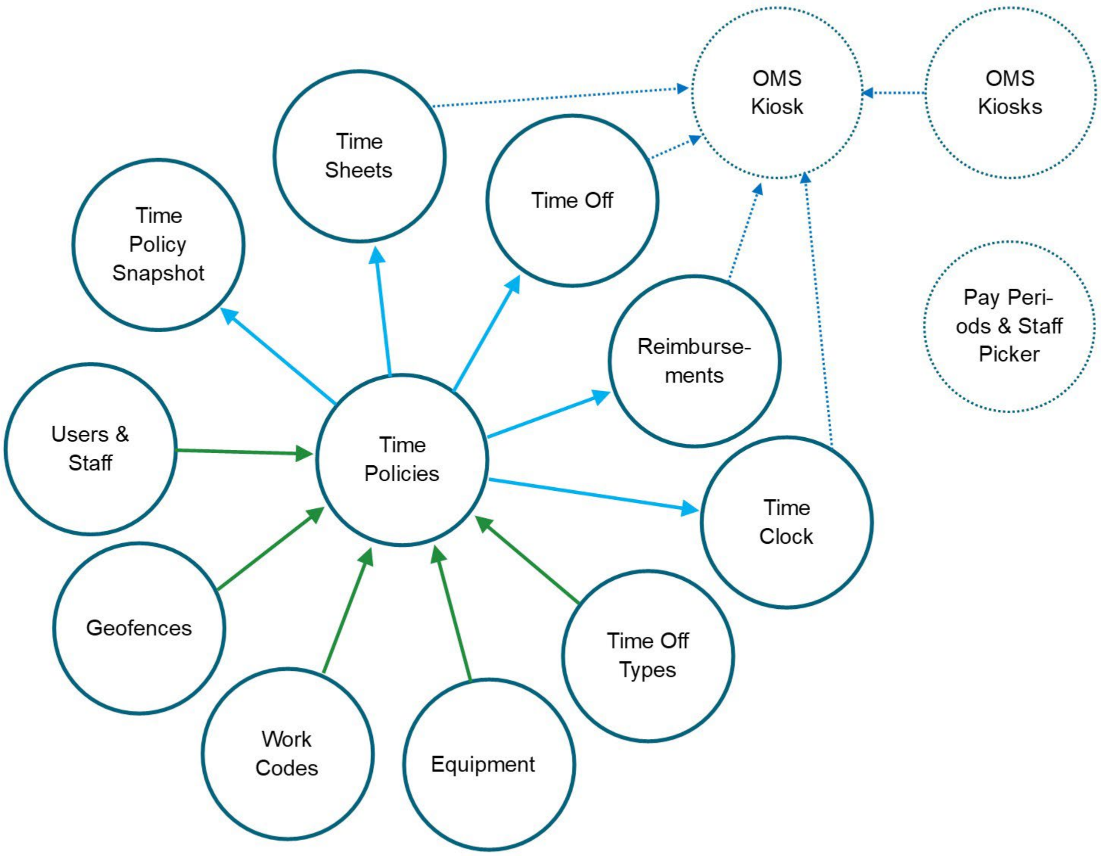
# Development of Operations Management System for Iowa Secondary Road Departments




**June 2025**

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16. **Abstract**


A management goal in every Secondary Road Department is to optimize the work performance of its employees. To be most effective, everyone in the department needs access to all the information about the soft assets used to do their jobs and effective communications with other staff. While this has long been accomplished via paper records, radios, phones and end-of-day discussions, this has created inefficiencies within the department.

To respond to this challenge, the Iowa County Engineers Association (ICEA) Computer and Information Technology Committee created a vision of a web-based set of tools that would help optimize the functioning of secondary road department maintenance assets. The Iowa County Engineers Association Service Bureau (ICEASB) with its team of web-based computer developers, worked closely with the ICEA Computer and Information Technology Committee to create several new computer applications that help manage the soft assets of a secondary road department. This suite of applications makes up the Operation Management System (OMS) hosted on the ICEASB website.

These applications include:

1. Time Tracking
   Time Policies, Time Clock, Time Off, Time Off Types, Time Sheets, Geofences, OMS Kiosks, Pay Periods and Staffs, Reimbursements, Work Codes, Equipment
2. Calendar
3. Call Outs


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# Development of Operations Management System for Iowa Secondary Road Departments

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*Prepared for*
Iowa Highway Research Board

June 2025

**Final Report**

TR-745

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# List of Abbreviations and Acronyms

ICEA ............................. Iowa County Engineers Association

ICEASB ......................... Iowa County Engineers Association Service Bureau

OMS ............................. Operations Management System

TAC .............................. Technical Advisory Committee

# Executive Summary

Asset management typically deals with assessment of and decisions about long-lived assets, such as pavement or bridges. These types of assets can be measured year after year and decisions can be made accordingly. Secondary road departments have other, softer assets, such as labor, equipment, and inventories that are not so easily measured and managed. A management goal in every Secondary Road Department is to optimize the work performance of its employees. To be most effective, everyone in the department needs access to all the information about the soft assets used to do their jobs and effective communications with other staff. While this has long been accomplished via paper records, radios, phones and end-of-day discussions, this has created inefficiencies within the department.

To respond to this challenge, the Iowa County Engineers Association (ICEA) Computer and Information Technology Committee created a vision of a web-based set of tools that would help optimize the functioning of secondary road department maintenance assets. The objective of this project was to develop an integrated time tracking accounting system, to enable multi-channel, global and worker to worker, intercommunication capabilities, and to provide all staff with a rich set of decision support tools. When implemented, it will enable secondary road employees to work with greater efficiency and apply their efforts more effectively.

The Iowa County Engineers Association Service Bureau (ICEASB) with its team of web-based computer developers, worked closely with the ICEA Computer and Information Technology Committee to create several new computer applications that help manage the soft assets of a secondary road department. This suite of applications makes up the Operation Management System (OMS) hosted on the ICEASB website. These applications are available to use by all 99 Iowa county secondary road departments. These applications include:

1. Time Tracking:
   Time Policies, Time Clock, Time Off, Time Off Types, Time Sheets, Geofences, OMS Kiosks, Pay Periods and Staffs, Reimbursements, Work Codes, Equipment
2. Calendar
3. Call Outs

# Chapter 1. Project Overview

## Problem Statement

Asset management typically deals with assessment of and decisions about long-lived assets, such as pavement or bridges. These types of assets can be measured year after year and decisions can be made accordingly. Secondary road departments have other, softer assets, such as labor, equipment, and inventories that are not so easily measured and managed. A management goal in every Secondary Road Department is to optimize the work performance of its employees. To be most effective, everyone in the department needs access to all the information about the soft assets used to do their jobs and effective communications with other staff. While this has long been accomplished via paper records, radios, phones and end-of-day discussions, this has created inefficiencies within the department.

To respond to this challenge, the Iowa County Engineers Association (ICEA) Computer and Information Technology Committee created a vision of a web-based set of tools that would help optimize the functioning of secondary road department maintenance assets.

## Objectives

Overall objectives identified by the ICEA Computer and Information Technology Committee that were addressed during this project included:

<u>Operational performance improvement</u>
The fundamental goal is to identify how and where a secondary road department can be enabled to be more fluid, responsive and effective by means of improved communications and access to real-time information as to the status of labor, equipment, and inventories.

<u>Time, equipment, materials and work tracking</u>
This module will encompass clock-in/out options, entry and consolidation of labor, equipment & supply usage, work accomplished and related tally, checking and quantification activities. The goal is to simplify the process of capturing such data and enable downstream managers to access and view it as soon as it becomes available.

<u>Intra-departmental communications</u>
In this subdivision of the project, the goal is to enhance internal communications between staff, management and administration so that the organization can become more responsive to changes in work conditions, needs and status.

<u>Decision support resource acquisition and delivery</u>
A slate of resources providing both individual staff members and management with current-as-of-the-moment information needed to make informed decisions when planning a day's work or when responding to unanticipated changes of circumstance.

<u>Device and operating system flexibility</u>
It is the intent of this project, that users be able to access the features and functions of the OMS applications via desktop, laptop, tablet or smartphone. The apps will be designed to work on any browser.

Security
The OMS applications will incorporate security protocols intended to protect the system from intrusions, hacking or data loss.

## Steps to Completion

The ICEA Computer and Information Technology Committee in cooperation with ICEASB staff functioned as the Technical Advisory Committee (TAC) on the development of the OMS research project. The OMS project was performed in three phases:

**Phase I**:
Consisted of creating and then vetting a prototype of all major screens, to make sure that both users and programmers have a clear vision of what's going to be built and understand each other's issues. Once complete, the programming team drafted a detailed set of coding requirements to be used as their roadmap for building the applications.

**Phase II:**
The ICEAB development team used an iterative approach to OMS development. As pieces of the applications were built, they were presented to the TAC for review. The ICEA development team would take the comments from the TAC and make changes as necessary and continue with the next application. This iterative process occurred over the 5-year project until all applications were finished and ready for deployment and use by all 99 counties.

**Phase III:**
Consisted of deploying the OMS system for use. First, a few select users were involved in Beta-testing to help find and fix the most obvious bugs and glitches. Then refinements were applied before commencing a full-scale roll-out. The roll-out involved giving presentations at ICEA Conferences, around the state training sessions, and finally, on-site instruction with individual users.

## Results

ICEASB, with its team of web-based computer developers, worked closely with the ICEA Computer and Information Technology Committee to create several new computer applications that help manage the soft assets of a secondary road department. This suite of applications makes up the Operation Management System (OMS) hosted on the ICEASB website, www.iceasb.org. These applications are available to use by all 99 Iowa county secondary road departments. These applications include:

1. **Time Tracking:**
   Time Policies, Time Clock, Time Off, Time Off Types, Time Sheets, Geofences, OMS Kiosks, Pay Periods and Staffs, Reimbursements, Work Codes, Equipment
2. **Calendar**
3. **Call Outs**

# Chapter 2. Time Tracking

Time tracking is made of several smaller applications that work together. Each application can be found in the Pods menu near the bottom of www.iceasb.org.

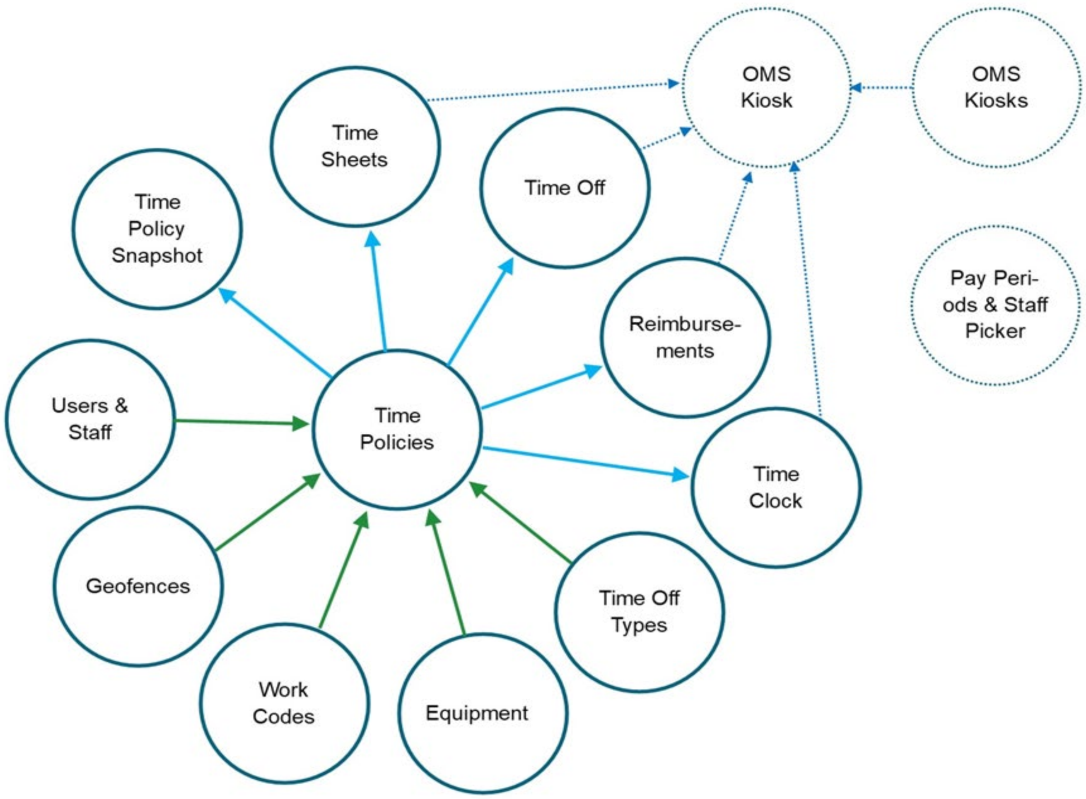



**Figure 1. Time Tracking Pods Relationships**

## Getting Started (Admin)

To get started with Time Tracking, an administrator needs to do some set up of the system. Time Policies will dictate the behavior of time tracking applications. These are the following steps to set up Time Tracking:

1. *Users & Staff*
    a. Give **Time Tracking Administrator** role to appropriate user
    b. Enter all staff that will be using the Time Tracking Applications
    c. Mark them as a User **only** if they need access to non-Time Tracking applications
        i. A user will need to set up an account, staff do not
        ii. Both will have access to Time Tracking applications
            1. Users access through www.iceasb.org or OMS Kiosk
            2. Staff access through OMS Kiosk
        iii. Optional: Give each staff or user a unique PIN code **to access OMS Kiosk**
    d. Optional: Set up staff groups for use in Time Policies and/or Pay Periods & Staff picker

2. *Optional: Set Up Data*
    a. Geofences – Create geofences to track where staff clock in or out
    b. Equipment – Make a list of equipment for staff to choose from when reporting hours
    c. Work Codes – Add local codes to the list of standard codes for staff to report hours
    d. Time Off Types – Create a list for staff to choose from to make Time Off requests
3. *Time Policies*
    a. Edit your organization policy and choose what applies
        i. Read through the Welcome tab to learn what each setting means
        ii. An organization policy cannot be removed
        iii. Be sure to set up Pay Periods
    b. Optional: Create group and staff policies
        i. Org policy settings can be overridden for exceptions
4. *Time Sheets*
    a. Create the first pay period in the Pay Periods tab
        i. Moving forward pay periods will generate automatically based on Time Policies
5. *Optional: OMS Kiosks*
    a. Choose which applications are available in the kiosk
    b. Email the kiosk link
    **c.** Save the kiosk link as a bookmark on the device the staff will use to record their work information

## Typical Work Flow

Generally, after an administrator enters their county's data and sets up time policies, staff will then start using the system. Administrators should use the system as staff do, along with their admin duties. Staff will clock in and out, recording their work activities. They can also request time off and reimbursements. Administrators need to dismiss any flags that were created on time records as a result of policy settings. Administrators also need to approve or deny any time off or reimbursement requests. Time sheets can be viewed at any point in the pay period. Once a pay period is ended, time sheets can be approved and closed and the data can be downloaded for use in accounting software such as Solutions or Tyler.

# Time Policies Application

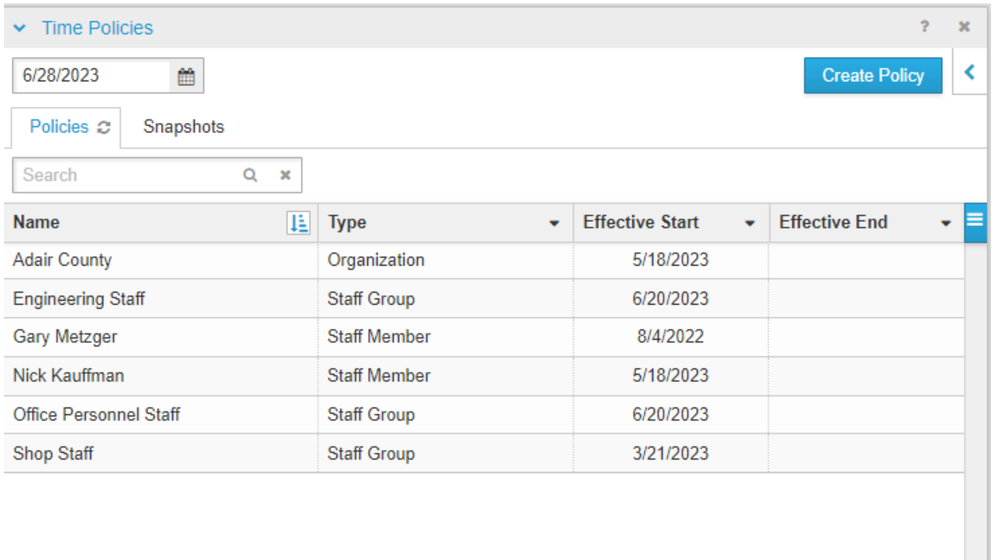



**Figure 2. Time Policies**

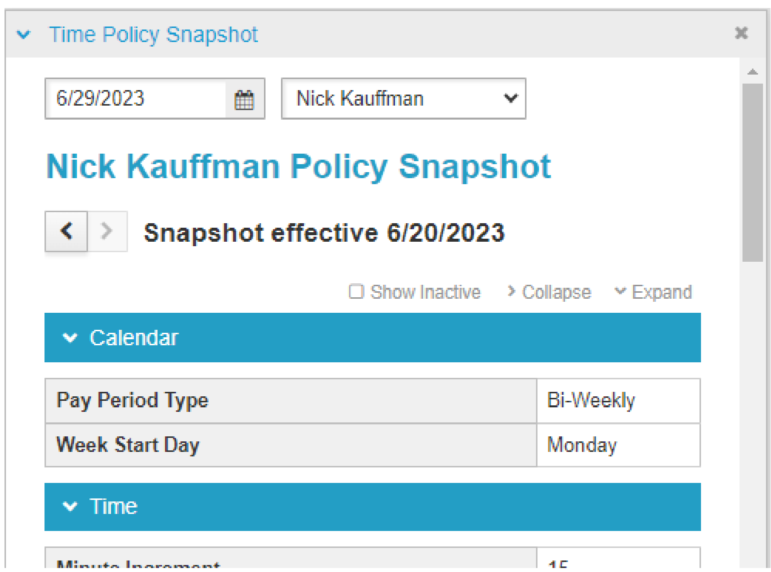



**Figure 3. Time Policy Snapshot**

## <u>Admin</u>

Time Policies are defined using three tiers. Basic policy settings that apply to every staff member can be set in the Organization Policy and the exceptions can be applied using Staff Group and/or Staff Member policies. Staff Member policy settings override Staff Group and Organization policy settings.

1. Create or edit a policy
2. Choose the dates you want these new changes to begin and end
    a. For example, a summer policy can be set with a start and end date, and when the end date arrives, the previous policy will take over

3. In the policy tab, use the checklist on the left to turn on and off whole sections
4. In each section, choose yes or no for each setting
    a. Descriptions of the settings are listed in the Welcome Tab of the application
    b. Any setting without yes or no checked will fall through to their next policy
5. Be sure to click submit when finished
    a. Submitting policies takes longer than most Service Bureau online forms

## Help Content

Click on the links below to watch screencast videos showing how to use the application.

- Create Policy *How to create a policy*
- Update Policy *How to update a policy*

### General

**How do I open a policy?**
Click on a policy from the list in the Policies tab.

**How do I create a policy?**
Create Policy Help Video Click the Create Policy button at the top of the left pane. Choose which date the settings will become effective, and optionally a date the settings will end.

**How do I edit a policy?**
Update Policy Help Video Open the policy and click the Edit button. Choose which date the settings will become effective, and optionally a date the settings will end.

**What is a policy version?**
A version is the settings of a policy for a given range of time.

**How do I remove a version from a policy?**
Open the policy version you wish to remove and click the Remove Version button. Organization versions and versions that start before the last partially closed pay period cannot be removed.

**What is the difference between the policies in the Policies tab and Snapshots tab?**
The policies in the Policies tab show the policy versions. The Snapshots tab shows the snapshot of a staff member, after all policies that apply have been combined.

**Why can I no longer see the Edit and End Policy buttons when I open a policy?**
Make sure the policy from the Policies tab is open. Only policy versions can be edited or ended, not the snapshots. Only staff member or staff group policies can be ended.

**How do I see policies that are in the past?**
Use the date picker in the left pane to choose any date you would like to see. If a policy is open, use the navigation buttons to cycle through all effective date ranges for that policy.

### How do I make sure the policy settings are correct?
Once you have submitted a policy, check staff snapshots in the Snapshots tab to make sure their policies are correct for the effective start dates.

### Why are some of the settings grayed out on a policy?
Grayed out settings mean they weren't checked yes or no in this policy. If they are grayed out in the policy in the Policies tab, it means the setting was not set in that specific policy, but can fall though to a different policy. If they are grayed out in a staff's snapshot, it essentially means that setting is no for the staff member.

## Setting Up a Policy

### Policy Tiers?
To simplify policy setup and maintenance, Time Policies are defined using three tiers. Basic policy settings that apply to every staff member can be set in the Organization Policy and the exceptions can be applied using Staff Group and/or Staff Member policies. Staff Member policy settings override Staff Group and Organization policy settings. Staff Group policy settings override settings of other Staff Group policies with a lower priority and Organization policy settings. Each staff member's policy can be derived by merging all their related policies using the rules above.

### What do effective dates mean when I try to create or edit a policy?
All policies need an effective start date, stating when the changes you are about to make to the settings will begin. This date can be in the past or future, including today. The effective end date is the day these settings no longer apply, and the settings will revert to the next underlying policy.

### What happens if I don't set an end date when I choose a policy's effective dates?
The policy settings will carry forward until a change is made to the end date, or another policy overrides the settings.

### How do staff group priorities affect my policies?
Staff group policies with a higher priority number will override a lower priority group policy.

## Settings

### Organization Policy
Each organization *(county)* will have an organization policy. Settings of this policy are overridden when Staff Group or Staff Member policies overlap them. The organization policies can include all the settings of Staff Group and Staff Member policies and additional settings under Calendar and Time. Organization polices can be updated but not ended.

#### Calendar
- **Pay Period Type** Weekly, Bi-Weekly, Semi-Monthly, or Monthly
- **Week Start Day** Sunday, Monday, Tuesday, Wednesday, Thursday, Friday, or Saturday
- **Pay Period Start Days** Days of the month semi-monthly and monthly pay periods start on.

**Time**

- **Minute Increment** Smallest number of minutes time is tracked in.

**Staff Group Policies**

Staff members can belong to zero or more staff groups. Each staff group can optionally have a single active policy. Staff groups have a priority that dictates which policies' settings override another when a staff member belongs to more than one group. Staff group policies have a start date and can have an end date. Staff group policies can include any of the settings below.

**Workday**

- **Start Time** Used for determining flags and calculating expected overtime
- **End Time** Used for determining flags and calculating expected overtime
- **Hours** Hours per workday. Used for calculating expected overtime. Hours can be different from the span between start time and end time.
- **Lunch Break Minutes** Used for determining flags and filling in the default lunch break for clock out
- **Flag clock in/out not at actual time** Used for determining flags
- **Minutes Allowed** How many minutes the actual time can differ from the time entered when clocking in or out before a flag occurs
- **Flag weekend work** Flag clock in or clock out on Saturday or Sunday
- **Flag non-work hours** Flag clock in or clock out before start time or after end time
- **Flag short or long lunch breaks** Flag lunch breaks longer or short than the policy lunch break minutes
- **Activity hours must equal hours worked** Prevent clocking out if total activity hours are less than the hours worked

**Overtime**

- **Overtime exempt** Calculated expected overtime will always be 0 if overtime exempt
- **Overtime when hours worked are non-work hours** Hours worked before workday start time or after workday end time should be overtime
- **Overtime when hours worked exceeds workday hours** Hours worked in excess of workday hours should be overtime
- **Allow overtime to comp time conversion** Allow a portion of the overtime recorded on a time sheet to be converted into a comp time off balance accrual

**Time Sheets**

- **Require each staff member to approve their own time sheet** Prevent the closing of a time sheet until the staff member approves it
- **Require a time tracking reviewer to approve each time sheet** Prevent the closing of a time sheet until a time tracking reviewer approves it

**Time Off**

Include or exclude time off types. Examples of time off types are Holiday, Comp, Unpaid, etc. The ability to pick which types are included or excluded gives users the most flexibility for setting up policies across all 3 policy tiers.

- **Track Balance** Included time off types can have a balance of hours to be used for time off requests.
- **Time Worked** Whether a time off type should be treated as time worked for the purpose of calculating expected overtime.
- **Maximum** Maximum balance of hours for a type of time off.
- **Accruals** How many hours and what interval of accrual should the system generate for a time off type.

**Work Codes**
Include or exclude work codes. The work codes available for entering work activities. The ability to choose which work codes are included or excluded, gives users the most flexibility for setting up policies across all 3 policy tiers.

- **Alternate Pay** The name of an alternate pay rate that applies to activities assigned to a work code.

**Equipment**
Include or exclude equipment. The equipment available for entering work activities. The ability to choose which equipment is included or excluded gives users the most flexibility for setting up policies across all 3 policy tiers.

- **Alternate Pay** The name of an alternate pay rate that applies to activities assigned to a piece of equipment.

**Geofences**
Include or exclude geofences. The geofences available for clocking in or out. The ability to choose which geofences are included or excluded gives users the most flexibility for setting up policies across all 3 policy tiers.

**Staff Member Policies**
Each staff member can optionally have a single active staff member policy. Settings of this policy will override settings of all staff groups policies for staff groups the staff member belongs to and settings of the organization policy. Staff member policies have a start date and can have an end date. Staff member policies can include all the same settings as staff group policies. The only differences between staff group policies and staff member policies is that staff member policies don't have a priority, and they define policy settings for a single individual staff member and not a group of staff members.

## FAQ'S

**Why are there different types of policies?**
Different types of policies allow for the most customization for settings. The organization policy should be set up to be correct for most staff. Group policies can be set up for staff members that share exceptions. Member policies are for cases unique to that staff member.

**How do I set 10-hour work days for the summer?**

If most staff switch to 10-hour days except some people, edit the organization policy with effective dates as the summer days, and change the workday hours to 10. Then set up a staff group in Users & Staff and create a group policy with effective dates as the summer time frame, and set workday hours to 8. Once the end date passes, the organization policy will revert to previous settings.
If only a handful of people switch to 10-hour days, set up a staff group for those staff members and create a group policy for the summer time frame with workday hours set to 10.

**How to I set up accruals based on longevity?**
Use Users & Staff to create staff groups for each longevity bracket and assign staff members to the appropriate groups. Create a staff group policy for each of those groups and fill out the Time Off section. When a staff member needs a new accrual rate, return to Users & Staff and move them out of their current staff group and into the group with the correct longevity.

**When should balances be tracked on time off types that are being added to a policy?**
Balances should be tracked for any time off type that has accruals or a maximum. If staff are allowed to convert overtime to comp, then they should have Comp in their policy with tracked balances.

**Why shouldn't I choose 900 codes as work codes?**
Work codes are used to enter activities into Time Clock. Time off entered in Time Clock does not deduct from balances so that time will not be tracked, and the request cannot be reviewed by an admin. Time off should generally be tracked in the Time Off pod.

**I don't understand how different policies combine to make a snapshot?**
Picture each of your policies as a sheet of paper. Each sheet has a spot for every policy setting. To get the policy that applies to a staff member, we create a stack of policy papers that are relevant to that staff member. On the bottom of the stack is a paper for the organization policy. Next, we have the papers for staff group policies the staff member is in. The staff member policy paper is on top. For every setting on a non-organization policy you can either set a value or leave it blank. Setting a value is like writing the value on the paper. Leaving it blank is like cutting a hole in the paper for that setting, allowing the value to be read from the paper policy below it. An organization policy will default to a value of "no" when settings are left unchecked, so if the rest of the papers have holes in them, the organization policy will be shown. The settings that you can see when looking at these stacked papers are the settings that will apply to the staff member.

## Time Clock Application

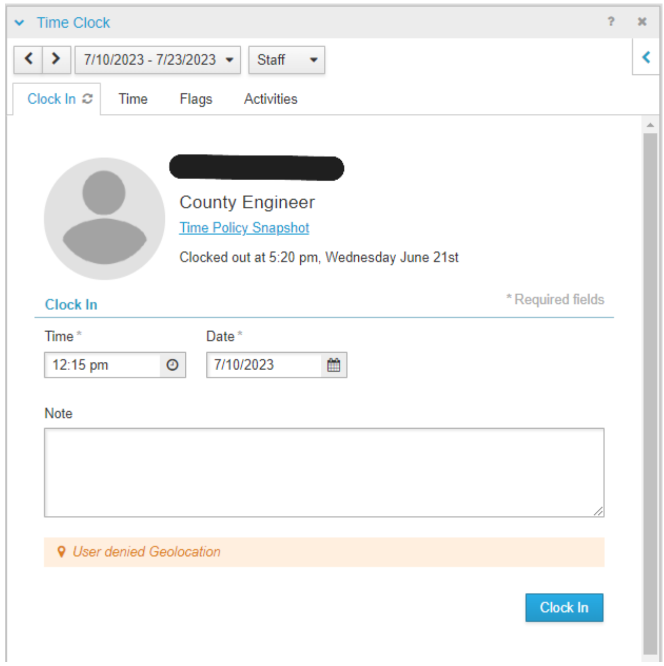



**Figure 4. Clock In**

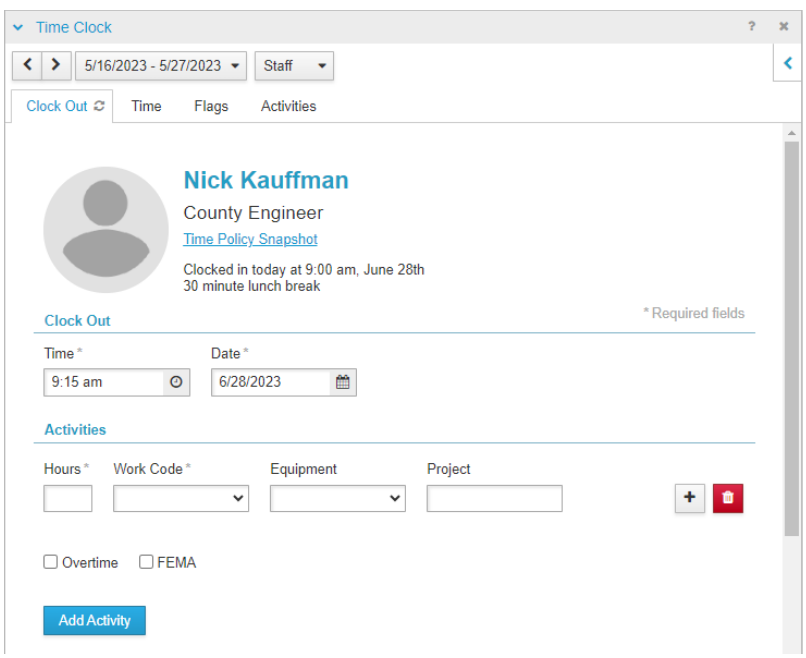



**Figure 5. Clock Out**

Time clock is used to record daily work hours. Each hour recorded must have a work code associated with it and optionally a piece of equipment and a project.

## Staff

1. Clock in
2. Clock out
    a. Enter an activity for each group of hours worked under a work code
        i. If equipment, project, or overtime changes for certain hours, a new line will be
        ii. needed, even if the work code is the same
3. New time records can be added in the Time tab if needed

## Admin

1. Dismiss all flags (must be dismissed to close a time sheet)
2. Can enter time for any staff in the Time tab
3. View time records, flags, and activities. For example, these can be used to view hours per project or work code over a longer period of time

## Help Content

Click on the links below to watch screencast videos showing how to use the application.

- Clock Out *How to clock out*
- Dismiss Flags *How to dismiss flags*

### Clocking In

**How do I clock in?**
Open the Time Clock application and go to the clock in tab. If you are already clocked in, you will first need to clock out.

**What do the warnings mean when I clock in?**
Time Policies Help
The warnings will show up as flags to an administrator based on how they set up your policy. You can fix the warnings that should be fixed, or continue clocking in with the warnings.

### Clocking Out

**How do I clock out?**
Clock Out Help Video Open the Time Clock application and go to the clock out tab. If you have not yet clocked in, you will need to.

**How do I fill out activities?**
Enter the amount of hours worked for a particular work code. Optionally enter what equipment was used or the project. Mark the hours overtime or FEMA if applicable. **If some, but not all, hours for a work code were overtime, add an additional activity with that work code and only mark the correct number of hours as overtime**

**Why am I missing a work code I need?**

Time Policies Help  Available work codes are determined by Time Policies. Contact your administrator if your work codes are incorrect.

**Why are there no equipment to choose from?**
Time Policies Help  Available equipment is determined by Time Policies. Contact your administrator if your equipment is incorrect.

## Clocking In/Out Details

**How do I enter time for a day other than today?**
Click the time tab, then click Create Time. Fill out the form, including activities.

**How do I see all the days I have clocked in?**
Click on the Time, Flags, or Activities tabs to see the respective records. Use the Pay Period Picker to change the dates shown in the list.

**How do I see the information for a certain day?**
Dismiss Flags Help Video  Click on the Time, Flags, or Activities tabs to see the respective records. Click on the row in the list to open that Time record. There you can see all flags that were applied as well as the details of the time record. You can also activate or dismiss flags.

**How do I change the information of a time record?**
Click on the Time, Flags, or Activities tabs to see the respective records. Click on the row in the list to open that Time record. Click Edit and fill out the form.

**How do I delete a time record?**
Click on the Time, Flags, or Activities tabs to see the respective records. Click on the row in the list to open that Time record. Click Remove.

# Time Off Application

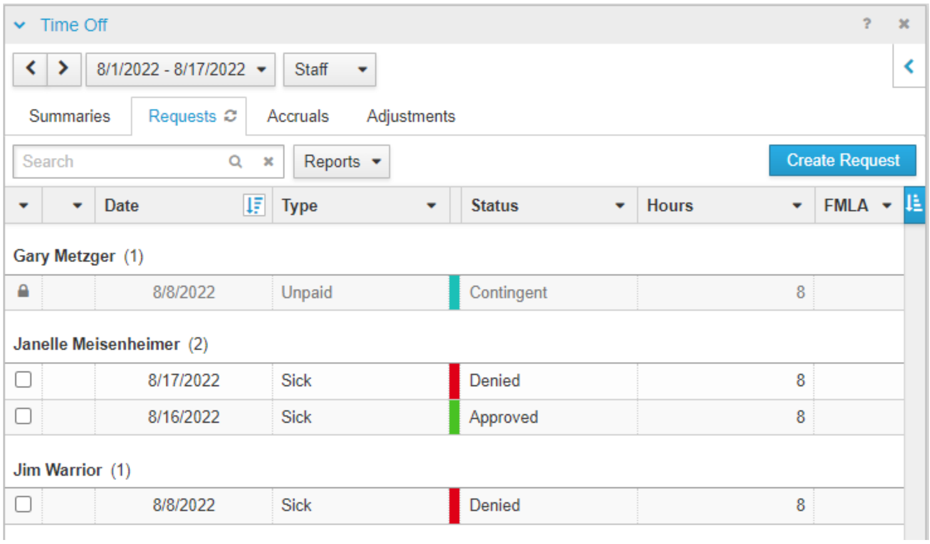



Figure 6. Time Off Request

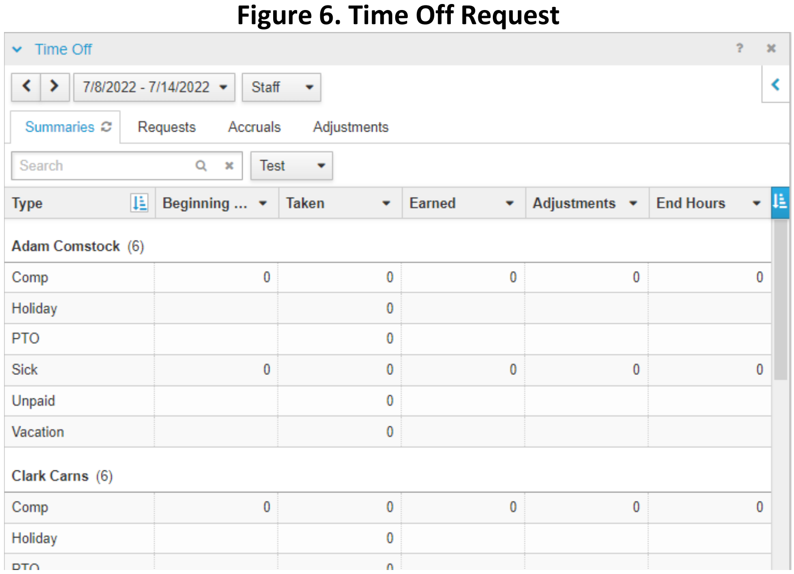



Figure 7. Time Off Summaries

## Staff

1. View balances for time off types in the summaries tab
2. Click the requests tab and click the “Create Request” button to fill out the time off request form
3. Click the Accruals or Adjustments tabs to see the corresponding information

## Admin

1. View each staff summaries
2. Approve/deny time off requests
3. Create accruals or adjustments

## Help Content

Click on the links below to watch screencast videos showing how to use the application.

- Create Time Off Request *How to create a time off request*
- Approve/Deny Time Off Request *How to approve or deny a time off request*

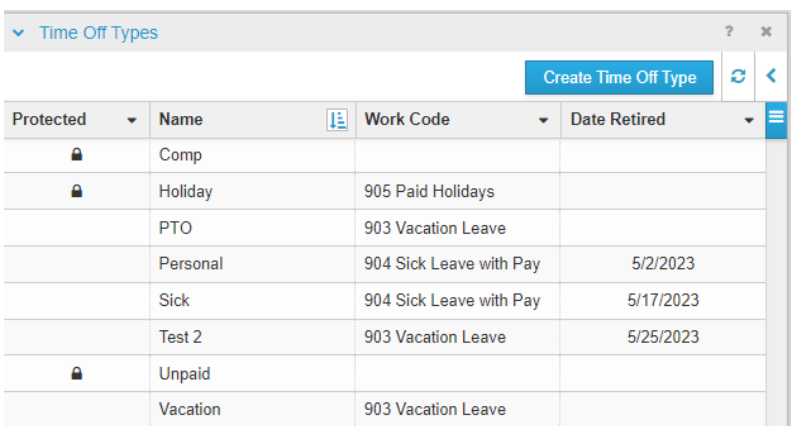
### General

**How do I see my time off?**
Click on the tabs to see information about your time off. Use the Pay Period Picker to change the date range for the lists to use.

**Why are there orange warnings next to some of my hours?**
The warnings represent something wrong with the hours. Click on the row in the list to open the details about that time off type to see an explanation of the warnings.

**How do I create a time off request?**
Create Time Off Request Help Video Click on the Requests tab. Click Create Request, then fill out the form. Why can I not choose the type I need in the time off request form? Those types are set by your administrator. Contact them if the types are incorrect.

# Time Off Types Application




| Protected | Name | Work Code | Date Retired |
|---|---|---|---|
| | Comp | | |
| | Holiday | 905 Paid Holidays | |
| | PTO | 903 Vacation Leave | |
| | Personal | 904 Sick Leave with Pay | 5/2/2023 |
| | Sick | 904 Sick Leave with Pay | 5/17/2023 |
| | Test 2 | 903 Vacation Leave | 5/25/2023 |
| | Unpaid | | |
| | Vacation | 903 Vacation Leave | |

**Figure 8. Time Off Types**

## Admin

Admins should set up time off types they want staff to use when making time off requests in the Time off pod. These types need to link to a work code.

## Help Content

Click on the links below to watch screencast videos showing how to use the application.

- Create Time Off Type *How to create a Time Off Type*

## General

**How do I view a Time Off Type?**
Click on the row in the list on the left.

**What is a "protected" Time Off Type?**
Protected Time Off Types are types that are available to use by default. They cannot be edited, retired, or removed.

**Who can change Time Off Types?**
Users with the Time Tracking administrator role can create, edit, retire, or remove Time Off Types.

**How do I create a Time Off Type?**
Create Time Off Type Help Video  Click "Create Time Off Type" at the top of the left panel. Complete the form in the right panel and click "Submit" at the bottom of the form.

**How do I edit a Time Off Type?**
Open the Time Off Type's details panel and click "Edit". Complete the form in the right panel and click "Submit" at the bottom of the form.

**What is "date retired"?**
Date retired is the last day the Time Off Type will be available to be used.

**What is the difference between retiring a Time Off Type and removing it?**
After a Time Off Type is retired, it will no longer be able to be chosen when requesting time off. Removing a Time Off Type is only possible if it has never been used outside the Time Off Type pod. Once it is removed, there will be no record of it.

**How do I retire a Time Off Type?**
You can set a date retired while creating or editing a Time Off Type. The date retired can be in the past or future.

**How do I remove a Time Off Type?**
Open the Time Off Type and click "Remove" at the top. Only Types that are not currently in use in Time Off or Time Policies may be removed.

**How do I make Time Off Types available for staff to use?**
Time Policies Help  In the Time Policies pod, policies can be set to use any of the active Time Off Types.

**How do I sort and filter the Time Off Types list?**
In the upper-right hand corner of the list, there is a blue menu button. Click the menu button and choose "Help" for more information on using the list.

# Time Sheets Application

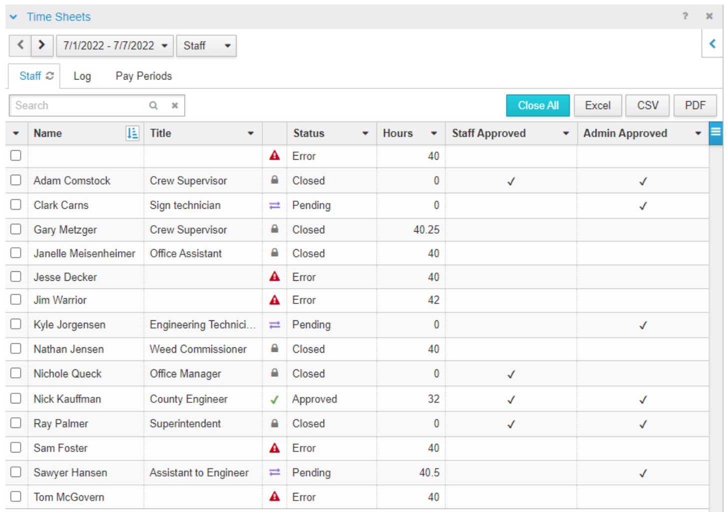



**Figure 9. Time Off Sheets**

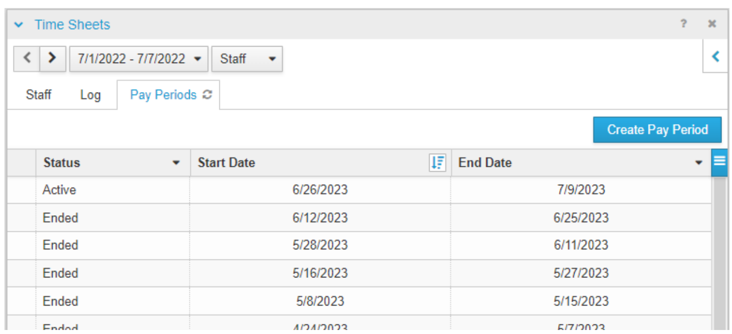



**Figure 10. Pay Periods**

## Staff

1. Use the pay period selector to choose which pay period's time sheet to view
2. In the Time Sheet tab, review all time off requests, reimbursements, and time tracked
a. A checkbox labeled "Staff Approved" will be shown if staff approval is required
b. If approval is required, approve the time sheet
3. In the log tab, view all changes that have happened throughout the pay period

## Admin

1. Use the pay period selector to choose which pay period's time sheet to view
2. In the Staff tab, view each time sheet for the pay period
3. Address and dismiss all flags for each time sheet
a. Active flags will prevent a time sheet from being closed
4. Approve all time sheets, if necessary
a. Requiring approval can be changed in the time policies
5. Close all time sheets
a. Optional: Use the checkboxes in the staff list to approve/close multiple time sheets at once

6. Optional: Use the Excel, CSV, or PDF buttons to download data to use in accounting software
7. Optional: View pay periods in the Pay Periods tab, create a pay period if necessary

a. Once the first pay period is created, the system will use the Time Policy to continue creating pay periods

## Help Content

### Getting Started

**How do I start using Time Sheets?**

1. A Time Tracking Administrator must set up your Organization Policy in the Time Policies pod. Make sure to set the correct pay period type in the policy.
2. Create your first pay period in the Time Sheets pod. After the first pay period is created, pay periods will be generated going forward based on your organization policy.
3. Start using Time Tracking pods.

### Managing Pay Periods

**Who can manage pay periods?**

Users with the Time Tracking Administrator role can view, create, edit, and remove pay periods. Pay Periods that contain closed time sheets cannot be altered.

**How do I view pay periods?**

Click on the "Pay Periods" tab.

**How do I create pay periods?**

Click "Create Pay Period" in the "Pay Periods" tab. Complete the form.
After you have created the first pay period, pay periods will be automatically generated going forward based on your organization policy. Pay periods can be created manually if needed.

**How do I edit a pay period?**

Click on the pay period in the "Pay Periods" tab. Complete the form. Pay Periods that contain closed time sheets cannot be edited.

**How do I remove a pay period?**

Click on the pay period in the "Pay Periods" tab. Click "Remove". Pay periods will be created as needed in order to keep a timeline of pay periods. If you are removing the last pay period and it contains the current date, a new pay period will be generated based on your policies, which may end up identical to the one removed.

**What are the effects of changing pay periods?**

Any pay periods that are modified will have approvals revoked and overtime to Comp conversions undone. Adjacent pay periods will be adjusted so there are no holes in the timeline.

**What are the possible statuses for pay periods?**

- **Future**: A Pay period whose start date is in the future. These will show up in the list in the pay periods tab, but they will not show up in the pay periods dropdown.
- **Active**: A pay period whose start date has been reached but whose end date has not yet passed.
- **Ended**: A pay period whose end date has passed.
- **Pending**: A pay period with at least one closed time sheet. Pending pay periods can no longer be edited or removed.
- **Closed**: A pay period with all time sheets closed.

## General

**How do I see the time sheets for the previous or next pay period?**
Click on the left or right arrow next to the pay periods dropdown to navigate to the previous or next pay periods respectively.

**How do I see time sheets for a particular pay period?**
Open the pay period dropdown and click on the pay period.

**How do I view a time sheet?**
Staff without a Time Tracking Reviewer or Administrator role will have their time sheet displayed for them in the "Time Sheet" tab. Time Tracking Reviewers and Administrators must click on a time sheet within the "Staff" tab.

**What are the possible statuses for a time sheet?**

- **Active**: The time sheet belongs to a pay period whose start date has been reached but whose end date has not yet passed.
- **Ended**: The time sheet belongs to a pay period whose end date has passed.
- **Pending**: The time sheet has an approval, but not all of the approvals required by the policy to close it.
- **Approved**: The time sheet has all of the approvals required by the policy to close it.
- **Closed**: The time sheet has been closed by an administrator and data relating to the staff member during the pay period can no longer be altered in any Time Tracking application.
- **Error**: The time sheet does not have a policy that applies during the pay period. This is likely caused by an issue in Users & Staff. To rectify this, have an admin verify the staff member's employment history in Users & Staff.

**How do I see a list of changes on time sheets for the pay period?**
Open the "Log" tab. The list contains all changes that have happened within the pay period across the Time Tracking system. For Time Tracking Administrators and Reviewers, this log contains changes for all staff. For staff, this log contains only changes that are relevant to their time sheet.

**How do I see what time policy settings apply to a staff member during the pay period?**
In the staff member's time sheet, click the link labeled "Time Policy Settings". Use the date picker to view the settings for a different day.

**How do I sort or filter the staff, log, or pay periods lists?**
In the upper-right hand corner of the lists, there is a blue menu button. Click the menu button and choose "Help" for more information on using lists.

**How do I search the staff or log lists?**
Type your search term into the search bar above the list you wish to search and press the "Enter" key (or click on the magnifying glass icon inside the search bar) to run the search.

**How do I export time sheets?**
A staff member's time sheet can be exported as a CSV, Excel, or PDF file by clicking on the respective buttons in the time sheet. Time Tracking Administrators and Reviewers can export a file with all time sheets by clicking on the buttons in the staff tab.

The CSV export is intended to be useful for importing into a third party accounting software such as Solutions. Employee Numbers are included in the CSV export to uniquely identify each employee. Employee Numbers can be set in Users & Staff by going to the Staff/History sub tab, choosing the active employee record from the list, entering the Employee Number, and submitting the form.

## Approvals

**When can a time sheet be approved?**
A time sheet can be approved if its status is neither "Error" nor "Closed".

**How do I approve a time sheet?**
Open the time sheet. Click "Approve".

**Can I approve multiple time sheets at once?**
Administrators and Reviewers can use the staff list to select each time sheet that they wish to approve and then, in the menu above the checkbox column click "Approve". When it finishes, it will say how many time sheets were successfully approved.

**How do I unapprove of a time sheet?**
Open the time sheet. Click "Unapprove".

**Can I unapprove multiple time sheets at once?**
Administrators and Reviewers can use the staff list to select each time sheet that they wish to unapproved and then, in the menu above the checkbox column click "Unapproved". When it finishes, it will say how many time sheets were successfully unapproved.

**How do I know who has approved a time sheet?**
In the time sheet, above the controls to approve, export, etc, there will be a list of people who have approved the time sheet.

**How do I know what has changed since someone last approved a time sheet?**
In the time sheet, to the right of each staff member that approved the time sheet, will be the number of changes that have occurred since they last approved it (if any). Clicking on this value will open the log and filter it to show you just these changes.

**Is a staff member required to reapprove their time sheet if a reviewer or admin makes changes?**
No. Once a time sheet is approved by an individual, it remains approved by that individual unless that approval is withdrawn. If your organization specifies that the staff member should have to re-approve their time sheet, then it is up to management to enforce that.

**How do I know what approvals a time sheet requires and what approvals it has been given?**
The check boxes in the time sheet will be checked if the appropriate reviewers have approved the time sheet.

## Closing and Reopening

**Who can close or reopen a time sheet?**
Users with a Time Tracking Administrator role can close and reopen time sheets.

**When can a time sheet be closed?**

1. The status on the time sheet cannot be "Error".
2. The pay period must be ended.
3. The time sheet must have all approvals required by the policy.
4. The amount of overtime converted to Comp cannot exceed the amount of overtime available.
5. All time records must have a clock in and clock out.
6. All Time Clock flags must be dismissed.
7. All reimbursement requests must be approved or denied.
8. All time off requests must either be approved, denied, or contingent.
9. All time sheets in previous pay periods must be closed.

**When can a time sheet be reopened?**
Only time sheets in the most recent "Closed" or "Pending" pay period can be reopened.

**How do I close or reopen a time sheet?**
Open the time sheet. Click "Close" or "Reopen". Alternatively, you can use the staff list to select each time sheet that you wish to close or reopen and then, in the menu above the checkbox column click "Close" or "Reopen". When it finishes, it will say how many time sheets were successfully closed or reopened. There is also a "Close All" button at the top of the staff list that can be used to close every time sheet. When it finishes, it will say how many time sheets were successfully closed.

## Comp Time

**Who can convert overtime to Comp?**
Staff whose policy settings indicate that they are allowed to convert their overtime to comp time.

**When do I convert my overtime to Comp?**
If overtime hours were accrued, you can convert overtime once the pay period has ended.

**How do I convert overtime to Comp?**
In your time sheet, click "Convert Overtime to Comp". Move the slider or use the form to indicate how much overtime should be converted. The amount of converted Comp cannot exceed the maximum amount set by Time Policies.

## Overtime

**What is Actual?**
The total number of activity hours that were marked as overtime.

**What is Expected?**
The total number of activity hours that the system expected to be marked as overtime, based on the staff member's policies.

**What is Converted to Comp?**
The number of overtime hours that have been converted to Comp time

## Time Off

**Where can I see starting and ending balances for a Time Off Type?**
The "Time Off" section displays the same information available in the "Summaries" tab of the Time Off application.

**Where can I see the total hours earned and adjustments for a Time Off Type?**
The "Time Off" section displays the same information available in the "Summaries" tab of the Time Off application.

**How do I see more information about activity on a particular Time Off Type?**
Clicking anywhere on the row for the Time Off Type in the "Time Off" section will open an overlay of the Time Off application with the summary details for that particular Time Off Type open.

**How do I approve or deny Time Off requests?**
Click on the hours associated with the time off request in the "Time" section. Approve or deny the request in the Time Off pod. Note that you will need to reload the time sheet in order to see the change reflected there.

## Reimbursements

**Where can I see a list of the reimbursement requests?**
The "Reimbursements" section displays all reimbursement requests that have not been denied.

**How do I see more information about a reimbursement request?**
Click on the request.

**How do I approve or deny a pending reimbursement request?**

Click on the request and click Approve or Deny. Note that you will need to reload the time sheet in order to see the change.

### Time

**Where can I see the hours recorded for each day?**
The "Time" section shows the total number of hours either being paid out or converted to Comp time during the pay period. This includes activity hours and Time Off requests that were not denied.

**How do I know which hours use an alternate pay**
The hours will be marked with the alternate pay.

**How do I know which hours are overtime?**
All overtime hours will be marked with *OT*.

**How do I see more information about a time record?**
Click on the hours related to the time record.
**How do I dismiss flags on a time record?**
Click on the flag or hours to open that time record in Time Clock. The flags can then be dismissed in the time details.

**How do I see more information about a time off request?**
Click on the hours related to the request.

**How can I see days as columns instead of rows?**
If you click "Pivot Table" at the top of the "Time" section, the table will toggle between days as rows and days as columns.

## Geofences Application

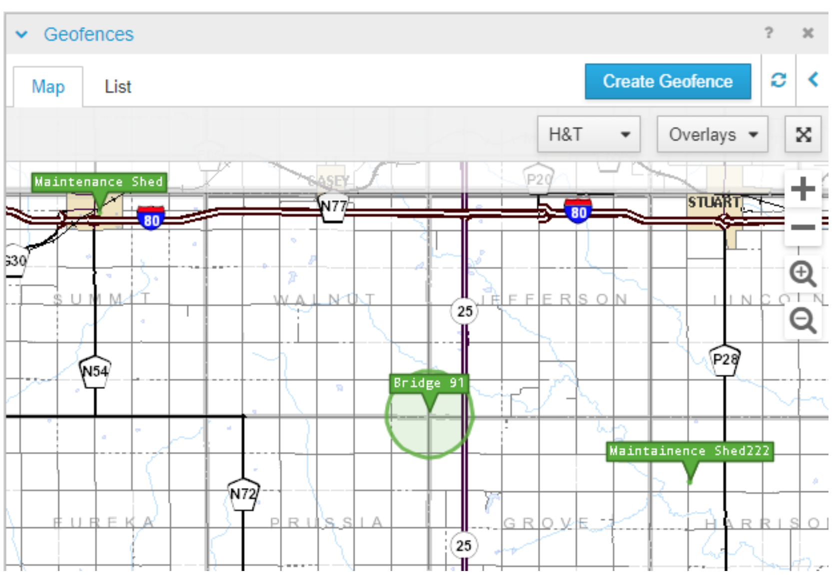


**Figure 11. Geofences**

## Admin

Admins create geofences to ensure staff are clocking in and out in determined locations. Counties can have any number of geofences established, with staff policies determining which geofence is applicable.

1. Click the "Create Geofence" button
2. Enter name, then navigate the map to the desired geofence location
3. Click the "Set Geofence" button, then click and drag on the map to create the geofence
    a. One geofence can be created at a time
4. Scroll down and click "Submit"

## Help Content

Click on the links below to watch screencast videos showing how to use the application.

- Create Geofence *How to create a geofence*

### General

**How do I view geofences?**
Open the "Map" tab to see the locations of all geofences. Open the "List" tab to see the list of geofences.

**How do I open a geofence?**
Click on a marker on the map or a row in the list to open the geofence.

**Who can change geofences?**
Users with the administrator role can create, edit, or remove geofences.

**How do I create a geofence?**
Create Geofence Help Video Click "Create Geofence" at the top of the left panel. Above the map in the form, click "Set Geofence" and click and drag on the map where you want the the geofence to be. An existing geofence can be moved by dragging the circle on the map. It can also be resized by dragging one of the points on its border.

**How do I edit a geofence?**
Open the geofence and click "Edit". Above the map in the form, click "Set Geofence" and click and drag on the map where you want the the geofence to be. An existing geofence can be moved by dragging the circle on the map. It can also be resized by dragging one of the points on its border.

**How do I remove a geofence?**
Open a geofence and click "Remove" at the top.

**How do I know when staff members clock in or out outside of a geofence?**

[Time Policies Help](#) In the Time Policies pod, policies can be set to use any of the active geofences.

**How do I sort and filter the geofence list?**
In the upper-right hand corner of the list, click the blue menu button. Choose "Help" for more information on using the list.

## OMS Kiosks Application

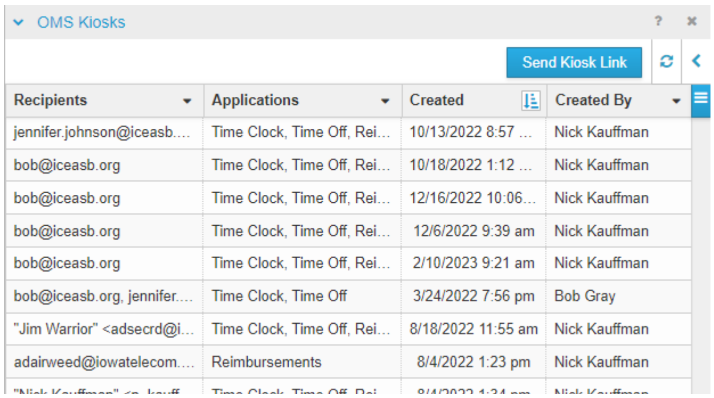



**Figure 12. OMS Kiosks**

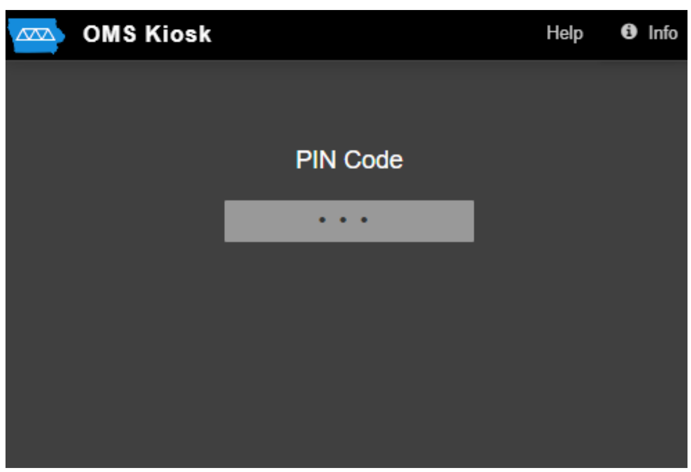



**Figure 13. OMS Login**

### Admin

Admins use OMS Kiosks to send out kiosk links. These links can then be opened through an email for staff to access using their assigned PIN code. Once a link has been sent, it cannot be changed. If the link should no longer be used, it can be removed.

1. Click “Send Kiosk Link”
2. Choose which applications should be accessed from staff at the kiosk
3. Enter any emails the link will be sent to, examples:
    a. An email a shop has access to, i.e. shop foreman
    b. Individual staff member email for them to access alone

# Help Content

## General

**What are kiosks and kiosk links?**
A kiosk is a collection of applications tied to your organization that can be accessed without having to have a user account and password. A kiosk link can be used to access the kiosk from anywhere.

**Why should I use kiosks?**
Kiosks allow staff members to use Service Bureau applications without logging in to the homepage.

**Is there anything I should be cautious of when using kiosks?**
A kiosk can be used by anyone who has access its link and knows a valid pin code for your organization. If a staff member is no longer employed and their employment history in Users & Staff reflects this, then they will no longer be able to use their pin code to sign in to kiosks.

**Who can use a kiosk?**
Anyone who has access to the kiosk link and has a valid pin code.

**How do I modify a kiosk?**
Kiosks cannot be changed. Once a kiosk has been created, it can only be removed.

**How do I change who has access to a kiosk?**
The kiosk must be removed and a new one created to remove staff. To add staff, you can send them the link.

**Why does my kiosk link have an expiration date?**
For security reasons, links must expire.

**How do I view the details of a kiosk link?**
Click on the kiosk in the list on the left.

**How do I create a kiosk?**
Click "Send Kiosk Link" at the top of the left panel. Complete the form.

**How do I remove a kiosk?**
Open the kiosk. Click "Remove".

**How do I sort or filter the list of kiosks?**
In the upper-right hand corner of the list, there is a blue menu button. Click the menu button and choose "Help" for more information on using the list.

**How do I save the list of kiosks as a CSV?**
In the upper-right hand corner of the list, there is a blue menu button. Click the menu button and choose "Save As CSV".

## Pay Periods and Staff Application

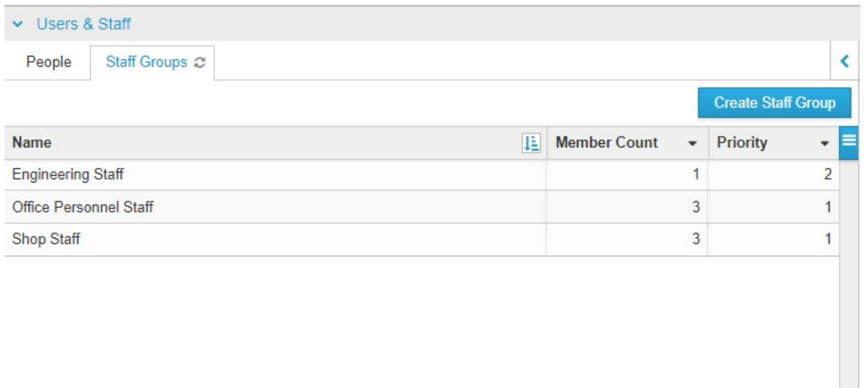



**Figure 14. Staff Groups**

### Help Content

Click on the links below to watch screencast videos showing how to use the application.

- Using the Pay Periods Picker *How to use the pay periods picker*
- Using the Staff Picker *How to use the staff picker*

### General

**What do the pickers do?**
The pickers allow you to easily filter the data you see based on date ranges and staff members. The pay periods picker makes it easy to view data within individual pay periods but also lets you do custom date ranges. The staff picker lets you select which staff members you wish to see data from and also lets you select them by staff groups.

**Which applications utilize the pickers?**
The pay periods and staff pickers are used by Reimbursements, Time Off, and Time Clock
.

**How can I make multiple applications on a dashboard all use the same date range and staff choices?**
If the "Pay Periods & Staff" pod (found in the pods menu at the bottom of the screen) is opened within a dashboard, it will control all of the relevant applications within that dashboard.

### Pay Periods Picker

**How do I view the previous or next pay period?**
Using the Pay Periods Picker Help Video Click on the left or right arrows found next to the pay period picker to move to the previous or next pay periods.

**How do I choose a pay period?**

[Using the Pay Periods Picker Help Video]() Click on the pay period picker. Click on the pay period from the list.

**How do I use a date range that is different from my pay periods?**
[Using the Pay Periods Picker Help Video]() Click on the pay period picker. Fill out the form for the dates you want to see.

**How do I see data for all time?**
Click on pay period picker. Click "Clear" in the form.

### Staff Picker

**How do I use the staff picker?**
[Using the Staff Picker Help Video]() Open the staff picker. Choose staff as groups or individually, then click Apply.

## Reimbursements Application

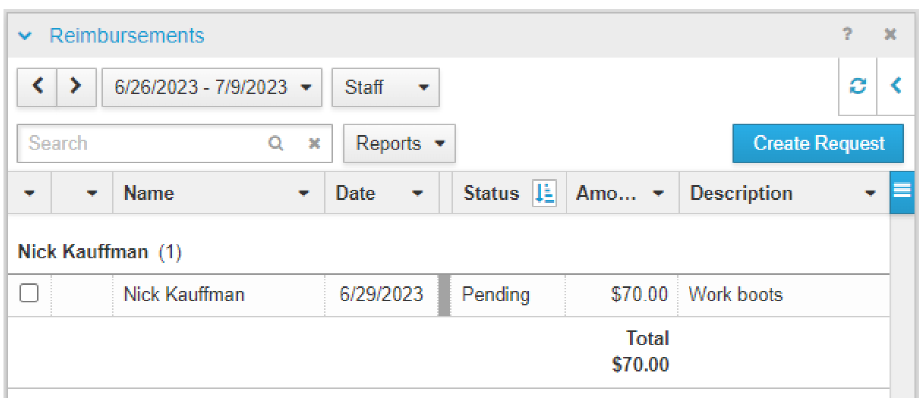



**Figure 15. Reimbursements**

### Staff

1. Create a reimbursement request
2. Optionally upload a file i.e. picture of receipt

### Admin

1. Approve or deny requests

### Help Content

Click on the links below to watch screencast videos showing how to use the application.

- [Create Reimbursement Request]() *How to create a reimbursement request*
- [Approve/Deny Reimbursement Request]() *How to approve or deny a reimbursement request*

## General

**How do I view a reimbursement request?**
Click on the row in the list on the left.

**Who can create, edit, or remove reimbursement requests?**
Anyone can create, edit, or remove a reimbursement request for themselves. However, users with the Time Tracking administrator role can also create, edit, or remove reimbursement requests for other staff members. Additionally, only Time Tracking administrators can edit or remove reimbursement requests that have a status other than "Pending".

**How do I create a reimbursement request?**
Create Reimbursement Request Help Video  Click "Create Request" at the top of the left panel. Complete the form in the right panel and click "Submit" at the bottom of the form.

**How do I edit a reimbursement request?**
Open the request and click "Edit". Complete the form in the right panel and click "Submit" at the bottom of the form.

**How do I remove a reimbursement request?**
Open the request and click "Remove" at the top.

**How do I approve or deny a reimbursement request or set it back to "Pending"?**
Approve/Deny Reimbursement Request Help Video  Users with the Time Tracking administrator role can open the request and click "Approve", "Deny", or "Pending" at the top, depending on what action you wish to take.

**How do I filter the list of reimbursement requests?**

- For simple filtering by pay periods, other date ranges, or staff members you can use the pay periods and staff pickers. See Pay Periods & Staff Help for information on using the pay periods and staff pickers.
- For more advanced filtering or filtering by other columns there is a blue menu button in the upper-right hand corner of the list. Click the menu button and choose "Help" for more information on using the list. Note that any filters placed on the date or name columns will override any filters coming from the Pay Periods or Staff pickers respectively.

**How do I sort or group the list of reimbursement requests?**
In the upper-right hand corner of the list, there is a blue menu button. Click the menu button and choose "Help" for more information on using the list.

**How do I save the list of reimbursement requests as a CSV file?**
In the upper-right hand corner of the list, there is a blue menu button. Click the menu button and choose "Save As CSV".

**How do I search the list of reimbursement requests?**

Type your search term into the search bar and press the "Enter" key (or click on the magnifying glass icon inside the search bar) to run the search.

## Work Codes Application

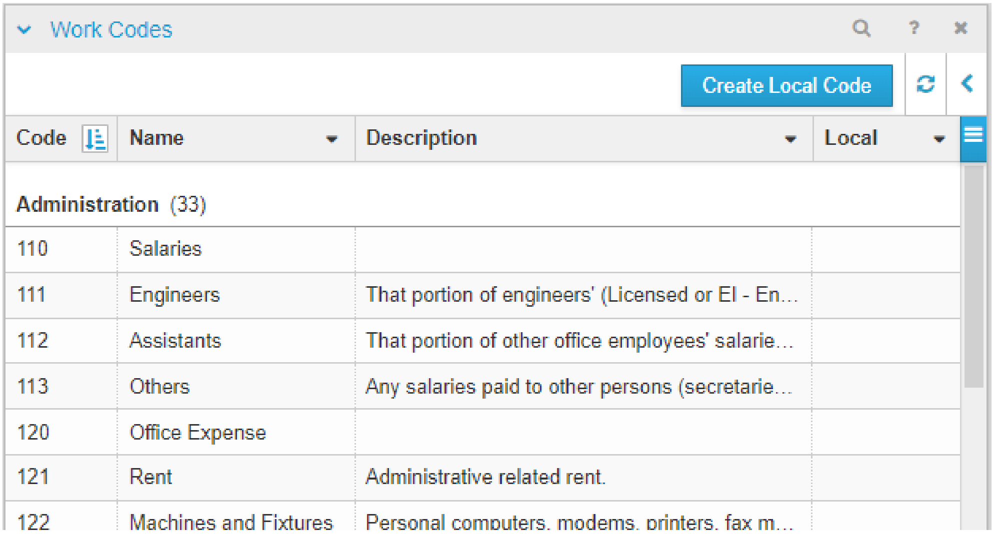



**Figure 16. Work Codes**

### Admin

The list of work codes includes all DOT Standard Work Codes. These codes cannot be changed. Admins can add their own local codes by providing a Code and Name, and choosing which standard DOT code to link it to.

### Help Content

Click on the links below to watch screencast videos showing how to use the application.

- Create Local Work Code *How to create Local Work Codes*

### General

**How do I view a Work Code?**
Click on the row in the list on the left.

**Who can change Local Work Codes?**
Users with the administrator role can create, edit, or remove Local Work Codes.

**How do I create a Local Work Code?**
Create Local Work Code Help Video Click "Create Local Code" at the top of the left panel. Complete the form in the right panel and click "Submit" at the bottom of the form.

**How do I edit a Local Work Code?**
Open the Work Code and click "Edit". Complete the form in the right panel and click "Submit" at the bottom of the form.

**How do I remove a Local Work Code?**
Open the Work Code and click "Remove" at the top.

**Why does a Local Work Code no longer have a Standard Work Code associated with it?**
This will happen if the Iowa DOT retires an accounting code that is associated with a Local Work Code. If this has happened, an administrator should edit the Local Work Code and choose a new Standard Work Code to associate it with.

**How do I make a Work Code available for staff to use in Time Clock?**
Time Policies Help In the Time Policies pod, policies can be set to use any of the active Work Codes.

**How do I sort, filter, or group the Work Code list?**
In the upper-right hand corner of the list, there is a blue menu button. Click the menu button and choose "Help" for more information on using the list.

**How do I save the Work Code list as a CSV file?**
In the upper-right hand corner of the list, there is a blue menu button. Click the menu button and choose "Save As CSV".

**How do I search the Work Code list?**
Click on the magnifying glass icon in the upper-right corner of the Work Codes pod. Type your search term into the search bar that opens and press the "Enter" key (or click on the magnifying glass icon inside the search bar) to run the search.

## Equipment Application

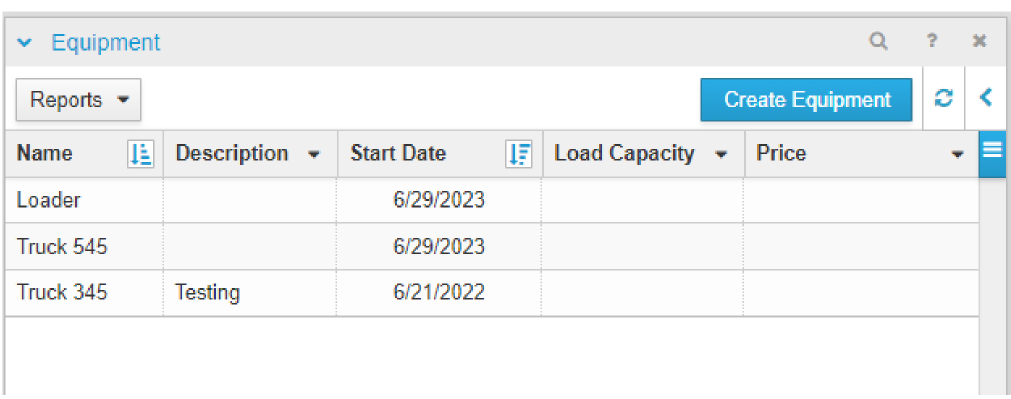



**Figure 17. Equipment**

### Admin
Equipment should be set up for staff to select when choosing activities for their work day.

### Help Content

Click on the links below to watch screencast videos showing how to use the application.

- Create Equipment *How to create equipment*

## General

**How do I view a piece of equipment?**
Click on the row in the list on the left.

**What is "date retired"?**
Date retired is the last day the equipment is available to be used.

**What is the difference between retiring equipment and removing it?**
After equipment is retired, it will no longer be able to be chosen when filling out activities. Removing equipment is only possible if it has never been used outside the equipment pod. Once it is removed, there will be no record of it.

**Who can change equipment?**
Users with the Time Tracking administrator role can create, edit, retire, or remove equipment.

**How do I create equipment?**
Create Equipment Help Video Click "Create Equipment" at the top of the left panel. Complete the form in the right panel and click "Submit" at the bottom of the form.

**How do I edit equipment?**
Open the equipment and click "Edit". Complete the form in the right panel and click "Submit" at the bottom of the form.

**How do I retire equipment?**
You can set a date retired while creating or editing equipment. The date retired can be in the past or future.

**How do I remove equipment?**
Open the equipment and click "Remove" at the top.

**How do I make equipment available for staff to use?**
Time Policies Help In the Time Policies pod, policies can be set to use any active equipment.

**How do I sort and filter the equipment list?**
In the upper-right hand corner of the list, there is a blue menu button. Click the menu button and choose "Help" for more information on using the list.

**How do I save the equipment list as a CSV file?**
In the upper-right hand corner of the list, there is a blue menu button. Click the menu button and choose "Save As CSV".
**How do I search the equipment list?**
Type your search term into the search bar above the list.

# Chapter 3. Calendar Application

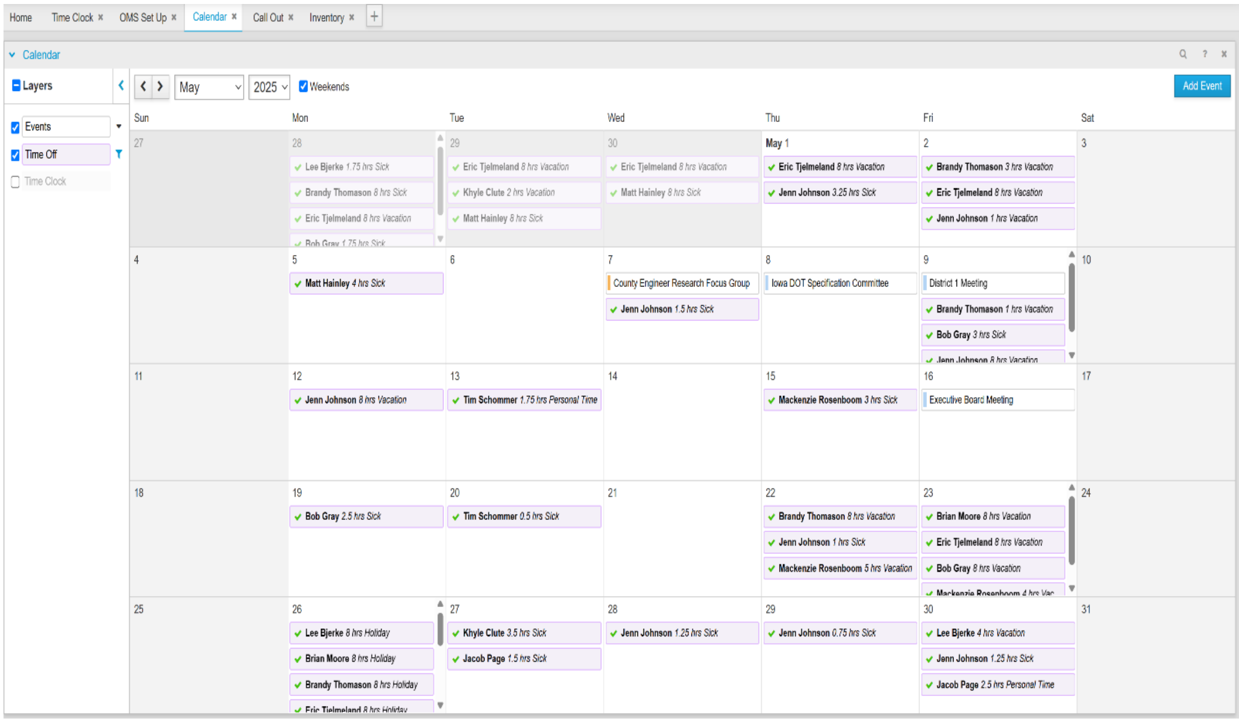


**Figure 18. Calendar Application**

## Getting Started (Admin)

To get started with Calendar, an administrator needs to do some set up of the system.

1. *Users & Staff*
    a. Give **Calendar Administrator** role to appropriate users

## Help Content

### General

**How do I open an event?**
Click the event in the calendar.

**How do I edit an event?**
Open the event, then click the Edit button.

**How do I change what events I see?**
Open the calendar legend, then toggle the layers you would like to see. Each layer can be filtered from its menu.

**How do I stop seeing certain events?**
Open the event, then click the ignore button. To hide the event from the calendar, open the calendar legend, then choose the menu for the events layer. Toggle off Show Ignored Events.

**Can I change how the events look on the calendar?**
Open the calendar legend, then choose the menu for the layer you want to change. Then click on background color or border color to choose a color.

**How do I see a different month?**
Using the arrow buttons at the top will move you one month at a time in the respective direction. In addition, you can use the two dropdown menus to choose a month and year.

**What do the colored banners on the events mean?**
Events are colored according to their type, which will be displayed in the details panel.

**How do I save an event to my personal calendar?**
Open the event, then click the download button. Once downloaded, save it to your calendar.

**How do I print an event?**
Open the event, then click the print button at the bottom.

**How do I register for an event?**
Open the event, then click the register button at the bottom.

**How do I unregister for an event?**
Open the event, then click the unregister button at the bottom.

## Adding an Event

**How do I add an event?**
Make sure you have the Calendar Administrator role. Click the Add Event button.

**How do I allow users to register for my event?**
Check the Track Registrants checkbox to allow users to sign up for the event in the Service Bureau website. Only include an external Registration URL if you have a website that will track event registrants for you.

## Event Audiences

**What are event audiences?**
An audience is a group of users that will be able to see the event on their calendar.

**What type of audiences can I choose?**
Audiences can be organizations, staff groups, people, organization types, or job types. Each of those audiences (except people) can then be pared down by job type.

**How can I choose different audiences for my event?**

Click the Add Audience button for each separate audience you need. For example, if you want all county engineers to see the event, plus a few extra people from your county, click Add Audience. Change the drop down to Job Types, then choose County Engineer and click Submit. Then click the Add Audience button again and change the drop down to People and choose the staff you would like to include. Alternatively, if your extra staff were in a Staff Group, you could change the drop down to Staff Groups and choose the corresponding group.

**How can I make my event seen by all users?**

Remove all audiences in the event form and it will be made public for all users to see.

# Chapter 4. Call Outs Application

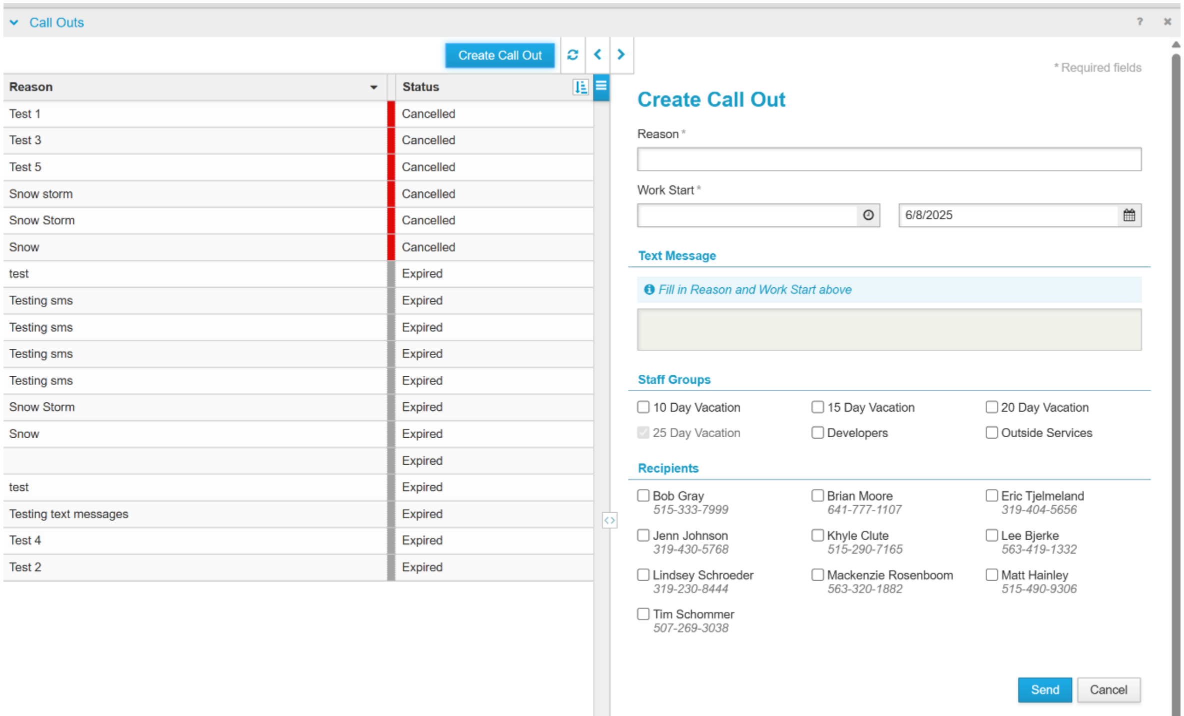



**Figure 19. Create Call Out**

## Getting Started (Admin)

To get started with Call Outs, an administrator needs to do some set up of the system.

1. *Users & Staff*
    a. Give **Call Out Administrator** role to appropriate users

## Help Content

Click on the links below to watch screencast videos showing how to use the application.

- Call Outs Application *An overview of Call Outs*
- Call Outs Alarm Setup *How to set a unique alarm for incoming call out messages on Android devices.*

### General

**How does a Call Out work?**
When a Call Out is created, a text message gets sent to all recipients with the details of the Call Out. Recipients reply with "**Y**" or "**N**" to accept or decline. Users can see responses in the application.

**How do I ensure staff receive a Call Out?**
[Call Outs Alarm Setup Help Video]  Call Out text messages are sent from **833-456-1418**. We recommend sending a test Call Out before you are ready to use the system. Staff can save this number as a contact and optionally assign a unique ringtone to it. On Android devices, you can also install the Automate app to setup a unique alarm.

**How do I see the responses?**
A Call Out's details will show who the Call Out was sent to, as well as how they have responded. If their response starts with "**Y**", we indicate the recipient has accepted. If their response starts with "**N**", we indicate the recipient has declined.

**When does a Call Out expire?**
A Call Out expires when the *Work Start* time passes. After it expires, a Call Out can no longer be cancelled, no new notifications can be sent for it, and it can no longer be responded to.

**What happens when I cancel a Call Out?**
All of a Call Out's recipients will receive a text message stating the Call Out was cancelled. No new notifications can be sent for cancelled Call Outs and cancelled Call Outs can no longer be responded to.

**What if I need to change a Call Out's Work Start time?**
The Call Out will need to be cancelled, and a new Call Out created.

**Why are some recipients unable to be chosen?**
Call Out responses are determined by the sender's mobile number. If the mobile number is already being used in an active Call Out, it can't be chosen for a new Call Out. Additionally, if more than one person is assigned the same mobile number, only one person with that number can active at any time.

# Chapter 5. Conclusions

It was decided by the TAC that "Time Tracking" would be the initial effort and applications built. This endeavor turned out to be very challenging. "Time Tracking" would require many separate applications to be built. The individual applications would need to interact with each other to make the entire system work. Also, it quickly became apparent that all counties do not have the same time policy business practices. The "Time Tracking" system had to be built to accommodate many different business cases. This created many iterations and back and forth discussions with the TAC committee over 5 years. This complexity created many time delays in the research completion timeline and took a majority of the budget for this project.

Once "Time Tracking" was released in July of 2023, the development team was able to create additional features in the Calendar application and to create the Call Outs application for use in the winter to call employees in for snow removal purposes.

In the end, this research project was a success as ICEASB was able to create some very beneficial applications that counties can use to create efficiencies and time savings within their department. Implementation is ongoing, as ICEASB continues to bring counties on board with using the new applications. ICEASB assists counties with the initial set up of "Time Tracking" to ensure correct policies are set. No additional research is needed at this time to enhance what was completed as a part of this project.

# Appendix A: Implementation

## DEVELOPMENT OF OPERATIONS MANAGEMENT SYSTEM FOR IOWA SECONDARY ROAD DEPARTMENTS

### Project Description

| | |
|---|---|
| **Project Number:** | TR-745 |
| **Project Funding Program:** | Iowa Highway Research Board |
| **Projected End Date:** | June 27, 2025 |
| **Project Champion:** | Lee Bjerke, PE |
| **Project Manager:** | Click here to enter text. |
| **Principal Investigator:** | Brian P. Moore, PE |

### Project Objectives

Develop a suite of computer applications to allow Iowa's 99 county Secondary Road Departments to better manage its soft assets and increase efficiency.

### Implementation Plan

The applications described in this final report were created and are now available for use on the Iowa County Engineers Association Service Bureau website, www.iceasb.org

#### Major Tasks

| | |
|---|---|
| **Task: Application Training** | Educate and train counties on use of new applications |
| **Responsible Iowa DOT Department(s) and/or Staff Member(s):** | N/A |
| **Iowa DOT Resources Required:** | N/A |
| **Implementation Partner Agencies:** | N/A |
| **Anticipated Start Date:** | July 2023 |
| **Anticipated Completion Date:** | Ongoing |

#### Potential Challenges or Barriers

None

#### Expected Benefits

| **Expected Benefit** | **Description** |
|---|---|
| ☐ Decreased lifecycle costs | Click here to enter text. |

| Expected Benefit | Description |
|---|---|
| ☐ Developed new or revised specification | Click here to enter text. |
| ☐ Expedited project delivery | Click here to enter text. |
| ☐ Improved aspects of the environment | Click here to enter text. |
| ☒ Improved operations | More efficiencies in County Road Departments |
| ☐ Improved system reliability | Click here to enter text. |
| ☐ Increased customer satisfaction | Click here to enter text. |
| ☐ Increased knowledge | Click here to enter text. |
| ☐ Increased lifecycle costs | Click here to enter text. |
| ☒ Increased productivity or efficiency | Time savings |
| ☐ Increased safety | Click here to enter text. |
| ☐ Increased service life | Click here to enter text. |
| ☐ Reduced agency administrative costs | Click here to enter text. |
| ☐ Reduced construction costs | Click here to enter text. |
| ☐ Reduced engineering and design costs | Click here to enter text. |
| ☐ Reduced maintenance costs | Click here to enter text. |
| ☐ Reduced operations costs | Click here to enter text. |
| ☐ Reduced user costs | Click here to enter text. |
| ☐ Validated current practice | Click here to enter text. |

## Training Needs

As counties start using the new applications, one on one training is needed to educate and set up the applications properly.

## Future Research

None at this time.

# Appendix B: Project Deliverables

Web-Based Applications hosted on the ICEASB website, www.iceasb.org

- Time Policies
- Time Clock
- Time Off
- Time Off Types
- Time Sheets
- Geofences
- OMS Kiosks
- Pay Periods and Staffs
- Reimbursements
- Work Codes
- Equipment
- Calendar
- Call Outs