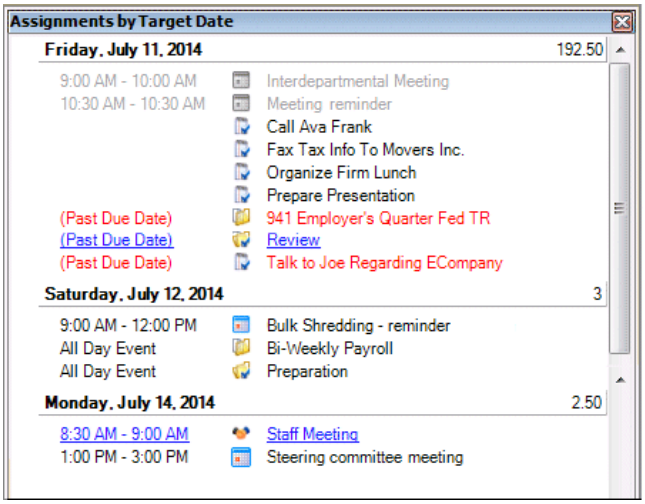
Benefits

Benefit	Beg Bal	Earned YTD	Used YTD	Balance	Remaining Accruals	To Use	Carryover Max
Vacation Time	0.00	60.00	0.00	60.00	60.00	120.00	0.00
	0.00	60.00	0.00	60.00	60.00	120.00	

Assignments by Target Date portlet

- Click the Schedule tab.

The Assignments by Target Date portlet displays the current staff member's schedule in a day format, and includes work items.

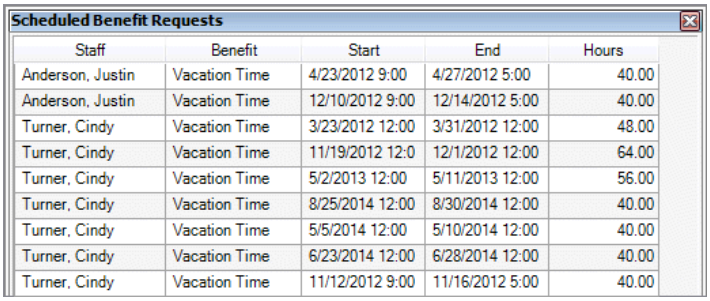


Note: To change the number of days displayed in this portlet, right-click within the portlet and choose Options from the context menu.

Scheduled Benefit Requests portlet

- Right-click, choose Select Portlets, and then mark the *Scheduled Benefit Requests* checkbox.

This portlet displays for supervisors any pending benefit requests submitted by staff for approval, and enables a supervisor to approve or deny requests.

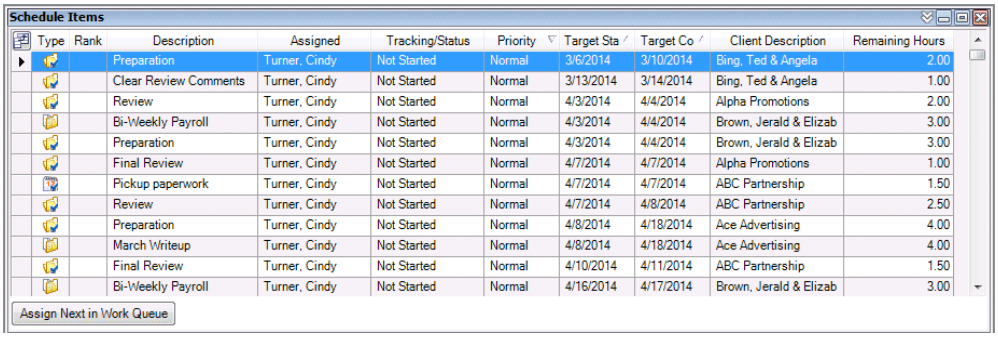


Scheduled Benefit Requests

Staff	Benefit	Start	End	Hours
Anderson, Justin	Vacation Time	4/23/2012 9:00	4/27/2012 5:00	40.00
Anderson, Justin	Vacation Time	12/10/2012 9:00	12/14/2012 5:00	40.00
Turner, Cindy	Vacation Time	3/23/2012 12:00	3/31/2012 12:00	48.00
Turner, Cindy	Vacation Time	11/19/2012 12:0	12/1/2012 12:00	64.00
Turner, Cindy	Vacation Time	5/2/2013 12:00	5/11/2013 12:00	56.00
Turner, Cindy	Vacation Time	8/25/2014 12:00	8/30/2014 12:00	40.00
Turner, Cindy	Vacation Time	5/5/2014 12:00	5/10/2014 12:00	40.00
Turner, Cindy	Vacation Time	6/23/2014 12:00	6/28/2014 12:00	40.00
Turner, Cindy	Vacation Time	11/12/2012 9:00	11/16/2012 5:00	40.00

Schedule Items portlet

This portlet displays all of the schedule items assigned to the current staff member, and provides a button for assigning to the staff member the next available item from the work queue.



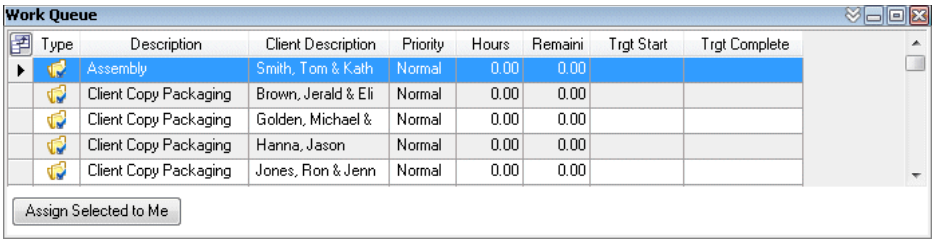
Schedule Items

Type	Rank	Description	Assigned	Tracking/Status	Priority	Target Sta	Target Co	Client Description	Remaining Hours
		Preparation	Turner, Cindy	Not Started	Normal	3/6/2014	3/10/2014	Bing, Ted & Angela	2.00
		Clear Review Comments	Turner, Cindy	Not Started	Normal	3/13/2014	3/14/2014	Bing, Ted & Angela	1.00
		Review	Turner, Cindy	Not Started	Normal	4/3/2014	4/4/2014	Alpha Promotions	2.00
		Bi-Weekly Payroll	Turner, Cindy	Not Started	Normal	4/3/2014	4/4/2014	Brown, Jerald & Elizab	3.00
		Preparation	Turner, Cindy	Not Started	Normal	4/3/2014	4/4/2014	Brown, Jerald & Elizab	3.00
		Final Review	Turner, Cindy	Not Started	Normal	4/7/2014	4/7/2014	Alpha Promotions	1.00
		Pickup paperwork	Turner, Cindy	Not Started	Normal	4/7/2014	4/7/2014	ABC Partnership	1.50
		Review	Turner, Cindy	Not Started	Normal	4/7/2014	4/8/2014	ABC Partnership	2.50
		Preparation	Turner, Cindy	Not Started	Normal	4/8/2014	4/18/2014	Ace Advertising	4.00
		March Writeup	Turner, Cindy	Not Started	Normal	4/8/2014	4/18/2014	Ace Advertising	4.00
		Final Review	Turner, Cindy	Not Started	Normal	4/10/2014	4/11/2014	ABC Partnership	1.50
		Bi-Weekly Payroll	Turner, Cindy	Not Started	Normal	4/16/2014	4/17/2014	Brown, Jerald & Elizab	3.00

Assign Next in Work Queue

Work Queue portlet

This portlet displays all scheduled items assigned to the work queue for which the current staff member is qualified, and enables the staff member to accept assignment of a selected item.



Type	Description	Client Description	Priority	Hours	Remaini	Trgt Start	Trgt Complete
	Assembly	Smith, Tom & Kath	Normal	0.00	0.00		
	Client Copy Packaging	Brown, Jerald & Eli	Normal	0.00	0.00		
	Client Copy Packaging	Golden, Michael &	Normal	0.00	0.00		
	Client Copy Packaging	Hanna, Jason	Normal	0.00	0.00		
	Client Copy Packaging	Jones, Ron & Jenn	Normal	0.00	0.00		

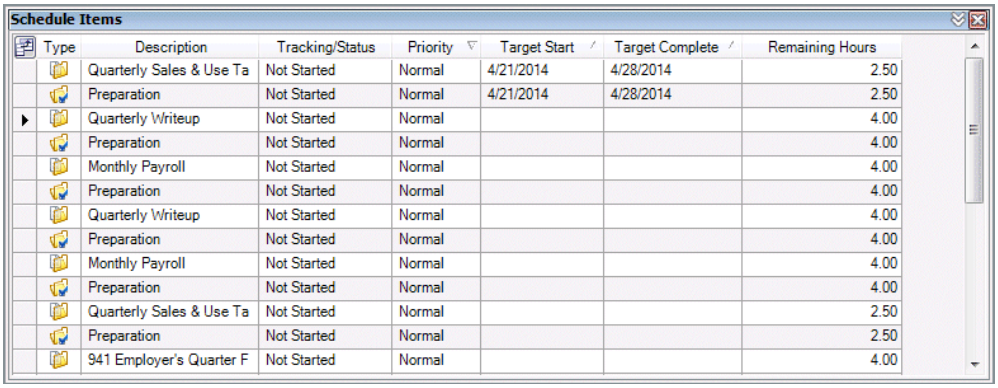
Client Dashboard

The Client Dashboard features one Staff Management-related portlet.

1. Click the Client Dashboard button in the toolbar.
2. Right-click, choose Select Portlets, and then mark the *Schedule Items* checkbox.

Schedule Items portlet

This portlet displays all of the schedule items for the currently selected client.



Type	Description	Tracking/Status	Priority	Target Start	Target Complete	Remaining Hours
	Quarterly Sales & Use Ta	Not Started	Normal	4/21/2014	4/28/2014	2.50
	Preparation	Not Started	Normal	4/21/2014	4/28/2014	2.50
	Quarterly Writeup	Not Started	Normal			4.00
	Preparation	Not Started	Normal			4.00
	Monthly Payroll	Not Started	Normal			4.00
	Preparation	Not Started	Normal			4.00
	Quarterly Writeup	Not Started	Normal			4.00
	Preparation	Not Started	Normal			4.00
	Monthly Payroll	Not Started	Normal			4.00
	Preparation	Not Started	Normal			4.00
	Quarterly Sales & Use Ta	Not Started	Normal			2.50
	Preparation	Not Started	Normal			2.50
	941 Employer's Quarter F	Not Started	Normal			4.00

Time & Expense Entry screen

In the Time & Expense Entry screen, you can enter both comp time and CPE information during time entry.

Comp time

If your firm has activated the tracking of comp time, a Comp Time button appears on the Time & Expense Entry screen. The Comp Time button opens the Comp Time Detail dialog, where staff can make comp time entries.

Note: For information on activating comp time, see “Setting up comp time” on page 18.

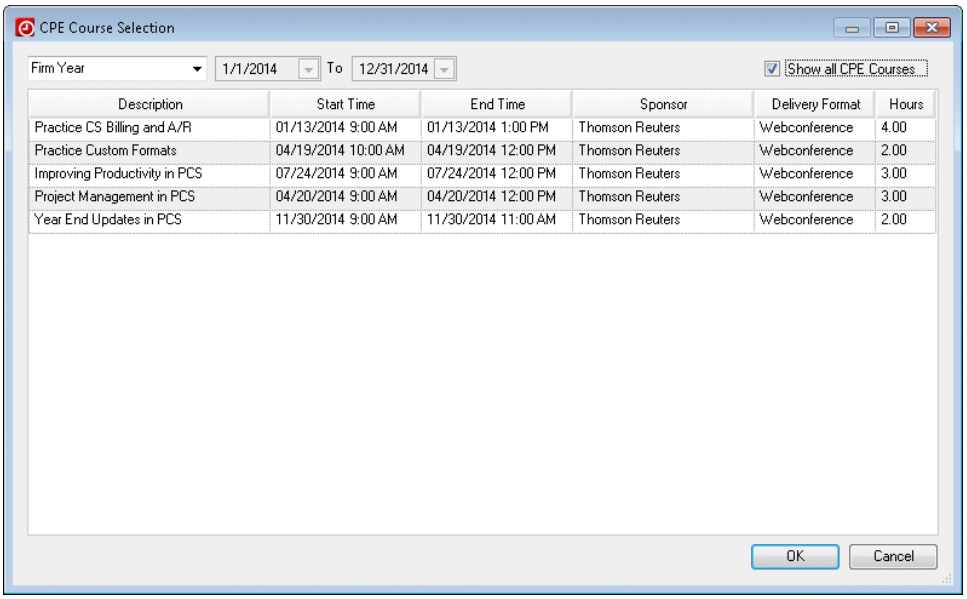
In the Comp Time Detail dialog, you can enter earned comp time as earned, used, or a manual adjustment.

Enter time as earned if you worked more than your allotted time for the day and want to add to your bank of comp time. Enter time as used if you worked less than

your allotted time for the day and want to use comp time to make up for the unworked hours. Use manual adjustments to record previously earned or used comp time.

CPE

If you enter time using a CPE administrative activity, you can click the button in the column to add or select a CPE course using the CPE Course Selection dialog.

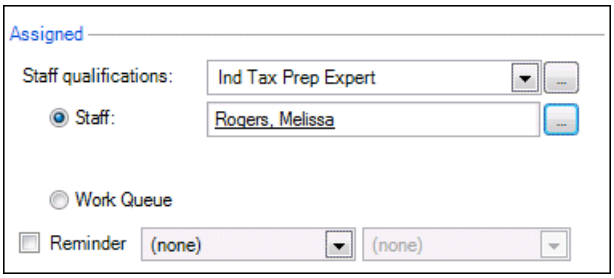


Manage Projects screen

If your firm is also licensed for the Project Management module, you can open projects or tasks from the Manage Projects screen and update assignments on projects and tasks according to staff qualifications.

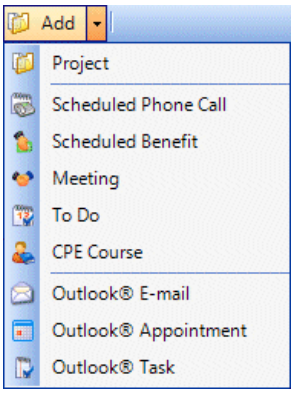
- To open the Manage Projects screen, choose Actions > Manage Projects.

Double-click a project or task and use the fields and options in the Assigned section to update assignments.



Add button

The Add button on the main Practice CS toolbar provides access to various schedule items that are related to the Staff Management module, including scheduled benefits, scheduled phone calls, meetings, and to-do items. Click the down arrow on the right side of the button to open a drop-down menu of commands.



Note: The icon on the Add button reflects the last item that was added using the button. If you click the main part of the button instead of the down arrow, another instance of the previous item is added.

Setting Up Staff Management

Before you can begin using the features of the Staff Management module, you must first perform several setup tasks to prepare Practice CS to track the relevant data. This chapter will familiarize you with these tasks.

Setting up firm options

If you plan to use the Staff Management module to track staff benefits such as vacation and comp time, you should perform the following setup tasks.

Defining the firm's benefit year

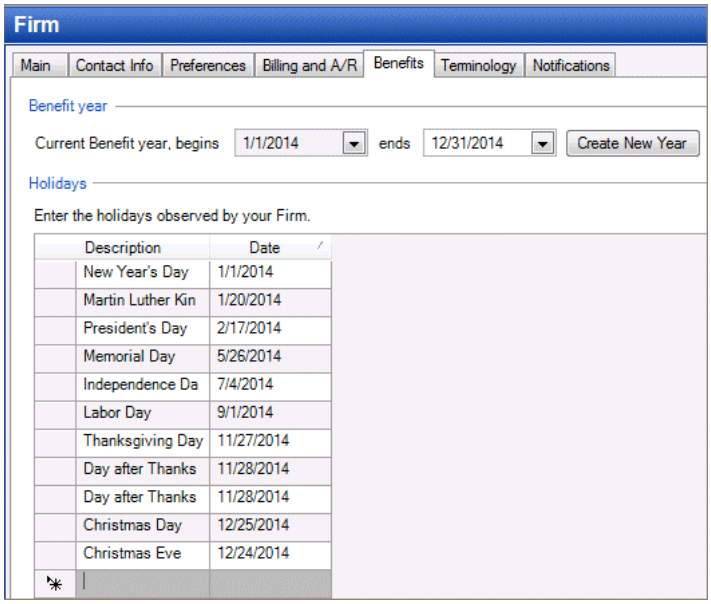
1. Choose Setup > Firm to open the Firm setup screen.
2. Click the Benefits tab.
3. If your firm tracks benefits over the course of a year that ends on a date other than December 31, enter the appropriate ending date in the field provided. Practice CS updates the beginning date accordingly. For this walkthrough, leave the default date.

Note: If the benefit year has concluded and your staff have entered all of their time for that year, you can click the Create New Year button to roll to the next year.

Setting up holidays

1. Choose Setup > Firm and click the Benefits tab.

2. In the blank row at the bottom of the Holidays section, enter **Christmas Eve** in the *Description* field and **12/24** of the current year in the *Date* field.

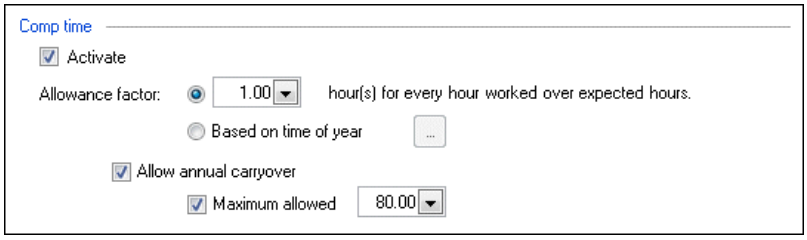


3. Click Enter to save your changes.

Setting up comp time

If your firm wants to track comp time in Practice CS, you must activate that benefit on the Firm setup screen.

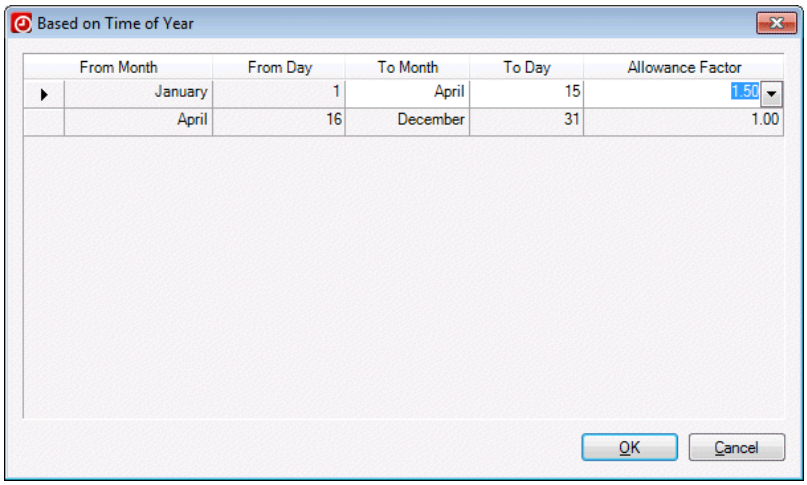
1. Choose Setup > Firm and click the Benefits tab.
2. In the Comp time section, mark the *Activate* checkbox. The checkbox is already marked in the sample database.



3. For this exercise, you will change the comp time allowance to be based on the time of year. Click the *Based on time of year* option and then click the ... button.

4. In the first row, change the values in the *To Month* and *To Day* fields to **April** and **15**, respectively.

5. In the *Allowance Factor* field, enter **1.50**. From January 1 to April 15, staff members will earn 1.50 hours of comp time for every hour worked over their expected hours.



6. Notice that Practice CS creates a new row to fill out the remainder of the year, using an allowance factor of 1.00. Click OK to save your changes and close the dialog.

7. If your firm allows comp time to carry over from one year to the next, mark the *Allow annual carryover* checkbox. For this walkthrough, leave the checkbox marked.

8. If your firm sets a maximum allowable carryover of comp time, mark the *Maximum allowed* checkbox and indicate the maximum number of comp time hours that can be carried over in the field provided. For this walkthrough, leave the default selection.

9. Click Enter to save your changes.

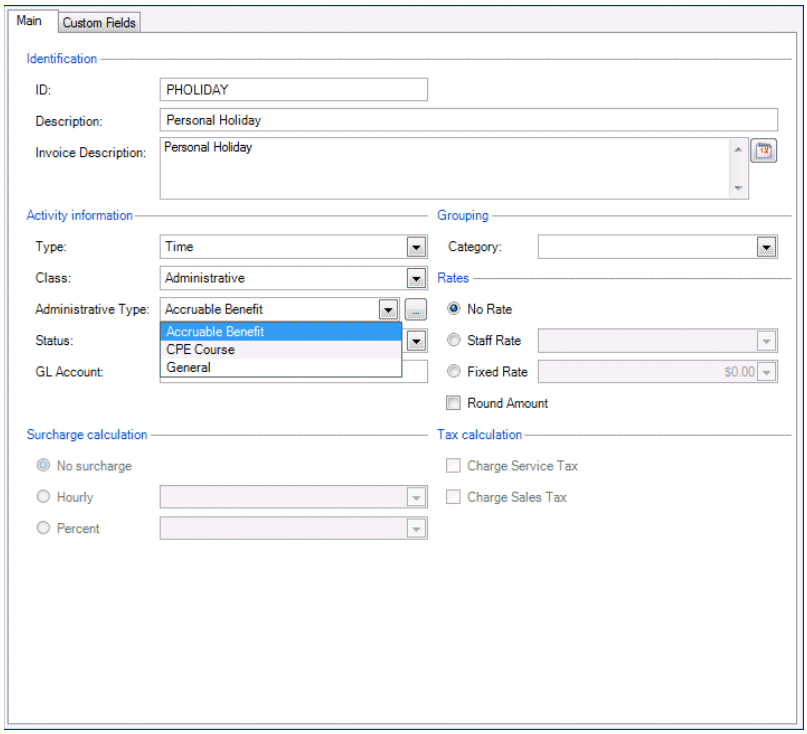
Setting up accruable benefits

To track accruable benefits such as vacation and sick time in Practice CS, you must set up activities for your employees to use during time entry. To set up an accruable benefit activity, follow these steps.

1. Choose Setup > Activities to open the Activities setup screen.

2. Click the Add button.

3. Enter information for the new activity to match the example below.

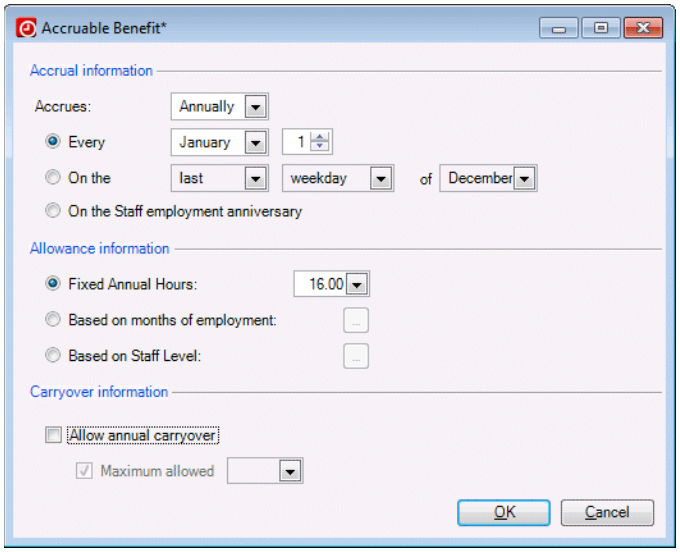


4. Click the button next to the *Administrative type* field.

5. In the Accruable Benefit dialog, indicate that the benefit accrues annually on January 1.

6. Click the *Fixed Hours* option and enter **16.00** for the hours.

7. Unmark the *Allow annual carryover* checkbox, and click OK.



8. Back on the Activities setup screen, choose **Administrative Time** in the *Category* field, and click Enter to save your changes.

Setting up staff skill sets

Skill sets indicate your staff members' proficiency at the various tasks performed by your firm. You can use skill sets to assign work items to qualified staff, either directly or through the work queue. To set up skill sets, you must first define skill areas and skill ratings.

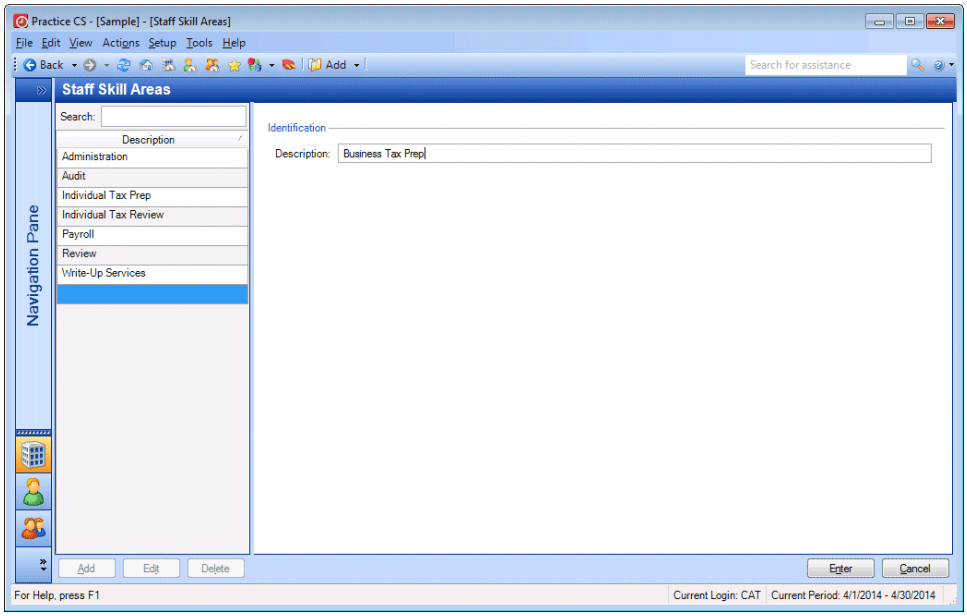
Setting up skill areas

Define skill areas to identify the types of work your firm performs, such as Individual Tax, Corporate Tax, and so on. To set up skill areas, follow these steps.

1. Choose Setup > Staff Skill Areas.

   Note: Several skill areas are already defined in the sample database.

2. Click the Add button to enter a new item.
3. In the *Description* field, enter **Business Tax Prep**.



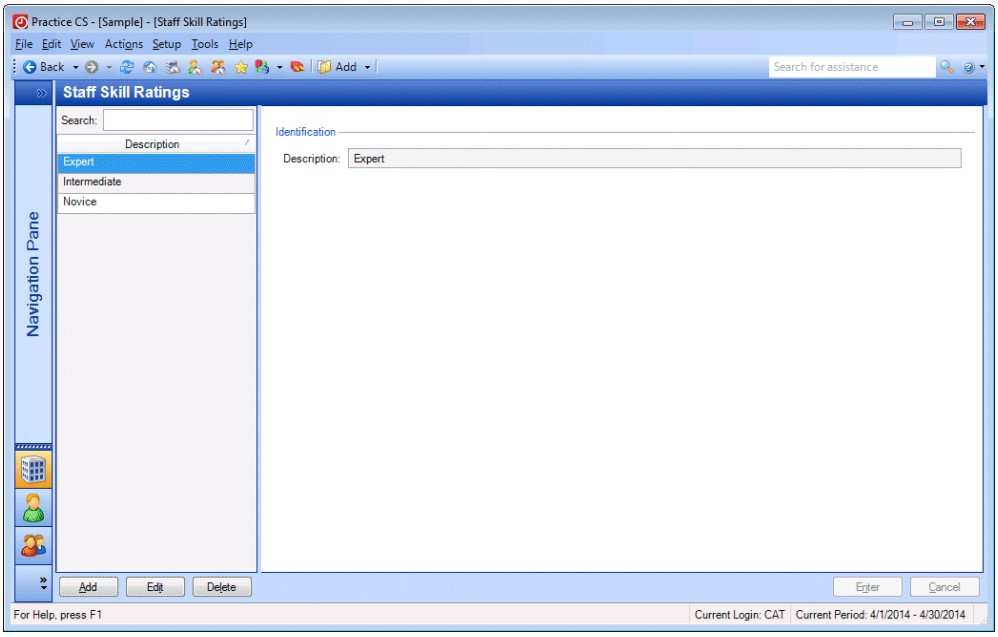
4. Click Enter to save the new skill area.
5. Repeat these steps to create a skill area named **Business Tax Review**.

Setting up skill ratings

Define skill ratings to describe various levels of expertise that your staff possess for the work performed by your firm. Some examples are Novice, Average, and Expert. To set up skill ratings, follow these steps.

- Choose Setup > Staff Skill Ratings.

The sample database already has the ratings we will need for this walkthrough. The process for adding new skill ratings is similar to the process for adding new skill areas.



Setting up qualifications filters

Once skill sets have been entered for your staff, you can use them to create qualifications filters for use when assigning work items.

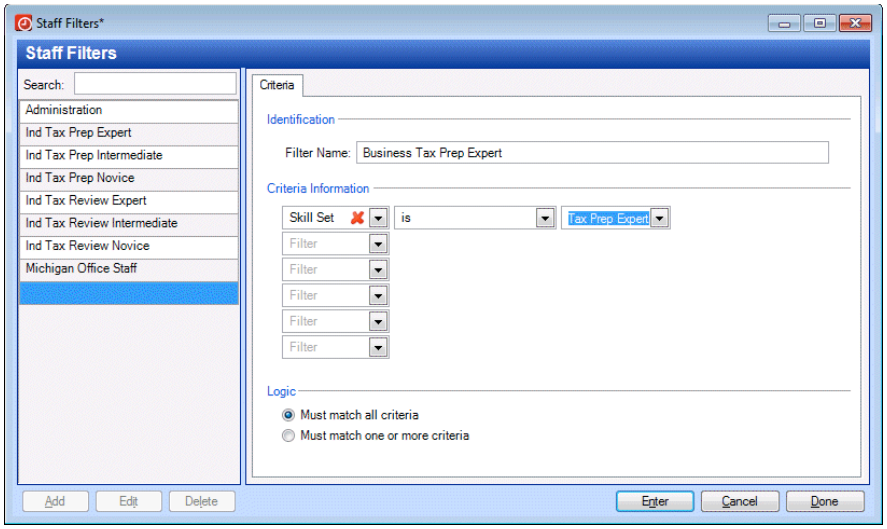
Qualifications filters are staff-based filters, and must be set up from a related screen, such as the Staff setup screen. You can also set them up while working on any screen or dialog where you choose qualifications for work items.

Adding new filters

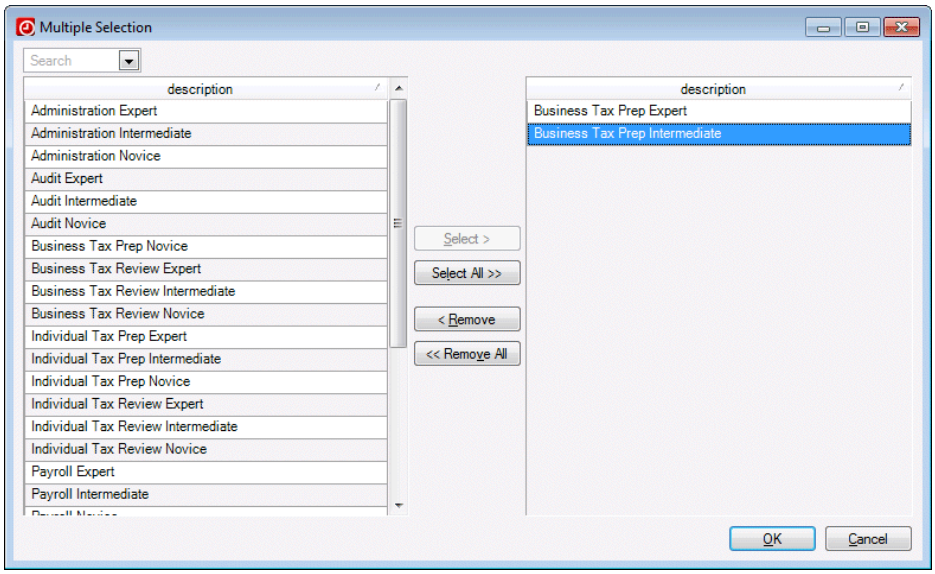
1. Choose Setup > Staff to open the Staff setup screen.
2. Click the button to show the *Filter* field.
3. Click the button next to the *Filter* field to add a new filter.
4. In the Staff Filters dialog, click the Add button.
5. In the *Filter Name* field, enter **Business Tax Prep Expert**.
6. In the top *Filter by* field, select **Skill Set**.
7. In the *Method* field, select **is**.

8. In the *Selected* field choose **Business Tax Prep Expert**.

Note: For filters that contain only one criterion, you can choose either of the options in the Logic section.



9. Click Enter to save the new filter.
10. Click the Add button to add another filter, and enter **Business Tax Prep Intermediate** in the *Filter Name* field.
11. In the top *Filter by* field, select **Skill Set**.
12. In the *Method* field, choose **is in the list**.
13. Click the ... button next to the *Selected* field.
14. In the Multiple Selection dialog, highlight **Business Tax Prep Expert** and then click the Select button.
15. Highlight **Business Tax Prep Intermediate** and click the Select button.



16. Click OK.
17. Click the **Must match one or more criteria** option.
18. Click Enter to save the new filter.
19. Click Done.

Modifying existing filters
The existing Individual Tax filters need to be fixed so that all staff can work on novice-level tasks. Using the set of filters you just created as a model, fix the Ind Tax Prep filters and the Ind Tax Review filters.

1. For both Novice filters, add the Expert and Intermediate skill sets.
2. Click Done when you are finished modifying the individual tax filters.

Setting up staff

To take full advantage of the features of the Staff Management module, you need to add staff management information to your firm's staff records in Practice CS. In this section, you will activate benefits for a staff member, then set up skill set information and target hours.

Activating benefits

After you create accruable benefit activities for your firm to track, you must activate them for staff members.

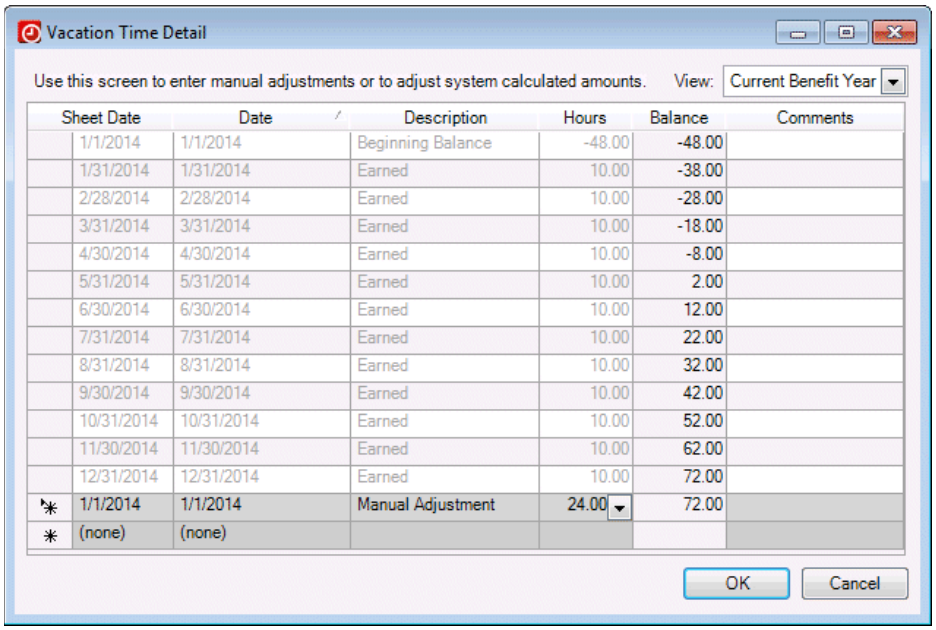
1. If the Staff setup screen is not already open, choose Setup > Staff.
2. Select staff member JPW from the list of staff and click the Edit button.
3. Click the Benefits tab and mark all of the checkboxes in the Active column.
4. In the Effective Date column, change all dates to January 1 of the current year.
5. Click Enter to save your changes.

Adjusting benefit balances

You may need to enter existing balances for staff benefits when you first implement the Staff Management module. You can do this during setup. For this exercise, you will adjust the vacation balance of staff member JPW.

1. With staff member JPW still selected on the setup screen, click the Edit button.
2. Click the button at the end of the Vacation Time row.
3. In the Vacation Time Detail dialog, choose **Current Benefit Year** from the **View** drop-down list.
4. Place your cursor in the bottom row of the grid and choose **01/01** of the current year for both the *Sheet Date* and *Date* fields. This will backdate the adjusted vacation balance to January 1 to reflect vacation that was carried over from the previous year.

5. Enter **24.00** in the *Hours* field.



Sheet Date	Date	Description	Hours	Balance	Comments
1/1/2014	1/1/2014	Beginning Balance	-48.00	-48.00	
1/31/2014	1/31/2014	Earned	10.00	-38.00	
2/28/2014	2/28/2014	Earned	10.00	-28.00	
3/31/2014	3/31/2014	Earned	10.00	-18.00	
4/30/2014	4/30/2014	Earned	10.00	-8.00	
5/31/2014	5/31/2014	Earned	10.00	2.00	
6/30/2014	6/30/2014	Earned	10.00	12.00	
7/31/2014	7/31/2014	Earned	10.00	22.00	
8/31/2014	8/31/2014	Earned	10.00	32.00	
9/30/2014	9/30/2014	Earned	10.00	42.00	
10/31/2014	10/31/2014	Earned	10.00	52.00	
11/30/2014	11/30/2014	Earned	10.00	62.00	
12/31/2014	12/31/2014	Earned	10.00	72.00	
1/1/2014	1/1/2014	Manual Adjustment	24.00	72.00	
(none)	(none)				

6. Click OK.

7. The adjusted amount will be reflected on the Staff setup screen. Click Enter to save your changes.

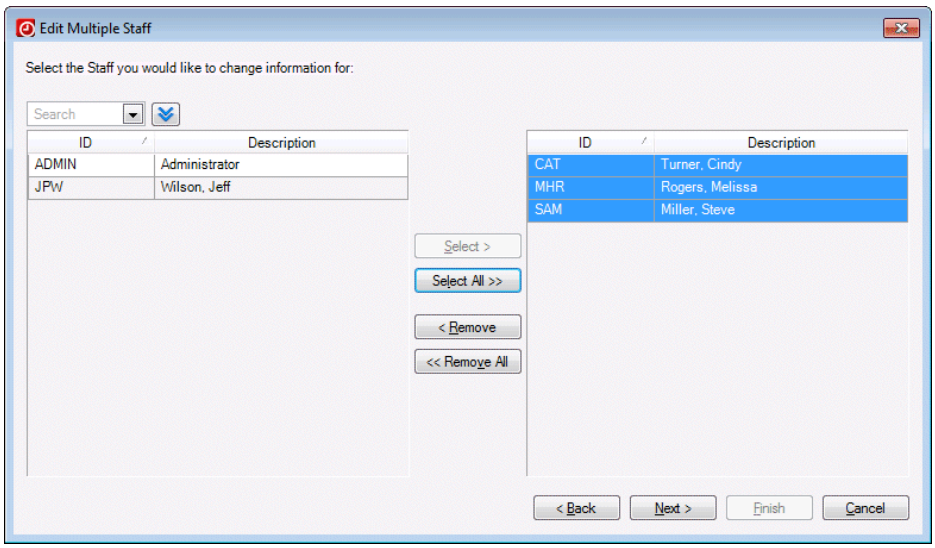
Modifying benefits for multiple staff

Practice CS provides the ability to edit multiple staff records at once. You will now use this feature to activate the personal holiday benefit for other staff members.

1. Click the **Edit multiple Staff** link at the bottom of the Staff setup screen.

2. In the Edit Multiple Staff dialog, click the *Change Staff Benefits* option and then click Next.

3. Select staff members CAT, MHR, and SAM, and then click the Select button to move them to the right pane. (Press and hold the CTRL key to make multiple selections.)



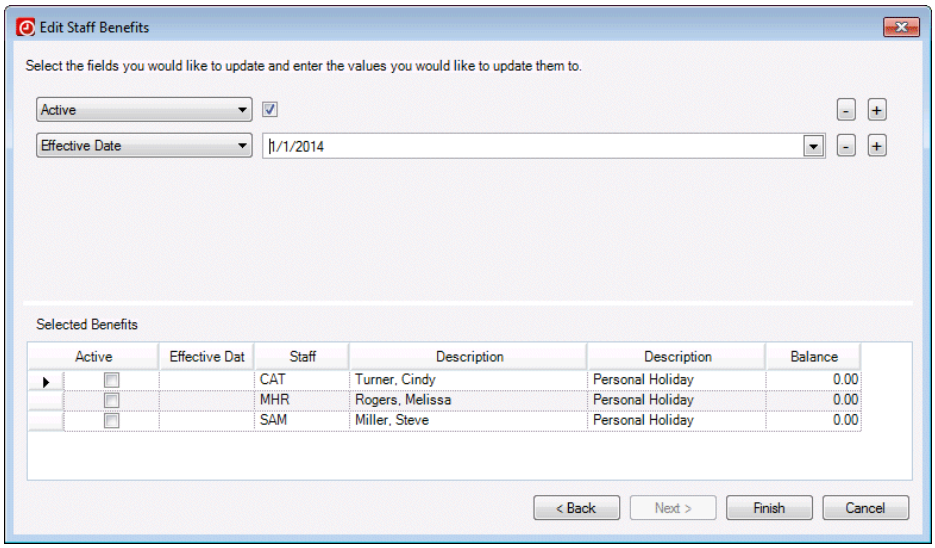
4. Click Next.

5. Select Personal Holiday from the list and click the Select button. Then click Next.

6. Select **Active** in the field at the top of the Edit Staff Benefits dialog, and then mark the accompanying checkbox.

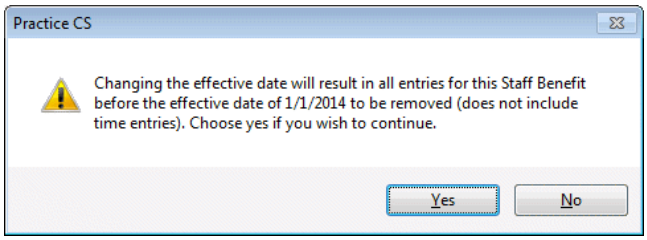
7. Click the + button to add a new row.

8. In the next row, select **Effective Date** in the first field and enter **January 1** of the current year in the second field, as in the following example.



9. Click Finish, and then click Yes to confirm.

10. If you are prompted about changing the effective date, click Yes.

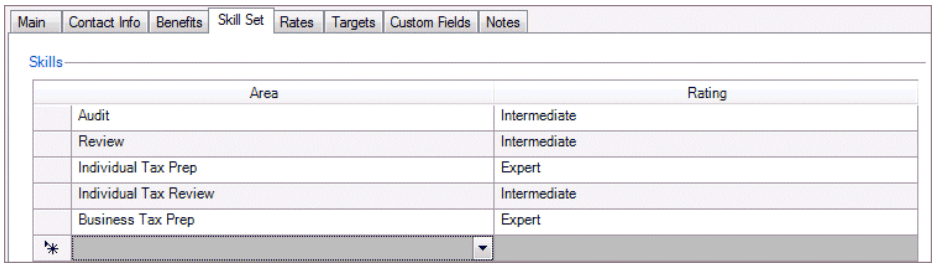


The personal holiday benefit is now activated for all staff members with an effective date of January 1.

Adding skill sets to staff records

Once you have defined skill areas and ratings, you can define skill sets for your staff.

1. With staff member JPW selected on the Staff setup screen, click the Edit button.
2. Click the Skill Set tab.
3. In the first blank field in the Area column, select **Business Tax Prep** from the drop-down list.
4. In the Rating column, select **Expert** from the drop-down list.



5. Finish the staff skill set for JPW by entering the information from the following table.

Area	Rating
Business Tax Review	Expert
Payroll	Intermediate
Write-Up Services	Intermediate

Tip: You can type the first few letters of an area or rating to speed up data entry.

6. Click Enter to save your changes.

Entering target hours

To compare actual staff hours to target hours, you first must enter target hours. Follow these steps to enter target hours for the staff members in the sample database.

1. With staff member JPW selected on the Staff setup screen, click the Edit button.

2. Click the Targets tab.

   The Sample database already contains target hours for all staff members. Note that the targets have been entered for each week of the year. You can enter targets for any time period — days, weeks, months, quarters, and so on.

Main | Contact Info | Benefits | Skill Set | Rates | Targets | Custom Fields | Notes

From	To	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Wkly Wrk Hrs	Billable %	Billable Hrs	Rate	Billable Amt
7/8/2012	7/14/2012	0.00	7.00	7.00	7.00	7.00	7.00	0.00	35.00	60.0000	21.00	Individual Tax Rat	4,725.00
7/15/2012	7/21/2012	0.00	7.00	7.00	7.00	7.00	7.00	0.00	35.00	60.0000	21.00	Individual Tax Rat	4,725.00
7/22/2012	7/28/2012	0.00	7.00	7.00	7.00	7.00	7.00	0.00	35.00	60.0000	21.00	Individual Tax Rat	4,725.00
7/29/2012	8/4/2012	0.00	7.00	7.00	7.00	7.00	7.00	0.00	35.00	60.0000	21.00	Individual Tax Rat	4,725.00
4/22/2012	4/28/2012	0.00	7.00	7.00	7.00	7.00	7.00	0.00	35.00	70.0000	24.50	Individual Tax Rat	5,512.50
4/29/2012	5/5/2012	0.00	7.00	7.00	7.00	7.00	7.00	0.00	35.00	70.0000	24.50	Individual Tax Rat	5,512.50
5/6/2012	5/12/2012	0.00	7.00	7.00	7.00	7.00	7.00	0.00	35.00	70.0000	24.50	Individual Tax Rat	5,512.50
5/13/2012	5/19/2012	0.00	7.00	7.00	7.00	7.00	7.00	0.00	35.00	70.0000	24.50	Individual Tax Rat	5,512.50
5/20/2012	5/26/2012	0.00	7.00	7.00	7.00	7.00	7.00	0.00	35.00	70.0000	24.50	Individual Tax Rat	5,512.50
5/27/2012	6/2/2012	0.00	7.00	7.00	7.00	7.00	7.00	0.00	35.00	70.0000	24.50	Individual Tax Rat	5,512.50
6/3/2012	6/9/2012	0.00	7.00	7.00	7.00	7.00	7.00	0.00	35.00	70.0000	24.50	Individual Tax Rat	5,512.50
6/10/2012	6/16/2012	0.00	7.00	7.00	7.00	7.00	7.00	0.00	35.00	70.0000	24.50	Individual Tax Rat	5,512.50
6/17/2012	6/23/2012	0.00	7.00	7.00	7.00	7.00	7.00	0.00	35.00	70.0000	24.50	Individual Tax Rat	5,512.50
6/24/2012	6/30/2012	0.00	7.00	7.00	7.00	7.00	7.00	0.00	35.00	70.0000	24.50	Individual Tax Rat	5,512.50
7/1/2012	7/7/2012	0.00	7.00	7.00	7.00	7.00	7.00	0.00	35.00	70.0000	24.50	Individual Tax Rat	5,512.50
8/5/2012	8/11/2012	0.00	7.00	7.00	7.00	7.00	7.00	0.00	35.00	70.0000	24.50	Individual Tax Rat	5,512.50

3. For this exercise, click Cancel.

Setting up schedule items

Once you have set up skill sets and qualifications filters, you can use the filters to assign work items to qualified staff members or to a work queue from which only qualified staff can select the items.

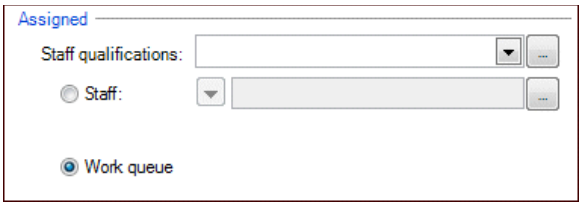
You can change the assignments for existing items, but you may also want to set qualifications for projects and tasks at the template level.

Setting qualifications for templates

If you want to set default qualifications for future projects and tasks, you can set up the qualifications on project and task templates. When you set staff qualifications on a project or task, you filter the list of staff to show only those who are qualified to work on it.

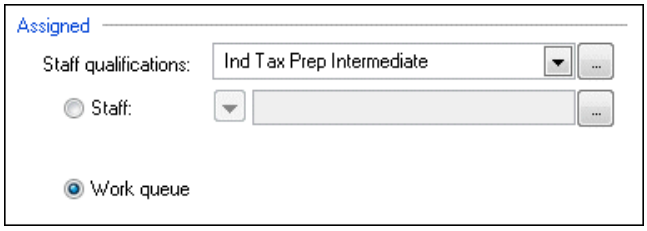
Note: Projects and tasks are features of the separately licensed Project Management module of Practice CS.

You can also automatically assign staff to the project based on a work queue. When you mark the *Work queue* option, the project will be placed in a queue that appears in the Work Queue portlet of the Staff Dashboard only for those staff who meet the qualifications.



Adding qualifications to project templates
Follow these steps to add qualifications to project templates.

1. Choose Setup > Templates > Projects.
2. In the Project Templates screen, select 1040 from the list of templates and click the Edit button.
3. In the *Staff qualifications* field, select **Ind Tax Prep Intermediate** from the drop-down list.
4. Click the *Work queue* option.



Adding qualifications to task templates
With the project template still open, follow these steps to add qualifications to task templates.

1. Click the Tasks tab.
2. Double-click the first task, Client Meetings & Discussions.
3. In the Task Template dialog, select **Ind Tax Prep Novice** from the drop-down list in the *Staff qualifications* field.
4. Click the *Work queue* option.
5. Click OK to save your changes to the task template.

6. Update the remaining tasks for the project with the information from the following table.

Task	Staff qualifications	Staff / Work queue
Information In/Scanning	Ind Tax Prep Novice	Work queue
Preparation	Ind Tax Prep Novice	Work queue
Review	Ind Tax Review Intermediate	Work queue
Clear Review Comments	Ind Tax Prep Novice	Work queue
Final Review	(leave blank)	Client Partner
Client Copy Packaging	Ind Tax Prep Novice	Work queue
E-File Authorization Received	(leave blank)	Client Associate
E-File Assembly	(leave blank)	Client Associate
E-File Transmitted	(leave blank)	Client Associate

Main | Tasks | Links | Custom Fields

Order	Description	Assigned	In Work Queue	Activity	Staff Qualifications	Trgt Comp M	Trgt Comp D	Tracking
1	Client Meetings & Discus		✔	Client Meeti	Ind Tax Prep Novice	0	0	Not Started
2	Information In/Scanning		✔	Information I	Ind Tax Prep Novice	0	1	Not Started
3	Preparation		✔	Preparation	Ind Tax Prep Novice	0	6	Not Started
4	Review		✔	Review	Ind Tax Review Intermediate	0	8	Not Started
5	Clear Review Comments		✔	Clear Revie	Ind Tax Prep Novice	0	10	Not Started
6	Final Review	Client Partner		Final Review		0	11	Not Started
7	Client Copy Packaging		✔	Client Copy	Ind Tax Prep Novice	0	12	Not Started
8	E-File Authorization Rec	Client Associate		E-File Autho		0	14	Not Started
9	E-File Assembly	Client Associate		E-File Asse		0	14	Not Started
10	E-File Transmitted	Client Associate		E-File Trans		0	14	Not Started

7. Click Enter to save your changes to the project template.

In the future, all 1040 projects and selected tasks will be added to the work queue with the qualifications you have defined in this template. You can modify these assignments for specific projects or tasks as needed.

Reassigning existing work items based on skill sets

You can change the assignment on an individual work item as needed, for both previously assigned items and items in the work queue.

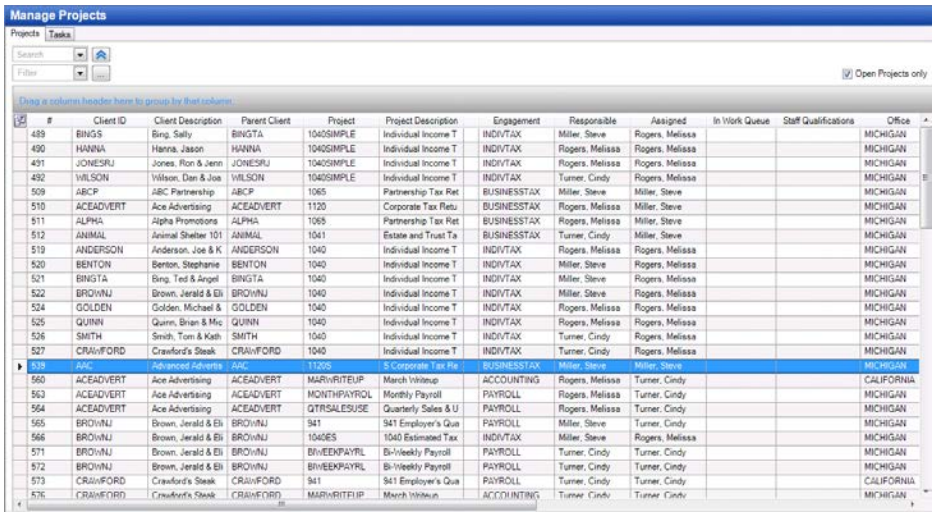
Note: This exercise uses features of the separately licensed Project Management module.

Reassigning projects

Follow these steps to reassign work to a qualified staff member.

1. Choose Actions > Manage Projects.

2. In the Manage Projects screen, double-click the 1120S project for client AAC.

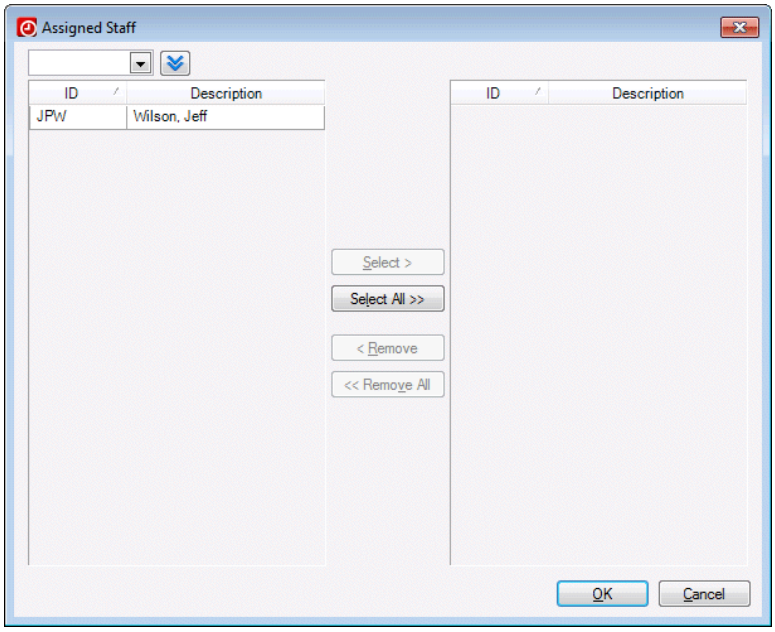


#	Client ID	Client Description	Parent Client	Project	Project Description	Engagement	Responsible	Assigned	In Work Queue	Staff Qualifications	Office
489	BINGS	Bing, Sally	BINGTA	1040SIMPLE	Individual Income T	INDIVTAX	Miller, Steve	Rogers, Melissa			MICHIGAN
490	HANNA	Hanna, Jason	HANNA	1040SIMPLE	Individual Income T	INDIVTAX	Rogers, Melissa	Rogers, Melissa			MICHIGAN
491	JONESRJ	Jones, Ron & Jenn	JONESRJ	1040SIMPLE	Individual Income T	INDIVTAX	Rogers, Melissa	Rogers, Melissa			MICHIGAN
492	WILSON	Wilson, Dan & Joa	WILSON	1040SIMPLE	Individual Income T	INDIVTAX	Turner, Cindy	Rogers, Melissa			MICHIGAN
509	ABCP	ABC Partnership	ABCP	1065	Partnership Tax Ret	BUSINESSTAX	Miller, Steve	Miller, Steve			MICHIGAN
510	ACEADVERT	Ace Advertising	ACEADVERT	1120	Corporate Tax Retu	BUSINESSTAX	Rogers, Melissa	Miller, Steve			MICHIGAN
511	ALPHA	Alpha Promotions	ALPHA	1065	Partnership Tax Ret	BUSINESSTAX	Rogers, Melissa	Miller, Steve			MICHIGAN
512	ANIMAL	Animal Shelter 101	ANIMAL	1041	Estate and Trust Ta	BUSINESSTAX	Turner, Cindy	Miller, Steve			MICHIGAN
519	ANDERSON	Anderson, Joe & K	ANDERSON	1040	Individual Income T	INDIVTAX	Rogers, Melissa	Rogers, Melissa			MICHIGAN
520	BENTON	Benton, Stephanie	BENTON	1040	Individual Income T	INDIVTAX	Miller, Steve	Rogers, Melissa			MICHIGAN
521	BINGTA	Bing, Ted & Angel	BINGTA	1040	Individual Income T	INDIVTAX	Miller, Steve	Rogers, Melissa			MICHIGAN
522	BROWNJ	Brown, Jerald & Eli	BROWNJ	1040	Individual Income T	INDIVTAX	Miller, Steve	Rogers, Melissa			MICHIGAN
524	GOLDEN	Golden, Michael &	GOLDEN	1040	Individual Income T	INDIVTAX	Rogers, Melissa	Rogers, Melissa			MICHIGAN
525	QUINN	Quinn, Brian & Mic	QUINN	1040	Individual Income T	INDIVTAX	Rogers, Melissa	Rogers, Melissa			MICHIGAN
526	SMITH	Smith, Tom & Kath	SMITH	1040	Individual Income T	INDIVTAX	Turner, Cindy	Rogers, Melissa			MICHIGAN
527	CRAWFORD	Crawford's Steak	CRAWFORD	1040	Individual Income T	INDIVTAX	Turner, Cindy	Rogers, Melissa			MICHIGAN
539	AAC	Advanced Advertis	AAC	1120S	S Corporate Tax Re	BUSINESSTAX	Miller, Steve	Miller, Steve			MICHIGAN
560	ACEADVERT	Ace Advertising	ACEADVERT	MARWRITEUP	March Writeup	ACCOUNTING	Rogers, Melissa	Turner, Cindy			CALIFORNIA
563	ACEADVERT	Ace Advertising	ACEADVERT	MONTHPAYROL	Monthly Payroll	PAYROLL	Rogers, Melissa	Turner, Cindy			MICHIGAN
564	ACEADVERT	Ace Advertising	ACEADVERT	QTRSALESUSE	Quarterly Sales & U	PAYROLL	Rogers, Melissa	Turner, Cindy			MICHIGAN
565	BROWNJ	Brown, Jerald & Eli	BROWNJ	941	941 Employer's Qua	PAYROLL	Miller, Steve	Turner, Cindy			MICHIGAN
566	BROWNJ	Brown, Jerald & Eli	BROWNJ	1040ES	1040 Estimated Tax	INDIVTAX	Miller, Steve	Rogers, Melissa			MICHIGAN
571	BROWNJ	Brown, Jerald & Eli	BROWNJ	BIWEEKPAYRL	Bi-Weekly Payroll	PAYROLL	Turner, Cindy	Turner, Cindy			MICHIGAN
572	BROWNJ	Brown, Jerald & Eli	BROWNJ	BIWEEKPAYRL	Bi-Weekly Payroll	PAYROLL	Turner, Cindy	Turner, Cindy			MICHIGAN
573	CRAWFORD	Crawford's Steak	CRAWFORD	941	941 Employer's Qua	PAYROLL	Turner, Cindy	Turner, Cindy			CALIFORNIA
576	CRAWFORD	Crawford's Steak	CRAWFORD	MARWRITEUP	March Writeup	ACCOUNTING	Turner, Cindy	Turner, Cindy			MICHIGAN

Note: If the project does not appear in the list, there may be an active filter applied to the Manage Projects screen. Click the button to show the *Filter* field, then click the in the *Filter* field to remove the filter.

3. In the Assigned section, choose **Business Tax Prep Intermediate** in the *Staff qualifications* field.

4. Click the button next to the *Staff* field to open the Assigned Staff dialog. (If prompted to remove a currently selected staff member, click Yes, then click the button again.) Note that only staff members who meet the qualifications you specified appear in this dialog.



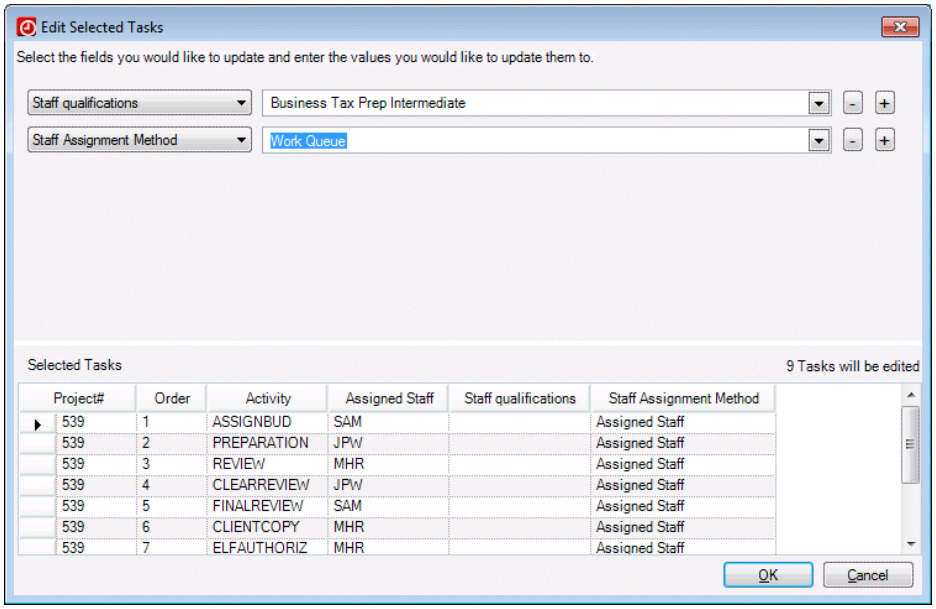
5. Select staff member JPW and click the Select button.

6. Click OK to accept the change of assignment.

Reassigning tasks

You can use the Edit Multiple feature in Practice CS to reassign multiple projects or tasks simultaneously. For this walkthrough, you will reassign multiple tasks in just a few steps.

1. With the Project dialog still open to the 1120S project for client AAS, click the Tasks tab.
2. Select all tasks. To do so, press CTRL+A, or select the first task, press SHIFT, and select the last task in the list.
3. Right-click and choose Edit Selected Tasks.
4. In the top row of the Edit Selected Tasks dialog, select **Staff qualifications** in the first field and **Business Tax Prep Intermediate** in the second field.
5. Click the + button to add another row.
6. In the second row, select **Staff Assignment Method** in the first field and **Work Queue** in the second field.



7. Click OK to save your changes, and click Yes to confirm.

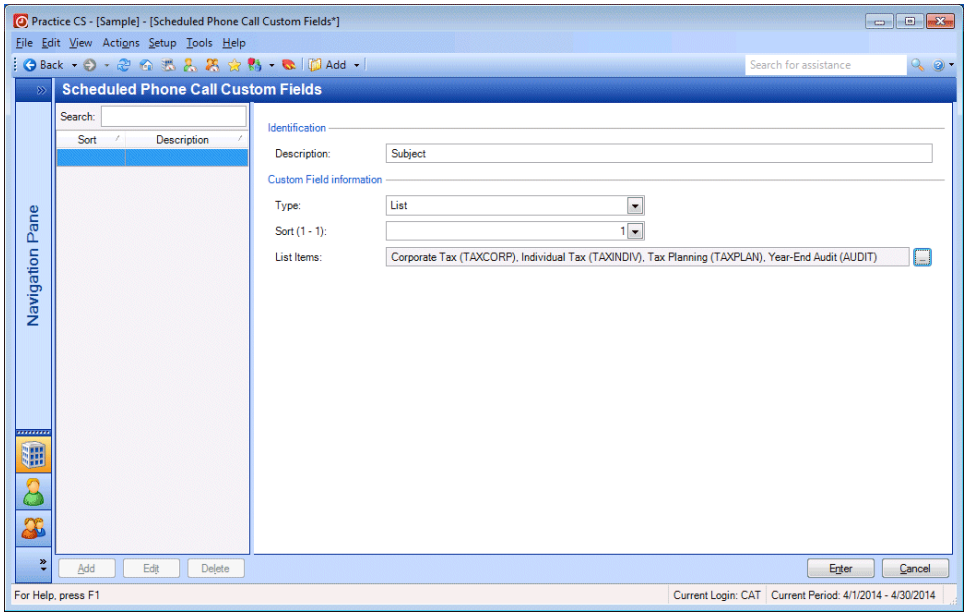
Setting up custom fields for schedule items

If you want to track additional information for schedule items, you can set up custom fields to do so.

1. Choose Setup > Custom Fields, then choose the schedule item for which you want to create a custom field: Scheduled Phone Call, Scheduled Benefits, Meetings, To Dos, or CPE Courses.

2. In the Custom Fields setup screen for the schedule item you selected, enter the following information:

   - **Description** — The name of the field that will appear on the Custom Fields tab.
   - **Type** — The type of custom field. Options are Check Box, Date, List, Number, Staff List, or Text.
   - **Sort** — The order in which the field will appear on the Custom Fields tab. The field with sort value 1 will appear at the top of the tab.
   - **Length** — The number of characters allowed for a custom field of the Text type. Maximum length is 4000 characters.
   - **List Items** — For custom fields of the List type, the items that appear in the list. Click the button to add list items.



Tracking CPE requirements

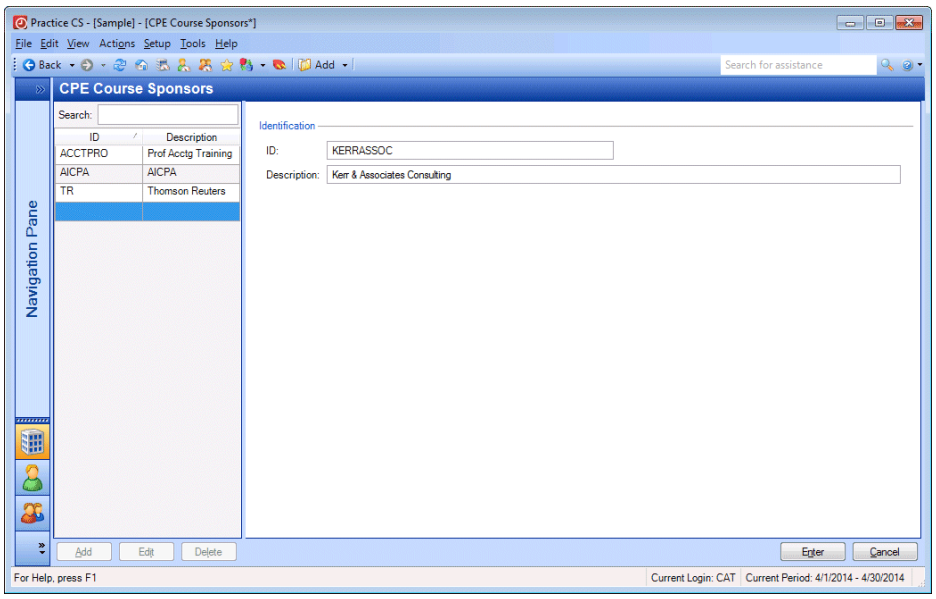
The CPE components of the Practice CS Staff Management module allow your firm to track the number of credit hours each staff member has earned to fulfill CPE regulatory board requirements. You can enter information about CPE course providers, and keep track of information such as date, cost, credit hours, and attendees for specific CPE courses.

Setting up CPE course sponsors

CPE course sponsors are entities that have registered with state boards or at the national level to offer CPE courses and comply with education standards. In this exercise, you will enter a sample CPE course provider.

1. From the Setup menu, choose CPE Course > Sponsors.
2. Click the Add button.
3. In the *ID* field, enter **ACCTPRO**. The ID can be up to 11 characters long.
4. In the *Description* field, enter **Prof Acctg Training Svcs, Inc**. The description can be up to 30 characters long.
5. Click Enter to save the information.
6. Repeat steps 2 through 5 to add the following CPE course sponsor.

ID	Description
KERRASSOC	Kerr & Associates Consulting



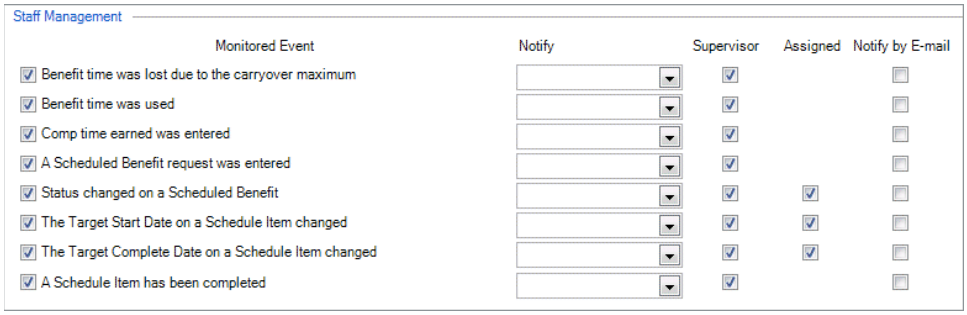
Notes

- To record time attending CPE courses, you must set up an activity using the administrative type CPE. The Sample database already has such an activity.
- If you also want to record incidental expenses specifically related to CPE courses, you must set up an expense activity using CPE as the administrative type.

Setting up notifications

The Staff Management module provides several additional notifications. You can specify to whom these notifications should be sent, and choose to send notifications via email.

1. Choose Setup > Firm and click the Notifications tab.
2. Mark all checkboxes in the Monitored Event, Supervisor, and Assigned columns of the Staff Management section to match the following example.



3. Click Enter to save your changes. A notification will be sent to a staff member's supervisor for any occurrence of each monitored event.

Setting up security options

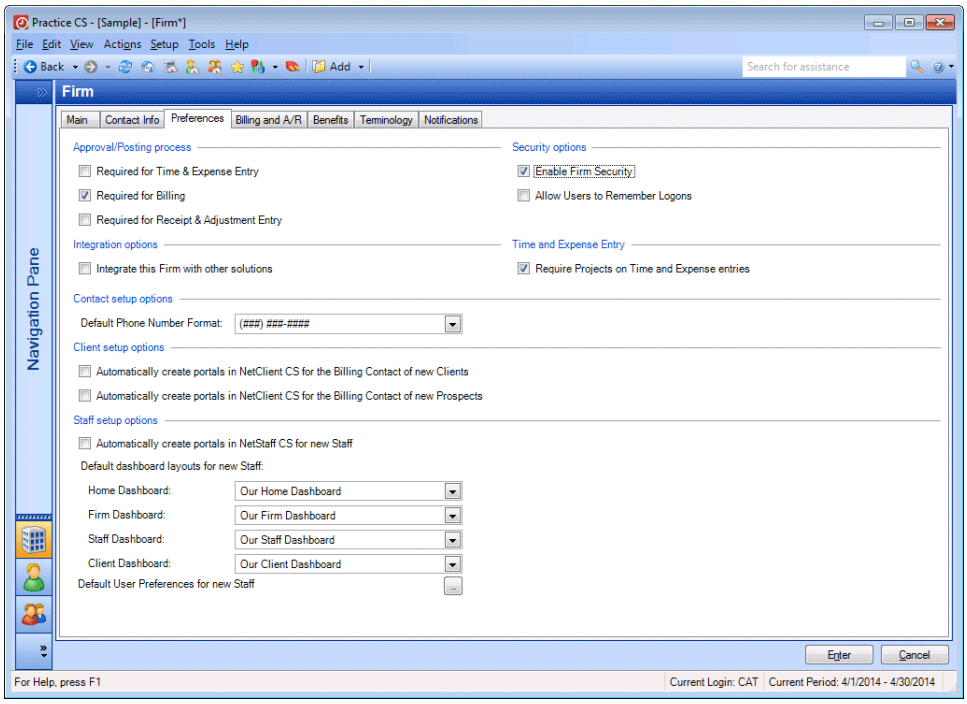
You may want to restrict access to much of the information provided by the Staff Management module. If your firm uses the security features of Practice CS, you can easily control access to Staff Management information using security profiles.

Enabling security

If you have not already enabled security for the sample database, follow these steps.

1. Choose Setup > Firm and click the Preferences tab.

2. Mark the *Enable Firm Security* checkbox.

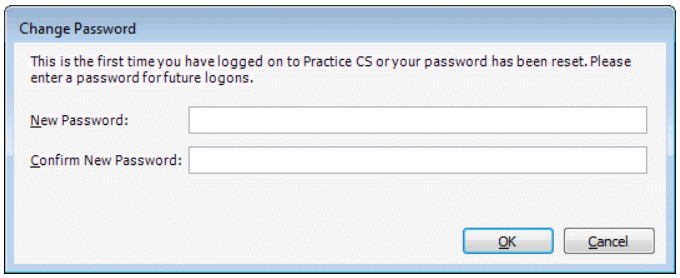


3. Click Enter, then click Yes to confirm.

4. Choose File > Open Firm.

5. Click OK in the login dialog.

6. Click OK again in the Change Password dialog to log in without creating a password.



Setting up security for Staff Management

Before implementing the Staff Management module, you should take some time to determine which staff members should have access to various features. For this walkthrough, you will explore the security options that affect Staff Management, and grant some rights to members of the sample database's Time Entry security group so they can see selected Staff Management information.

1. Choose Setup > Security Groups.

2. From the list of security groups, highlight Time Entry and click the Edit button.

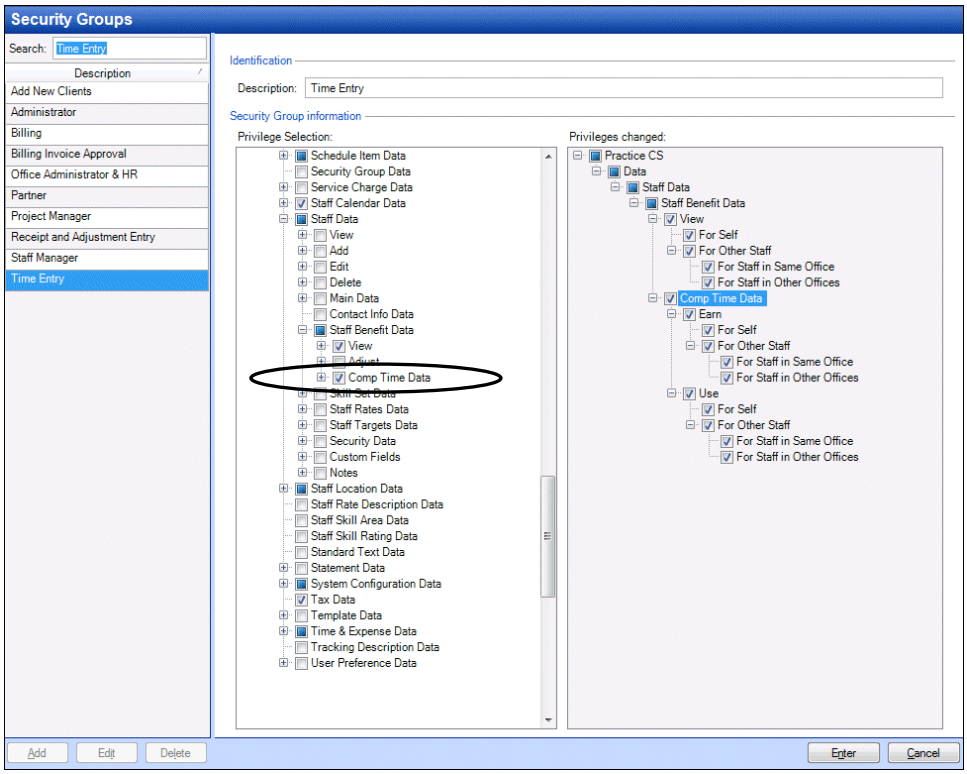
3. Under Privilege Selection, expand the Practice CS, Menu, File Menu, Print Reports, and Staff Management items. Notice that you can control access to staff management reports on an individual basis.

4. Expand the View Menu item and note the *Staff Dashboard* checkbox. This grants timekeepers access to the Staff Dashboard, where they can use various portlets to view Staff Management information.

5. Expand the Actions Menu item. Notice the *Manage Staff* checkbox. Security groups with this checkbox marked have access to the Manage Staff screen. Do not mark this checkbox for the Time Entry group.

6. Expand the Setup Menu item. Notice that there are checkboxes for *Staff Skill Areas* and *Staff Skill Ratings*. Members of security groups with these privileges can add, modify, or delete skill areas and ratings. Do not mark any checkboxes for the Time Entry group.

7. Expand the Data, Staff Data, and Staff Benefit Data items. Mark the *Comp Time Data* checkbox. This enables members of the Time Entry security group to enter earned and used comp time transactions on the Time & Expense Entry screen. Note that the Privileges changed pane shows all of the items affected by this change.



8. Expand the View item under Staff Benefit Data and unmark the *For Other Staff* checkbox. This prevents members of this security group from viewing or editing benefit data for other staff members.

9. Under the Staff Data item, expand the Skill Set Data item. You can grant view and/or edit privileges for staff skill set data as needed. For this walkthrough, leave these checkboxes unmarked.

10. Under Data, expand Schedule Item Data, and then Staff Management Schedule Item Data. Notice that view, add, and edit privileges have been granted to the Time Entry group. This enables group members to add and edit schedule items such as meetings and scheduled phone calls.

11. You should have made only two changes — granting access to the Comp Time Data, then revoking View access to other staff members' Staff Benefit Data. Click Enter to save these changes.

Note: If your firm has multiple offices, the ability to view or modify some data for other offices may be restricted. For more information, please see the topic More about security privileges in the Practice CS help.

Walkthrough Exercises

This chapter will walk you through the core functions of the Staff Management module, including using target hours to assess staff performance, scheduling work items according to qualifications and availability, and administering staff benefits.

Setting the training date override

This walkthrough uses the sample database that is installed with Practice CS. This database contains data that is mostly relevant to the month of April 2014. In order for the scheduled dates in this chapter to be displayed as current, you can use the Training Date Override feature to temporarily override your computer's system date. The date you select is the date that Practice CS will use instead of your computer's system date to determine whether schedule items are due, past due, completed, and so on, in the following areas of Practice CS:

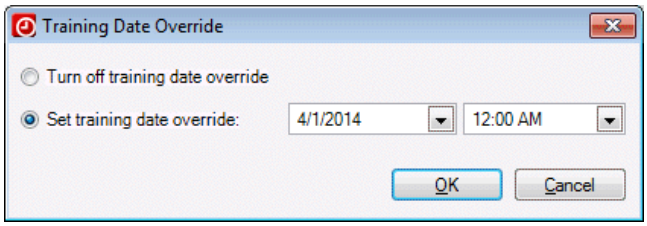
- Assignments, Schedules, and Schedule Items tabs of the Manage Staff screen
- Schedule Items portlet on the Staff Dashboard
- Scheduling dialog, available by clicking the Schedule button in the Project and Task dialogs
- Staff Schedule Summary report

Note: The training date override affects only the database you currently have open. If you are using Sample or another training database, the training date override will not affect your firm's database.

To set the training date override, follow these steps.

1. From the Tools menu, choose Set Training Date Override.
2. In the Training Date Override dialog, click the *Set training date override* option.
3. From the first drop-down list, select **4/1/2014** from the calendar. This will represent today's system date for the purposes of this exercise.

Note: This date will be in effect until you close the sample database. If you do close the database before completing this walkthrough, you will need to reset the training date override for the remainder of the exercises.

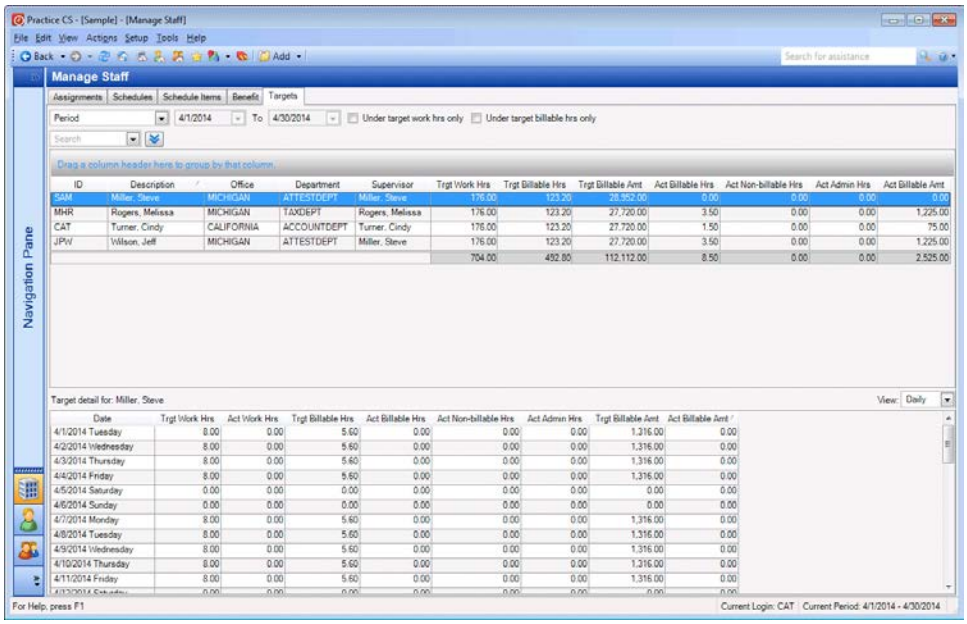


4. You can optionally select a time of day from the second drop-down list.
5. Click OK to save your changes.

Assessing staff performance relative to target hours

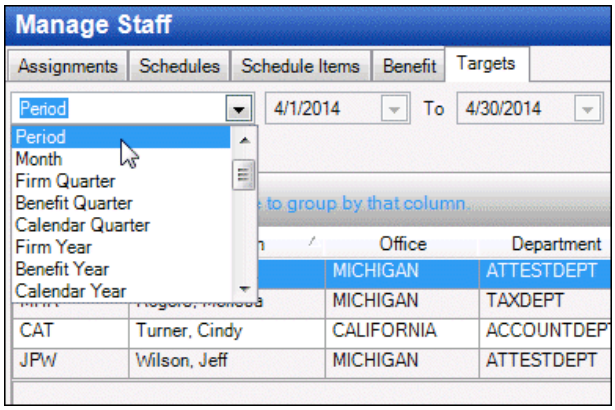
To assess your staff members' progress against the targets that have been set for them, use the Targets tab of the Manage Staff screen.

1. Choose Actions > Manage Staff > Targets tab.

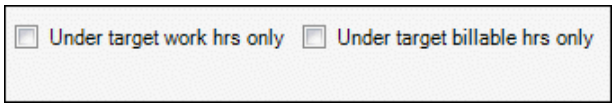


The Targets tab provides information about the performance of each of your staff members relative to the targets you set for them. You can view their target work hours, billable hours, and billable amounts, alongside their actual billable hours, nonbillable hours, administrative hours, and billable amounts.

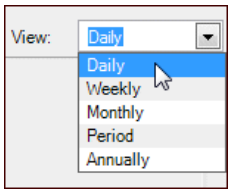
You can change the scope of the data by changing the time period specified in the fields at the top of the tab.



You can also limit the displayed staff to those who are under their target work hours or target billable hours by marking the checkboxes at the top of the tab.

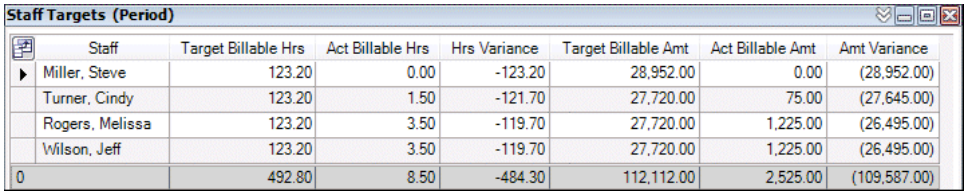


You can view details about a staff member's performance in the bottom pane. Change the scope of the bottom pane by making a different selection from the *View* field.



Practice CS also provides dashboard portlets for viewing this information.

2. Click the Firm Dashboard button on the toolbar and then click the Staff Summary view. The Staff Targets portlet provides up-to-date information about actual staff hours, along with target hours for comparison.



Staff Targets (Period)

Staff	Target Billable Hrs	Act Billable Hrs	Hrs Variance	Target Billable Amt	Act Billable Amt	Amt Variance
Miller, Steve	123.20	0.00	-123.20	28,952.00	0.00	(28,952.00)
Turner, Cindy	123.20	1.50	-121.70	27,720.00	75.00	(27,645.00)
Rogers, Melissa	123.20	3.50	-119.70	27,720.00	1,225.00	(26,495.00)
Wilson, Jeff	123.20	3.50	-119.70	27,720.00	1,225.00	(26,495.00)
0	492.80	8.50	-484.30	112,112.00	2,525.00	(109,587.00)

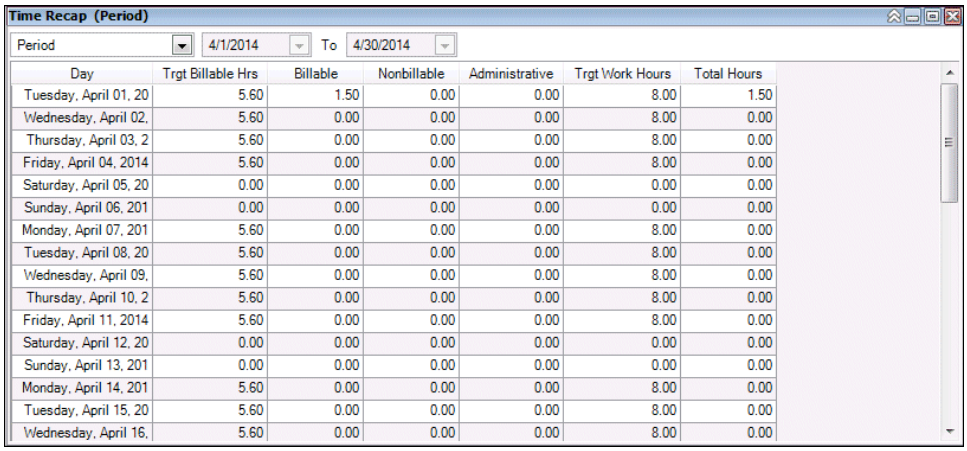
Note: You can change the date range for the information displayed in this portlet by right-clicking within the portlet and choosing Show Options from the context menu or by clicking the button.

3. Click the Staff Dashboard button on the toolbar and then click the Overview view.

4. Right-click in the Time Recap portlet and choose Show Options from the context menu, or click the button to display the options.

5. Verify that Period is selected in the first drop-down list.

   The Time Recap portlet displays actual and target hours for the current staff member.



Time Recap (Period)

Period 4/1/2014 To 4/30/2014

Day	Trgt Billable Hrs	Billable	Nonbillable	Administrative	Trgt Work Hours	Total Hours
Tuesday, April 01, 20	5.60	1.50	0.00	0.00	8.00	1.50
Wednesday, April 02,	5.60	0.00	0.00	0.00	8.00	0.00
Thursday, April 03, 2	5.60	0.00	0.00	0.00	8.00	0.00
Friday, April 04, 2014	5.60	0.00	0.00	0.00	8.00	0.00
Saturday, April 05, 20	0.00	0.00	0.00	0.00	0.00	0.00
Sunday, April 06, 201	0.00	0.00	0.00	0.00	0.00	0.00
Monday, April 07, 201	5.60	0.00	0.00	0.00	8.00	0.00
Tuesday, April 08, 20	5.60	0.00	0.00	0.00	8.00	0.00
Wednesday, April 09,	5.60	0.00	0.00	0.00	8.00	0.00
Thursday, April 10, 2	5.60	0.00	0.00	0.00	8.00	0.00
Friday, April 11, 2014	5.60	0.00	0.00	0.00	8.00	0.00
Saturday, April 12, 20	0.00	0.00	0.00	0.00	0.00	0.00
Sunday, April 13, 201	0.00	0.00	0.00	0.00	0.00	0.00
Monday, April 14, 201	5.60	0.00	0.00	0.00	8.00	0.00
Tuesday, April 15, 20	5.60	0.00	0.00	0.00	8.00	0.00
Wednesday, April 16,	5.60	0.00	0.00	0.00	8.00	0.00

Note: The views on the sample database dashboards are specific to that database, though you can set up your own dashboards with similar views.

Scheduling

The powerful scheduling features of the Staff Management module enable you to monitor staff workloads and availability, assign work items to available staff according to predefined qualifications, and maintain a work queue of items from which qualified staff can select items to work on. You can also maintain calendars for staff and clients.

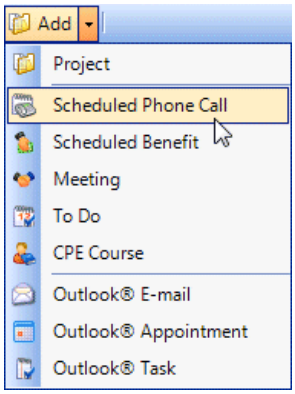
Adding schedule items

Along with projects and tasks, the Staff Management module can track scheduled phone calls, meetings, to-do items, and CPE courses.

Scheduling phone calls

A scheduled phone call is one that your firm plans to place in the future, preferably at a predetermined time. To add a scheduled phone call, follow these steps.

1. Click the arrow on the right side of the Add button on the main Practice CS toolbar, and choose the Scheduled Phone Call command.

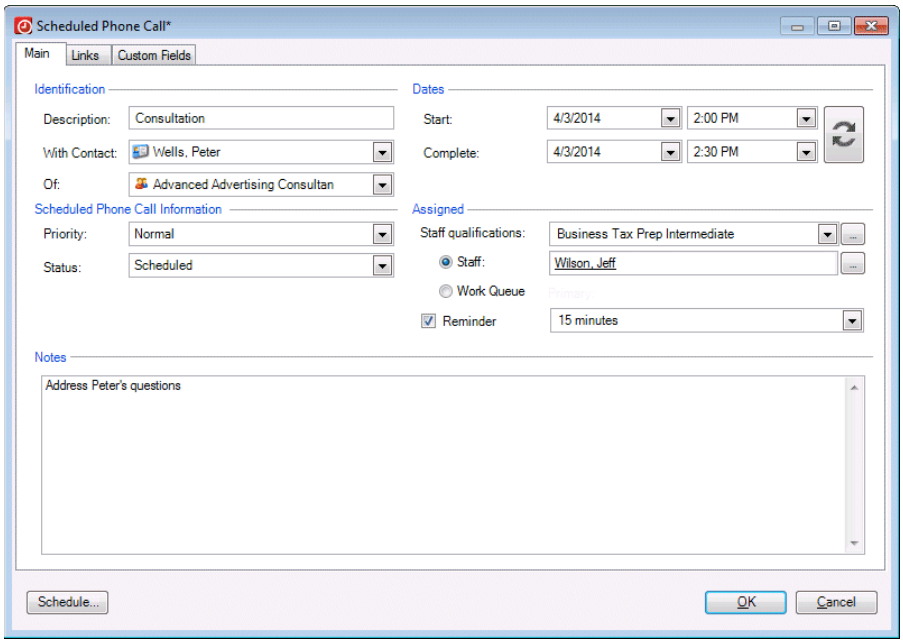


2. In the Schedule Phone Call dialog, enter the following information. When prompted to remove entries that do not match qualifications, click Yes.

Field	**Entry**
Description	Consultation
With Contact	Wells, Peter
Of	AAC
Start	4/3/14 at 2:00 PM
Complete	4/3/14 at 2:30 PM
Staff qualifications	Business Tax Prep Intermediate
Staff	Wilson, Jeff

3. Mark the *Reminder* checkbox and use the drop-down list to set a reminder for 15 minutes before the call is to begin.

4. In the *Notes* field, enter **Address Peter's questions**.



5. Click OK to schedule the phone call.

Scheduling meetings

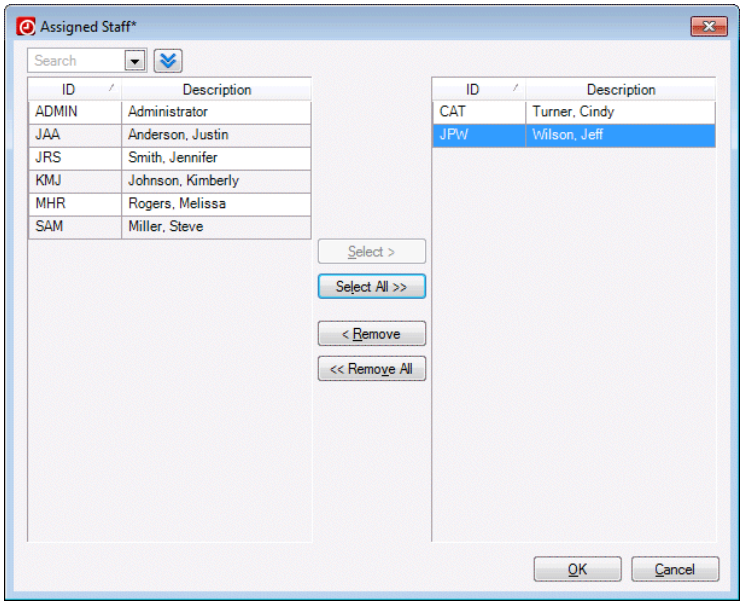
With the Staff Management module, you can use Practice CS to schedule meetings, even without Microsoft® Outlook.® Scheduled meetings are added to calendars in Practice CS and generate reminders for attendees, if selected. To schedule a meeting, follow these steps.

1. Click the arrow on the right side of the Add button on the Practice CS toolbar and choose Meeting.

2. In the Meeting dialog, enter the following information.

Field	Entry
Description	Follow up with Peter Wells
Client	AAC
Engagement	BUSINESSTAX
Activity	CLIENTMEET
Start	4/9/14 at 10:00 AM
End	4/9/14 at 11:00 AM

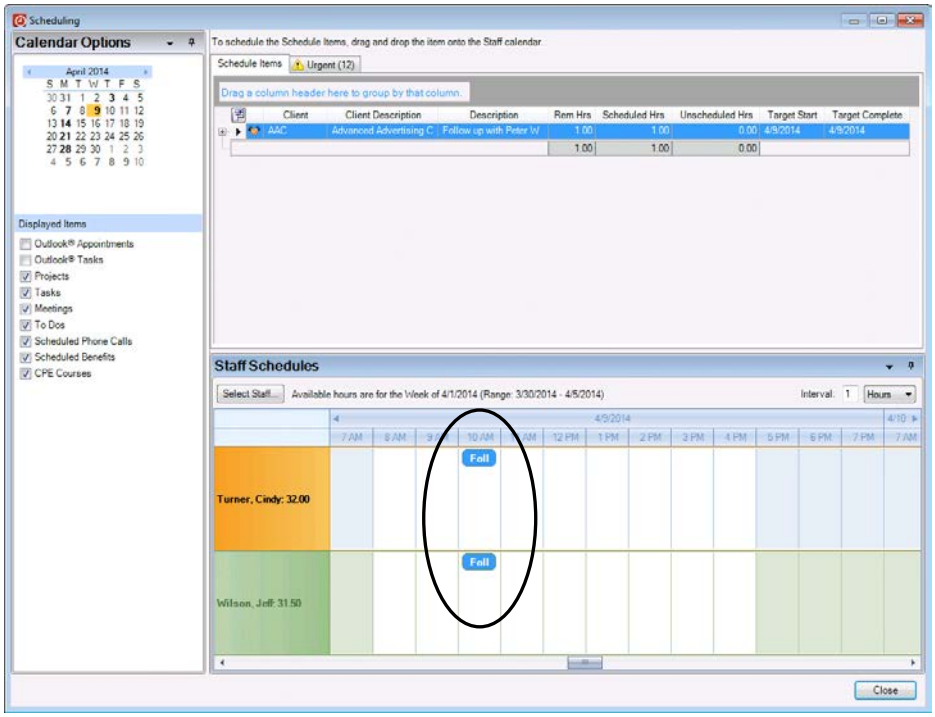
3. Add staff member JPW to the meeting by clicking the button next to the *Staff* field, selecting **JPW** from the list of staff, clicking the Select button, and clicking OK.



4. Mark the *Reminder* checkbox and use the drop-down list to set a reminder for 30 minutes before the meeting is to begin.

5. In the *Notes* field, enter **Present Peter with our findings**.

6. Click the Schedule button to view the schedules of the attendees. Notice that the meeting has been added to the schedule for the staff members who are to attend.



7. Click the Close button in the Scheduling dialog.
8. Click OK in the Meeting dialog to schedule the meeting.

Note: To make the meeting recurring, click the button in the Meeting setup dialog and set up the recurrence frequency and dates in the Recurrence dialog. See the topic Setting up recurring schedule items in the Practice CS Help & How-To Center for details.

Scheduling to-do items

You can add miscellaneous work items as to-do items, which can be scheduled and assigned to staff (or the work queue) based on staff qualifications. To add a to-do item, follow these steps.

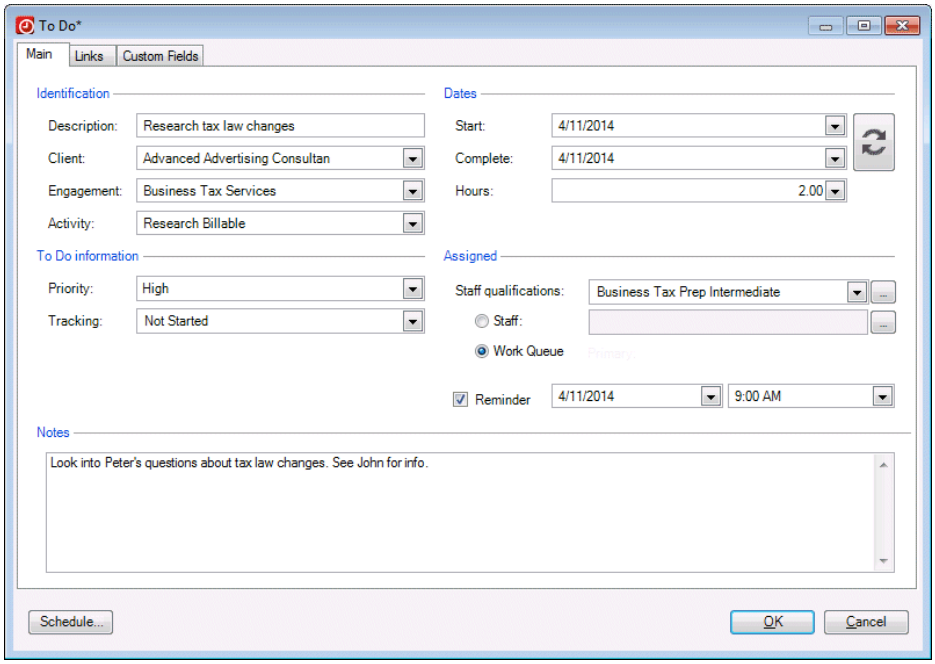
1. Click the arrow on the right side of the Add button on the Practice CS toolbar and choose To Do.
2. In the To Do dialog, enter the following information.

Field	Entry
Description	Research tax law changes
Client	AAC
Engagement	BUSINESSTAX
Activity	RESEARCHBIL
Priority	High
Start	4/11/14
Complete	4/11/14
Hours	2.00

3. In the *Staff qualifications* field, select **Business Tax Prep Intermediate** from the drop-down list.
4. Click the *Work queue* option. If you are prompted to remove an entry that does not match the qualifications, click Yes.
5. Mark the *Reminder* checkbox and use the drop-down lists to schedule a reminder for 9:00 a.m.

Note: To make the To Do item recurring, click the button in the To Do setup dialog and set up the recurrence frequency and dates in the Recurrence dialog. See the topic Setting up recurring schedule items in the Practice CS for details.

6. In the *Notes* field, enter **Look into Peter's questions about tax law changes. See John for info.**



7. Click OK to schedule the to-do item.

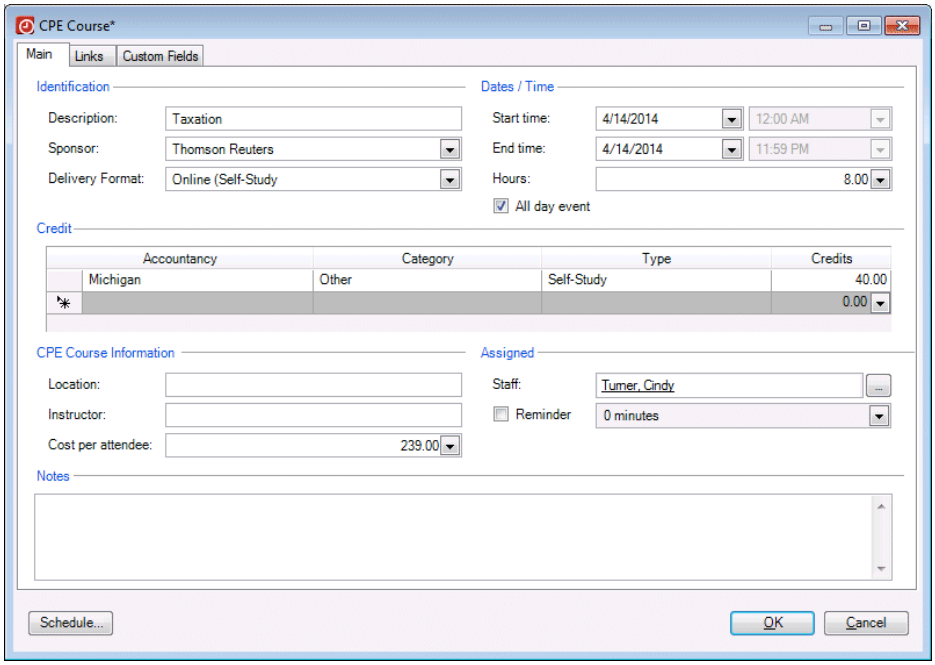
Entering CPE courses

In this example, you will schedule a CPE course for staff member CAT to attend.

1. Click the arrow on the right side of the Add button on the Practice CS toolbar and choose CPE Course.

2. Enter the following information.

Field	Entry
Description	Taxation
Sponsor	Thomson Reuters
Delivery Format	Online (Self-Study)
Start time	4/14/2014 (skip the time of day field)
End time	4/14/2014 (skip the time of day field)
All day event	Mark this checkbox
Accountancy	Michigan
Category	Other
Type	Self-Study
Credits	40
Cost per attendee	239.00
Staff	Cindy Turner



3. Click OK.

Maintaining your firm's work queue

The Staff Management module enables you to maintain a *work queue* for your firm, which is a list of unassigned work items that your staff can take on when they have time. Staff members can view work queue items using the Work Queue portlet on the Staff Dashboard.

If you enter staff qualifications for an item in the work queue, only staff members who meet those qualifications can view and select the item from their Work Queue portlets. Items without qualifications can be viewed and selected by all staff members.

Adding items to the work queue

Items that can be added to work queues include projects, tasks, scheduled phone calls, and to-do items. You already added a few items to the work queue earlier in this walkthrough.

To assign an item to the work queue, use the following procedure. Although this exercise uses a scheduled phone call, the same procedure works for all eligible work items, including projects, tasks, and to-do items.

1. Click the arrow on the right side of the Add button on the main toolbar and choose the Scheduled Phone Call command.

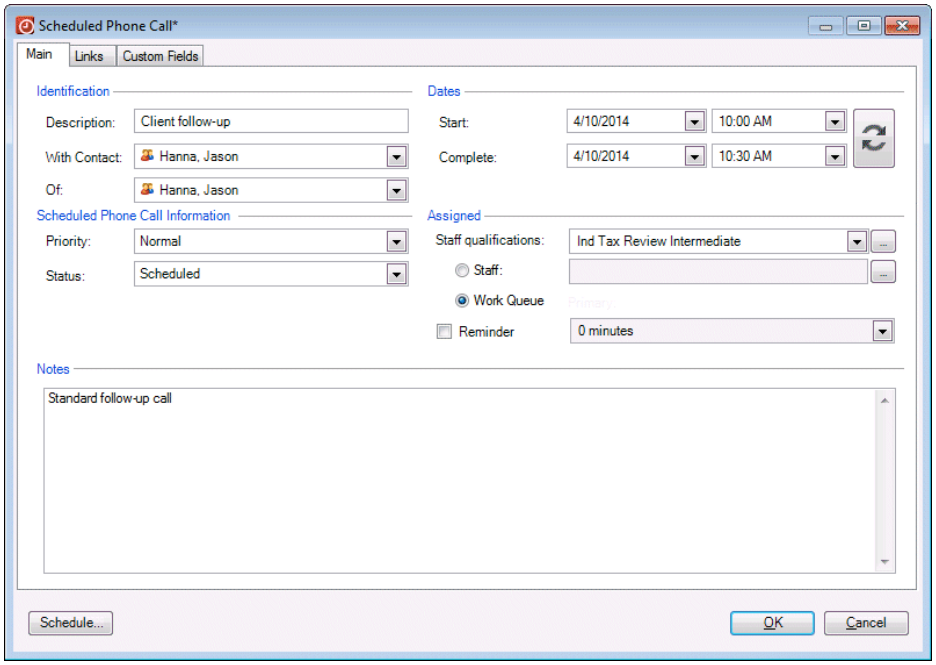
2. Enter the following information:

Field	Entry
Description	Client follow-up
With Contact	Hanna, Jason
Of	HANNA
Start	4/10/14 at 10:00 AM

Field	Entry
Complete	4/10/14 at 10:30 AM
Staff qualifications	Ind Tax Review Intermediate

If you are prompted to remove an entry that does not match qualifications, click Yes.

3. Click the *Work queue* option.
4. In the *Notes* field, enter **Standard follow-up call**.



5. Click OK.

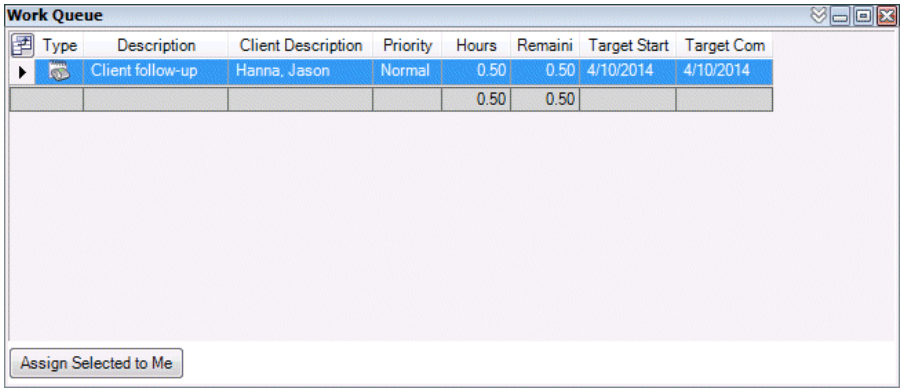
The scheduled phone call is added to the work queue and can be selected by any staff member who meets the qualifications you specified.

Selecting a specific item from the work queue
Staff members can select from the work queue any item for which they are qualified. To select a work queue item, follow these steps.

1. Click the Staff Dashboard button  on the toolbar.
2. Click the Schedule view.

Note: The views on the sample database dashboards are specific to that database, though you can set up your own dashboards with similar views.

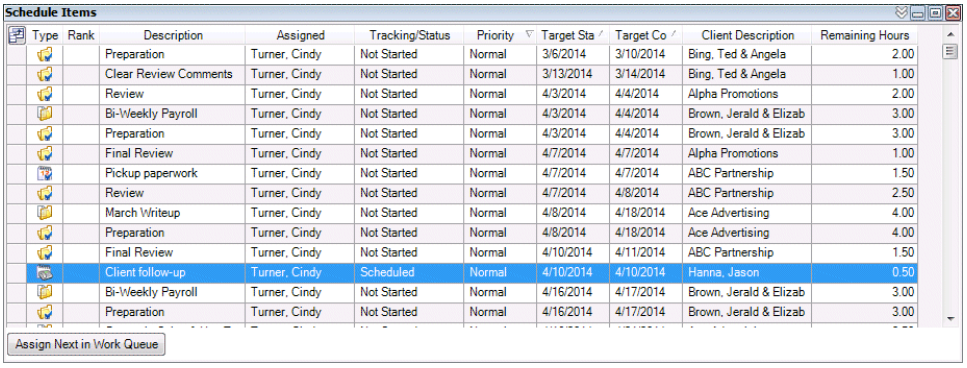
3. In the Work Queue portlet, select the scheduled phone call you just created and click the Assign Selected to Me button.



The work item has now been assigned to Cindy Turner and no longer appears in the Work Queue portlet.

Selecting the next item from the work queue
Staff members can also select the next available item in the work queue using the Schedule Items portlet on the Staff Dashboard.

- In the Schedule Items portlet, click the Assign Next in Work Queue button.



Practice CS assigns the next available work item for which the staff member is qualified.

Viewing and configuring calendars

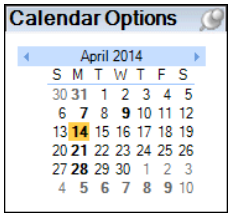
The Staff Management module provides calendars you can use to view schedules for staff and clients. The staff calendar can display projects, tasks, meetings, to-do items, scheduled phone calls, and scheduled benefits. You can double-click items displayed on calendars to open them.

If your firm uses Microsoft Outlook with an Exchange server, and your staff has sufficient security privileges, you can also view shared Outlook appointments and tasks for other staff.

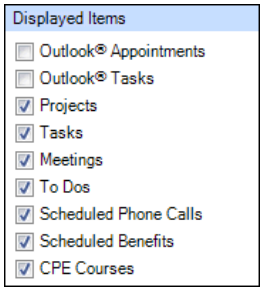
Viewing and configuring the staff calendar
To view and configure the staff calendar, follow these steps.

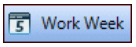
1. Choose View > Staff Calendar.

2. Using the calendar at the top of the Calendar Options pane, click the arrow to go to April 2014, and click **April 14**.



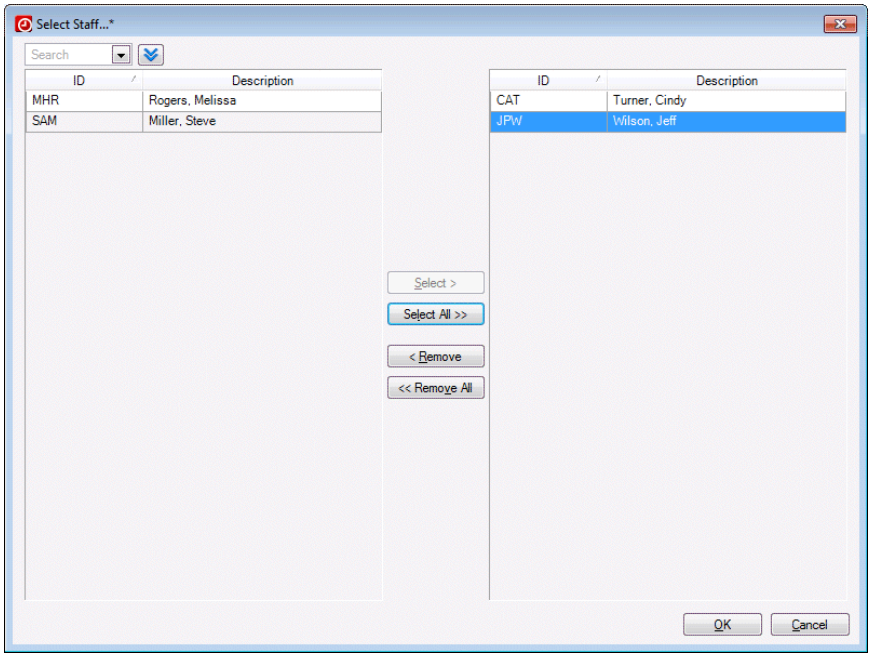
3. In the Displayed Items section, mark the following checkboxes, as shown.



4. Click the Work Week button  in the toolbar to display the calendar for Monday through Friday.

5. Click the Select Staff button.

6. In the Select Staff dialog, select Jeff Wilson.

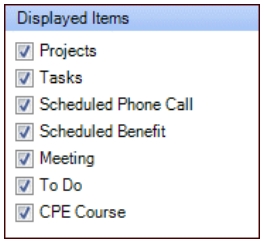


7. Click OK. Notice that the staff calendars are color coded and appear side by side.

Note: Tasks and calendar items from Microsoft Outlook can be viewed by other staff members if those items are set up as shared in Outlook. Practice CS pulls information from the calendar associated with the email address entered on the Staff setup screen.

Viewing and configuring the client calendar
To view and configure the client calendar, follow these steps.

1. Choose View > Client Calendar.
2. Using the calendar at the top of the screen, select **April 6**.
3. From the drop-down list at the top of the screen, select client **AAC**.
4. In the Displayed Items section, mark all checkboxes.



5. Click the Month button  on the toolbar to display a full month.

Using the Manage Staff screen to monitor schedules

The Manage Staff screen is a valuable tool for partners and senior staff to evaluate the progress of the firm's work items and balance staff workloads as necessary.

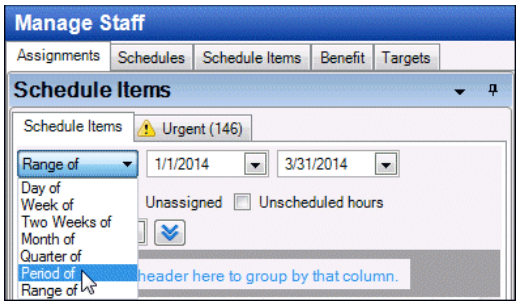
- To open the Manage Staff screen, choose Actions > Manage Staff.

Using the Assignments tab
The Assignments tab is designed for managers to assign, order, and loosely schedule work for their staff. This tab can be useful when you want to do the following:

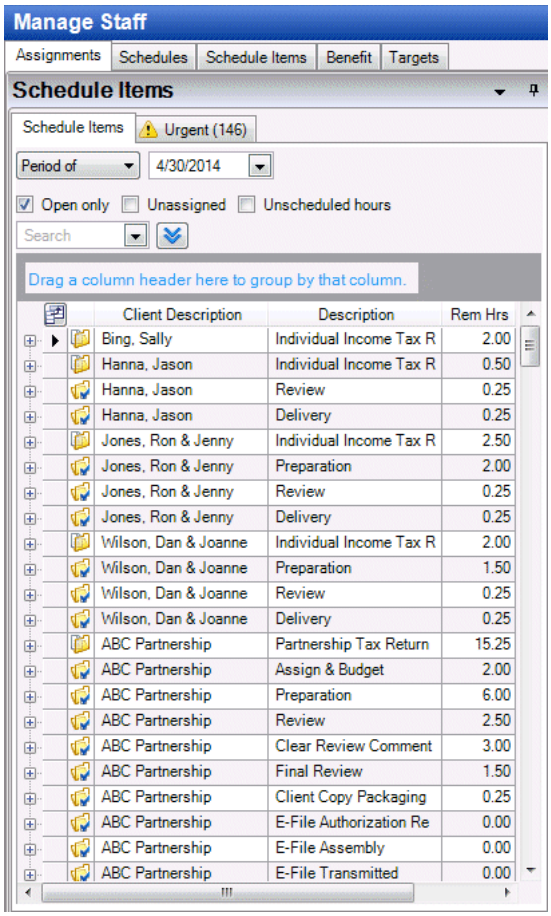
- See which schedule items are already assigned to staff members
- See a summary of assigned hours for each staff member and then drill down to see the actual schedule items
- Indicate in which order you want your staff to work on assigned schedule items
- Balance assignments across your staff
- See how many scheduled hours each staff person has over a particular time frame

Depending on your workflow, your firm may need to use this tab for only some of these activities.

1. In the Manage Staff screen, click the Assignments tab.
2. In the Schedule Items subtab, click the top left button and select **Period of**.



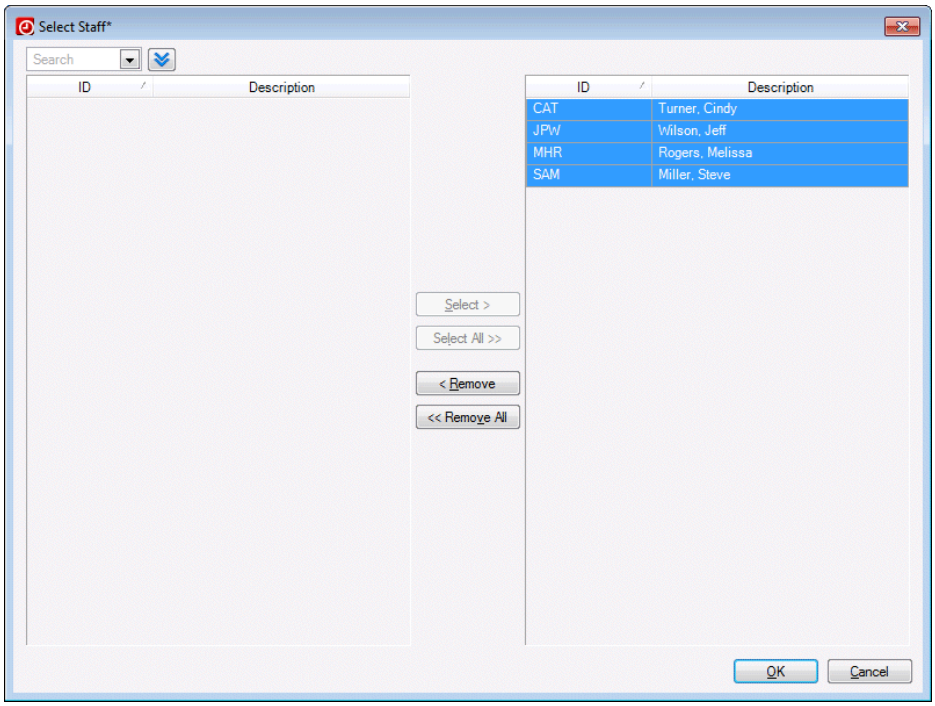
3. Select **4/30/2014** from the second drop-down list.
4. If necessary, mark the *Open only* checkbox.
5. The Schedule Items pane shows all schedule items for the date range you select. From this list, you can drag and drop items from the Schedule Items pane onto a staff member in the staff pane to assign the item to that staff member. You can also right-click an item in the list and choose Assign To.



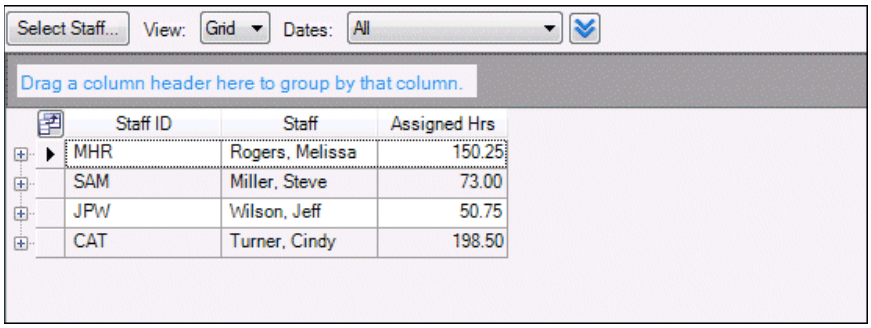
The Schedule Items and Urgent subtabs list all of the schedule items within your selected date range and other criteria. By default, the selected date is today's date until you change it.

Note: The Urgent subtab appears only if you have enabled it in User Preferences. To enable the Urgent subtab, choose Setup > User Preferences > Scheduling tab, or click the button next to Urgent User Preferences on the Urgent tab, and mark the checkboxes for any reasons why a schedule item should be flagged as urgent. See the topic Setting up user preferences for scheduling in the Practice CS Help & How-To Center for more information on defining schedule items as urgent.

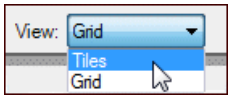
6. Click the Select Staff button.
7. In the Select Staff dialog, click the Select All button.



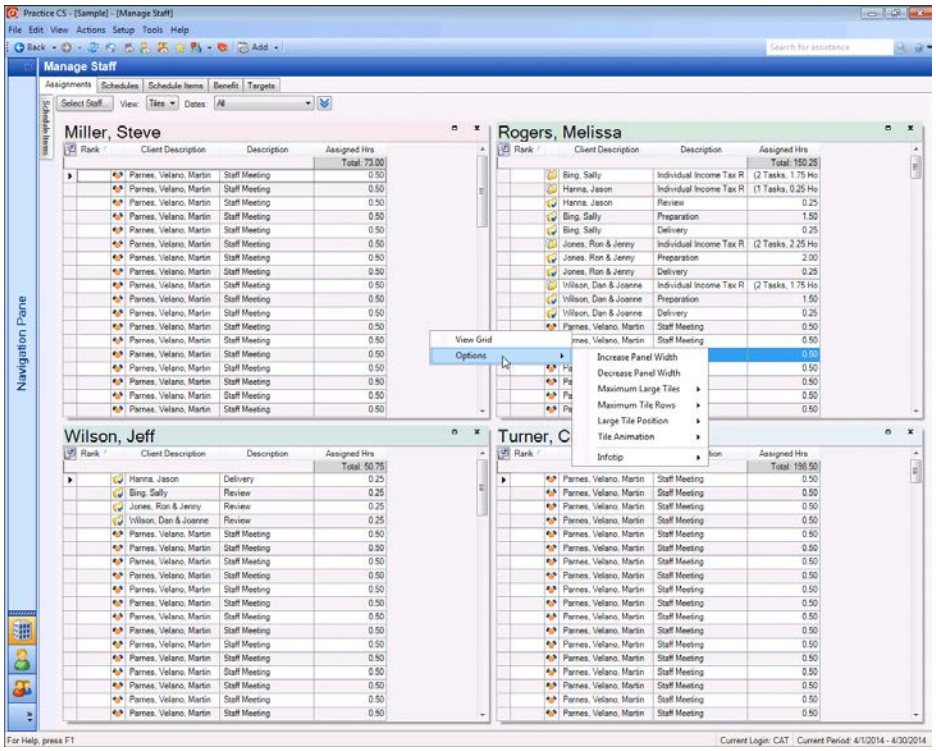
8. Click OK.
9. The staff section of the Assignments tab shows selected staff members and their current assignments. You can choose to see all current staff assignments regardless of date range, or limit the assignments to target date range or scheduled date range.



10. You can also view staff assignments in either Tiles or Grid mode. Click the down arrow on the View button and select Tiles from the drop-down list.

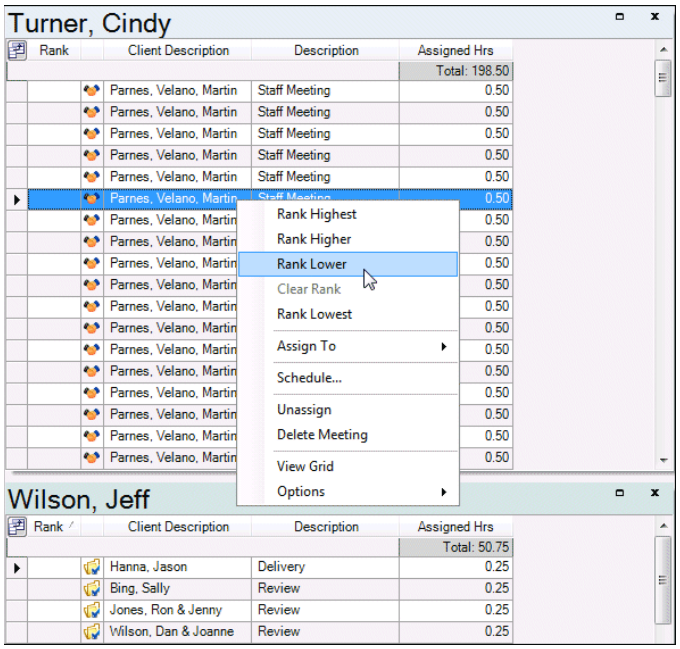


11. In Tiles mode, you can right-click, choose Options, and change the width, number, and position of tiles to arrange the screen to best suit your needs.



12. Right-click a schedule item in a grid and use the context menu to rank the item for the order in which the staff member should complete it. You can also use the context menu to assign, schedule, or delete the item.

Once an item is ranked, you can also click and drag other schedule items above or below it in the list to rank them higher or lower.



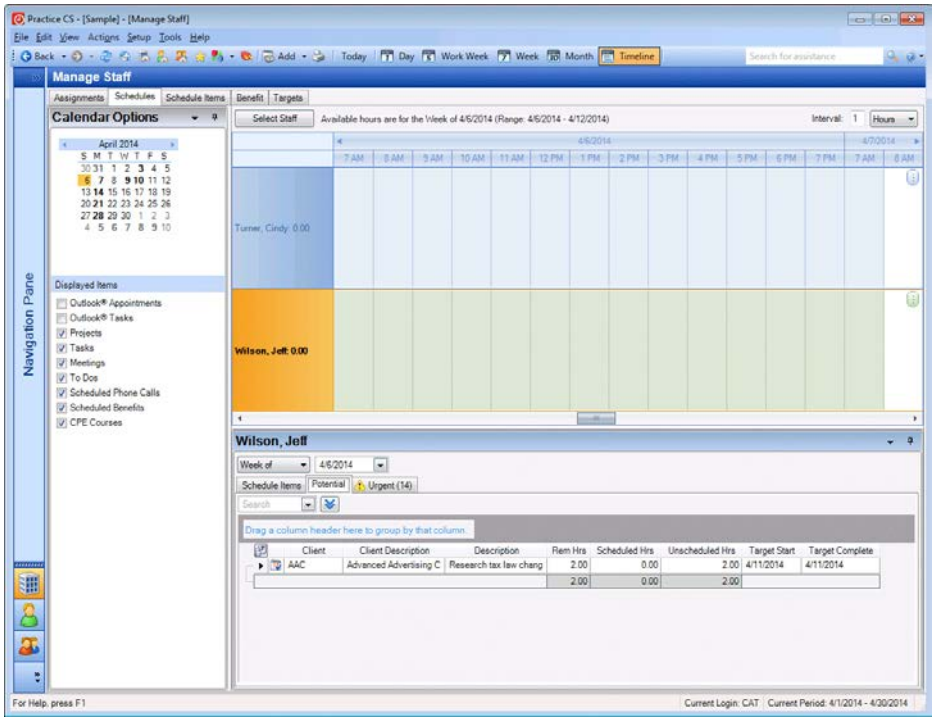
See the topic Assignments tab overview in the Practice CS Help & How-To Center for more information.

Using the Schedules tab

Use the Schedules tab to view staff schedules and assign items to staff members based on their qualifications and availability. Here you can find more potential work items for staff, identify urgent items for selected staff members, and reschedule work from one staff member to another.

1. Click the Schedules tab.
2. In the toolbar, click the Timeline button.
3. Click the Select Staff button and select staff CAT (Cindy Turner) and JPW (Jeff Wilson).
4. In the timeline, click Jeff Wilson to display his schedule items, potential work items, and urgent items in the lower pane.

5. If necessary, select **Week of** and the date of **4/6/14** in the lower pane, and then click the Potential tab.



6. Double-click the to-do item for client AAC in the grid. You can make changes to the item, including assigning it to a staff member or the work queue. For this exercise, click Cancel

Notes

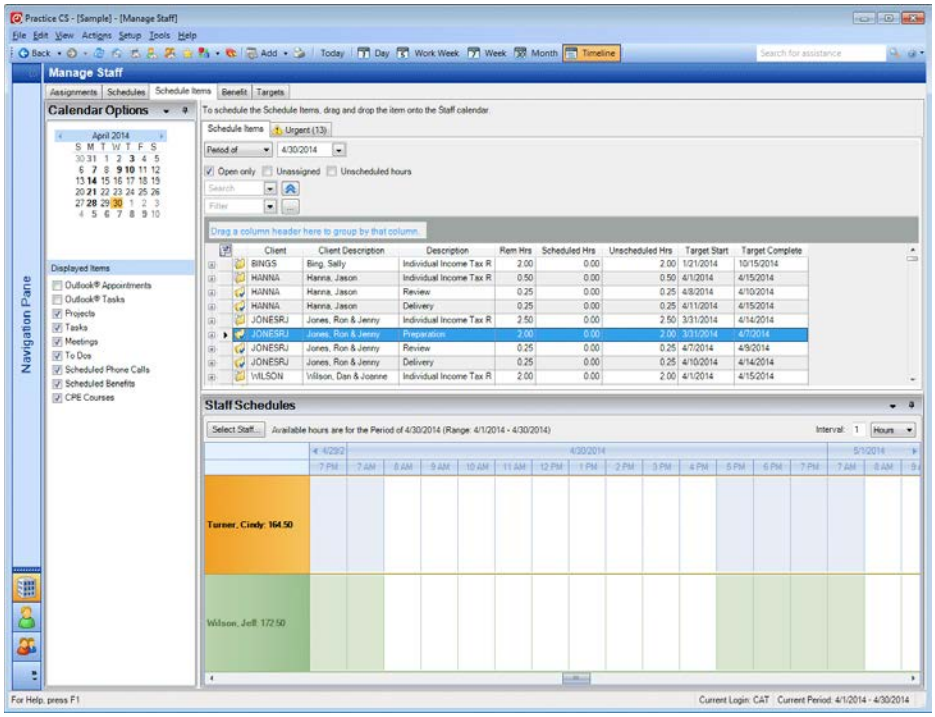
- You can drag and drop an item onto the calendar to schedule the item for a specific day and time when you are in Day or Timeline view.
- Drag and drop an item onto the calendar to loosely schedule the item when you are in Work Week, Week, or Month view.

Using the Schedule Items tab

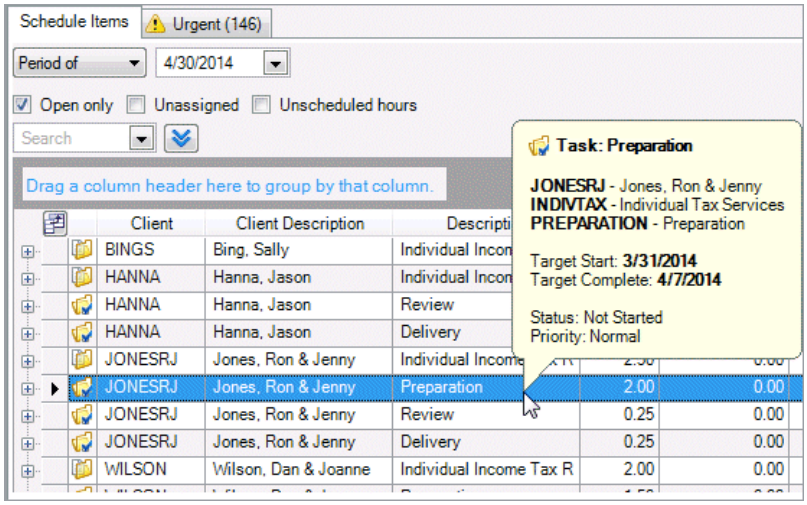
Use the Schedule Items tab to look for schedule items that are unassigned, not fully scheduled, or flagged as Urgent. You can also schedule items for staff based on their availability and qualifications.

1. Click the Schedule Items tab.
2. In the Schedule Items subtab, select **Period of** for the date range, and **4/30/2014** for the period end date.
3. In the Staff Schedules pane, click the Select Staff button and select Jeff Wilson (along with Cindy Turner, who should already be selected), then click OK.

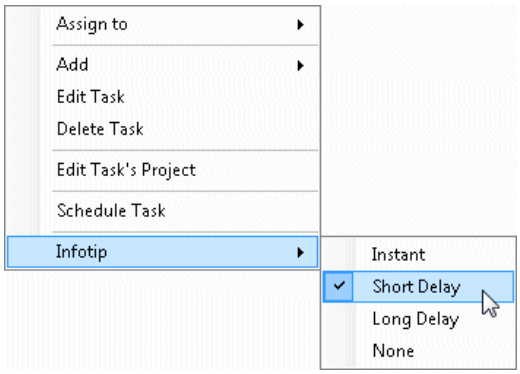
4. Locate the **Preparation** task for client JONESRJ in the Schedule Items grid, and select that item.



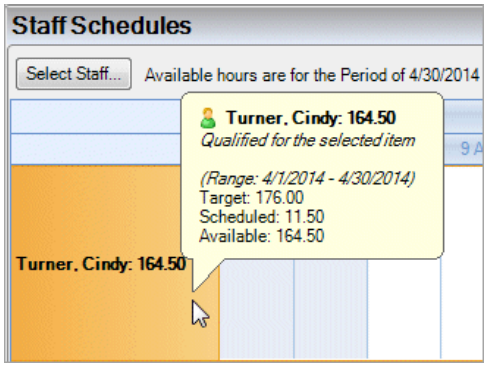
5. If you hold your mouse pointer over the item, an Infotip is displayed showing information about that item.



Note: You may have to turn on the Infotip by right-clicking and choosing Infotip and a delay option.

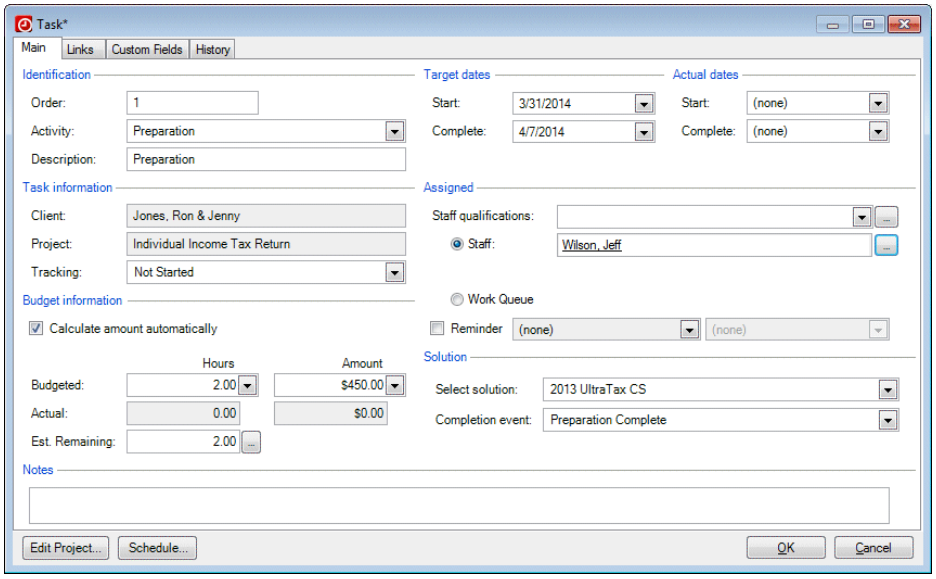


6. If you hold your mouse pointer over the staff description in the timeline, the Infotip shows whether the staff member is qualified to work on the selected schedule item.



7. Double-click the selected task to open it.
8. In the Assigned section, click the *Staff* option.

9. Click the button next to the *Staff* field, use the Assigned Staff dialog to assign the task to staff member JPW, and click OK.



10. Click OK to save your changes. The task is now assigned to Jeff Wilson.

Note: You can use the *Open only* and *Unassigned only* checkboxes in this tab to narrow the list of items.

As with the Schedules tab, you can drag and drop an item in the Schedule Items tab onto the calendar to schedule it for a specific day and time when you are in Day or Timeline view, or to loosely schedule it when you are in Work Week, Week, or Month view.

Staff benefits

Staff members can view their benefit balances and submit scheduled benefit requests using the Staff Management module.

Supervisors can make balance adjustments as needed and approve or deny benefit requests.

Viewing benefit balances

Staff members who have security privileges for the Benefits portlet on the Staff Dashboard can view their benefit balances.

1. Click the Staff Dashboard button on the toolbar.
2. Click the Benefits view and review the information displayed in the Benefits portlet.

Benefits

Benefit	Beg Bal	Earned YTD	Used YTD	Balance	Remaining Accruals	To Use	Carryover Max
Comp Time	0.00	0.00	0.00	0.00	0.00	0.00	80.00
Vacation Time	0.00	60.00	0.00	60.00	60.00	120.00	0.00
Personal Holiday	0.00	16.00	0.00	16.00	0.00	16.00	0.00
	0.00	76.00	0.00	76.00	60.00	136.00	

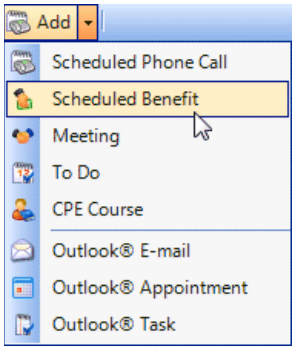
This portlet provides information on benefit beginning balances, earned and used amounts, current balances, remaining accrual amounts, maximum carryover amounts, and amounts that need to be used to bring balances down to the carryover maximum.

Note: The sample database includes the Benefits portlet on a Staff Management view, but your own dashboard may be customized differently. To add the Benefits portlet to your Staff Dashboard, click the Select Portlets link, mark the checkbox for the Benefits portlet, and click OK.

Submitting scheduled benefit requests

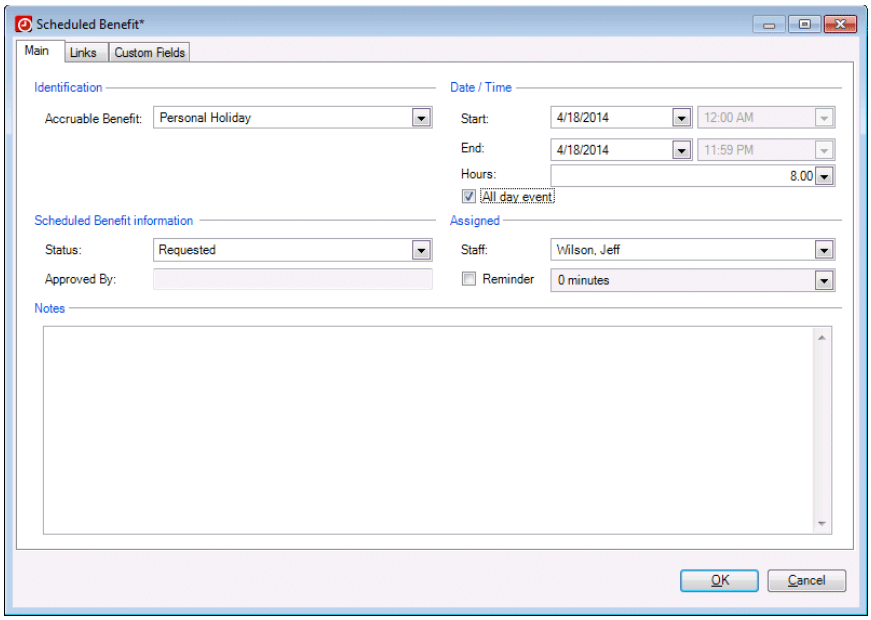
Staff members with sufficient security privileges can submit scheduled benefit requests in Practice CS, which can then be approved by their supervisors.

1. Click the down arrow on the right side of the Add button on the toolbar and choose Scheduled Benefit.



2. In the Scheduled Benefit dialog, choose **Personal Holiday** from the drop-down list in the *Accruable Benefit* field.
3. For the start date, enter **4/18/14**. Skip the accompanying time field.

4. Mark the *All day event* checkbox.
5. In the *Staff* field, select Wilson, Jeff.



6. Click OK when finished. This submits the request to the staff member's supervisor.

   In the next exercise, you will approve the request, but first you need to log in again to Practice CS as the staff member's supervisor, Steve Miller (SAM).
7. Choose File > Open Firm, enter **SAM** in the *Staff ID* field, and click OK.
8. Click OK on the Change Password dialog to leave the password blank for staff SAM.

Note: Because you have closed and reopened the Sample training database, you need to reset the training date to 4/1/2014 (Tools > Set Training Date Override) to complete the exercises in the rest of this chapter. See "Setting the training date override" on page 39 for details on setting the training date override.

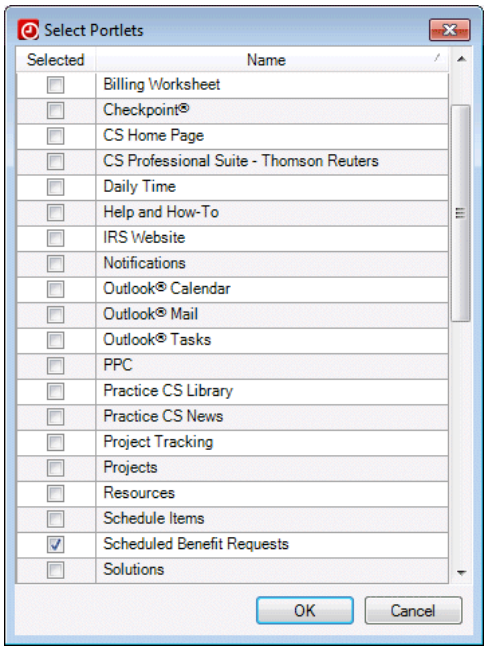
Approving or denying scheduled benefit requests

When a staff member submits a benefit request, it appears in the supervisor's Schedule Benefit Requests portlet on the Staff Dashboard. The supervisor may also receive a notification, if selected on the Notifications tab of the Firm setup screen.

Follow these steps to approve the scheduled benefit request you just entered.

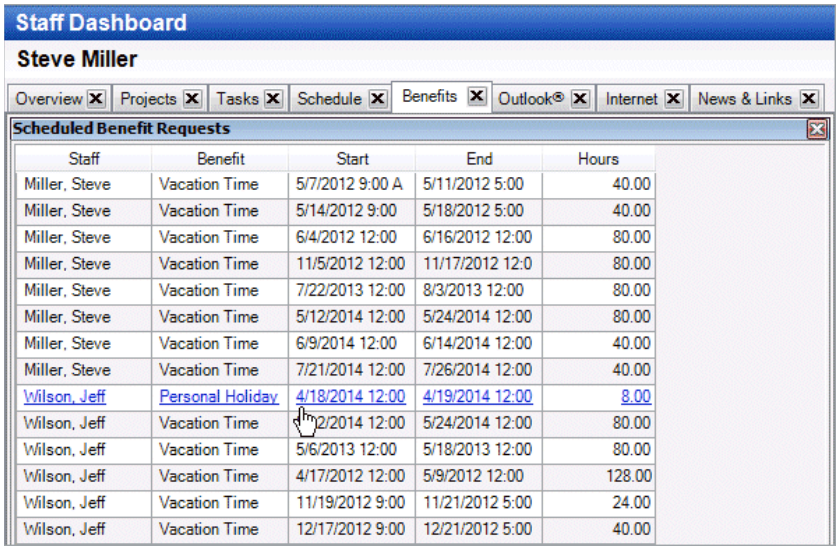
1. Click the Staff Dashboard button  on the toolbar.
2. Click the Benefits view.
3. Click the **Select Portlets** link and mark the *Scheduled Benefit Requests* checkbox.

4. Click OK.



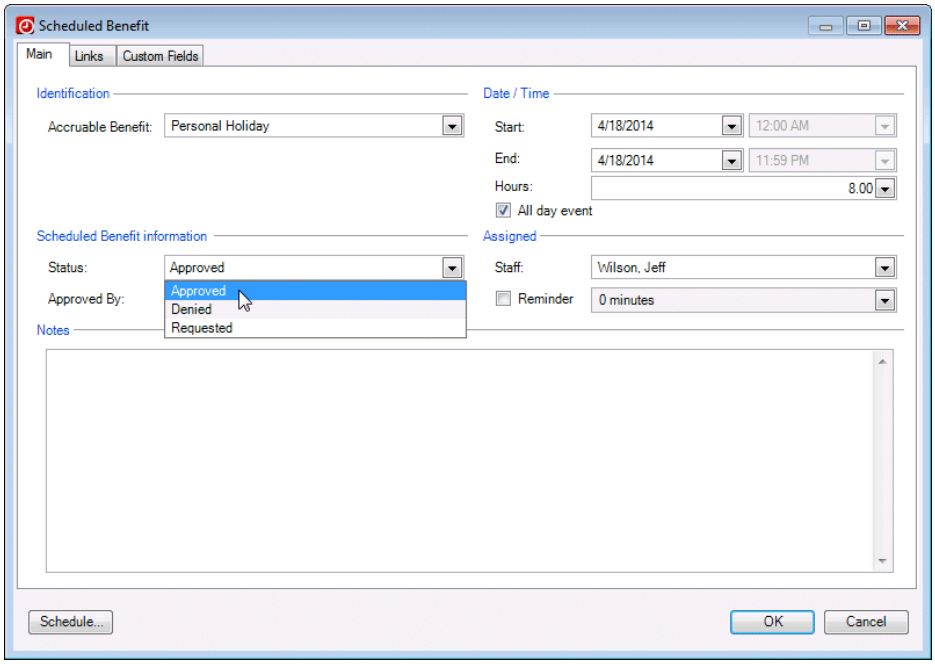
If necessary, click and drag the edges of the portlet on the dashboard until you can see all the columns.

5. Click the 4/18/14 Personal Holiday item for Jeff Wilson that appears in the Scheduled Benefit Requests portlet.

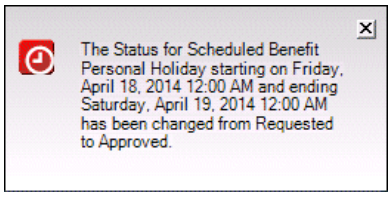


Staff	Benefit	Start	End	Hours
Miller, Steve	Vacation Time	5/7/2012 9:00 A	5/11/2012 5:00	40.00
Miller, Steve	Vacation Time	5/14/2012 9:00	5/18/2012 5:00	40.00
Miller, Steve	Vacation Time	6/4/2012 12:00	6/16/2012 12:00	80.00
Miller, Steve	Vacation Time	11/5/2012 12:00	11/17/2012 12:0	80.00
Miller, Steve	Vacation Time	7/22/2013 12:00	8/3/2013 12:00	80.00
Miller, Steve	Vacation Time	5/12/2014 12:00	5/24/2014 12:00	80.00
Miller, Steve	Vacation Time	6/9/2014 12:00	6/14/2014 12:00	40.00
Miller, Steve	Vacation Time	7/21/2014 12:00	7/26/2014 12:00	40.00
Wilson, Jeff	Personal Holiday	4/18/2014 12:00	4/19/2014 12:00	8.00
Wilson, Jeff	Vacation Time	2/2014 12:00	5/24/2014 12:00	80.00
Wilson, Jeff	Vacation Time	5/6/2013 12:00	5/18/2013 12:00	80.00
Wilson, Jeff	Vacation Time	4/17/2012 12:00	5/9/2012 12:00	128.00
Wilson, Jeff	Vacation Time	11/19/2012 9:00	11/21/2012 5:00	24.00
Wilson, Jeff	Vacation Time	12/17/2012 9:00	12/21/2012 5:00	40.00

6. In the Scheduled Benefit dialog, select **Approved** from the drop-down list in the *Status* field.



7. Click OK to approve the request. You will receive a notification that the request has been approved.



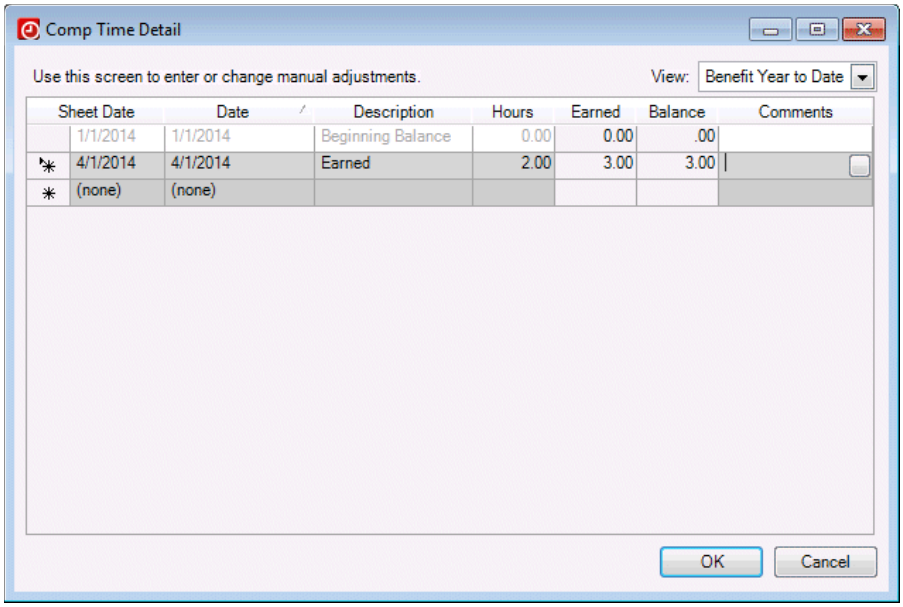
Entering comp time

Staff members with sufficient security privileges can enter comp time. In this exercise, you will enter comp time for Jeff Wilson in the Time & Expense Entry screen.

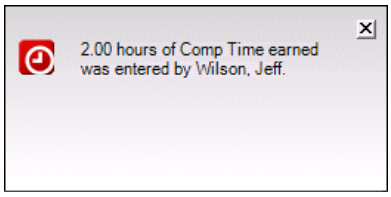
1. Choose Actions > Time & Expense Entry.
2. In the *Staff* field at the top of the Entry tab, select staff member **JPW**.
3. In the *Sheet date* field, select **4/1/2014**.
4. Click the Comp Time button in the upper-right corner.
5. In the Comp Time Detail dialog, place your cursor in the bottom row and enter **4/1/2014** in the Sheet Date and Date columns.
6. Select **Earned** in the Description column.

7. Enter **2.0** in the Hours column.

   Notice that the Earned column shows 3.0 hours even though you entered 2.0 in the Hours column. This is because of the allowance factors you entered in the "Setting up comp time" section of this walkthrough.

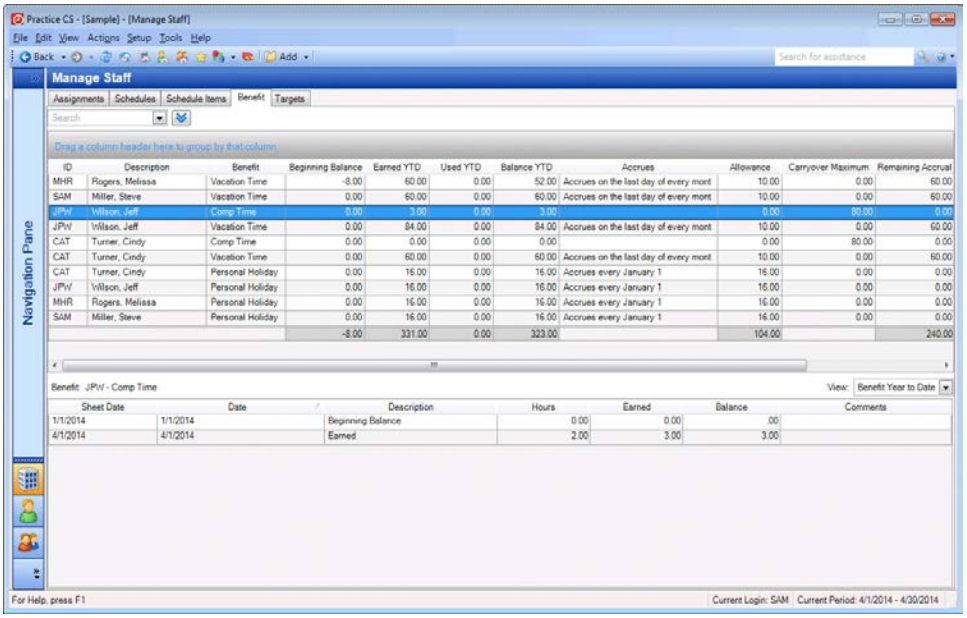


8. Click OK. You will receive a notification that comp time was entered for Jeff Wilson.



9. Choose Actions > Manage Staff and click the Benefit tab.

10. Select the Comp Time item for Jeff Wilson. You can see the details of the transaction you just entered in the bottom pane.



Making adjustments to benefit balances

If you need to make adjustments to benefit balances, you can do so using the steps found in “Adjusting benefit balances” on page 24.

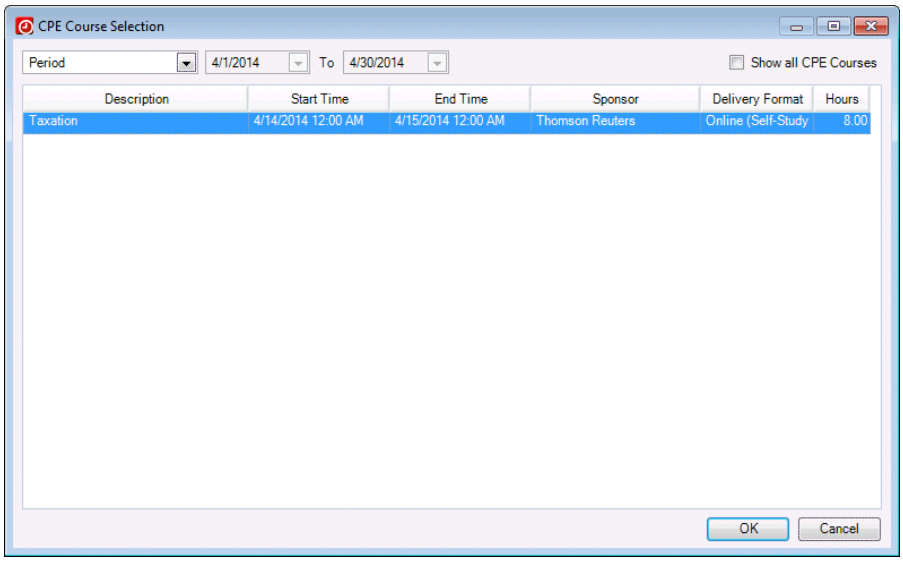
Entering CPE courses in Time & Expense Entry

Time spent attending CPE courses can be recorded on the Time & Expense Entry screen using the CPE administrative activity that you set up earlier.

1. Choose Actions > Time & Expense Entry.
2. In the *Staff* field, select Cindy Turner.
3. Select **4/15/14** in the *Sheet date* field.
4. In the first row, select **PVM** in the *Client* field.
5. Select the **ADMIN** engagement.
6. In the *Activity* field, select **CPE**.
7. Click the button under the CPE icon to open the CPE Course Selection dialog.

Note: You can modify your user preferences to have this dialog open automatically. Choose Setup > User Preferences > Time & Expense Entry tab and mark the *Auto display CPE Course Selection* checkbox.

8. In the CPE Course Selection dialog, select the **Taxation** class and click OK.



9. On the Time & Expense Entry screen, enter **8.00** in the *Hours* field.

Notes

- Time entries using a CPE activity will appear on the CPE Course Cost Analysis report as Staff Cost.
- To enter incidental expenses incurred while attending a CPE course, you must have an expense activity set up using the CPE administrative type. Expense entries using the CPE activity will appear on the CPE Course Cost Analysis report as Expenses.

Reporting

The Staff Management module features reports that provide information about schedule items, staff benefits, staff targets, comp time, and CPE courses.

Calendar Listing report

The Calendar Listing report shows schedule item information by scheduled date / time. The report date range is based on scheduled dates (week, month, period, 6 months, 12 months, custom, and so on). The detail line is based on scheduled start or end date.

1. Choose File > Print Reports to open the Print Reports screen.
2. Scroll down the list of reports to the Staff Management section, highlight the Calendar Listing report, and click the Select button.
3. On the Selection tab, select **Period End Date** in the *Report date* field and **Period** in the *Detail line* field.
4. On the Layout tab, select **Staff** in the first *Group by* field.

5. Click the Preview Selected button to view the report.

Parnes, Velano, Martinez & Co.

Calendar Listing
April 1, 2014 - April 30, 2014

Start	End	Staff ID	Client ID	Client Name	Description	Hours
CAT	**Turner, Cindy**					
04/07/14 8:30 AM	04/07/14 9:00 AM	CAT	PVM	Parnes, Velano, Martinez & Co.	Staff Meeting	0.00
04/09/14 10:00 AM	04/09/14 11:00 AM	CAT	AAC	Advanced Advertising Consultan	Follow up with Peter Wells	0.00
04/10/14 10:00 AM	04/10/14 10:30 AM	CAT	HANNA	Hanna, Jason	Client follow-up	0.00
04/14/14	04/14/14	CAT			Taxation	0.00
04/14/14 8:30 AM	04/14/14 9:00 AM	CAT	PVM	Parnes, Velano, Martinez & Co.	Staff Meeting	0.00
04/18/14	04/18/14	CAT			Personal Holiday	0.00
04/21/14 8:30 AM	04/21/14 9:00 AM	CAT	PVM	Parnes, Velano, Martinez & Co.	Staff Meeting	0.00
04/28/14 8:30 AM	04/28/14 9:00 AM	CAT	PVM	Parnes, Velano, Martinez & Co.	Staff Meeting	0.00
Turner, Cindy Totals						0.00
JPW	**Wilson, Jeff**					
04/03/14 2:00 PM	04/03/14 2:30 PM	JPW	AAC	Advanced Advertising Consultan	Consultation	0.00
04/07/14 8:30 AM	04/07/14 9:00 AM	JPW	PVM	Parnes, Velano, Martinez & Co.	Staff Meeting	0.00
04/09/14 10:00 AM	04/09/14 11:00 AM	JPW	AAC	Advanced Advertising Consultan	Follow up with Peter Wells	0.00
04/14/14 8:30 AM	04/14/14 9:00 AM	JPW	PVM	Parnes, Velano, Martinez & Co.	Staff Meeting	0.00
04/18/14	04/18/14	JPW			Personal Holiday	0.00
04/18/14	04/18/14	JPW			Personal Holiday	0.00
04/18/14	04/18/14	JPW			Personal Holiday	0.00
04/21/14 8:30 AM	04/21/14 9:00 AM	JPW	PVM	Parnes, Velano, Martinez & Co.	Staff Meeting	0.00
04/28/14 8:30 AM	04/28/14 9:00 AM	JPW	PVM	Parnes, Velano, Martinez & Co.	Staff Meeting	0.00
Wilson, Jeff Totals						0.00
MHR	**Rogers, Melissa**					
04/07/14 8:30 AM	04/07/14 9:00 AM	MHR	PVM	Parnes, Velano, Martinez & Co.	Staff Meeting	0.00
04/14/14 8:30 AM	04/14/14 9:00 AM	MHR	PVM	Parnes, Velano, Martinez & Co.	Staff Meeting	0.00
04/21/14	04/25/14	MHR			Vacation Time	0.00
04/21/14 8:30 AM	04/21/14 9:00 AM	MHR	PVM	Parnes, Velano, Martinez & Co.	Staff Meeting	0.00
04/28/14 8:30 AM	04/28/14 9:00 AM	MHR	PVM	Parnes, Velano, Martinez & Co.	Staff Meeting	0.00
Rogers, Melissa Totals						0.00

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6. Click the Back button to return to the Print Reports screen.

7. Click the Remove button to remove the report from the Selected Reports list.

CPE Course Cost Analysis report

The CPE Course Cost Analysis report analyzes the cost per credit for a CPE course. When a CPE course is associated with a time or expense entry, the staff cost and/or the expense cost are also factored into this analysis.

1. In the Staff Management section, highlight the CPE Course Cost Analysis report and click the Select button.

2. Leaving the default Selection and Layout settings, click the Preview Selected button. The report shows the Taxation class you entered for Cindy Turner, including the base cost of the course and the staff cost (8 hours at her cost rate).

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CPE Course Cost Analysis
April 1, 2014 - April 30, 2014
Date Based on: Target Complete

Description	Assigned Attendee	Delivery Format	Credits	Course Cost	Expenses	Staff Cost	Total Cost	Cost Per Credit
Taxation	Turner, Cindy	Online (Self-Study	40.00	239.00	0.00	560.00	799.00	19.98
Report Totals			40.00	239.00	0.00	560.00	799.00	19.98

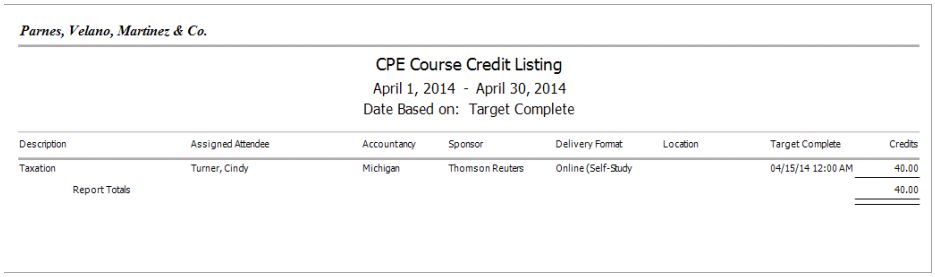
3. Click the Back button to return to the Print Reports screen.

4. Click the Remove button to remove the report from the Selected Reports list.

CPE Course Credit Listing report

The CPE Course Credit Listing report shows CPE courses and the staff who attended for date range you select. Course information includes description, sponsor, format, location, target complete date, and number of credits.

1. In the Staff Management section, highlight the CPE Course Credit Listing report and click the Select button.
2. Leaving the default Selection and Layout settings, click the Preview Selected button. The report shows the CPE course you entered for Cindy Turner (see “Entering CPE courses” on page 47).



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CPE Course Credit Listing
April 1, 2014 - April 30, 2014
Date Based on: Target Complete

Description	Assigned Attendee	Accountancy	Sponsor	Delivery Format	Location	Target Complete	Credits
Taxation	Turner, Cindy	Michigan	Thomson Reuters	Online (Self-Study		04/15/14 12:00 AM	40.00
Report Totals							40.00

3. Click the Back button to return to the Print Reports screen.
4. Click the Remove button to remove the report from the Selected Reports list.

Schedule Item Detail report

This report is similar to the Schedule Item Listing report but includes columns for Remaining Hours, Scheduled Hours, and Unscheduled Hours. You can mark the Include *Calendar Entry Detail* checkbox on the Layout tab for a subreport that shows all the open calendar entries for each schedule item.

1. In the Staff Management section, highlight the Schedule Item Detail report and click the Select button.
2. On the Selection tab, select **Period End Date** in the *Report date* field and **Period** in the *Detail line* field.
3. On the Layout tab, select **Assigned Staff List** in the first *Group by* field.

4. Click the Preview Selected button.

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Schedule Item Detail
April 1, 2014 - April 30, 2014
Date Based on: Target Start

Type	Description	Client Name	Assigned	Status	Remaining Hours	Scheduled Hours	Unscheduled Hours	Target Complete
CAT	**Turner, Cindy**							
Project	941 Employer's Quarter Fed TR	Brown, Jerald & Elizabeth	Turner, Cindy	Not Started	3.00	0.00	3.00	
Project	941 Employer's Quarter Fed TR	Crawford's Steak House	Turner, Cindy	Not Started	4.00	0.00	4.00	
Project	941 Employer's Quarter Fed TR	Prototype Design	Turner, Cindy	Not Started	4.00	0.00	4.00	
Project	941 Employer's Quarter Fed TR	Ace Advertising	Turner, Cindy	Not Started	1.00	0.00	1.00	
Project	Bi-Weekly Payroll	Brown, Jerald & Elizabeth	Turner, Cindy	Not Started	3.00	0.00	3.00	04/04/14
Project	Bi-Weekly Payroll	Brown, Jerald & Elizabeth	Turner, Cindy	Not Started	3.00	0.00	3.00	04/17/14
Scheduled Phone Call	Client follow-up	Hanna, Jason	Turner, Cindy	Scheduled	0.00	0.00	0.00	04/10/14 10:30 AM
Task	Final Review	Alpha Promotions	Turner, Cindy	Not Started	1.00	0.00	1.00	04/07/14
Task	Final Review	ABC Partnership	Turner, Cindy	Not Started	1.50	0.00	1.50	04/11/14
Task	Financial Statement Review	Smith, Tom & Kathleen	Turner, Cindy	Not Started	1.00	0.00	1.00	
Project	March Writeup	Crawford's Steak House	Turner, Cindy	Not Started	4.00	0.00	4.00	
Project	March Writeup	Ace Advertising	Turner, Cindy	Not Started	4.00	0.00	4.00	04/18/14
Project	Monthly Payroll	Ace Advertising	Turner, Cindy	Not Started	4.00	0.00	4.00	
Project	Monthly Payroll	Crawford's Steak House	Turner, Cindy	Not Started	4.00	0.00	4.00	
Project	Monthly Payroll	Prototype Design	Turner, Cindy	Not Started	4.00	0.00	4.00	
Scheduled Benefit	Personal Holiday		Turner, Cindy	Requested	0.00	0.00	0.00	04/19/14 12:00 AM
To Do	Pickup paperwork	ABC Partnership	Turner, Cindy	Not Started	1.50	0.00	1.50	04/07/14
Task	Preparation	Ace Advertising	Turner, Cindy	Not Started	4.00	0.00	4.00	
Task	Preparation	Brown, Jerald & Elizabeth	Turner, Cindy	Not Started	3.00	0.00	3.00	
Task	Preparation	Crawford's Steak House	Turner, Cindy	Not Started	4.00	0.00	4.00	
Task	Preparation	Crawford's Steak House	Turner, Cindy	Not Started	4.00	0.00	4.00	
Task	Preparation	Crawford's Steak House	Turner, Cindy	Not Started	4.00	0.00	4.00	

Printed by SAM on 7/23/2014 at 3:47 PM *Page 1*

5. Click the Back button to return to the Print Reports screen.
6. Click the Remove button to remove the report from the Selected Reports list.

Schedule Item Listing report

The Schedule Item Listing report enables you to generate a list of schedule items by date range and grouped by various schedule item properties.

1. In the Staff Management section, highlight the Schedule Item Listing report, and click the Select button.
2. On the Selection tab, make the following selections.

Field	Selection
Report date	Period End Date
Detail line	Period-to-date
Based on	Target Complete

3. On the Layout tab, select **Client** in the first *Group by* field.

4. Click Preview Selected to view the report.

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Schedule Item Listing
April 1, 2014 - April 30, 2014
Date Based on: Target Complete

Type	Description	Client Name	Assigned	Priority	Hours	Target Start	Target Complete
Unspecified							
Scheduled Benefit	Personal Holiday		Wilson, Jeff	Normal	8.00	04/18/14 12:00 AM	04/19/14 12:00 AM
Scheduled Benefit	Personal Holiday		Turner, Cindy	Normal	8.00	04/18/14 12:00 AM	04/19/14 12:00 AM
Scheduled Benefit	Personal Holiday		Wilson, Jeff	Normal	8.00	04/18/14 12:00 AM	04/19/14 12:00 AM
Scheduled Benefit	Personal Holiday		Wilson, Jeff	Normal	8.00	04/18/14 12:00 AM	04/19/14 12:00 AM
CPE Course	Taxation		Turner, Cindy	Normal	8.00	04/14/14 12:00 AM	04/15/14 12:00 AM
Scheduled Benefit	Vacation Time		Rogers, Melissa	Normal	40.00	04/21/14 12:00 AM	04/26/14 12:00 AM
	Unspecified Totals				80.00		
AAC	**Advanced Advertising Consultan**						
Scheduled Phone Call	Consultation	Advanced Advertising Consultan	Wilson, Jeff	Normal	0.50	04/03/14 2:00 PM	04/03/14 2:30 PM
Meeting	Follow up with Peter Wells	Advanced Advertising Consultan	Turner, Cindy; Wilson, Jeff	Normal	1.00	04/09/14 10:00 AM	04/09/14 11:00 AM
To Do	Research tax law changes	Advanced Advertising Consultan	Work Queue: Business Tax Prep Intermediate	High	2.00	04/11/14	04/11/14
	Advanced Advertising Consultan Totals				3.50		
ABCP	**ABC Partnership**						
Task	Clear Review Comments	ABC Partnership	Rogers, Melissa	Normal	3.00	04/09/14	04/10/14
Task	Client Copy Packaging	ABC Partnership	Rogers, Melissa	Normal	0.25	04/14/14	04/14/14
Task	E-File Assembly	ABC Partnership	Rogers, Melissa	Normal	0.00	04/14/14	04/14/14
Task	E-File Authorization Received	ABC Partnership	Rogers, Melissa	Normal	0.00	04/14/14	04/14/14
Task	E-File Transmitted	ABC Partnership	Rogers, Melissa	Normal	0.00	04/14/14	04/14/14
Task	Final Review	ABC Partnership	Turner, Cindy	Normal	1.50	04/10/14	04/11/14
Project	Partnership Tax Return	ABC Partnership	Miller, Steve	Normal	15.25	03/31/14	04/14/14
To Do	Pickup paperwork	ABC Partnership	Turner, Cindy	Normal	1.50	04/07/14	04/07/14
Task	Preparation	ABC Partnership	Rogers, Melissa	Normal	6.00	03/31/14	04/07/14
Task	Review	ABC Partnership	Turner, Cindy	Normal	2.50	04/07/14	04/08/14
	ABC Partnership Totals				30.00		
ACEADVERT	**Ace Advertising**						

Printed by SAMon 7/23/2014 at 3:51 PM *Page 1*

5. Click the Back button to return to the Print Reports screen.
6. Click the Remove button to remove the report from the Selected Reports list.

Staff Assigned Summary report

The Staff Assigned Summary report shows staff target work hours, assigned hours, remaining hours, and work load for the specified date range. You can also mark the Include Schedule Item Detail checkbox on the Layout tab to see the priority, status, and start and complete dates, for each schedule item that makes up the assigned hours for the staff member.

Note: This report was formerly named the Staff Schedule Summary report. A different report now bears that name.

1. In the Staff Management section, highlight the Staff Assigned Summary report and click the Select button.
2. On the Selection tab, select **Period End Date** in the *Report date* field and **Period** in the *Detail line* field.
3. On the Layout tab, verify that the *Include Schedule Item Detail* checkbox is marked.

4. Click the Preview Selected button to view the report.

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Staff Assigned Summary
April 1, 2014 - April 30, 2014

ID	Name	Office	Supervisor	Target Work Hours	Assigned Hours	Remaining Hours	Work Load
ADMIN	Administrator			0.00	0.00	0.00	0.00
CAT	Turner, Cindy	California Office	Turner, Cindy	176.00	62.50	113.50	35.51

Detail: Type	Description	Client Name	Priority	Status	Hours	Start	Complete
Project	Monthly Payroll	Ace Advertising #563 - MONTHPAYROL	Normal	Not Started	0.00		
Task	Preparation	Ace Advertising #563 - MONTHPAYROL	Normal	Not Started	4.00		
Project	941 Employer's Quarter Fed TR	Brown, Jerald &Elizabeth #565 - 941	Normal	Not Started	0.00		
Task	Preparation	Brown, Jerald &Elizabeth #565 - 941	Normal	Not Started	3.00		
Project	941 Employer's Quarter Fed TR	Crawford's Steak House #573 - 941	Normal	Not Started	0.00		
Task	Preparation	Crawford's Steak House #573 - 941	Normal	Not Started	4.00		
Project	March Writeup	Crawford's Steak House #576 - MARWRITEUP	Normal	Not Started	0.00		
Task	Preparation	Crawford's Steak House #576 - MARWRITEUP	Normal	Not Started	4.00		
Project	Monthly Payroll	Crawford's Steak House #579 - MONTHPAYROL	Normal	Not Started	0.00		
Task	Preparation	Crawford's Steak House #579 - MONTHPAYROL	Normal	Not Started	4.00		
Project	941 Employer's Quarter Fed TR	Prototype Design #581 - 941	Normal	Not Started	0.00		
Task	Preparation	Prototype Design #581 - 941	Normal	Not Started	4.00		
Project	Monthly Payroll	Prototype Design #584 - MONTHPAYROL	Normal	Not Started	0.00		
Task	Preparation	Prototype Design #584 - MONTHPAYROL	Normal	Not Started	4.00		
Project	Quarterly Writeup	Prototype Design #586 - QTRWRITEUP	Normal	Not Started	0.00		
Task	Preparation	Prototype Design #586 - QTRWRITEUP	Normal	Not Started	4.00		
Task	Review	Smith, Tom & Kathleen #587 - QTRCOMP	Normal	Not Started	1.00		
Task	Financial Statement Review	Smith, Tom & Kathleen #587 - QTRCOMP	Normal	Not Started	1.00		
Project	941 Employer's Quarter Fed TR	Ace Advertising #600 - 941	Normal	Not Started	0.00		
Task	Preparation	Bing, Ted &Angela #521 - 1040	Normal	Not Started	2.00	03/06/14	03/10/14
Task	Clear Review Comments	Bing, Ted &Angela #521 - 1040	Normal	Not Started	1.00	03/13/14	03/14/14
Task	Review	Alpha Promotions #511 - 1065	Normal	Not Started	2.00	04/03/14	04/04/14
Project	Bi-Weekly Payroll	Brown, Jerald &Elizabeth #571 - BIWEEKPAYRL	Normal	Not Started	0.00	04/03/14	04/04/14
Task	Preparation	Brown, Jerald &Elizabeth #571 -	Normal	Not Started	3.00	04/03/14	04/04/14

Printed by SAMon 7/23/2014 at 3:53 PM *Page 1*

5. Click the Back button to return to the Print Reports screen.
6. Click the Remove button to remove the report from the Selected Reports list.

Staff Benefits Summary report

The Staff Benefit Summary report displays active benefit balances for staff — beginning balance, earned, used, and current balance. If you mark the Include Benefits Detail checkbox in the Layout tab, you can include the earned and used history for each benefit.

1. With the Print Reports screen open, double-click the Staff Benefits Summary report to move it to the Selected Reports list.
2. On the Selection tab, select **Period End Date** in the *Report date* field and **Year-to-date** in the *Detail line* field.

3. Click the Preview Selected button to view the report.

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Staff Benefits Summary
January 1, 2014 - April 30, 2014

ID	Name/Description	Beg Bal	Earned	Used	Balance
CAT	**Turner, Cindy**				
	Personal Holiday	0.00	16.00	0.00	16.00
	Vacation Time	0.00	40.00	0.00	40.00
CAT	Turner, Cindy	0.00	56.00	0.00	56.00
JPW	**Wilson, Jeff**				
	Comp Time	0.00	3.00	0.00	3.00
	Personal Holiday	0.00	16.00	0.00	16.00
	Vacation Time	0.00	64.00	0.00	64.00
JPW	Wilson, Jeff	0.00	83.00	0.00	83.00
MHR	**Rogers, Melissa**				
	Personal Holiday	0.00	16.00	0.00	16.00
	Vacation Time	-8.00	40.00	0.00	32.00
MHR	Rogers, Melissa	-8.00	56.00	0.00	48.00
SAM	**Miller, Steve**				
	Personal Holiday	0.00	16.00	0.00	16.00
	Vacation Time	0.00	40.00	0.00	40.00
SAM	Miller, Steve	0.00	56.00	0.00	56.00
	Report Totals	-8.00	251.00	0.00	243.00

4. Click the Back button to close the preview, and click the Remove button to remove the report from the Selected Reports list.

Staff Capacity Analysis report

The Staff Capacity Analysis report provides a way to see staff availability (target hours - scheduled hours) for up to 18 periods at a time. Use this report to see how many hours are available for a specific staff member, office, or for the firm. Available hours can be grouped by day, week, month, or period, and by several staff- and firm-level options.

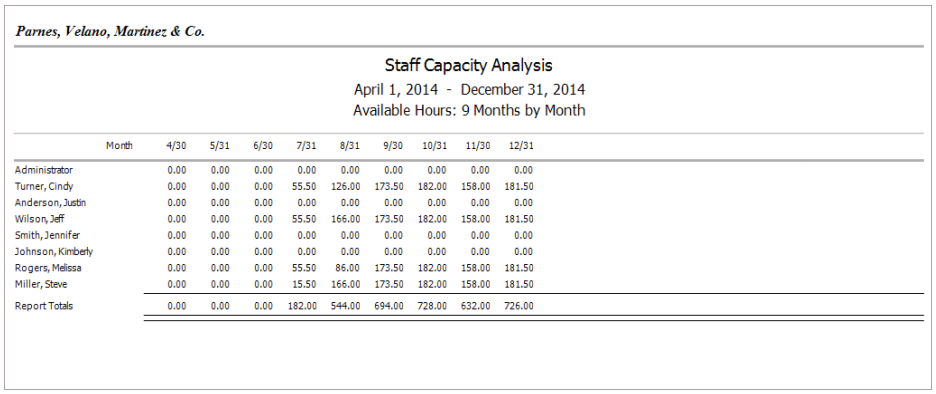
1. In the Staff Management section, highlight the Staff Capacity Analysis report and click the Select button.

2. On the Selection tab, make the following selections:

Field	Selection
Report date	Period End Date
Detail line	9 Months
Columns by	Month

3. On the Layout tab, select **Staff** in the *Detail by* field.

4. Click the Preview Selected button to view the report.



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Staff Capacity Analysis
April 1, 2014 - December 31, 2014
Available Hours: 9 Months by Month

Month	4/30	5/31	6/30	7/31	8/31	9/30	10/31	11/30	12/31
Administrator	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Turner, Cindy	0.00	0.00	0.00	55.50	126.00	173.50	182.00	158.00	181.50
Anderson, Justin	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Wilson, Jeff	0.00	0.00	0.00	55.50	166.00	173.50	182.00	158.00	181.50
Smith, Jennifer	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Johnson, Kimberly	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Rogers, Melissa	0.00	0.00	0.00	55.50	86.00	173.50	182.00	158.00	181.50
Miller, Steve	0.00	0.00	0.00	15.50	166.00	173.50	182.00	158.00	181.50
Report Totals	0.00	0.00	0.00	182.00	544.00	694.00	728.00	632.00	726.00

5. Click the Back button to return to the Print Reports screen.

6. Click the Remove button to remove the report from the Selected Reports list.

Staff Schedule Summary report

The Staff Schedule Summary report shows staff target work hours, scheduled hours, available hours, and work load for the specified date range. You can also mark the *Include Calendar Entry Detail* checkbox on the Layout tab to see the type, priority, status, and start and end dates for each schedule item that makes up the assigned hours for the staff member.

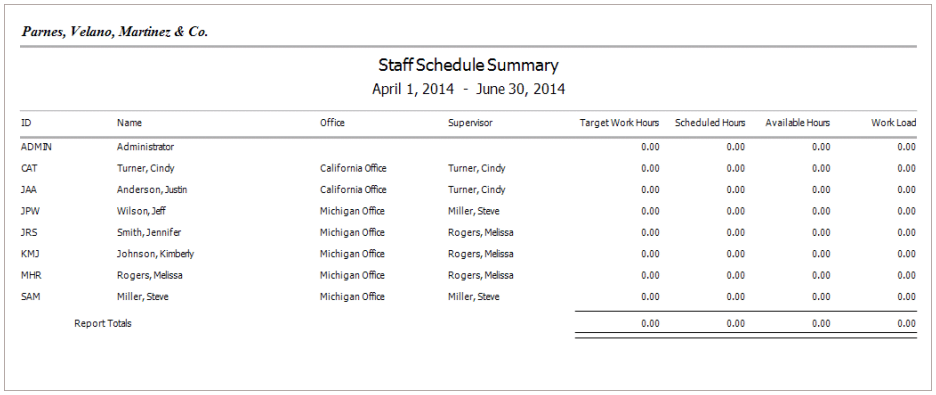
Note: The report that previously bore this name is now called the Staff Assigned Summary report.

1. In the Staff Management section, double-click the Staff Schedule Summary report.

2. On the Selection tab, select **Period End Date** in the *Report Date* field and **3 Months** in the *Detail line* field.

3. Click the Layout tab and verify that the *Include Calendar Entry Detail* checkbox is marked.

4. Click the Preview Selected button.



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Staff Schedule Summary
April 1, 2014 - June 30, 2014

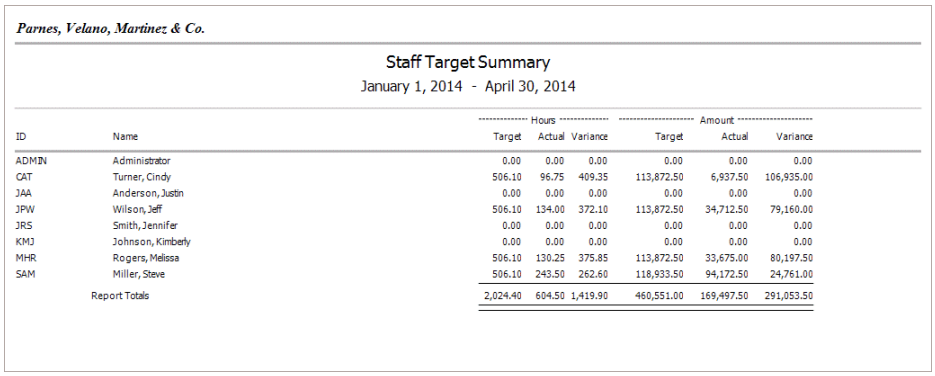
ID	Name	Office	Supervisor	Target Work Hours	Scheduled Hours	Available Hours	Work Load
ADMIN	Administrator			0.00	0.00	0.00	0.00
CAT	Turner, Cindy	California Office	Turner, Cindy	0.00	0.00	0.00	0.00
JAA	Anderson, Justin	California Office	Turner, Cindy	0.00	0.00	0.00	0.00
JPW	Wilson, Jeff	Michigan Office	Miller, Steve	0.00	0.00	0.00	0.00
JRS	Smith, Jennifer	Michigan Office	Rogers, Melissa	0.00	0.00	0.00	0.00
KMJ	Johnson, Kimberly	Michigan Office	Rogers, Melissa	0.00	0.00	0.00	0.00
MHR	Rogers, Melissa	Michigan Office	Rogers, Melissa	0.00	0.00	0.00	0.00
SAM	Miller, Steve	Michigan Office	Miller, Steve	0.00	0.00	0.00	0.00
Report Totals				0.00	0.00	0.00	0.00

5. Click the Back button to close the preview, and click the Remove button to remove the report from the Selected Reports list.

Staff Target Summary report

The Staff Target Summary report enables you to compare actual hours worked by your staff during a specified date range to the targets established for them.

1. With the Print Reports screen open, double-click the Staff Target Summary report to move it to the Selected Reports list.
2. On the Selection tab, select **Period End Date** in the *Report date* field and **Year-to-date** in the *Detail line* field.
3. Click the Preview Selected button to view the report.



Parnes, Velano, Martinez & Co.

Staff Target Summary

January 1, 2014 - April 30, 2014

		Hours			Amount		
ID	Name	Target	Actual	Variance	Target	Actual	Variance
ADMIN	Administrator	0.00	0.00	0.00	0.00	0.00	0.00
CAT	Turner, Cindy	506.10	96.75	409.35	113,872.50	6,937.50	106,935.00
JAA	Anderson, Justin	0.00	0.00	0.00	0.00	0.00	0.00
JPW	Wilson, Jeff	506.10	134.00	372.10	113,872.50	34,712.50	79,160.00
JRS	Smith, Jennifer	0.00	0.00	0.00	0.00	0.00	0.00
KMJ	Johnson, Kimberly	0.00	0.00	0.00	0.00	0.00	0.00
MHR	Rogers, Melissa	506.10	130.25	375.85	113,872.50	33,675.00	80,197.50
SAM	Miller, Steve	506.10	243.50	262.60	118,933.50	94,172.50	24,761.00
	Report Totals	2,024.40	604.50	1,419.90	460,551.00	169,497.50	291,053.50

4. Click the Back button to close the preview and click the Remove button to remove the report from the Selected Reports list.

Timesheet Exception report

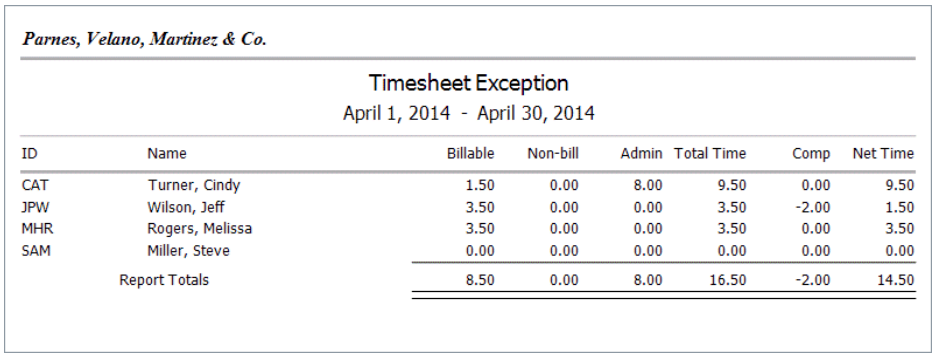
The Timesheet Exception report enables you to verify that your staff are meeting their target hours. This report displays comp time information in addition to billable, nonbillable, and administrative hours.

1. With the Print Reports screen open, double-click the Timesheet Exception report to move it to the Selected Reports list.

   Note: This report is listed under Production in the list of reports.

2. On the Selection tab, select **Period End Date** in the *Report date* field and **Period-to-date** in the *Detail line* field.
3. On the Layout tab, mark the *Include Staff with hours less than their target work hours* checkbox.

4. Click the Preview Selected button to view the report.



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Timesheet Exception

April 1, 2014 - April 30, 2014

ID	Name	Billable	Non-bill	Admin	Total Time	Comp	Net Time
CAT	Turner, Cindy	1.50	0.00	8.00	9.50	0.00	9.50
JPW	Wilson, Jeff	3.50	0.00	0.00	3.50	-2.00	1.50
MHR	Rogers, Melissa	3.50	0.00	0.00	3.50	0.00	3.50
SAM	Miller, Steve	0.00	0.00	0.00	0.00	0.00	0.00
	Report Totals	8.50	0.00	8.00	16.50	-2.00	14.50

5. Click the Back button to close the preview.

Restoring the sample database

After you have completed this walkthrough, you should restore the sample database that you backed up (see “Backing up the sample database” on page 2). Use the restored sample database to complete other Practice CS walkthroughs.

1. From the File menu, choose Restore.
2. In the Restore dialog, enter the path to the backup file that you want to restore, or click the ... button to navigate to the backup location (typically **X:**\Program Files\Microsoft SQL Server\MSSQL$CREATIVESOLUTION\Data, where **X:** is the drive on the computer where the data resides).
3. In the Restore File Location dialog, click the backup file that you want to restore and click OK.
4. In the Restore dialog, enter a new name for the database in the *New Firm name* field.

Note: When you restore the sample database, you must give it a different name. The restore process in Practice CS does not overwrite an existing database, and Practice CS does not allow firm databases with duplicate names. Therefore, you will need to give the database a different name when you restore it (for example, **Sample1**). The name may contain only alphanumeric characters.