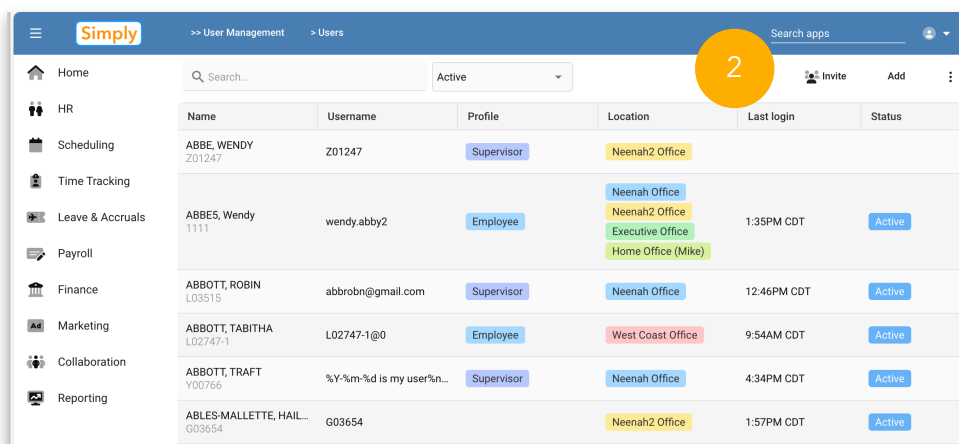
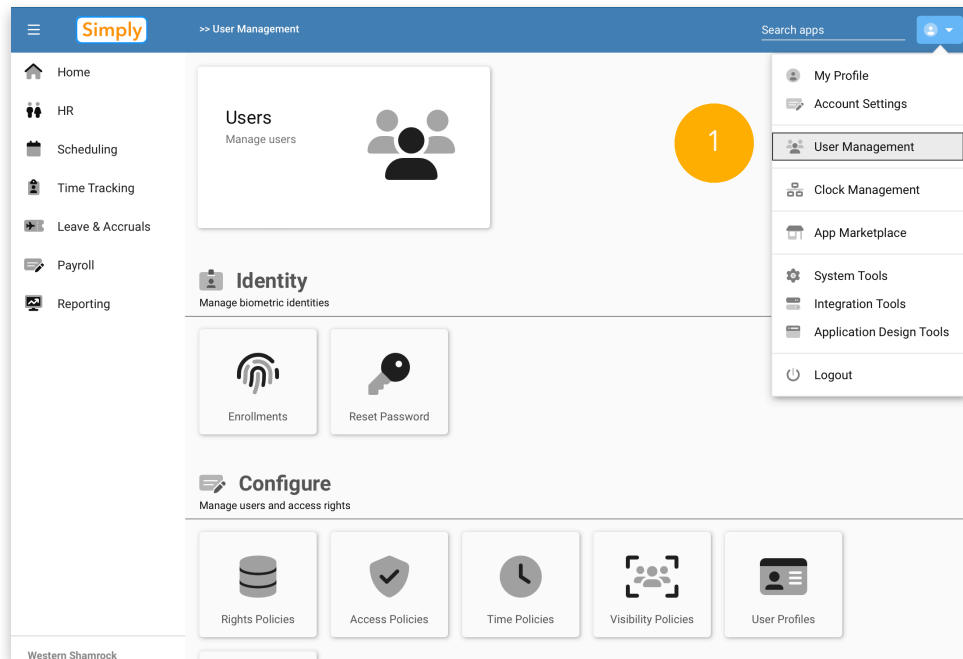


## User Management

Use the System Menu (1) in the upper right of the app to navigate to User Management, where users can be maintained, invited to join and assigned a User Profile.



Go to the Users app to send invites (2) to new users. For those with an email attached to their user account, an automated email will be sent to guide them through the login process.

## Editing a User

Click on any user in the Users app to edit their user record. The username is their unique credential to your instance and can be a fully-qualified email address (within your domain) or a unique employee number. For those who require more than the minimum access rights, assign a User Profile (3). The default profile is used for any user who is not assigned a profile (e.g. Employee).

>> User Management > Users [ ABBE, WENDY (Z01247) ] Search apps

ABBE, WENDY (Z01247) Save Cancel

WENDY X

Lastname\*

ABBE X

Employee number

Z01247 X

Account

Use **Inactive** to temporarily deactivate user access, and **User Profile** to set the user access and rights policies. **Location** is the default location for the user, while **Non employee** designates a user who has access but is not included in employee type apps.

☐ Inactive

User profile\*

Supervisor 3

Location\*

WI2 X

Region

Details

Contact

Invite

Versions

Email and contact details can be confirmed on the Contact card (4), and an another invite option located on the Invite card (5).

>> User Management > Users [ ABBE, WENDY (Z01247) ] Search apps

ABBE, WENDY (Z01247) Save Cancel

Contact Info

Work phone:

(920) 886-7001

Work email:

Mobile phone:

(920) 555-1212

Personal email:

abby@gmail.com

If an email is available above, use the button below to send an invite to this user for access to this system. They will receive an email with a login link and further instructions.

Send Invite 5

Password

Use the **Reset Password** button to reset the password for someone who does not have email or can't receive an automated password reset. a temporary password will be displayed here. For users who have access to email and have an email address listed above, they can reset the password directly by pressing the **Forgot username or password** link on the main login page.

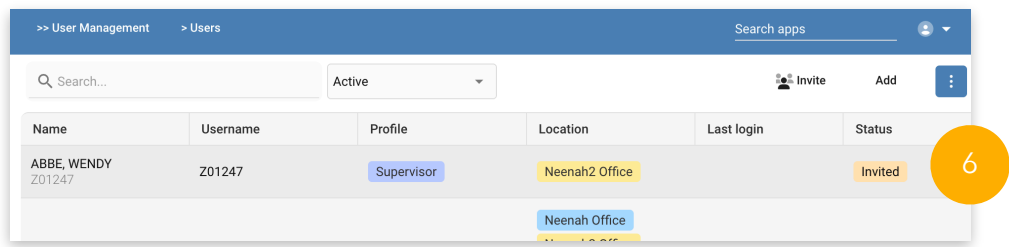
Details

Contact 4

Invite

Versions

A users’s progress from invite through logging in is tracked in the Status (6). During the login a temporary password will be provided and the user prompted to change their password. A self service Password Reset is available on the app login page should they need to reset the password at a later time.

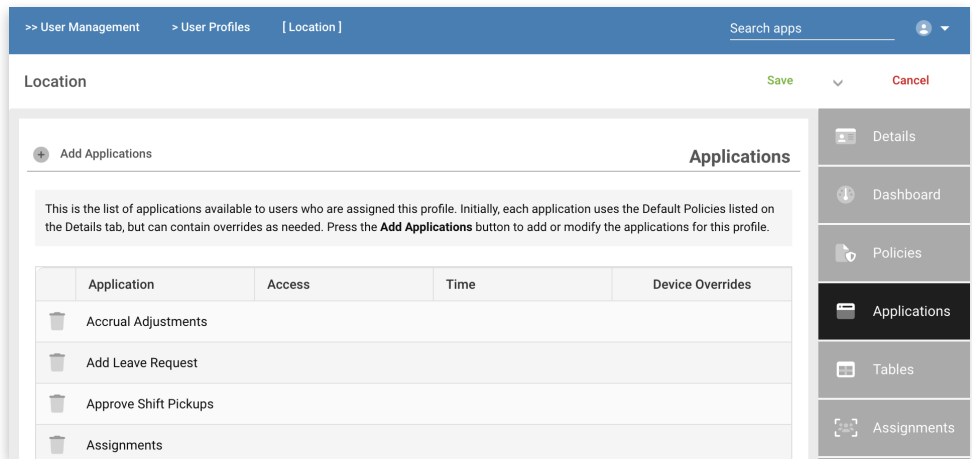


## User Profiles

User profiles determine the applications which are visible to a user, along with the visibility of other users. The following outlines the default profile visibility, though new profiles are easily created:

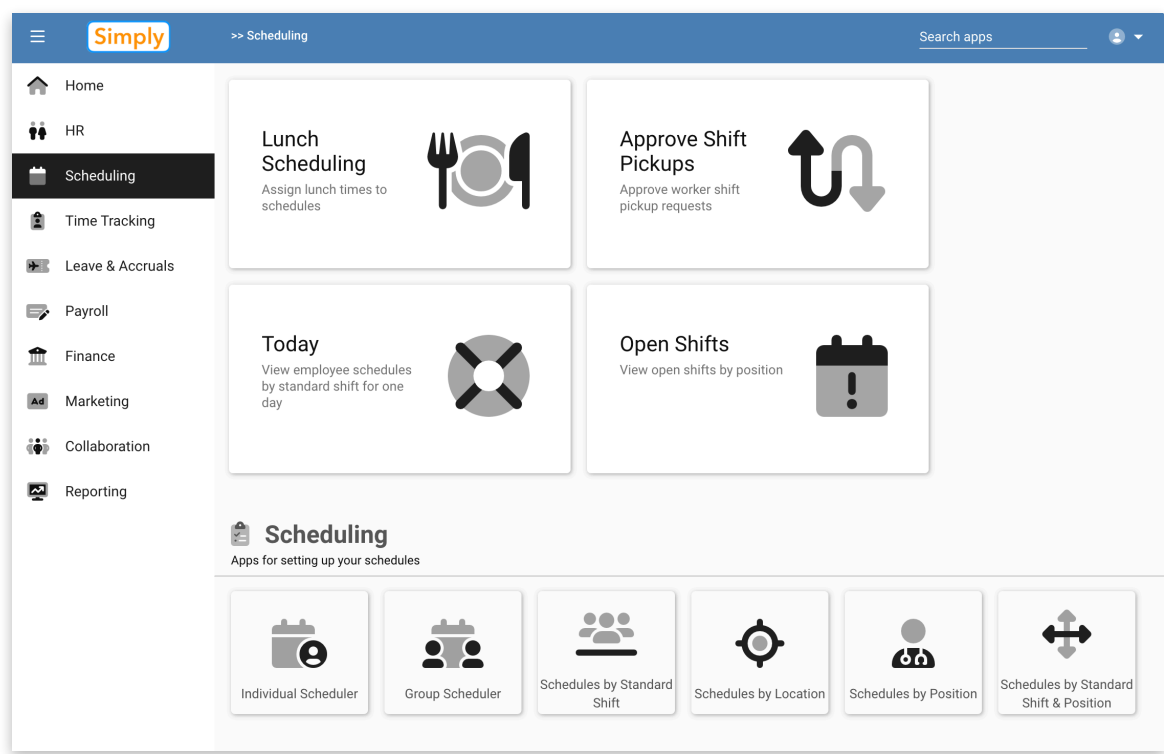
Profile Name	User Visibility
Admin	All
Regional	All users within the locations which are connected to the current user’s Region.
Location	All users within the current users Location(s)
Department	All users within the current users Department and Location(s)
Supervisor	The current users’s immediate reports.
Employee	Yourself

Profiles also present the list of applications presented to any user assigned to the profile.



# Scheduling

Scheduling tools are located on the main menu to the left in the application. Many of the scheduling tools are simply different views into the same shift data. What varies from app to app is



the purpose of the app and who might be using it. For example, the app used to create team schedules is different from the one used to maintain ad-hoc changes. Similarly, special views are created which only show certain schedule scenarios: e.g. open shifts, those with trades pending, or those with expected overtime.

## Using Scheduling Apps

All of the schooling apps are built upon the same core components. What varies from app to app are the organizational methods and filters. For example, one app may show all shifts by Location, while another pivots and displays by Position or Status.

The following table outlines the general components of the scheduler app:

	Component	Description
1	Search	Search for items on the Resource panel (in this example Users, but could be Positions, Shifts or Locations). Multiple search terms can be entered, such as the first three letters of a first name and first three of a last name.

2	Quick Filters	Preprogram filters which are app-specific and usually refer to a state (e.g. Open shifts, vs Trades)
3	Filters	Static filters which are used to specify content, such as specific Locations, Departments or Positions.
4	Date Navigation	Move forward and backwards in time
5	Date Period	Select the size of the view window; generally Weekly, Bi-Weekly, 3-4 Weeks or Monthly.
6	Action Buttons	Quick actions; these will vary by app but are used for special tools such as publishing, saving boards and other special tasks. The final ellipses contains a refresh to redraw the board to reflect changes from other users.
7	Resource	This is the primary axis for displaying calendar data. While typically this contains your list of users, in some apps this could be Position, Locations or even Equipment. All schedules are displayed with the Resource as the row header.
8	Transactions	These are the shifts or calendar events for a given resource row
9	Event Source	The far right is an optional source used for dropping onto the board. Depending in where dropped, a shift may be created or updated. In the example below the Event Source is Standard Shifts, which is the starting point for creating user schedules.

Below is the Group Scheduler with Users along the left (Resource) grouped by Position, Standard Shifts on the right (Event Source) and shifts displayed on the scheduler board (Transactions).

The screenshot displays a Group Scheduler interface with the following components and callouts:

- 1**: Search bar for finding specific resources or events.
- 2**: Filter dropdown menu to refine the displayed data.
- 3**: Date navigation controls to move forward or backward in time.
- 4**: Date period selector to choose the view window (e.g., Weekly, Bi-Weekly).
- 5**: Action buttons for tasks like publishing, saving, or refreshing the board.
- 6**: Search bar for finding standard shifts or event sources.
- 7**: Resource list on the left, grouped by position (e.g., Bartender, Chef).
- 8**: The main scheduler board showing shifts (Transactions) for each resource.
- 9**: Event source list on the right, including standard shifts and special events like maintenance or vehicle shifts.

# Standard Shifts

Standard shifts are the starting point for organization schedules. Standard Shifts refer to the typical shift times your users will work; e.g. First Shift, Second Shift, Weekend, Days, Nights, etc. You can create as many standard shifts as is needed to describe most typical work shifts. User schedules are then created by dragging-and-dropping Standard Shifts onto the scheduler board.

## Standard Shift Profiles

An additional element of Standard Shifts include Profiles which can be used to group Standard Shifts such that similar locations or teams can share a group of shifts, while other groups or locations can have a different collection of Standard Shifts to reflect their requirements.

Both apps provide an option for Color. Colors are very helpful in the scheduler apps for helping to easily identify scheduling items.

The Standard Shifts and Standard Shift Profiles apps are located under Settings on the Scheduling page.

Simply

>> Scheduling > Standard Shifts

Search apps

Home

HR

Scheduling

Time Tracking

Leave & Accruals

Payroll

Finance

Marketing

Collaboration

Reporting

Search...

Filters

Add

Name	Description	Color	Times	Lunch time	Profiles
First Shift	7am - 3pm	7am - 3pm	7:00 am - 3:00 pm	Open	Cafe Full service
Second Shift	3pm - 11pm	3pm - 11pm	3:00 pm - 11:00 pm	Open	Bar Full service
Third Shift	11pm - 7am	11pm - 7am	11:00 pm - 7:00 am	Open	Bar
Saturday maintenance	7am - 12noon	7am - 12noon	7:00 am - 12:00 pm	Open	Cafe Bar Full service
Saturday vehicle	7am - 12noon	7am - 12noon	7:00 am - 12:00 pm	Open	
Saturday building	7am - 12noon	7am - 12noon	7:00 am - 12:00 pm	Open	
ONCALL	On-Call	On-Call	-	Open	Full service Bar
OFF	Off	Off	-	Open	Full service
Float	Floating shift	Floating shift	7:00 am - 3:00 pm	Open	Cafe Bar Full service
Bad One	Bad	Bad	-	Open	

Standard Shifts

>> Scheduling > Standard Shift Profiles

Search apps

Search...

Add

Name	Description	Color
BAR	Bar	Bar
CAFE	Cafe	Cafe
FS	Full service	Full service

Standard Shift Profiles

Lunch Times



Lunch times is an app which provides a quick way to schedule lunch breaks. The Lunch times app allows you to publish common lunch times by Standard Shift. Then during the creation of shifts the lunch time is copied into the resultant schedules.

The Lunch Scheduling app provides a scheduler view of existing schedules by assigned lunch time. From this view a manager can easily slide a day’s shifts up-down to select a new lunch time.

>> Scheduling


> Lunch Times

Search apps

Q Search...

Add



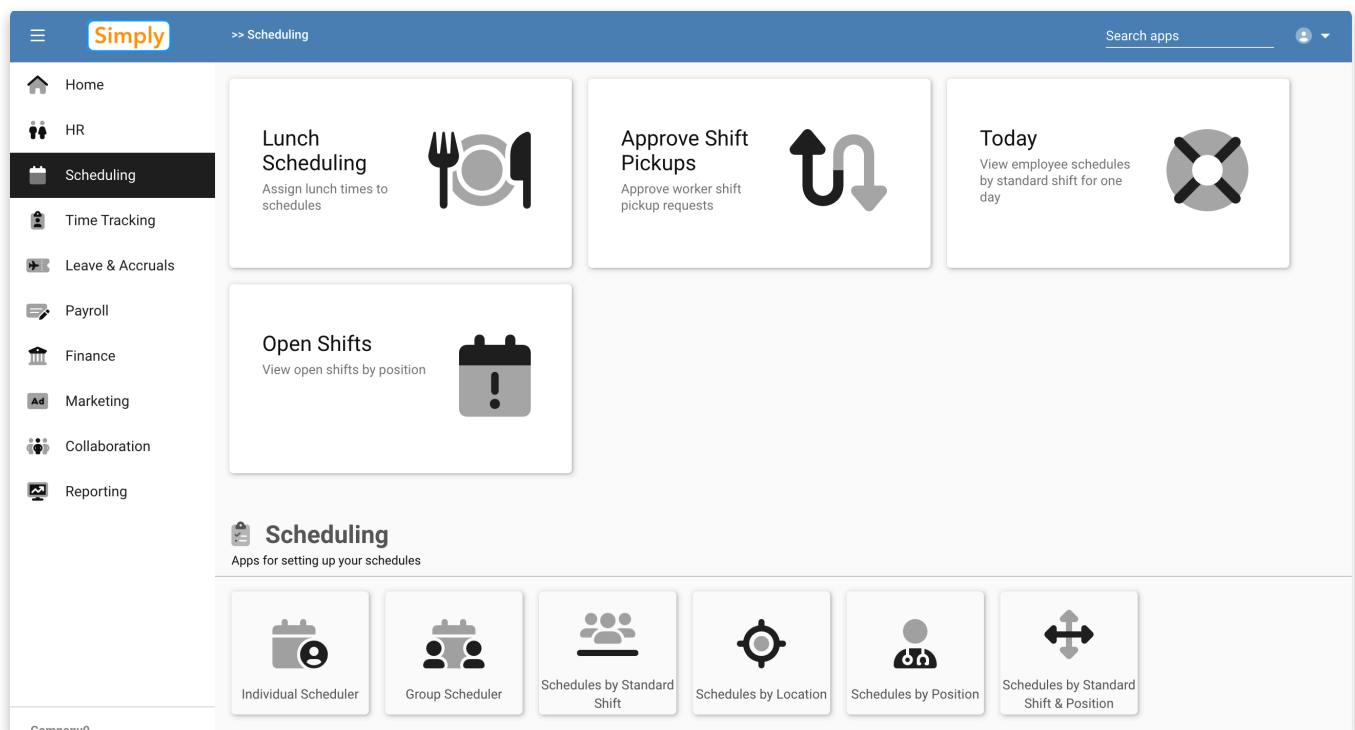
Name	Description	LunchTime	Standard Shifts			
FS1	First 11:00	11:00:00	First Shift	Saturday maintenance		
FS2	First 12:00pm	12:00:00	First Shift	Saturday maintenance	Saturday building	Saturday vehicle
FS3	First 1pm	13:00:00	First Shift	Saturday maintenance	Saturday vehicle	Saturday building
SS1	Second 3p	15:00:00	Second Shift			
OP	Open					

Lunch Times

## Creating Schedules

Schedules can be created from any of the scheduling apps. The table below lists the various scheduler views and how they may be best used:

App	Description
Individual Scheduler	View schedules for one person at a time. This is the classic calendar view whereby you can view in a month view, or side by side weeks.
Group Scheduler	View schedules for a group (e.g. everyone at your location) in a grid format.
Schedules by Standard Shift	Same as the Group Scheduler except the left side is Standard Shifts (Resource) and Users on on the right (Event)
Schedules by Location	Same as the Group Scheduler except Locations are on the left side (Resource)
Schedules by Position	Same as the Group Scheduler except Positions are on the left side (Resource)
Schedules by Standard Shift and Position	In this view Standard Shifts are on the left (Resource) while Positions are on the right (Event). Useful for creating intentionally open shifts.



Scheduling Menu



Another collection of apps are filtered for specific types of shifts or related data:

App	Description
Open Shifts	Show only shifts which are marked as open and requiring a worker
Today	Show a snapshot of what's happening now
Approve Shift Pickup	Approve requests by other users to pickup open or trade shifts
Lunch Scheduling	Modify the lunch time for existing schedules

## Group Scheduler

To create shifts from the Group Scheduler, first navigate to the desired date. Use the Date Period

The screenshot displays the 'Group Scheduler' interface. At the top, there's a navigation bar with '>> Scheduling' and '> Group Scheduler'. A search bar labeled 'Search apps' is on the right. Below this, a search bar 'Search...' and a 'Quick filters...' dropdown are visible. A date range selector 'Jun 30 - Jul 13 2024' is highlighted with an orange circle. The main area is a calendar grid with columns for days from Sun 6/30 to Tue 7/9. The first column is labeled 'Employees' and lists names like 'None', 'ABBE, WENDY', 'ABBE5, Wendy', 'ACHTABOWSKI, SAMANTHA', 'ADAMS, ASHLEY', and 'ADAMS (terminated), IRENE'. A list of 'Standard Shifts' is on the right, including 'First Shift', 'Second Shift', 'Third Shift', 'Saturday maintenance', 'Saturday vehicle', 'Saturday building', 'ONCALL', and 'OFF'. An orange arrow points from the 'Second Shift' option to a cell in the calendar grid.

Group Scheduler

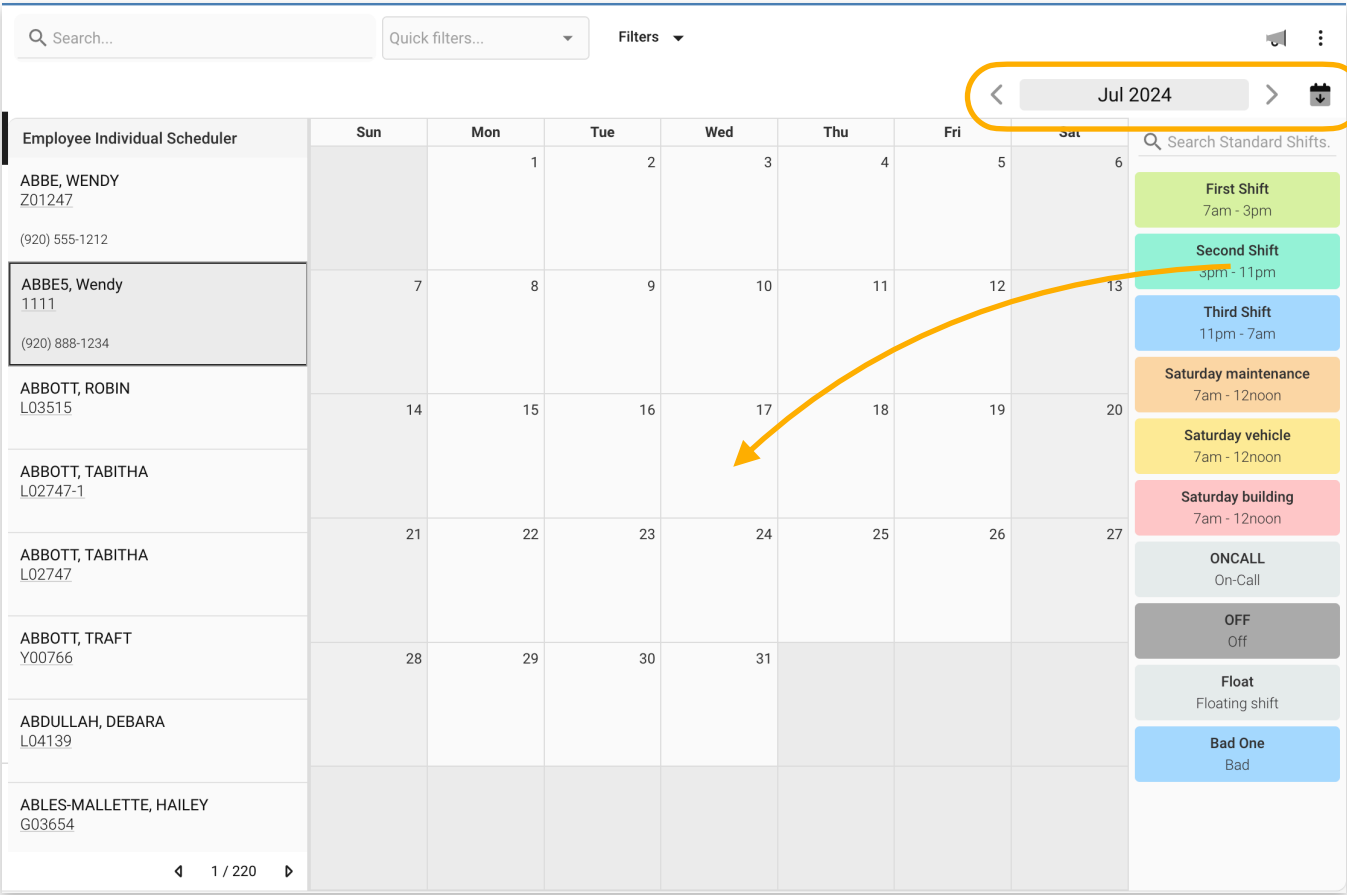
selector to choose how many weeks to view (1, 2, 3,4 or monthly).

To create a shift, drag one of the Standard Shifts onto the board. Alternately, you can pre-select a Standard Shift by clicking it once to hi-light (as shown above, "Second Shift"), then each subsequent click on a cell in the scheduler board will create a shift for user and date corresponding to the cell.

Shifts can be moved around by dragging-and-dropping onto other cells. Use Filters on the top of the app to zoom into a specific Location, Position or other demographic value. Search for specific users with the search bar in the upper left.

## Individual Scheduler

The Individual Scheduler is a more classic calendar view for viewing one users’s schedule at a time. As with the Group Scheduler, select dates and a date period using the controls in the upper right.

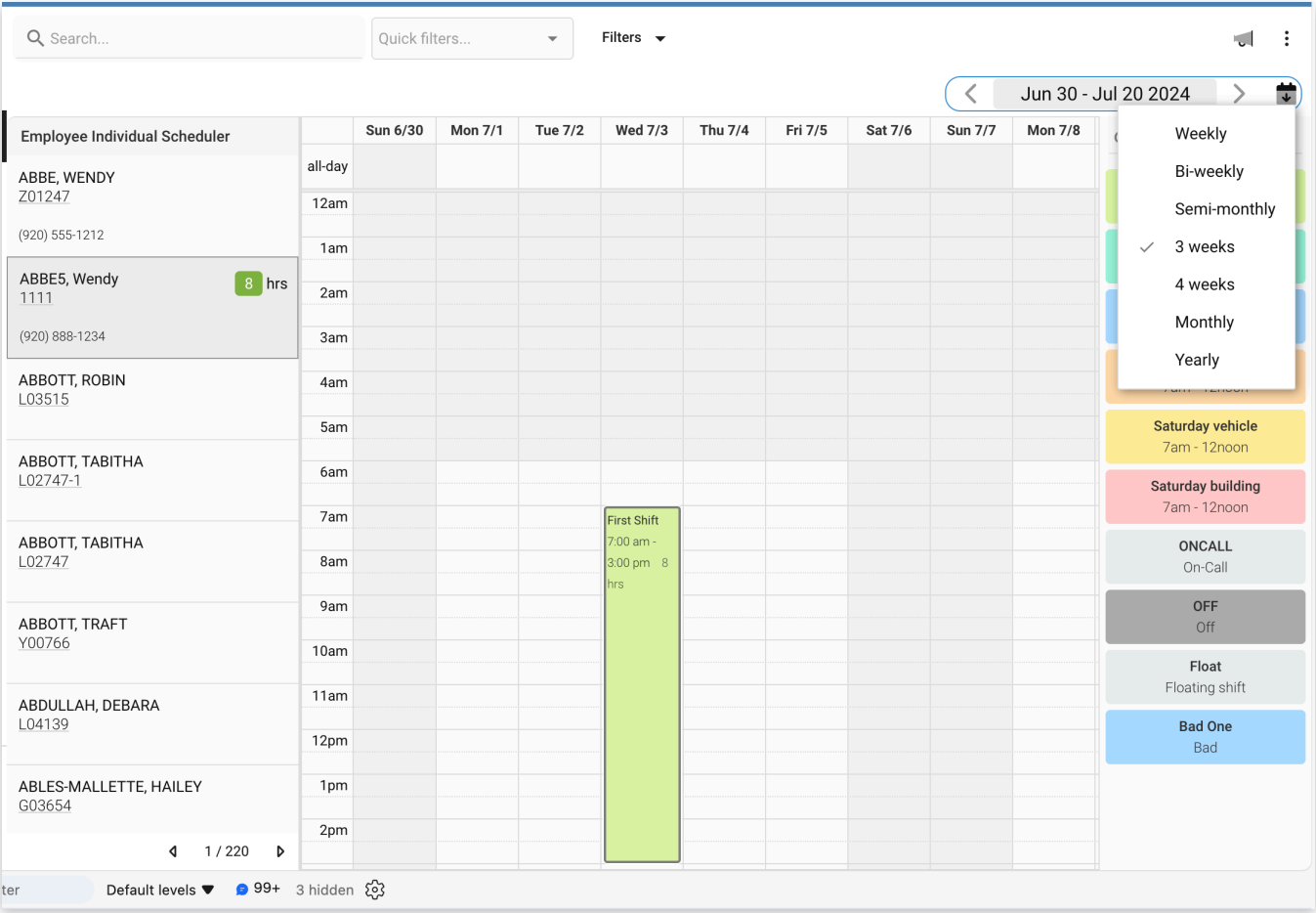


Individual Scheduler

To create a shift, first select a user in the left side resource list. Next, drag a Standard Shift onto any day. You can drag shifts around to place on alternate days (though you cannot assign to another user).

The Individual scheduler does offer a timeline view by selecting any of the Week selections on the Date Period control; after selecting a period (e.g. 3 or 4 weeks), then schedule board will be redrawn using the current start date. Use the left and right navigation buttons to move one week at a time in either direction.

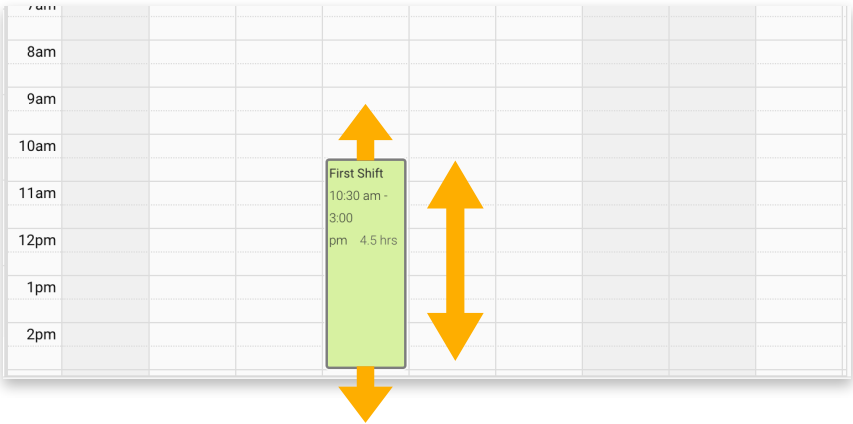
In the example below, a multi-week view is selected and a First Shift dragged onto the board for a target date:



Individual Scheduler

While Standard Shifts initially control the start and stop times for a shift, within the above timeline view you are able to drag a shift up/down to change the start/end times, or grab the top or bottom border to adjust just one of the times.

All other views allow you to drag a shift between cells (days) while this view still allow more granular adjusting of time down to 15min increments.



## Selecting Filters

From any of the scheduling apps you can use the Quick Filters and Filters menus to quickly zoom into the target transactions. Different filters act on up different sources. For example, when selecting Locations, the Users (resource) and Shifts (transactions) will be filtered to match the selection, while Standard Shifts, Positions and other sources would not. Each app will have variations in how the filter is applied based on the type of data being displayed.

In the example below, the Filter menu shows Locations and the Executive Office is chosen. The Users (on the left) and any target shifts matching that location are displayed. The selected filter is hi lighted

The screenshot displays the 'Individual Scheduler' interface. At the top, there's a navigation bar with '>> Scheduling' and '> Individual Scheduler'. A search bar on the right says 'Search apps'. Below the navigation bar, there's a search input field with a magnifying glass icon and a 'Quick filters...' dropdown. A 'Filters' button is also present. The main area shows a list of employees on the left and a calendar grid on the right. The 'Filters' menu is open, showing a list of filter categories: 'Positions', 'Locations', 'Standard Shift', 'StandardShiftProfiles', and 'Published'. The 'Locations' category is selected, and a sub-menu is open showing a list of locations: 'West Coast Office', 'Washington DC', 'Neenah Office', 'Neenah2 Office', 'Executive Office' (which is checked and highlighted with an orange circle), and 'Home Office (Mike)'. There is also a 'Clear All' option at the bottom of the sub-menu. The search bar at the top left now contains the text 'Locations = Executive Office' with a close button (X) next to it.

Individual Scheduler - Selecting a Filter

in the menu, but also displayed under the search bar.

You can add additional values by selecting the filter again and checking additional items. To remove a filter, repeat the process and uncheck the sections, or press the X to close the filter beneath the search bar.

# Publishing

By default shifts are not published and therefore not visible to the assigned users. The gray border indicates a non-published shift. To publish a shift, click on the shift to open the shift editor, then check the box to Publish. To publish in a batch based on a span of dates, press the Publish action button in the upper right of the app (megaphone):

>>Scheduling > Group Scheduler [ Manager Shift ]

Manager Shift

Unpublished

☐ Publish this shift

Shift\*

First Shift X

Position\*

Chef X

Department

Edit Shift

>>Scheduling > Group Scheduler Search apps

Q Search...

Quick filters...

Filters

Jun 30 - Jul 13 2024

Employees	Sun 6/30	Mon 7/1	Tue 7/2	Wed 7/3	Thu 7/4	Fri 7/5	Sat 7/6	Sun 7/7	Mon 7/8	Tue 7/9	
None	None										<div>First Shift 7am - 3pm</div>
ABBE, WENDY Z0124Z (920) 555-1212											<div>Second Shift 3pm - 11pm</div>
ABBE5, Wendy 1111 (920) 888-1234				<div>First Shift 10:30 am - 3</div>							<div>Third Shift 11pm - 7am</div>
											<div>Saturday maintenance 7am - 12noon</div>

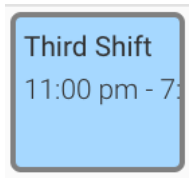
Publishing

The Publish Shift form allow you to specify one or more locations and positions, then a range of dates to publish. Upon Submitting, all schedules falling into the selected criteria will be marked as Published and visible to users.

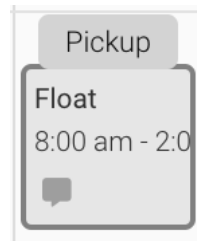
---

## Shift Identifiers

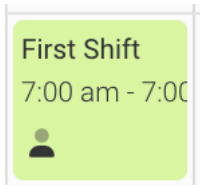
A variety of visual identifiers are used to note the status of a shift. The following outlines some of the common states:



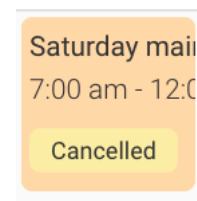
Unpublished; the gray border indicates that the shift is not visible to users. Managers are free to create and modify without affecting visibility



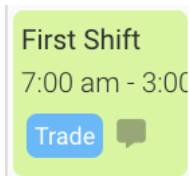
This shift has a pickup request linked to it. A manager must approve the pickup before the shift is re-assigned



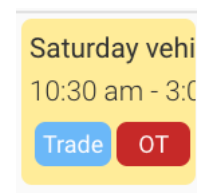
This shift is published and visible to the assigned user. In addition, the user has confirmed the shift (optional)



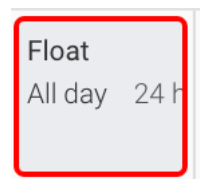
This shift has been cancelled and the user called off.



This published shift has a message attached to it (from manager to user) and is also being offered for trade (by the user)



This shift has a trade request by the user, and is also expected to put the user into overtime (assuming the shift is not traded)



This shift has errors and must be edited to fill in missing values (e.g. Location and Position are always required, but in some circumstances were not available when creating the shift).

For more information:

SimplyWork Support  
support@simplywork.com