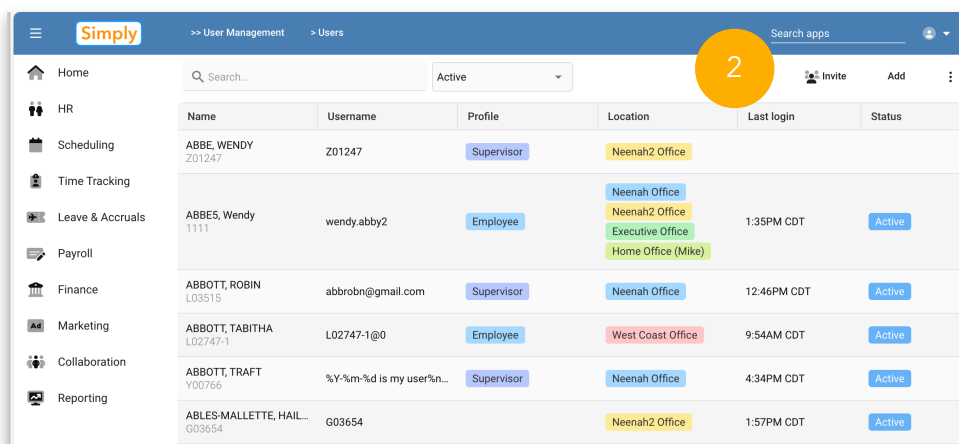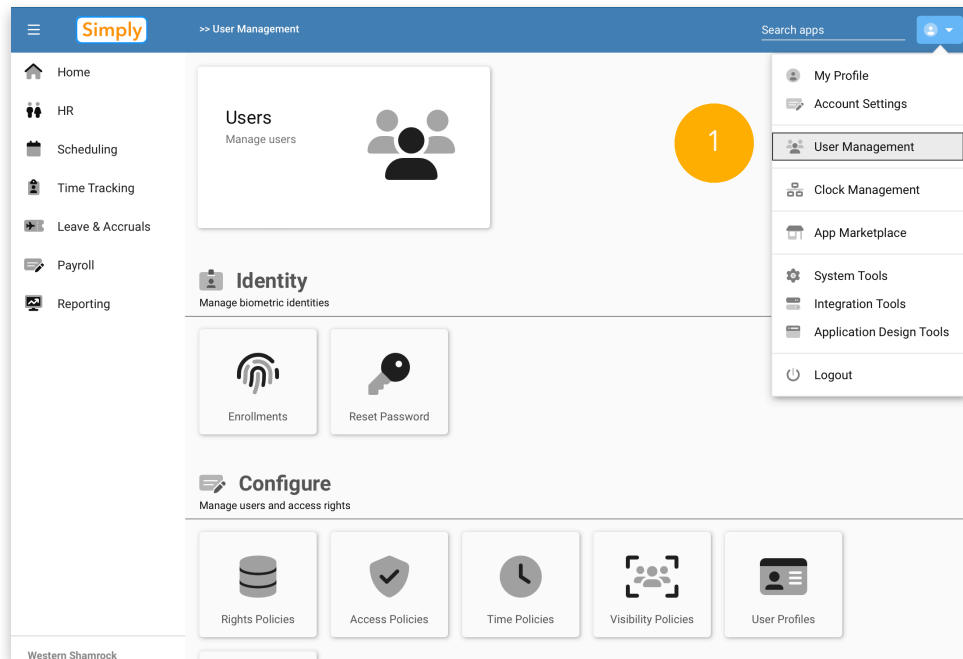# User Management

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).

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

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.
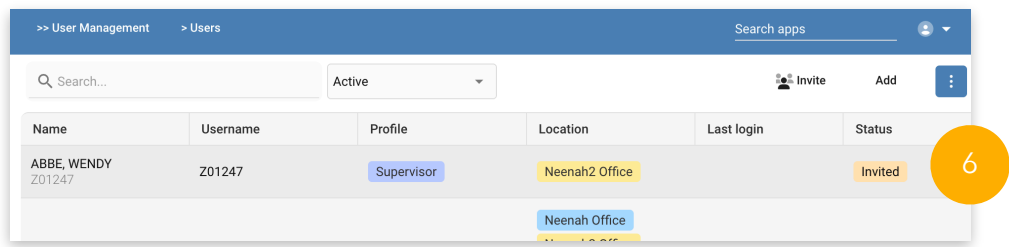

User Profiles

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.
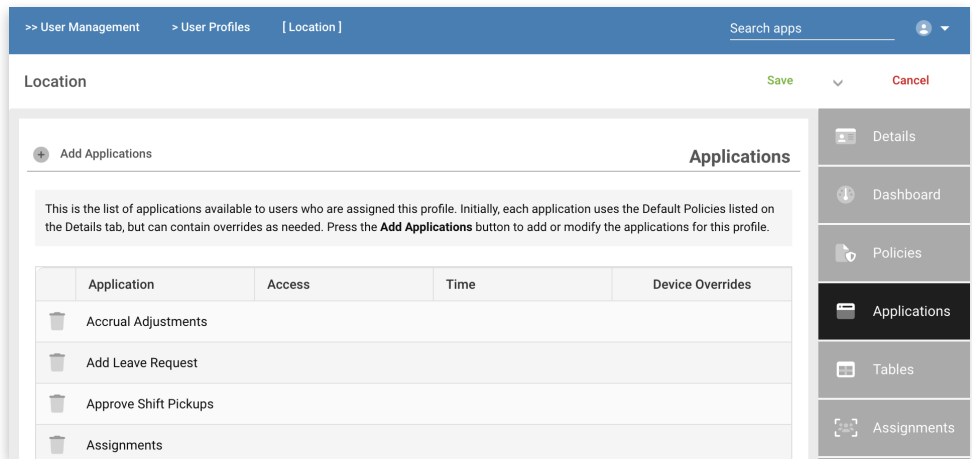
Scheduling

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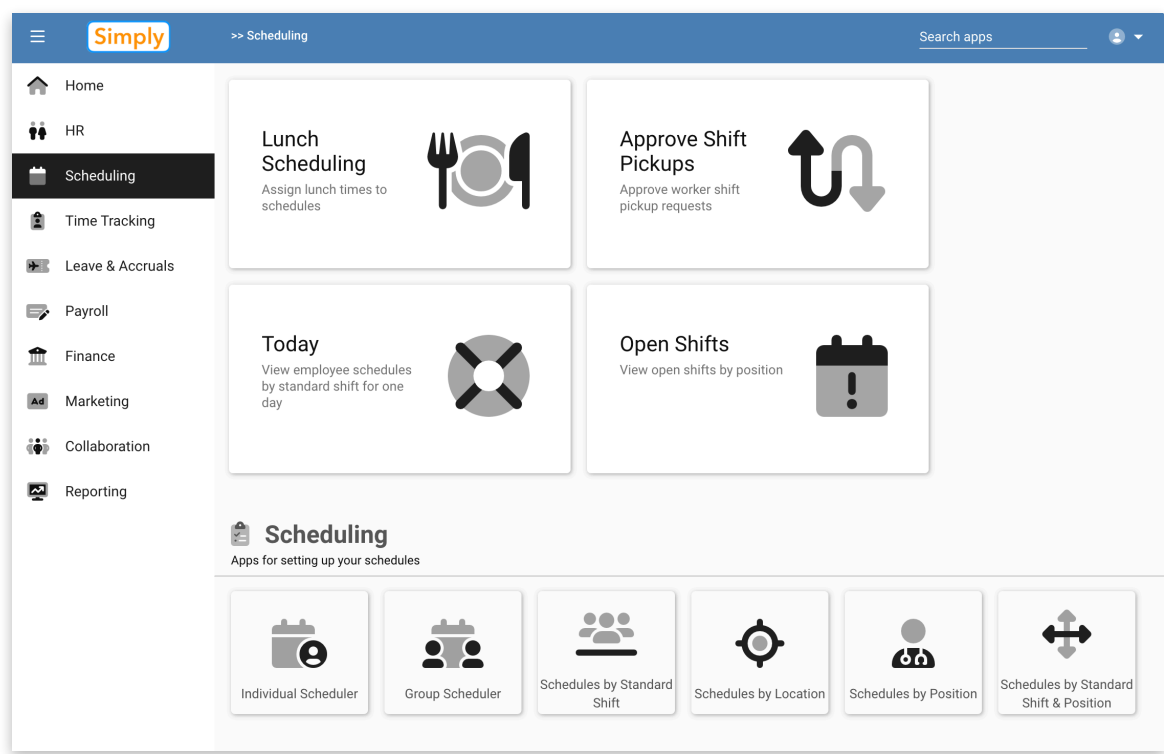
the purpose of the app and who might be using it. For example, the app used to create team schedules is different from the one used to maintain ad-hoc changes. Similarly, special views are created which only show certain schedule scenarios: e.g. open shifts, those with trades pending, or those with expected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

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.

Standard Shifts

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

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 Schedler	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.
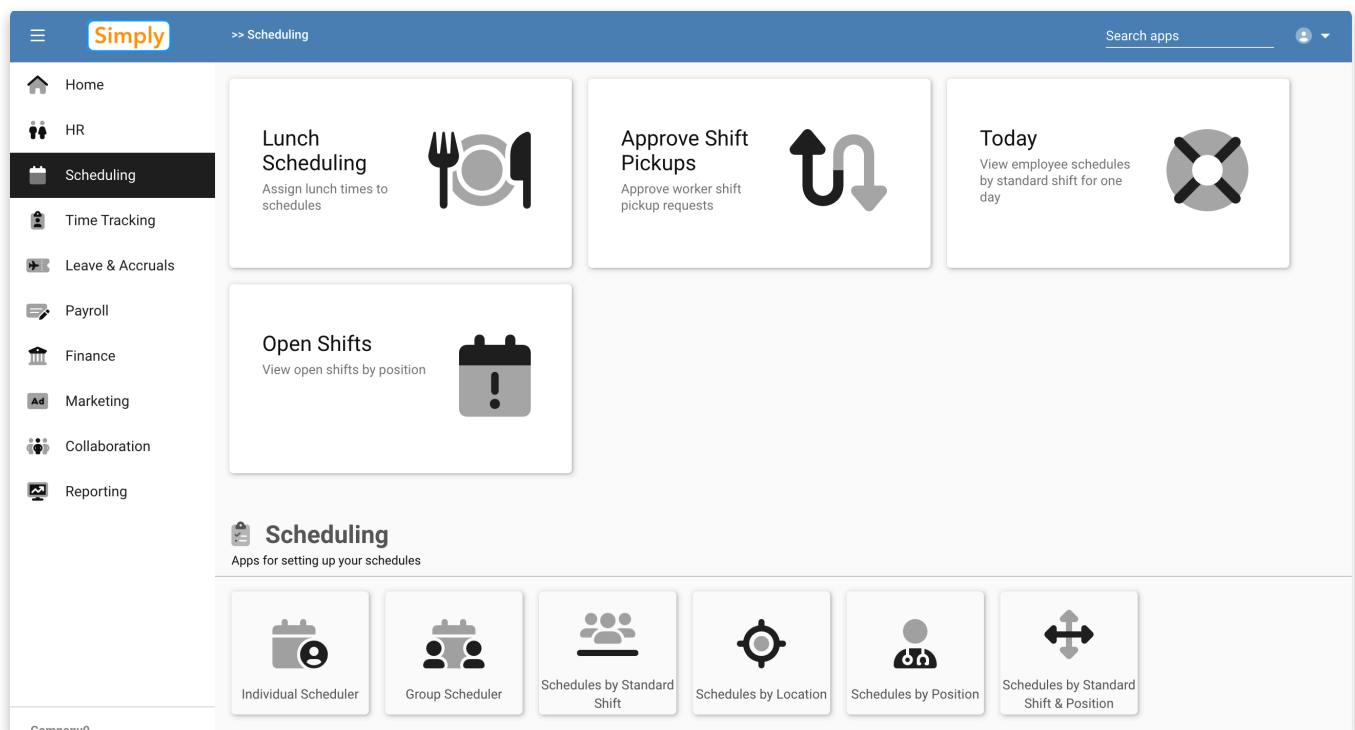
Scheduling Menu

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


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.
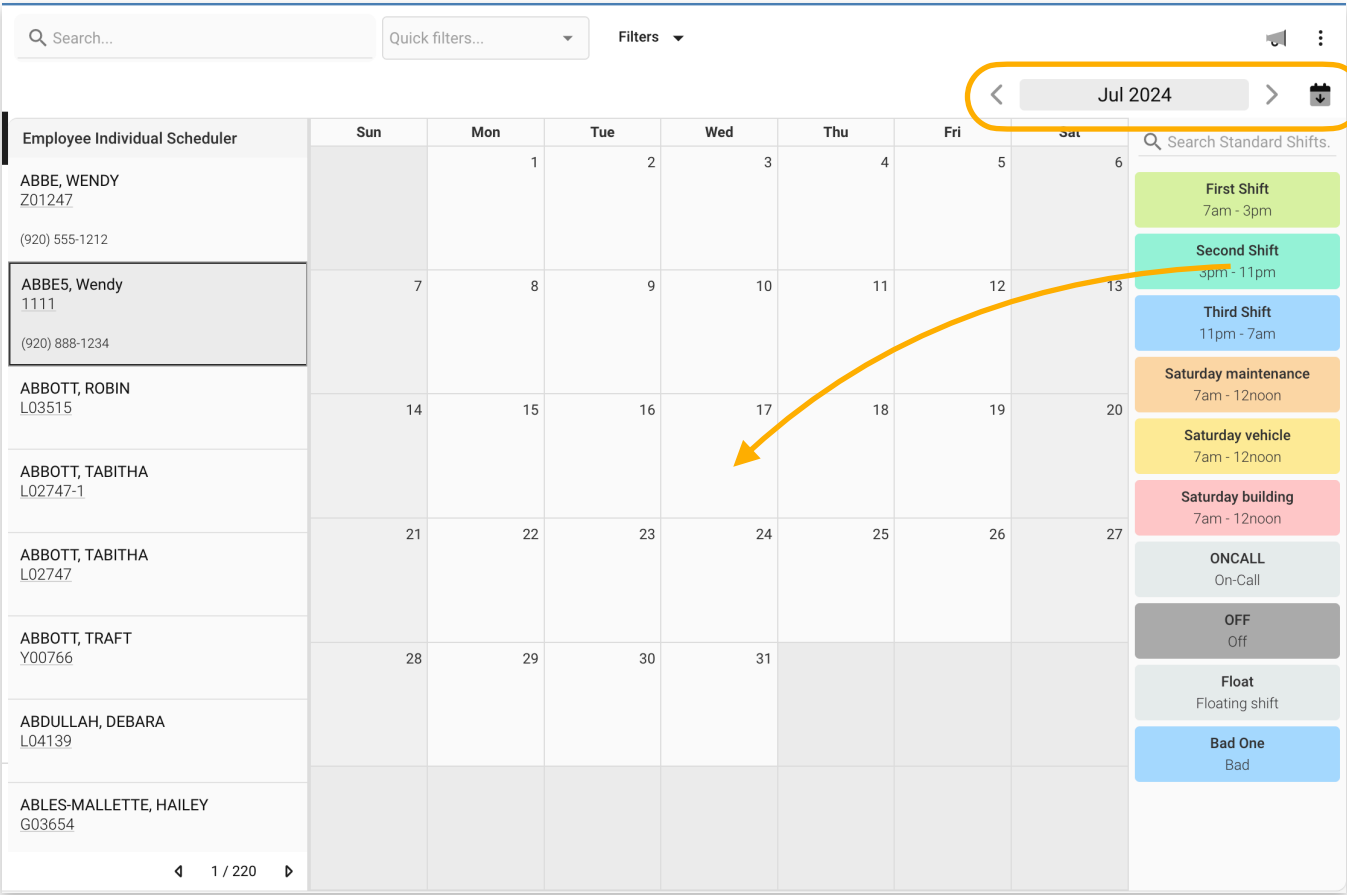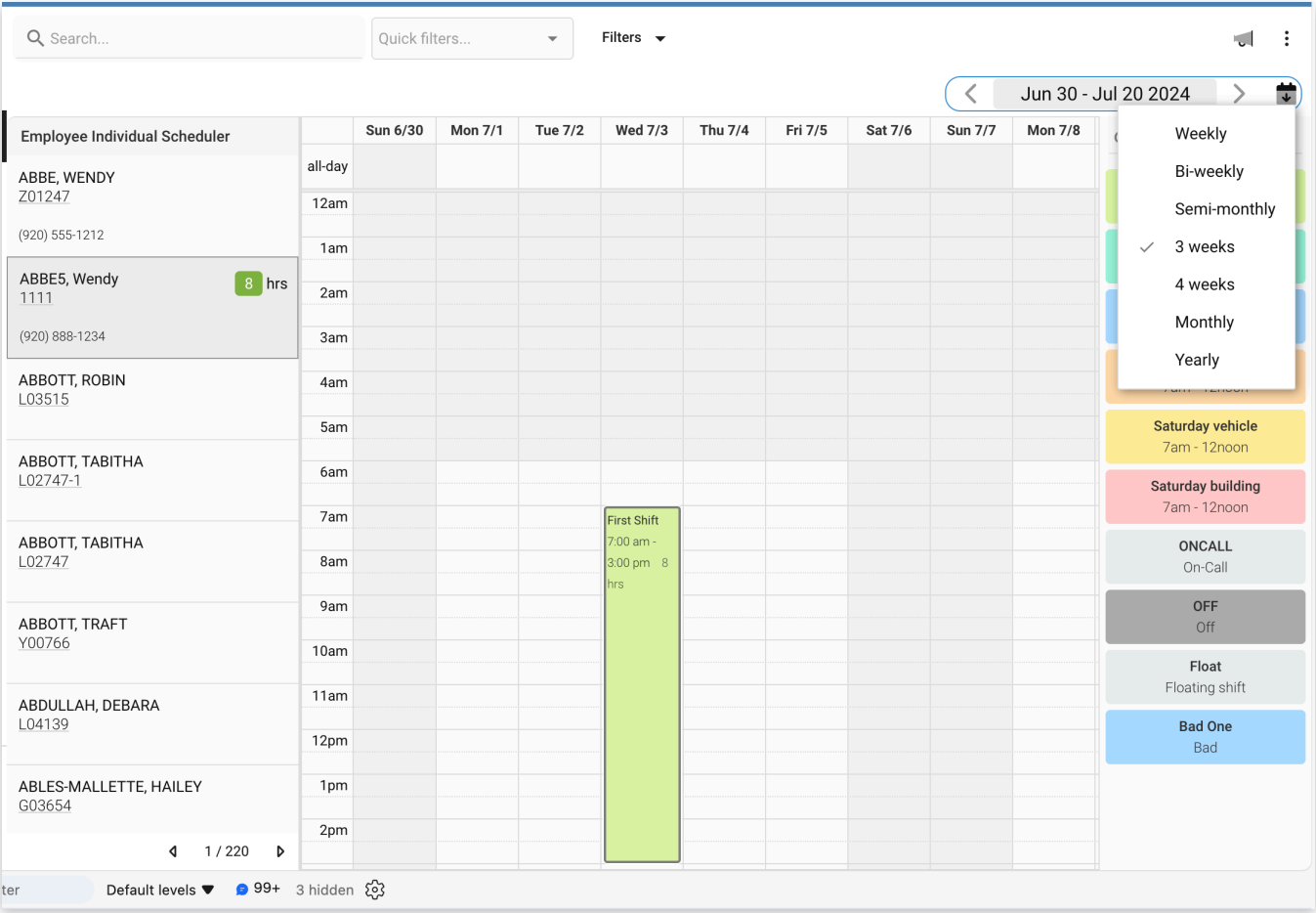

Individual Scheduler

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 sill allow more granular adjusting of time down to 15min increments.
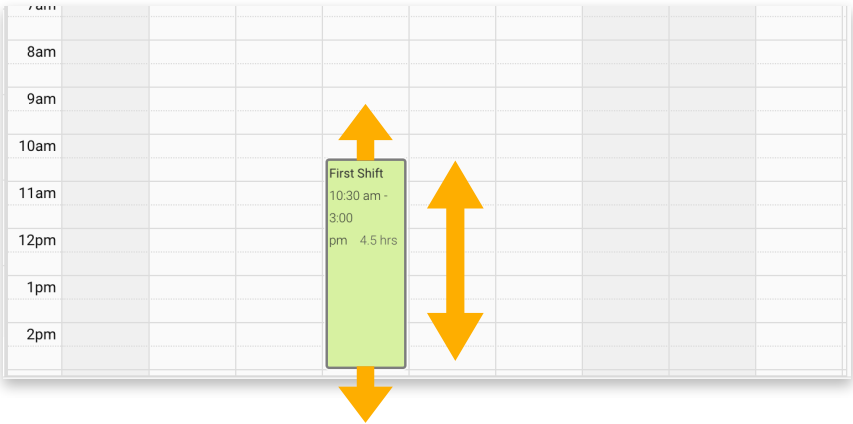
Selecting Filters

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

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, clock 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):


Edit Shift

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.
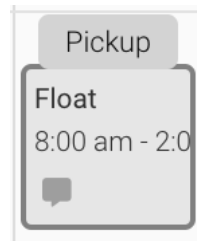
Shift Identifiers

A variety of visual identifiers are used to note the status of a shift. The following outlines some of the common states:
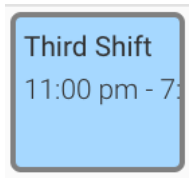
|	
Third Shift 11:00 pm - 7:	Unpublished; the gray border indicates that the shift is not visible to users. Managers are free to create and modify without affecting visibility

Pickup **Float** 8:00 am - 2:0 — This shift has a pickup request linked to it. A manager must approve the pickup before the shift is re-assigned
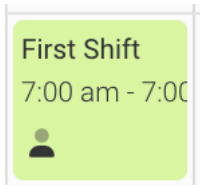
First Shift 7:00 am - 7:00 — This shift is published and visible to the assigned user. In addition, the user has confirmed the shift (optional)
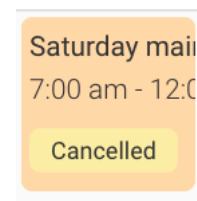
**Saturday mai** 7:00 am - 12:0 **Cancelled** — This shift has been cancelled and the user called off.
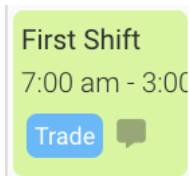
First Shift 7:00 am - 3:00 **Trade** — This published shift has a message attached to it (from manager to user) and is also being offered for trade (by the user)
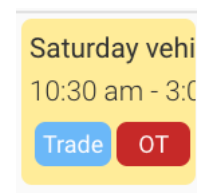
Saturday vehi 10:30 am - 3:0 **Trade** **OT** — This shift has a trade request by the user, and is also expected to put the user into overtime (assuming the shift is not traded)
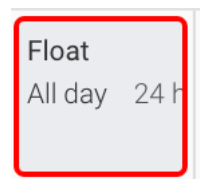
Float All day 24 H — This shift has errors and must be edited to fill in missing values (e.g. Location and Position are always required, but in some circumstances were not available when creating the shift.

For more information:

SimplyWork Support
support@simplywork.com