USER GUIDE

Employee Scheduler

Administration Section

SYSTEMS24-7

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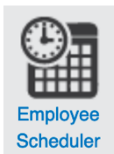
As an **Administrator** for your company, you are able to manage the Employee Scheduler. The Employee Scheduler allows you to create work schedules on the system and notify your employees via their My Calendar feature. You can also manage time off and customize calendars to include important days specific to your company.

To access the **Employee Scheduler**, we start off with accessing the administration section via the **Admin** button at the top right corner of your website. If you do not see this button, you may not have the proper administration privileges in the system.



Once you are in the **Administration** section, click on **Employee Scheduler** to see the Employee Scheduler functions.

Before we can actually start building the work schedule and assigning shifts, there are a few administrative parameters we must decide on first.

Let's get started! First up, **Configure Employee Scheduler**.

Configure Employee Scheduler

After selecting the **Employee Scheduler** from the admin menu, start by accessing the **Configure Employee Scheduler** function. This page provides a series of questions to help manage the functionality of your company's schedule.

> Configure Employee Scheduler
>
> Use this option to set-up the employee scheduler, apply settings, establish operating hours, etc.

Let's go over each question together.

Enable employee scheduler to create schedules? This turns on and off the functionality of being able to build your work schedule in Systems 24-7.

Enable approval of hours worked after a scheduling period has ended? Select "Yes" if you would like to review schedules when they are completed to verify hours for employees.

Enable employees to submit time-off requests? This allows employees to submit time-off requests for approval while selecting a time-off type (i.e., vacation) and if it's paid/unpaid.

Enable employees to submit time-off requests when they don't meet all criteria? The scheduler can keep track of the number of vacation days an employee has and by enabling option you will allow employees to submit requests who may not meet all the criteria.

Enable employees to cancel a time-off request? Instead of the employee coming to you to cancel a request, you can allow them to manage their own. You will still be notified of any changes.

Enable a default time frame for requesting time off and/or changing requests? Set parameters for when employees are able to request time-off or make changes to existing requests, i.e., 7 days prior to scheduled shift.

Default timeframe prior to request: Select the number of days an employee has to request time off before a scheduled shift. Use the dropdown menu to make your selection.

Do you wish to display the contact information for schedule admins when an employee attempts to transfer a shift or request time off outside the designated timeframes? This can be helpful since there can be exceptions to the rules. By displaying contact information, an employee can go directly to the admin to discuss the request. An email or phone number is recommended.

Once you have selected the Yes/No for all applicable questions, select **Save Settings**.

Company Hours of Operation

Next, we will setup your company hours of operation which will define when shifts can be scheduled. It's important to keep in mind if you have a janitorial staff that comes in after hours, these times need to be captured here. Start by selecting **Company Hours of Operation** from the Employee Scheduler functions.

Company Hours of Operation

Use this option to set up the hours of operation for your company.

Determine whether your company runs on a 12 or 24-hour clock by making a selection.

Company Clock: 12 Hour 24 Hour

Now select the operating times for your company for each day of the week by using the dropdown menus.

Sunday: Closed

Monday: 7:45 AM to 7:00 PM

Once all selections have been made, select **Save Settings**. You can update these at any time by returning to this function.

Calendar and Important Days

This function allows you to manage all the important days in your company calendar. **Important Days** are unique to your company and could come in the form of a company retreat, work anniversary, etc. As the admin you have the ability to select a **Holiday Type** (statutory/non-statutory), **Pay Type** (paid/unpaid), and set up a **Frequency** (one time, annual, etc.).

Date	Description	Country	Province	HolidayType	Pay Type	Working Day	Frequency	Authoring Options
January 22, 2021	Company Retreat	Canada	Ontario	Non-Statutory Holiday	Paid	Yes	One Time	Edit Status Delete

Important days are displayed by the current calendar year, but you also have the ability to view past important days or plan ahead. To do this, select the year dropdown menu found above the **Date** column.

Under **Authoring Options,** you have the ability to make changes to Important Days in the calendar. Let's go over each option:

Edit allows you to make changes to the current settings for a particular day.

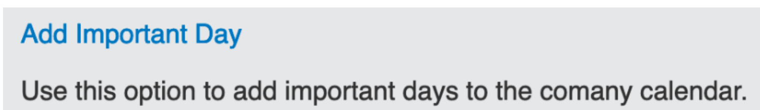
Status allows you to change an important day to Active or Inactive. The blue open eye icon represents an **Active** day in the calendar.

The grey closed eye icon represents an **Inactive** day in the calendar. This just means the important day is in the system but not in view in the calendar.

Delete will permanently delete the important day from the calendar and system. You will no longer be able to make changes to it.

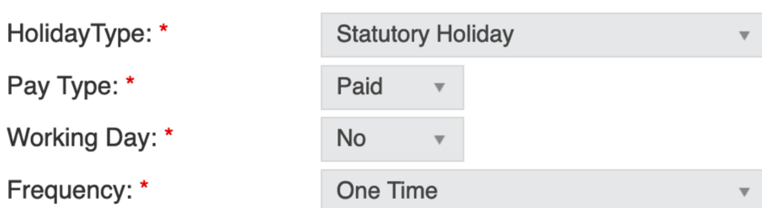
Add/Edit Important Day

To add an **Important Day** to the calendar you can either select **Add Important Day** from the **Employee Scheduler** functions or if you are currently managing **Calendar and Important Days** you can select **Add Important Day** which can be found above the **Authoring Options** column.



Start off by selecting if this Important Day applies to the whole country or a specific province. Use the calendar picker to select the actual date of your entry and provide a title and description.

Next, determine the **Holiday Type, Pay Type, Working Day**, and **Frequency** by using the dropdown menus.



After you have made all your selections, select **Add Day**. The system will notify you your changes have been saved and added to the system.

To review your changes, select **Calendar and Important Days** from the Employee Schedule functions page.

Setup Schedule Rules

In this section, you will follow a 4-step process to setting up the rules of your schedule. Start by selecting **Setup Schedule Rules** from the **Employee Scheduler** functions.

> **Set up Schedule Rules**
>
> Use this option to set up schedule rules, such the parameters for publishing, how you intend to build your schedule (organizational level), set up shifts, and more.

Step 1

Let's start off by naming your schedule. In our example we will use the Food and Beverage industry and name ours "Front of House".

Schedule Name: en | fr | es
Front of House

Select **Save and Continue** to move onto the next step.

Step 2

Now you must select the start and end times that apply to this particular schedule. As you will see, your hours default to the **Company Hours of Operation** you setup earlier.

> If you have not setup your company hours yet, please refer to the **Company Hours of Operation** section of this user guide for step-by-step instructions.

Once you have made the necessary changes, select **Save and Continue** to move onto the next step.

Step 3

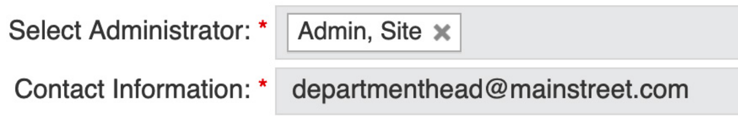
The selections you make in step 3 play a key role when you are building the actual schedule. You will only have access to the employees based on the decisions made in this step. For example, I am building a schedule for the Front of House of my restaurant so I will only need access to my employees within a specific department.

Select Organizational Level: * Department
Main Street : Front of House

Next, select the administrator that will be building the schedule weekly or monthly. This could be the department head or an administrative worker.

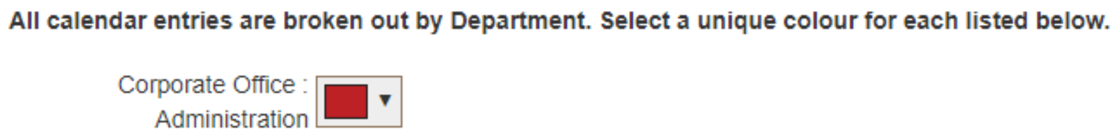
Select Administrator: * Admin, Site

Next, enter in their contact information in case an employee needs to go directly to them with any scheduling issues. This can be an email or phone number and will only be displayed if it was enabled when you configured the Employee Scheduler.



If you did not configure your Employee Scheduler, please refer to the **Configure Employee Scheduler** section of this user guide for step-by-step instructions.

Next, select a unique colour for each entity in your schedule (in this case, department):

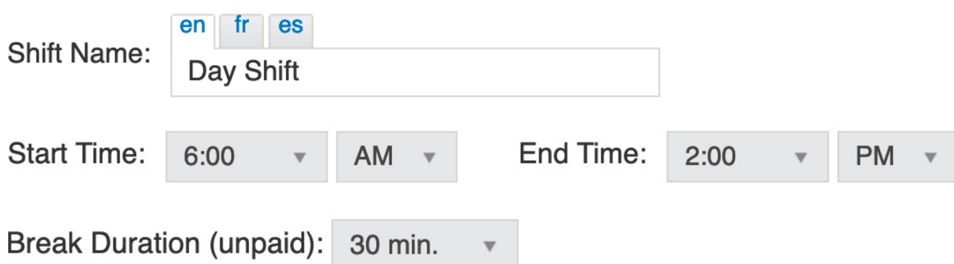


Select **Save and Continue** to move onto the next step.

Step 4

In this step, you can determine the common shifts used within your workplace. For example, shift work would operate off days, afternoons, and nights. Select **Yes** if you would like to setup predetermined shifts. This makes building your schedule a breeze!

Name your shift and select a **Start Time** and **End Time**. If your employees get an unpaid break for lunch, you can also add the duration of that break so that it is deducted from the total hours logged in the shift.



Once you have added all shifts for your schedule, select **Save and Continue** to move onto the next step.

Finished

You have finished setting up the rules of your schedule. You can now setup another schedule for a different department or start building!

If you ever need to make changes to a schedule's rules, please refer to the next section **Manage Schedule Rules** for step-by-step instructions.

Manage Schedule Rules

This function allows you to manage and make changes to the schedule rules you setup in the previous section. Start off by selecting **Manage Schedule Rules** from the Employee Scheduler functions page. You will see a complete list of all schedules that you have setup in the system.

You have several **Authoring Options** so let's go through them:

Edit allows you to go through the 4-steps of setting up the schedule so you can make changes to your current selections.

Copy allows you to duplicate a schedule's rules. You will be taken through the 4-step process where you can change the name and tweak any rules if necessary.

Status allows you to change a schedule setup to Active or Inactive. The blue open eye icon represents an **Active** schedule in the calendar.

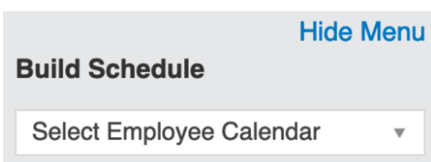
The grey closed eye icon represents an **Inactive** schedule in the calendar. This just means the schedule is in the system but not accessible when building in the calendar.

Delete will permanently delete the schedule rules from the system. You will no longer be able to make changes to it or access it when building a schedule in the calendar.

Build Schedule

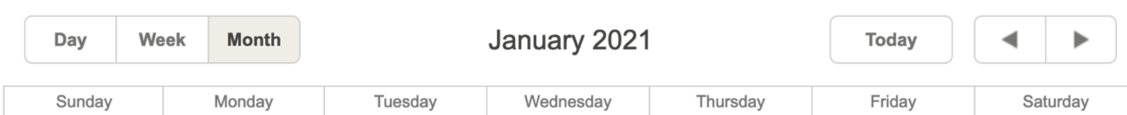
Now here comes the fun part! Setting up how your Employee Scheduler will work and the rules it will follow can be quite the process but once it's done it makes building your schedule as easy as 1-2-3. Select **Build Schedule** from the Employee Scheduler functions page.

Let's start with a basic overview of the **Build Schedule** tool. On the left-hand side of the page, you have a toolbar which is where all your tools for building the schedule will be.



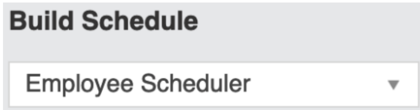
On the right-hand side of the page is your actual calendar. Across the top of the calendar, you are able to change your calendar view from **Month** to **Day** or **Week** view. For the sake of the user guide we will stay in month view but see what works best for you.

You can also toggle through the months, weeks, or days (depending which view you are in) by using the arrow keys on the right side of the calendar (pictured below). If you ever need to return back to today's date, click the **Today** button.

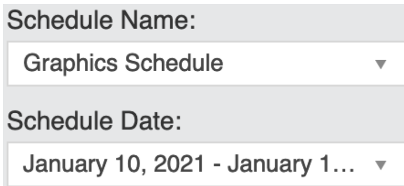


Add an Entry

To start building your schedule, select **Employee Scheduler** from the dropdown menu located in the **Build Scheduler Toolbar**.

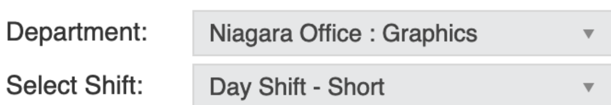


Next, select the **Schedule Name** and **Schedule Date** you would like to add shifts to.



The schedule date you selected will now become active on the calendar (appearing white instead of grey). To add a **New Entry,** you can select the ⊕ symbol next to the day you would like to add a shift to or click in the calendar day box.

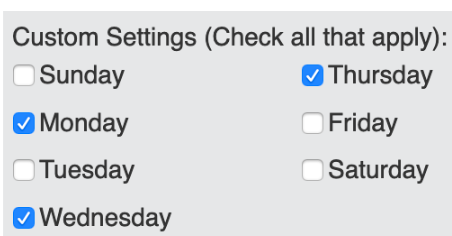
A dialogue box will appear with the selected date for entry. Select the **Department** and **Shift** you would like to add.



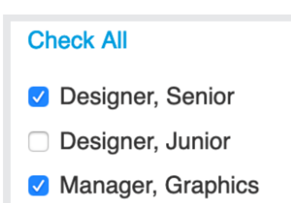
Repeat defaults to “Do not repeat” but if you have a shift that is the same for multiple days then you can apply settings using the dropdown menu.

Weekdays: This will repeat the shift every day from Monday to Friday.

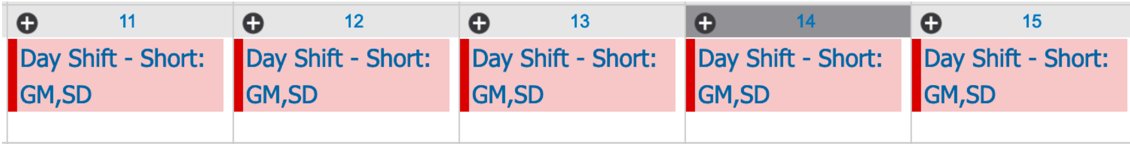
Custom: Allows you to select only certain days of the week.



Next, select the employees that you wish to schedule for this shift. Only the employees that fall within the company entities selected will be up for selection. If you can’t find someone you are looking for then you will have to adjust your **Schedule Rules** that you setup in **Step 3**.

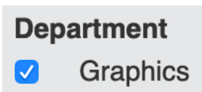


After you have made all your selections, click **Add Shift** to add it to the calendar.



In our example, we know the same people work the same shift Monday to Friday so we were able to use the **Repeat** function to have the shift added to every weekday.

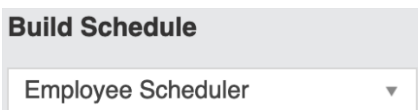
The calendar entry will show you the **Shift Name** and the initials of the employees scheduled for that shift. In your Employee Scheduler toolbar a legend will display the departments currently scheduled in the calendar.



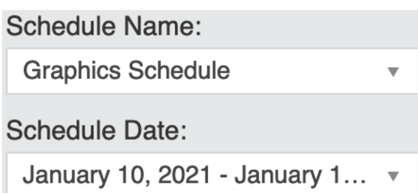
The scheduler automatically saves after each entry. Once you have added all your shifts, your schedule is live, and the shifts have been added to all employee calendars.

Edit an Entry

To make a change to a shift on the calendar, start by selecting **Employee Scheduler** from the dropdown menu located in the **Build Scheduler Toolbar**.



Next, select the **Schedule Name** and **Schedule Date** you would like to edit.



Next, click on the entry you would like to change. A dialogue box will appear with the shift information. Select the **Department** the employee belongs to and then make any revisions to the employees selected. Select **Save Changes** to update the calendar.

Administer Interests

This function allows you to manage all your **Interest** categories you have added to the system. An interest can be linked to a shift and when matched with an employee's interest in their profile, they will be notified of any shifts available.

For example, Jane Doe is interested in volunteering for Pet Therapy at the Long-Term Care facility she works at. When a shift becomes available and is tagged with the interest "Pet Therapy", this shift will appear on her **Pick-Up Shifts** page.

Employee Status	Authoring Options
Pet Therapy	Edit Status Delete

You have a few **Authoring Options** so let's go through them.

Edit allows you to change the **Interest Name**.

Status allows you to set an interest to Active or Inactive. The blue open eye icon represents an **Active** interest which means employees can select this in their profile.

The grey closed eye icon represents an **Inactive** interest which means employees cannot select this in their profile.

Delete will permanently delete the interest from the system. You will no longer be able to make changes to it or access it.

Add Interest

To add an **Interest** to the system you can either select **Add Interest** from the **Employee Scheduler** functions page or if you are currently in the **Administer Interest** function you can select **Add Interest** which can be found above the **Authoring Options** column.

Add Interest

Use this option to add an interest to the system.

Start by adding an **Interest Name**.

Interest Name: * en fr es Fundraising

By default, the system will select an **Active** status but if you are not quite ready for employees to use this interest then you can select **Inactive**.

Status: Active Inactive

Select **Add Interest** to save the interest to the system.

Administer Time Off Types

This function allows you to **Administer Time Off Types.** Examples of time off types could be a personal day, compassionate leave, sick day, etc. When an employee submits a time off request, they can select a **Time Off Type**. This will help the system manage how many days off your employees are taking and for what reasons.

Time Off Type	Country	Province	Pay Type	Calendar Colour	Authoring Options
Personal Day	All	All	Unpaid	BE1E2D	Edit Copy Status Delete

You have a few **Authoring Options** so let's go through them.

Edit allows you to make changes to which country and province the time off type applies to and if it is paid/unpaid. You can also update the colour assigned to it in the calendar.

Copy allows you to duplicate the time off type, make any changes and save it as a new time off type. This can be useful when you have personal days that are paid and unpaid.

Status allows you to set a time off type to Active or Inactive. The blue open eye icon represents an **Active** time off type which means employees can make a request for one.

The grey closed eye icon represents an **Inactive** time off type which means employees cannot request one.

Delete will permanently delete the time off type from the system. You will no longer be able to make changes to it or access it.

Add Time Off Type

To add a **Time Off Type** to the system you can either select **Add Time Off Type** from the **Employee Scheduler** functions page or if you are currently in the **Administer Time Off Types** function you can select **Add Time Off Type** which can be found above the **Authoring Options** column.

Add Time Off Type

Use this option to add a time off type to the system.

Start by adding a **Time Off Type Name**.

Time-Off Type Name: * en fr es Personal Day

Next, use the multiselect fields to determine whether or not this time off type applies to the whole country or only a specific province.

Country: All ×

Province: All ×

Select whether or not this time off type is **Paid** or **Unpaid.**

Pay Type: * Unpaid

Select a **Calendar Colour** using the colour picker tool or entering in a HEX colour code, for example: BE1E2D. This will be the colour assigned to the calendar entry when it is added to an employee's calendar.

Select Calendar Colour: * BE1E2D

By default, the system will select an **Active** status but if you are not quite ready for employees to use this time off type then you can select **Inactive**.

Status: Active Inactive

Select **Add Type** to save the time off type to the system.

Administer Employee Schedule Requests

This function allows you to manage time off requests submitted by employees**.** From this page you can see an overview of:

- the Employee who submitted the request,
- the time off type,
- whether it is paid or unpaid,
- the start and end date of the request,
- the number of days off the request requires, and
- the status of the request.

Employee	Time Off Type	Pay Type	Start Date	End Date	# of Days	Status	Authoring Options
Junior Designer	Vacation Day	Paid	December 23, 2020	December 29, 2020	5.0	Pending	Edit Delete

You have a few **Authoring Options** so let's go through them.

Edit allows you to **Approve** or **Decline** the time off request.

Delete will permanently delete the request from the system. This is in case an employee needs to cancel a request.

The requests are split up into two charts: Pending and Approved/Declined.

Approve/Decline a Time Off Request

To approve or decline a time off request, simply select the edit icon from the **Authoring Options** column.

Change the status of the request to **Approved or Declined** using the dropdown menu.

Status	Authoring Options
Approved (Approved / Declined)	Save Cancel

Select **Save** to complete your review. The system will notify the employee of your decision and the request will move to the Approved/Declined chart for your records.