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GETTING STARTED GUIDE

skytab.com/features/labor-management

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INTRODUCTION

This document is a collection of SkyTab Workforce help articles intended as a resource for Workforce merchants.

Workforce is an employee scheduling tool designed to make scheduling easy for managers and employees, including schedule creation, time off management, labor compliance, private and group messaging, and payroll integration.

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Workforce can be accessed via Lighthouse Business Manager or by downloading the SkyTab Workforce mobile app.

There are five main sections in the desktop version of Workforce:

- Scheduler: Where shifts are created and published to employees
- **Attendance:** Provides a live view of which employees are currently working and who are scheduled to clock-on soon
- Timecards: Where all timeclock data can be viewed / edited and exported to payroll
- Employees: Where employee data can be viewed (i.e., contact details, jobs, availability)
- Time off: Where employee time off requests can be viewed and approved

Note: Access to some of these features is dependent on permissions.

A number of other features can be accessed by clicking on your company name at the top of the screen.

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The Crabshack			
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Departments	Breaks	Address Details	Company Profile
Reports	Overtime	Permissions	Preferences
Jobs	Holiday Rates	Locations	
Public Holidays	Penalty Hours		
Certifications			

GETTING STARTED WITH WORKFORCE

When a company's Workforce account is first created, the following data is automatically imported:

- Company profile (i.e., location, industry)
- Employee data (including names, phone numbers, email addresses)
- Jobs and rate data
- Timecards

To get started with Workforce, there are three important steps you'll need to take:

- 1. Invite your employees
- 2. Create your department(s)
- 3. Add employees to their respective departments

1. Invite Your Employees

Any employees with access to Lighthouse Business Manager will automatically have an account created with Workforce and will be able to access it via the link on the Lighthouse Business Manager menu. No password is required when accessing Workforce from Lighthouse Business Manager, as Single Sign On is enabled.

All other employees will need to be invited to the app. Inviting employees to the app will set up an account for them and allow them to log in to the Workforce mobile app, where they can view their shifts, apply for time off requests, and submit their availability to their managers.

Employees can be invited singularly or in bulk.

Single Invitation

From the Employees screen, scroll to locate a specific employee. Select the action icon and proceed to **Send invite**.

Note: Employees must have a phone number set in their profile to be invited to Workforce. If they do not, you will be prompted to enter one.

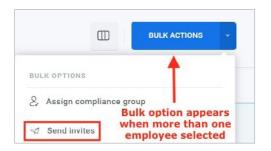
	Not Invited	:
	OPTIONS	
-		_
	View Profile	

Bulk Invitation

Use this method to invite more than one employee at a time.

From the Employees screen, select one or more employees. Click BULK ACTIONS, then Send invites.

Any employees selected who do not have a phone number set will not be invited, as invites are sent via text message.



2. Create Your Department(s)

Next, you will need to set up your department(s). A department maps to a schedule within Workforce. For example, you might wish to create separate departments for Front-of-House and Back-of-House. Employees and managers can then be assigned to their relevant department(s).

A department is set up by default when your Workforce account is first created. To view it, navigate to your **Company Name > Departments** in the top bar.

C Lighthouse	SKYTAB WORKFORCE	The Crabshack 🔺
The Crabs	shack	
THE CRABSH	IACK	COMPLIANCE
Departmen	ts 🗸	Breaks
Reports		Overtime
Jobs		Holiday Rates
Public Holic	lays	Penalty Hours
Certification	ns	

You can choose to rename the department to be more relevant to your business (i.e., Front-of-House).

You can also create more departments by clicking **Add Department**. There is no limit to how many departments you can create.

There are a number of settings you can define for each department, including enabling offsite addresses, creating sections, and defining shift swaps and drops. We'll visit these settings later in the document.

Departments		ADD DEPARTMENT
	Fremont, CA departments	
	NAME ACTIONS	
	My Department	
	+ Add Department	

3. Assign Employees to Departments

There are three levels of access within Workforce:

- Administrator: Gives full access to all features within Workforce
- **Manager:** Gives access to additional features of Workforce beyond those of an employee. Specific access to functions is controlled by manager sub-permissions.
- Employee: Gives access to the individual's own account data (i.e., viewing shifts, creating time off requests)

While administrators have full access to Workforce, managers must be specifically given permission to manage a department. There are also additional sub-permissions required so the manager can perform additional duties. The most crucial of those is the 'Manage Schedule' permission, which provides the ability to view, create, and edit shifts and schedules.

Access levels and individual manager user permissions are inherited from the permissions defined within Lighthouse Business Manager.

Assign Managers

Within Workforce, you can choose which departments managers have access to.

To grant manager access to a department:

- 1. Navigate to their employee profile via Employees > Employee Name > Access & Permissions.
- 2. Ensure that the employee has 'Manager' access in the Access Level drop-down menu.
- 3. Select the department(s) you wish the employee to manage.

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Employees > .Jol	hn Harris										
		B		,	ersonal Details						SAVE
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Assign Employees

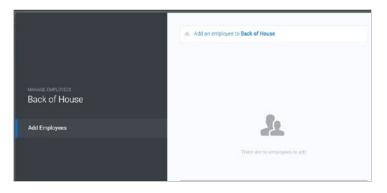
Employees will need to be added into their relevant departments. Once added, they are able to be scheduled for shifts and invited to shift opportunities.

To add employees to a department:

- 1. Click **Scheduler** in the top bar.
- 2. Click on the **blue plus sign** to bring up the 'Manage Employees' option.

\langle	Lighthouse	SKYTAB WORKFORCE	The Crabshack 🗸 🕴 Schedu
My D	epartment 🗸	< Mon, Apr 17 - Sun, Apr 23 >	View Week v
ţţţ	EMPLOYEES (8)	1≡ +	MON 17
Ð	Adam 8.00 /		
G	Denis 8.00 /	e Weber 40.00	

3. Select Add an employee to [Department Name].



4. Select the employees you wish to add to the department.

	Type an existing or new employees name
	CREATE NEW EMPLOYEE
MANAGE EMPLOYEES	EMPLOYEES
Back of House	Adam Miller
	Denise Weber
Add Employees	John Harris
	John Smith
	Leo Salo
	Manuel Meyers
	Mis Datal

With your departments created and employees invited, you're now ready to start scheduling.

The rest of this document provides helpful information about the key features of Workforce. Refer to it whenever you need help with the product.

SHIFTS AND SCHEDULES

Shifts and schedules are the backbone of the Workforce solution. All scheduling-related activity occurs on the Scheduler tab. Here, you may:

- Create shifts
- Publish schedules to employees
- Print or export your schedule
- Manage ongoing operational changes

Create Shift

Individual shifts can be created within the Weekly or Daily Schedule views.

Weekly View

- 1. Select an Employee and a Day for the shift.
- 2. Click in the cell.
- 3. The shift creation window will display.
- 4. Add their shift, then click **CREATE SHIFT** when done.

Day View

- 1. Position the cursor at the desired shift start time.
- 2. Click and drag to the desired shift end time and release.
- 3. The shift window will display.
- 4. Click **CREATE SHIFT** when done.

Copy Shift

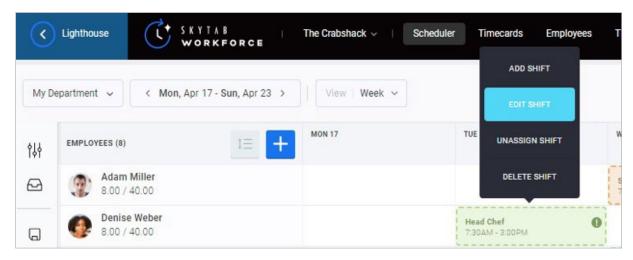
A single shift for an employee can be copied to another day in the current work week, or copied to another employee for any day within the same workweek. Here are the steps:

<	Lighthouse	SKYTAB WORKF		The Crabshack \lor \mid	Scheduler	Timecards	Employees	Time off
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Ø	Adam 8.00 /					MOVE	COPY	
G	Denise 8.00 /	e Weber 40.00				Head Chef		
đ	S John H 8.00 /							Bartender 11:00AM - 9:00PM

- 1. Hold down the mouse and drag the shift to another day or another employee.
- 2. For Mac users, use the 'CMD' key to copy. For Windows users, use the 'CTRL' key.
- 3. Release the mouse before releasing the 'CMD' or 'CTRL' key to copy the shift.

Edit Shift

Any attribute of an existing shift can be edited. This includes start time, end time, and job type, among others. To edit the shift, simply select the shift and choose **EDIT SHIFT**, which will open the Shift Details screen.



Delete Shift

Any shift can be deleted at any time. Simply select the shift and click **DELETE SHIFT**.

<		The Crabshack v Schedul	ler Timecards Employees
			ADD SHIFT
My D	epartment V Kon, Apr 17 - Sun, Apr 23	View Week ~	EDIT SHIFT
ţţ		MON 17	TUE UNASSIGN SHIFT
Ð	Adam Miller 8.00 / 40.00		DELETE SHIFT
G	Denise Weber 8.00 / 40.00		Head Chef 7:30AM - 3:00PM

Unassign Shift

An assigned shift can be unassigned from an employee at any time. Doing so will convert the shift into a shift opportunity and it will be moved down to the Shift Opportunity section.

$\overline{\langle}$	Lighthouse SKYTAB WORKFORCE	The Crabshack 🗸 🕴 Scher	duler Timecards Employees
			ADD SHIFT
My D	epartment V Kon, Apr 17 - Sun, Apr 23 >	View Week ~	EDIT SHIFT
¢\$\$	EMPLOYEES (8)	MON 17	TUE UNASSIGN SHIFT
	Adam Miller 8.00 / 40.00		DELETE SHIFT
G	Denise Weber 8.00 / 40.00		Head Chef 7:30AM - 3:00PM

Add Split Shift

An additional shift(s) can be added for an employee on a day they already have a shift. This is common where the employee is required to work a double shift.

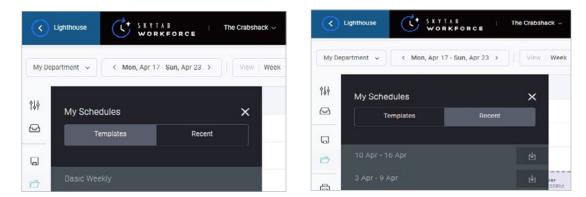
Note: The shifts cannot overlap.

<	Lighthouse SKYTAB WORKFO		heduler Timecards Employees
My D	epartment 🗸 Mon, Apr 17 - Sun,	Apr 23 > View Week ~	ADD SHIFT EDIT SHIFT
ţţţ	EMPLOYEES (8)	MON 17	TUE UNASSIGN SHIFT
6	Adam Miller 8.00 / 40.00		DELETE SHIFT
	Denise Weber 8.00 / 40.00		Head Chef 7:30AM - 3:00PM

Schedule Templates

Once your initial shifts for a workweek have been created, it can be saved as a **Weekly Schedule Template** for future use (to import into a future week). Schedule templates significantly expedite the schedule creation process.

A related feature is **Importing from a Recent Week**, which provides the option to choose any schedule from the most recent four weeks to import into a future week.



Publish Schedule

Now that your schedule is created, it can be published to your staff. Prior to publishing, all created shifts are automatically saved in draft mode. This means they have not been published and staff have not been notified.

To publish, click **PUBLISH**, confirm the publish dates are correct, and add a manager's note as required. The note will also be shared with scheduled employees as part of the publishing process. Click **PUBLISH & NOTIFY** to finalize.

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Print Schedules

Schedules can be printed at any time before or after publishing. Some key print features include:

- Print to PDF or export to Excel.
- Daily, weekly, and multi-week options.
- Report layout flexibility, including comprehensive 'Group By' and 'Sort By' variations.

Print Process

1. Click on the Print icon and select PRINT SCHEDULE.

٢	Lapinous C Monitores	The Chabshack - Sche	dular Timecards Employees	Time off				SINC 🕐	0 0 8- 1 417
My De	epartment u c Mon, Apr 17 - San, Apr 23	Vice - Mark v						8	© 12 mar
24	Decents ()	NUN 17	10.0	ME 19	THU 20	18 J	m.s	108.D	Total
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>	John Harris 8.00 / 40.00			traties - kapitel	Animater O	•		Rationaler 0	27.00
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	8 10/ 40.00			Matager Interes visitant		Manager V History - 11 Hans			4.00
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	Suc / 40.00		Delivery Driver 112200-1220000						4.50
	Total Drifts / Total Paid Hours	2 10.50	3 19.00	4 20.00	4 26.50	4 21.00	1 4.50	1 13.60	20 115
	SHIFT OPPORTUNITIES (1)	809.17	THE 10	w(p.11	Teory 300	tage 24	547.13	50% (D	

2. Click **GENERATE PRINTOUT** to print a default report.

	bepartment 🤟 🤆 Mon, Apr 17	Sun, Apr 23 ⇒	Ven Week -					
	EMPLOYEES (8)	1 +	MON 17	THE 18	WED 19	THE 28	PRI 21	547.22
	Adam Miller 8 00 / 40.00					0400# 8T	SORT BY	
	Denise Weber					Jobs and Employees	Employee Name	\$
>	Sotn Harris					DISPLAY OPTIONS		
5	Lee Salo 8 50 / 40.00					Show Job Titles		
	Manual Meyers			Print Schedules		Show Sections Show Offsite Addresses		
	6 Mia Putel					Show Shift Notes		
	Divia Smith					Show Day Notes		
	Oskar Garcia			Layout		O Include Unpublished Shifts		
	Tatel Shifts / Total Paid Hours					 Include Sales vs Labor Cost 		
	Beart or Postueines (1)		MON 17			GENERA	TE PRINTOUT	
	No Applicents Mo Applicents						_	- Managar

3. Confirm report settings and then click on **GENERATE PRINTOUT.**

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My Di	certment < Mon, Apr 37	- 500, Apr 23 - >	Week -							
耕	EMPLOYEES (B)	15 +	MINT	74E 18	(WED 1)	Tel 20		AN 21	5AT 33	
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	Manual Mayers			Print Schedules		MANAGER NOTES		Adobe PDF		
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	Oskar Garcia 8.05 / 4000									
								0996-0996-001	_	4.50
	SHUT OFFICIENCIES (1)		MON 17				GENERAT	E PRINTOUT		
	(a) No Applicants					_	_	_	Materia	

4. The report will display on the screen, where you can then send it directly to a printer.

POSITION	MON 19	TUE 20	WED 21	THU 22	FRI 23	SAT 24	SUN 25
Bartender							
John Harris			11:00a - 9:00p	11.00a - 9.00p			11:00a - 9:00p
Olivia Smith	9:00a - 5:00p	9:00a - 5:00p		9.00a - 5:00p	9:00a - 5:00p		
Delivery Driver							
Leo Salo	10:00a - 1:00p			10:00a - 1:00p			
Oskar Garcia		5:00p - 10:00p					
Head Chef							
Denise Weber		TIMEOFF		7:30a - 3:00p	7:30a - 3:00p		
John Harris		7:30a - 3:00p		-			
Manager							
Manuel Meyers		2	7:00a - 12:00p				
Mia Patel			9:00a - 11:00a		9:00a - 11:00a		
Server							
Adam Miller			7:00a - 12:00p		7:00a - 12:00p	7:00a - 12:00p	7:00a - 12:00p

5. For more print options, select the **Layout** section.

SHIFT OPPORTUNITIES

Shift opportunities are open shifts that you need to fill. You can invite a specific employee or group of employees to apply. Alternatively, you can advertise it out to all employees in your network that have the job in their profile that you require, and then choose the most suitable applicant. Finally, you can assign a shift opportunity directly to a specific employee.

Note: Employees must be connected to the company before they will be returned in search results.

Create a Shift Opportunity

1. From the Weekly or Daily Schedule View, click the **plus sign button** to open up the Create Shift Opportunity window.

Add Shi	ft Oppo	ortunity
SHIFT OPPORTUNITIES	+	MON 26

- 2. Add the appropriate shift details
 - Date
 - Start time
 - End time
 - Shift end option (as scheduled, until required, or until close)
 - Unpaid break (five-minute increments)
 - Job required (i.e., bartender)
 - Slots: Number of open shift opportunities required (ie., I need 2 bartenders)
 - Offsite Addresses: Off-site location where the shift will be worked (if enabled)
 - Sections: Work area within the location where the shift will be worked (if relevant)

	STARTS	ENDS	ENDS		UNPAID BREAK	
	5:00 PM	11:00 PM	As Scheduled 💲		None	\$
	JOB				SLOTS	
CREATE SHIFT OPPORTUNITY	Bartender		\$	×	1	¢
Fri, 30 Sep 🗘	OFFSITE ADDRESS	ES				
	Type an existin	ig or new address				
1 Create Shift Opportunity	SECTIONS					
2 Invite Employees	None					\$
	WHO CAN APPLY					
			NEXT			

3. Click Next.

- 4. Select who can apply to work the shift.
 - Invite Only: Select one or more employees who will be sent an invitation to apply.
 - **Employees Only:** Automatically send an invitation to all employees with the job assigned in their employee profile.

	JOB	SLOTS				
	Bartender	¢ × 1 ¢				
	OFFSITE ADDRESSES					
	Type an existing or new address					
CREATE SHIFT OPPORTUNITY	SECTIONS					
Fri, 30 Sep	None	\$				
1) Create Shift Opportunity	WHO CAN APPLY					
	Invite Only	÷				
	Invite Only					
	Employees Only					
		NEXT				

5. Click Next.

Invite Employees

- 6. On the next screen, you will be shown a list of suitable and available applicants that can be invited to apply.
 - **Percentage Match** represents the degree to which the employee is available for the time defined in the shift opportunity.
- 7. Select employees individually to invite them, or click **INVITE** to select all potential applicants in a single action.
- 8. If you would like, you can also select one or more employees to be auto-approved, meaning if they apply for the shift, they will be automatically approved to take it. This removes the need to manually review applicants before choosing who to accept for the shift.
- 9. Click **SAVE AS DRAFT** to leave the shift opportunity as unpublished or **SAVE & PUBLISH** to finalize the shift opportunity and notify employees.

K BACK	Suggestions	Match	AUTO APPROVE	INVITE
	John Harris	100	\bigcirc	0
	Olivia Smith	100	0	0
create shift opportunity Fri, 30 Sep				
(1) Create Shift Opportunity				
2 Invite Employees				
	SAVE AS DRAFT		SAVE & PUBLIS	H

Review and Accept Applicant

10. If the auto-approve option has not been applied to a preferred employee, it will be necessary to review all applicants and proceed to choose the employee who is deemed most suitable.

	2 INVITED APPLICANTS	
	Olivia Smith 🗲 📥 Auto Approve	Û
MANAGE SHIFT OPPORTUNITY Fri, 30 Sep	g John Harris	畲
Shift Details		
Applicants (2)		

- To see applicants that have been invited, and those that have applied, click on the **Shift Opportunity** and then select **MANAGE SHIFT**.
- 11. Here, applicants will be listed. The top section includes those that have applied and the bottom section shows those that have been invited but have yet to apply, or decided not to apply.
- 12. Once an applicant is accepted, the shift is removed from the Opportunities section, moved to the Schedule section, and assigned as a confirmed and published shift for the approved employee. The employee will receive a push notification informing them that they have been assigned the shift.
- 13. If no employees are suitable for the shift, you can subsequently choose to invite additional employees by clicking **Invite Employees** in the **Manage Shift Opportunity** screen.

MANAGING EMPLOYEES

Add Employee

Employee records are maintained within Lighthouse Business Manager. To add an employee:

1. Click on Workforce > Employees > Add Employee.

Shift4				P 1
SHET A TRAMMO CENTER TEET - 0021400002 Charge Location	Manage Emple	oyees		
Desidenered	Alsidas + Ime			Add Employee
Reports	Norm -	2054	Status -	Created at -
Vetaal Terestral	All and a second se			
Shifted Cares Gift Card	April Halfred	Hartandar Server	Not active	
Location Overview	datas Sara	Gever	Action	
Employee Schedule	Antos Marrent	Bacheville	Active	
Hanage Employees v	the second s			
Employues	Arnari Xapo	Harberghe	Not active	

• You can also navigate here by clicking ADD EMPLOYEE on the Employees tab.

C Lighthouse	C SETTLE WORKPORCE	BA CAFE v Scheduler	Attendance Timecare	ds Employees Time off	SYNC ()	Q B & I +417
Q. Dep	artments v Manager v	Jobs v Compliance v	Status 🗸 Clear all		000 ~ 1 ~	+ ADD EMPLOYEE

2. Complete the relevant employee information.

The required fields are:

- Screen Name: This screen name will be shown on the SkyTab POS screens, employee schedule and time clock records, and the printed guest checks for the employee.
- Login PIN: The PIN code they will use to log in to the POS.
- Jobs: The job they will be assigned to.

First name, last name, and their email address should also be entered if known, as these will be synced to Workforce.

Note: When assigning a job to an employee, the base pay rate of the job will be present in the **Pay Rate** field. This can be changed for situations where the employee is paid at a rate that is different to the job's base rate.

Additional fields include:

- Track Labor: Select this if you'd like to track labor for the employee.
- Record Breaks: Select this to have the employee's breaks recorded.
- Paid Hourly: Select this if the employee is paid hourly.
- **Phones/Dates:** You can also add phone numbers and important dates for the employee's record. At least one phone number should be entered, as Workforce will use this to send an invite to the employee to activate their Workforce account.
- Permissions: Further down, you can select permissions for their POS access.

		New E	mployee		×
	Employee Information			Active	
	Screen Name*				
	First Name		Last Name		
	Payroll ID		Login Pin*		
	Email				
	Street Address 1				
	Street Address 2				
	City		State		
	ZIP		Birth Date		
	Liquor Card Expires		Health Card Expires		
	Track Labor				
	Record Breaks				
	Paid Hourty				
Discard					Save

3. Click **Save** to add the new employee record. The new employee record will appear in Workforce after the next sync, which occurs approximately every 15 minutes.

Navigate to **Workforce > Scheduler > Employees** to view a list of all employees synced between Lighthouse Business Manager and Workforce.

Edit Employee

Personal employee attributes such as name, phone number, and email address are all maintained through the employee's record in Lighthouse Business Manager. To edit an employee's record:

- 1. Click **Workforce > Employees**, then click on the employee's name from the list of employees on the screen.
- 2. This will open the **Edit** screen, where you can edit details such as employee name, address, login PIN, employee permissions and jobs, and more.
- 3. Click **Save** when completed. The updated details will appear in Workforce after the next sync, which occurs approximately every 15 minutes.

SHIFT @ =			Ed	it Employee		>
BA CAPE - 0022708755 Workforce		Employee Info	ormation		 Contraction 	Active
	Settings Scheduler Timecards	Screen Name*	Earbara			
Deshboard All status + Search by Employe		First Name	Berbere	Last Name	Johannes	
Reporting +		Payroll. ID	1020	Login Pin*		
Virtual Terminal Name +	Jobs	Email				
Shift4 Cares Gift Card		Street Address 1				
Barbara Location Overview	Batender	Street Address 2				
Workforce Bart	Bartender, Cashier	City		State		*
Employees Cetis	Bartender, Dusser	ZIP		Birth Date		. +
John Const	Distribut. Data	Liquor Card Expires		- Health Card Expires		
Carsian Labor Settings	Cashier	Track Labor				
Scheddar Conty	Manager	-				
		Pecord Breaks				
Table Layed	Coek					
Customer Detabase	Rack of House, Romer	Paid Hourly				
	Owner	Phones				
Loyalty Sail	Manager, Durver	Add Phone				
Manu Berter	Server	Discard		Deplea		-
Accounting +	Constant .					

Employee Profile

To view an employee's profile, simply click on the **Employees** tab within Workforce, then select on an employee to be taken into their profile. Alternatively, click on the **Actions** field on the far right of the employee and select **View Profile**.

Note: The Employees tab is only visible to administrators or managers with the Manage Company Employees and Employee Profiles permissions.

Depending on your account permissions, you will be able to see:

- **Personal Details:** Including name, phone number, and email address (synced from Lighthouse Business Manager).
- Job & Pay Rates (synced from Lighthouse Business Manager)
- Availability: When the employee is available and unavailable to work.
- Compliance: Custom rule groups, start date of week, etc.
- Certifications: Any certifications the employee has.
- Access & Permissions: Access level and permissions for Workforce.
- Notes: Any notes a manager may have made about the employee.

Note: Only active employees are displayed within Workforce. Inactive employees are visible in Lighthouse Business Manager only.

Invite Employees

Any employees with access to Lighthouse Business Manager will automatically have an account created with Workforce and will be able to access it via the link on the Lighthouse Business Manager menu. No password is required when accessing Workforce from Lighthouse Business Manager as Single Sign On is enabled.

All other employees will need to be invited to the app. Inviting employees to the app will set up an account for them and allow them to log in to the Workforce mobile app, where they can view their shifts, apply for time off requests, and submit their availability to their managers, along with other features.

To invite an employee to Workforce:

- 1. Select the **Employees** option from the main menu.
- 2. Scroll down the employee list to locate an employee.
- 3. Select the action icon and proceed to Send invite.

	ot Invited	
0	PTIONS	
4	Send invite	
	View Profile	

• Alternatively, you may also click on the employee's name in the employee list. From the Personal Details screen, click **SEND INVITE**.

			+
SJ	This account has not yet been a They will not receive any scheduler mobile account		CEMD IND/ITE
Personal Details	Personal Details		SAVE
Positions & Pay Rates	FIRST NAME LA	ST NAME	EMPLOYEE ID
Availability	Steve	Jones	
Compliance			
Certifications	PHONE EN	AIL ADDRESS	LEGAL NAME
Access & Permissions	2000; 2000; 2000; 💼		Stephen Jones
Notes	AGREED DAILY HOURS AGREED WEE	VIV LIAIDE	
	8 hrs 40 hrs		
	Set the maximum hours you want this em	ployer to be	

4. Once you send the invite, a text message invitation will automatically be sent to the employee's mobile phone with instructions on how to activate their Workforce account and connect to the company.

Note: Employees must have a phone number to be invited to use Workforce. If the employee does not have a phone number set, go to the employee's profile under **Workforce > Employees** and add their phone number. Alternatively, you can enter it in the form that appears when you click on Send Invite.

Link Lighthouse Users With Employee Records

Some employees have both a user account and employee account within Lighthouse Business Manager, both of which are synced to Workforce. Workforce has a tool that lets you link these accounts together so that the employee has a single account within Workforce.

To link the accounts:

1. From the Employees tab, click on the **three vertical dots** in the top-right corner, then select **Link Lighthouse accounts**.

C Lighthouse	WORKPORCE	Burger 9 Latent ~ I Scheduler Atlandance	Timecards Employees Time off	SINC ③ O ③ Å* + **
٩	Departments v Accessionel v	Jobs v Compliance v Status v		III - + ADD EMPLOYEE
	EMPLOYEES -	3008	25 Link Lightho	Net accounts Actions

2. The Link Lighthouse Accounts module will appear.

- The left-hand column displays a list of all Lighthouse user records that have not yet been linked to a Lighthouse employee record within Workforce.
- The middle column displays a drop-down list of all Lighthouse employee records that are not yet linked to any Lighthouse user accounts.
- 3. Click the drop-down menu in the middle column next to the appropriate employee to select their employee account that you wish to link to their user account.

Note: Sometimes there may be multiple employee records with the same or similar names, so you may be unsure which employee record is the correct one to link to. You can click **Show Details** to view more information about both the user account and the employee account you have selected.

LINK THIS LIGHTHOUSE USER	WITH THIS LIGHTHOUSE EMPLO	YEE	MORE
Michael Burmingham	Select employee	:	Show Details
U Isabella Underton	Select employee	÷	Show Details
Ian Tibblesworth	Select employee	¢	Show Details

4. When you have finished linking user accounts with their matching employee account, click SAVE.

LIGHTHOUSE USER ACCOUNT	LIGHTHOUSE EMPLOYEE ACCOUNT	
Name Ian Tibblesworth	Ian Tibblesworth	
Email ITibblesworth@gmail.com		
Phone Number 12018977988		

Notes:

- Workforce will attempt to auto-link accounts where possible (i.e., where accounts have the same email address/phone number). Only accounts that have not been matched will appear in this tool.
- You cannot view already linked accounts, nor can you unlink accounts using this tool. This must be done by raising a support ticket.
- If there are no unlinked accounts, a default screen will appear in place of this view.

Filters

When viewing the Employees page, employees are filtered by first name in ascending order, by default. Filters are available to help users efficiently manage employees in the company network. You can select any combination of filters to limit the list of employees to just those you're interested in. Available filters include:

- Departments
- Access Level (employee, manager, administrator)
- Jobs (filter employees by their employee profile job/jobs)
- Compliance (filter employees by their assigned compliance ruleset)
- Status

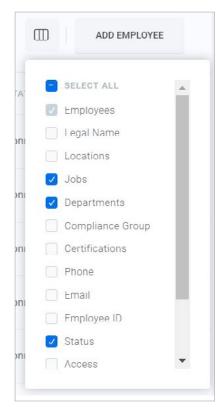
2	Departments	Access Level	Jobs	Compliance	Status
---	-------------	--------------	------	------------	--------

Selected filters are highlighted in blue. Filters that you set for a specific query are retained for that active session only. The next time you navigate back to the Employees page, the default sort order is returned. Use the **Search by Name** field to search for a specific employee.

Custom Columns

You can select the columns you want to see on your employee dashboard. The default field group includes the following, with Employees and Actions set as mandatory views:

- Employees
- Jobs
- Departments
- Status
- Actions



Selectable Fields

Where you have selected more columns than can be seen in a single view, the Employees column is fixed. Swipe right to left in the main body to reveal your other selected columns.

EMPLOYEES *	LEGAL NAME	JOSS	DEPARTMENTS	COMPLIANCE GROUP	CERTIFICATIONS PHONE	EMAIL	ACTIONS
() Adam Miller	Adam Miller	Server	All Departments	Default	California Food Handler Card	Adam.Mil	I
Denise Weber	Denise Weber	Head Chef	All Departments	Default	California RBS Certification	Denise.W	÷
🗶 John Harris	John Harris	Bartender	All Departments	Default		John Harr	I
🜒 John Smith 🔼	John Smith		All Departments	Default	(760) 000-0000	7ac85bd1	÷
🛞 Leo Salo	Leo Salo	Delivery Driver	All Departments	Default		Leo.Salo (1
Manuel Meyers	Manuel Meyers	Manager	All Departments	Default		Manuel.M	:

Sort Fields

Simply click on the field name to sort by either ascending or descending alphabetical order. The following fields are sortable:

- Employees
- Status (connected, invited, etc.)
- Access (employee, manager administrator)

MANAGE JOBS

Add Job

Employee records are maintained within Lighthouse Business Manager.

To add an employee:

- 1. Click Workforce > Jobs > Add Job
 - You can also navigate here by clicking **ADD NEW JOB** on the Jobs screen (accessible by clicking your company name) within Workforce.

SHIFT			() Chat) 🕱 🛔
BA CAFE - 0021768755 Change Location	Workforce Employees Jobs Labor Settings Scheduler Ti	imecards	
Dashboard Reporting +	All status • Search by Job Q		Add Job
Virtual Terminal Shift4 Cares Gift Card	Name * Description		Status ~
Location Overview Workforce =	Back of House Bartender		Active
Employees Jobs	Busser Cashier		Active
Labor Settings Scheduler	Cook		Active
C Lighthouse	9.К?ТАВ Burger9∨ Scheduler Tim / WORKFORCE	necards Employees Time off	⑦ ○ □ & · i vi.17
Burger 9 Jobs			ADD NEW JOB
108		HOURLY RATE EXPORT CODE	ACTIONS
Back of House		\$1.00	0

- 2. Complete the relevant job information, which includes:
 - Name of the Position (required)
 - **Pay Rate:** The base hourly pay rate for the job. This is used for labor tracking purposes. If the job is not tracked for labor, you can leave it as zero.
 - Job Description: Add a description of the job.
 - Login Type: Choose the default screen the employee will see when they log into the POS.
 - **Operate As:** This field is required and will determine how payment is recorded and tracked for the employees assigned to the job. For example:
 - Restricted mode allows employees to only take payment for tickets they created and own.
 - Cashier mode credits the user for payments and tips they accept, regardless of the ticket's owner.
 - **Manager mode** allows payment to be taken for any ticket, but the sale will be credited to the original ticket owner.
 - Default Order Type: Specify the type of tickets that employees will normally create on the POS.
 - Remote Printers: Select which additional printers the employees will be able to send orders to.

	New Job		× .
Job Informati	on .	Arthur	
Same*			
Pay Rate	0.00		
Job Description			
Login Type	Counter Service		
Operate As*	Select operation type	1.	
Default Order Type	Select order type		
Allowed Sett	ings		
Settings	O And Settings		
Remote Print	ers		
Printer	Select protein		
* Required fields			

Below these fields are Allowed Settings, which let you control the areas of the POS that employees have access to.

Anu?	
i Settingi	
cores Head Mode Allows a user to access	host made
cores Completed Totals Allows a user to view and ope complet	
const to All Tickets July bes eccess to	all tokets -
low Fast Pay Allows a star to use the last p	institutions.
low Grid View Allows a user to see the totest grid	st view and

3. Click **Save** to create the new job. The new job record will appear in Workforce after the next sync, which occurs approximately every 15 minutes.

Navigate to **Workforce > Scheduler > Jobs** under the Company Menu to view a list of all jobs synced between Lighthouse Business Manager and Workforce.

Edit Job

Job attributes are all maintained through the job's record in Lighthouse Business Manager. To edit a job:

- 1. Click **Workforce > Jobs**, then select the one you wish to edit from the list of jobs on the screen.
- 2. This will open the Edit screen, where you can edit details such as job name, pay rate, job description, settings, and more.

SHIFT 🕘	=		Edit Job X
BA CAFE - 0021768755 Change Location	Workforce	Job Informatio	on 🥂 Active
	Employees Jobs Labor Settings Scheduler Timecards	Name*	Back of House
Dashboard	All status + Search by Job	Job Code	
Reporting +		Pay Rate	1.00
irtual Terminal	Name - Description	Job Description	
hift4 Cares Gift Card	Dack of Floute	Login Type	Table Service *
ocation Overview	Dack of House	Operate As*	Restricted Mode +
Noricforce +	Bartander	Default Order Type	Select order type •
Imployees	Busser	Allowed Setti	ings
lobs	Carbier		
labor Settings		Settings	Add Settings
icheduler	Cook		Access Host Mode
limecards	Delivery		Allow Fast Pay
fable Layout	56.03 (2) 		C Allow Grid View
Customer Database	Host		C Declare Tips at Clock Out
hymenta b	Munager		Hold Kitchen Items
Loyalty 🕨	Owner		C Ignore Recuired Modifier Sets
Menu +		Discard	Duplicate
Accounting	Server	Dicard	Contain

3. Click **Save** when completed. The updated details will appear in Workforce after the next sync, which occurs approximately every 15 minutes.

Within the Jobs page in Workforce, there are two additional attributes that can be edited. These are:

- **Export Code:** Can be set by the employer as an option to overwrite the default values of employee rates and allowances during payroll export.
- Job Color: The color of the job as it will be displayed in the Scheduler.

Edit Job	3
820.10	
EXPOST COOK (7)	
Athligh A colod	
•	

SYNC DATA

Certain data is automatically synced from Lighthouse Business Manager to Workforce approximately every 15 minutes. This includes:

- Company profile (i.e., location, industry)
- Employee data (including names, phone numbers, email addresses)
- Jobs and rate data
- Timecards

There may be times when you are creating or editing an employee or job within Lighthouse Business Manager and you need it to appear in Workforce immediately, before the next sync occurs.

To trigger a sync, click **SYNC** in the top menu bar within Workforce. This will instantly sync all updated data from Lighthouse Business Manager to Workforce. Your new or updated record should then appear within Workforce, ready for you to use.

C Lighthouse	SKYTAB WORKFORCE	BA CAFE 🗸 🛛	Scheduler	Attendance	Timecards	Employees	Time off	SYNC	?	0	0	¢~		/4.17
--------------	---------------------	-------------	-----------	------------	-----------	-----------	----------	------	---	---	---	----	--	-------

USER ACCESS AND PERMISSIONS

There are three levels of access within Workforce:

- Administrators have access to all features within Workforce. They can see and modify all company settings and information.
- **Managers** have access to additional features of Workforce beyond those of an employee. Specific access to functions is controlled by manager sub-permissions.
- **Employees** do not have access to the company account and do not have any sub-permission options. Employees are restricted to their own personal account data (i.e., shifts, timecards, time off, availability).

Access levels (i.e., Administrator, Manager, Employee) and individual manager user permissions are inherited from the permissions defined within Lighthouse Business Manager.

Within Workforce, you can choose which departments managers have privileges for. To grant manager access to a department:

- 1. Navigate to their employee profile via Employees > Employee Name > Access & Permissions.
- 2. Ensure that employee has **Manager** access in the Access Level drop-down menu.
- 3. Select the department(s) you wish the employee to manage.

Note: If managers do not have the Manage Schedules permission set, they will not be able to create shifts and publish schedules for the department.

ACCESS LEVEL	
Manager	
Add the departments you'd like them to within LBM by navigating to Users -> Us DEPARTMENTS MANAGED	manage. Further sub-permissions (as shown below) can be configured er Permissions.
Back of House × Front of House	×

HANDY TIP

Each individual user can choose which schedules they would like to be notified about via their Notification Preferences.

Manager Permissions

Manager permissions can be viewed from the **Access & Permissions** screen. From this screen, you can set an individual manager's permission(s) to:

- Manage Schedule
 - If enabled, manager can create/edit shifts and publish schedule.
 - If disabled, provides the manager with read-only view of the Weekly Schedule.
- Manage Time Off
 - If enabled, the manager can manage time off requests submitted by employees (i.e., approve, decline, delete).
 - If disabled, the manager can only create time off requests on behalf of employees.
- Manage Employees and Employee Profiles
 - If enabled, the manager can view all employee profiles in the company network.
 - If disabled, the exact information visible to the manager is dependent on other permissions (i.e., if the Availability tab is not available, then they do not have the Manage Availability permission).
- Manage Availability
 - If enabled, the manager can create, edit, and delete availability sets.
 - If disabled, the manager can only approve or decline availability requests.
- Manage Timecards
 - If enabled, the manager can view, edit, approve, and export timecards.
 - If disabled, the manager will only have visibility of timecards that are produced as a result of shifts scheduled within the schedules that they manage.
- Manage Sales and Labor Costs
 - If enabled, the manager can view employee and job hourly rates and can view/edit sales and labor cost information for each department.
 - If disabled, the manager can only view labor costs in timecards.
- Manage Certifications
 - If enabled, the manager can administer company certifications.

PERMISSIONS	SETTINGS
Manage schedule Can create and edit shifts and publish schedule.	Not Allowed
Manage time off Can create, approve, decline and delete time off requests.	Not Allowed
Manage company employees and employee profiles Can view employees in the company network	Not Allowed
Manage availability Can create, edit, approve, decline and delete availability sets.	Allowed
	Allowed Not Allowed
Can create, edit, approve, decline and delete availability sets. Manage timecards	

EMPLOYEE AVAILABILITY

The availability management feature allows employees to set when they are available or unavailable to work, so they can be scheduled accordingly.

Managers and administrators can view these availability sets within the app. With the Availability permission, administrators and managers can also create availability sets on behalf of their employees or request changes to existing sets.

Types of Availability

There are two types of availability:

- 1. **Available:** This is when an employee is available to work for an employer. Setting availability means the employee is exclusively available for this employer during these times and cannot be scheduled anywhere else.
- 2. Unavailable: This is when an employee prefers not to work (i.e., if they have prior commitments).

Each availability set has a start and end date, and multiple sets can be created. These availability sets can also be set as the following:

• **Recurring Availability:** Both availability and unavailability sets are created as recurring availability, meaning availability or unavailability repeats.

Availability sets can repeat either every week or every two weeks.

- Date-specific (or one-off) availability is when an employee is not available to work on a specific date and/or specific time period within that day.
- For example, they may have a dentist appointment between 1:00-3:00 p.m. on Friday, May 12, or they are planning to go on vacation from June 1-7.
- One-off availability requests such as these should be submitted as time off requests.
- Accessing Availability is the method of accessing employee availability and is controlled by the Manager sub-permissions assigned to the user (Manage Company Employees & Employee Profiles and/or Manage Availability).

View Availability

You can view employee availability from your mobile device or desktop computer.

Users with the Manage Company Employees and Employee Profiles permission can view availability for a specific employee by navigating to **Employees > Employee > Availability**.

Users without the Manage Company Employees and Employee Profiles permission can only view availability for a specific employee.

<u>S</u>	Availability			REQUEST AVAILABILITY
•	TYPE	DAYS	REPEATS	STATUS ACTION
Personal Details	Availability	Tue, Wed, Thu, Fri, Sat	Every week	Pending approval · from employee
Jobs & Pay Rates				
Availability				
Compliance				
Certifications				
Access & Permissions				

To view the details of an individual set, simply click on it.

g	John Harris Availability change request	Ø	1	×
М				
T	AVAILABLE ALL DAY			
W	AVAILABLE ALL DAY			
T	AVAILABLE ALL DAY			
F	6:15a-6:30p			
S	AVAILABLE ALL DAY			
S				
	September 18 2022 - Indefinitely			
0	Every week			
Ø	Created by John Smith, today			
4-	Pending approval - from employee			

Create Availability

Managers require the Manage Availability permission in order to create, edit, approve, decline, and delete availability sets, or to receive availability related notifications.

To create availability on behalf of an employee:

1. Click **REQUEST AVAILABILITY** button on the Availability screen.

Availability for Jo	hn Harris									Repeats Every week *	Fro	m S	ep 18	2022		•	То	Indef	inite		
		12a	18	28	38	48	58	63	7a	Every week	1р	2p	Зр	4p	5p	6p	7p	8p	9p	10p	11p
Monday										Every 2 weeks											

2. Select whether the availability set will repeat every week or every two weeks.

Availability for Jo	hn Harris	Repeats Every week *	From Sep 18 2022 •	То	Indefinite •
	120 10 20 30 40 50 60 70	Every week	1p 2p 3p 4p 5p 6p	7p	8p 9p 10p 11p
Monday		Every 2 weeks			

3. Select when the availability set will start and end. You can also select 'indefinitely' as the end date, meaning there is no end date for the availability set.

vailability for John Harris											eats	ts Every week 👻				From Sep 22 2022			• To Mar 22 2023		
		12a	1a	28	30	43	5a	6a	7a	8a	9	¢		MA	RCH 2	2023		>	Indefinitely		
Monday																					
Tuesday															1	2	3	4	SHORTCUTS		
Wednesday												5	6	7	8	9	10		3 months (Dec 22 2022)		
												12		14	-		17		6 months (Mar 22 2023)		
Thursday												19	20	21	22	23	24	25	1 year (Sep 22 2023)		
Friday												26	27	28	29	30	31		1 Jean (Geb 22 2023)		
Saturday																					

4. Select the days and times of the availability you are requesting by dragging your cursor in the week view. You can select multiple days and times within the one availability set, as long as they repeat for the same period of time.

Availability for Jo	ohn Harris	onn Harris								Rep	eats	Every week *			From Sep 22 2022 •			•	To Mar 22 2023			•			
		128	18	28	39	49	58	6a	78	89	98	10a	11a	12p	1р	2p	Зр	4p	5p	6p	7p	8p	9p	10p	11p
Monday																									
Tuesday													10a-2p												
Wednesday													10a-9p												
Thursday																									
Friday																									
Saturday																									

- 5. Once complete, click **SEND REQUEST.**
- 6. A confirmation screen will appear where you can choose to enter a message to your employee about why you are requesting the availability. When you are ready to submit, select **CONFIRM**. The changes will be submitted to the employee for approval.

	Request A		
pptional messag			
		Maximum 10	0 characters
	CANCEL	CONFIRM	

Edit Availability

You can request changes to an employee's existing available set, but not to unavailable sets.

To request changes to an existing available set:

- 1. Click on the **pencil icon** in the top-right corner. This will bring up the **Edit Availability Set** screen.
- 2. Select the attribute(s) you want to update.
 - Repeats, ends, and days/times can be changed. Starts can only be changed if the set is active.
- 3. To submit the request, click **SEND.**
- 4. A confirmation screen will appear where you can choose to enter a message to your employee about why you are requesting the change. When you are ready to submit, select **CONFIRM**. The changes will be submitted to the employee for approval.

To Approve or Decline an Availability Request

When an employee edits an existing available set, you must approve it before it is considered live. Changes to unavailable sets do not require manager approval.

Any sets requiring your approval will have a status of "pending approval from management."

There are two ways to approve or decline a request:

From the Availability View

- 1. Click on the three vertical dots under the Actions column next to the set you wish to action.
- 2. Choose Approve or Decline.

Availability			REQUEST AVAI	LABILITY
ТҮРЕ	DAYS	REPEATS	STATU	S ACTION
Availability	Mon, Tue, Wed, Fri, Sat	Every week	Upcoming - starts in 4 day	s i
Availability	Mon, Tue, Wed	Every week	Pending approval - from managemen	t i
			OPTIONS	
			✓ Approve	
			X Decline	

From the Detailed View

1. On the availability set, click **Show changes**. This will bring up a list of what has changed from the original set.

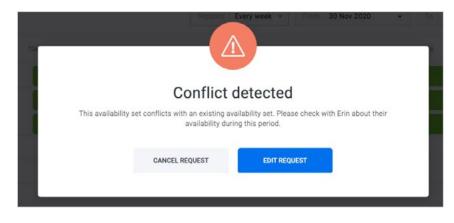
	David Smith Xvailability change request	Availability Changes	
м	AVAILABLE ALL DAY	CHANGED	
т	AVAILABLE ALL DAY	Friday : All day	Remo
w	AVAILABLE ALL DAY	rinday. Pri day	
т		Saturday : All day	Remo
F		ostatay , Ai ay	Kento
S		(=) "Sorry Mike, but I'm no longer available to work on Friday or Saturday"	
S			
_	30 November 2020 - Indefinitely		DONE
J	Every week		
0	Edited by David Smith, today Show changes		
Ð	"Sorry Mike, but I'm no longer available to work on Friday or Saturday"		
\sim	Pending approval - from management		
	DECLINE APPROVE		

2. Click **APPROVE** or **DECLINE** to take action on the request.

Availability Conflicts

When you are creating, editing, or approving an availability set for an employee, the app will check that the availability does not conflict with one of the employee's existing availability sets.

If it does, you will see an error message.



EMPLOYEE CERTIFICATIONS

Certification management enables companies to keep track of which employees have what certifications/training and enforce compliance that only suitably qualified employees can be scheduled.

Those with the Administrator permission or a manager with the Manage Certifications sub-permission can access and manage certifications.

Access Certifications

Navigate to Main Menu > Certifications.

C Lighthouse C SKYTAB WORKFORCE	The Crabshack A Scheduler	Timecards Employees Time off
The Crabshack		
THE CRABSHACK	COMPLIANCE	SETTINGS
Departments	Breaks	Address Details
Reports	Overtime	Permissions
Jobs	Holiday Rates	Locations
Public Holidays	Penalty Hours	
Certifications \checkmark		

Create a New Certification

To create a new certification, navigate to Main Menu > Certifications > Create Certificate.

CERTIFICATE SETTINGS	Create New Certificate
Certificate Tracker	
Settings	CERTIFICATE NAME
	Name or select your certificate title
	Apply this certificate to?
	You can easily manage employee groups that require this certificate. You can apply it to entire locations, departments or jobs.
	SELECT GROUP
	Does this Certificate expire?

1. Name Your Certificate

Name your certificate or select a name from the suggested list.

2. Apply Your Certificate

Choose who to apply the certificate to. This can be all employees at the location, all employees within a specific department or all employees who have a specific job in their profile. Alternatively, employees can be selected individually.

3. Does the Certificate Expire?

Set whether or not this certificate has an expiry date. If so, choose one or more pre-set intervals (x amount of days before expiry) to send a reminder notification to the employee. Additionally, you can choose to send the reminder notification to one or more managers.

4. Is this Certificate Mandatory?

Set whether this certificate is mandatory. If so, employees without a complete and valid certificate (not expired) will not be able to be scheduled.

Manage Certificates

To manage existing certificates, navigate to **Main Menu > Certifications.**

Certificate Health

The 'health' of each certificate is expressed as a percentage. This is calculated as the total number of completed certificates divided by the total number of certificates (sum of completed + incomplete + expired).

The Crabshack certificates					
CERTIFICATES	INCOMPLETE	EXPIRED	COMPLETED		HEALTH
California Food Handler Card	0	0	1	 	100%
California RBS Certification	1		U		0%
+ Create Certificate					

Individual Certificates

Select an individual certificate. This will open an additional window listing employees with that certificate, along with the individual status of the certificate for each employee.

This includes:

- Employee name
- Certificate expiry date
- · Period to expiry
- Status

A note can be recorded for an employee by selecting the **pencil icon**, which is visible when hovering over an individual employee.

cations > California Food Handler Card				ADD EMPLOY
CERTIFICATE SETTINGS	Certificate Tracker	Q Fo	d employee's certificates	
Settings	EMPLOYEE	EXPIRATION DATE ~	TIME TO EXPIRY	STATUS -
	Adam Miller	Sat. 16 Sep 2023	1 year	Completed -

Certificates by Employee

To view certificates for a specific employee, navigate to Employees > Employee Name > Certifications.



This opens a window listing the certificates for the employee including:

- Certificate name
- Note
- Expiry date
- Period to expiry
- Status

Note: Expiry date and status can be updated directly from the Employee Profile view.

yees > Denise Weber				
	Certifications			
	CERTIFICATES REQUIRED			
Personal Details	California (RDS CETURATION)			
Jobs & Pay Rates				
Availability	CERTIFICATES	EXPIRATION DATE	TIME LEFT	STATU
Compliance	California RBS Certification			Incomplete
Certifications				

TIME OFF REQUESTS

Employees can submit time off requests, and those requests can be reviewed and approved or denied by managers.

Department managers will receive a notification when an employee submits a time off request.

Access Time Off Requests

To access time off requests, select **Time off** in the Main Menu.



Time Off Dashboard

All requests are managed from the dashboard. The initial display lists all entries. The use of advanced filtering lets you quickly find relevant results. You can apply a single filter or a combination of filters.

Date Departments Status J	lobs Employees	ADD TIN	ME OFF C EXPORT
EMPLOYEE	STARTS/ENDS -	REQUESTED -	STATUS ACTIONS
3 Oskar Garcia	Sat, 17 Sep 2022 - Sun, 18 Sep 2022	19 Sep 2022	Approved 👻
	Sat, 24 Sep 2022 - Sun, 25 Sep 2022	19 Sep 2022	Pending -
😜 Mia Patel	Mon, 26 Sep 2022	19 Sep 2022	Approved -
Manuel Meyers	Mon, 19 Sep 2022 - Fri, 23 Sep 2022	19 Sep 2022	Pending -
+ Add Time Off			

Filtering Options

Date

This date filter is for the time off dates requested, not the date the request was submitted by the employee. To view by this filter, simply select the desired date range you wish to see, then click **Apply**.

<		AUG	UST	2022				S	EPTE	MBE	R 202	2	>	REQUESTED *	STATUS	ACTION
	1	2	3	4	5	6					1	2	3	19 Sep 2022	Approved -	
7	8	9	10	11	12	13	4	5	6	7	8	9	10			
14	15	16	17	18	19	20	11	12	13	14	15	16	17	19 Sep 2022	Pending	
21	22	23	24	25	26	27	18	19	20	21	22	23	24	17 000 2022		
28	29	30	31)			25	26	27	28	29	30		19 Sep 2022	Approved -	i i
Clear													Apply	19 Sep 2022	Pending -	

Departments

To view by department, select the department(s) you wish to see in this view, then click Apply.

✓ Aug 1 - Sep 30 →	My Department	Status Jobs	Employees Clear all	ADD TI		XPORT
EMPLOYEE	FREMONT, CA DI			REQUESTED -	STATUS	ACTIONS
3 Oskar Garcia	Clear	Apply	Sun, 18 Sep 2022	19 Sep 2022	Approved 🔶	:
😜 Mia Patel		Sat, 24 Sep 2022	- Sun, 25 Sep 2022	19 Sep 2022	Pending -	:
😜 Mia Patel		Mon, 26 Sep 202	2	19 Sep 2022	Approved 👻	:
Manuel Meyers		Mon, 19 Sep 202	2 - Fri, 23 Sep 2022	19 Sep 2022	Pending -	1
+ Add Time Off						

Status

To sort by status, select the desired status(es), then click **Apply**. The status options are Approved, Declined, and Pending.

MPLOYEE	Approved Declined	REQUESTED -	STATUS ACTION
👌 Oskar Garcia	Pending	19 Sep 2022	Approved ~
	Clear Apply		
🚱 Mia Patel	Mon, 26 Sep 2022	19 Sep 2022	Approved 🔶

Jobs

To view by job type, select the desired job(s), then **Apply.** The options available include all jobs created for your company.

Aug 1 - Sep 30 My Department Approved	Delivery Driver Employees Cl	lear all ADD TIME OFF	C' EXPORT
EMPLOYEE START	3/1 Q	QUESTED - STA	TUS ACTIONS
3 Oskar Garcia Sat, 17	S Bartender) Sep 2022 Ap	proved 👻
+ Add Time Off	Head Chef Manager Server		
	Clear Appl	y	

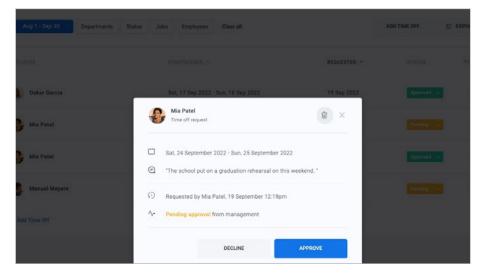
Employees

To view by employee, select the desired employee(s), then click **Apply**.

< Aug 1 - Sep 30 →	My Department	Approved	Delivery Driver	Oskar Garcia	Clear all	ADD TIME O	FF C	EXPORT
EMPLOYEE		STARTS/	ENDS ¥	٩			STATUS	ACTIONS
0skar Garcia		Sat, 17 S	Sep 2022 - Sun, 18 S	EMPLOYEES Manuel M Mia Patel			Approved	-
+ Add Time Off				🔽 Oskar Ga	rcia			
				Clear		Apply		

Review and Approve/Decline

All requests are placed in a Pending status upon initial submission by the employee. From the dashboard, click on a request to view full details, including any comments left by the employee.



If the employee has a shift published or drafted during this time, you will see a notification on the details page. Click on the **shifts** hyperlink to view the details of that shift. If their time off request is approved, any future shift(s) will be converted into shift opportunities.

1 - Sep 30 / Departments Status	Jol	Employees Clear all		ADD TIME OFF
4.			REQUESTED *	STATUR
iskar Garcia	Q	Manuel Meyers Time off request		Approved -
lia Patel	Ċ	Mon, 19 September 2022 - Fri, 23 September 2022		Panding
lia Palel	0	"Got a family trip planned on this week."		Approved
fanuel Meyers	0	Requested by Manuel Meyers, 19 September 12:19pm		Building -
	⚠	Manuel Meyers has 1 shift scheduled in this period		
me Off	∿-	Pending approval from management		
		DECLINE APPR	IOVE	

You can also see if any other employees requested off during the same time period by clicking the **employees** hyperlink. Additionally, the employee will also show here if they have previous requests for those dates.

Once a request has been **Approved**, you still have the option of changing the status to Declined or deleting the request. You can do so from within the request or through the Time Off dashboard.

• From Within the Request: Click on the three vertical dots in the top-right corner, then choose to Decline or delete the request.

Car Aug 1 - Sep 30 (12) Departments Sta	us Jobs Employees Clear all		ADD TIME OFF	EXPORT
NMELOXIE :		REQUESTED *		
Oskar Garcia	Sat, 17 Sep 2022 - Sun, 18 Sep 2022	19 Sep 2022		
Mia Patel	Oskar Garcia Time off request	- () ×		
Mia Patel	OFTIONS			
Manuel Meyers	'Moving hot 'Moving hot Delete time off request	-		
+: Add Time Off	 Requested Ly summaries in superimeter 12:20pm Approved by you, 19 September 12:20pm 			

• From the Time Off Dashboard: Simply change the status to Declined.

🔗 Stephanie Morgan	1 May 2020	16 Feb 2020	Approved +	1
Chris Blackmore	1 Apr 2020	13 Feb 2020	Declined	1

Manual Time Off Creation

On occasion, you may need to create a time off request on behalf of an employee. For example, this can happen when an employee approaches you last minute with an urgent request, which was not foreseen and cannot be prevented.

1. From the Time Off dashboard, click on **ADD TIME OFF**.

Aug 1 - Sep 30 Dep	artments	Status Jobs Employees Clear all	ADD	TIMEOFF	2 EXPORT
		STANTS/ENGS - REQUESTED			
Oskar Garcia		Sat, 17 Sep 2022 - Sun, 18 Sep 2022 19 Sep 2022	i l	Approved	
🚱 Mia Patel	Add T	me Off	×	Perdina +	
🚱 Mia Patel	-8	Select an employee	٢	Approved -	
Manuel Meyers	0	September 20 2022		Protect 1	
Add Time Off		🖉 All day			

2. Select the employee and enter relevant dates. By default, 'All Day' request is selected. Alternatively, uncheck this to allow 'Partial Day' request, (specify date and time).

- 3. Once the request has been created, you are given the opportunity to review the request prior to approving.
- 4. You will also be prompted with the opportunity to review additional requests, either pending or approved, during that time frame.

Employees with time off			×
EMPLOYEES (1)	DATES	JOBS	STATUS
Manuel Meyers	Sep 19 2022 - Sep 23 2022	Manager	Pending approva
			DONE

5. Once the request has been reviewed, select **Approve** to finalize. The employee will receive a notification the request has been approved.

Note: Time off requests cannot be created for the past. Additionally, time off requests cannot be edited; they must be declined/deleted and a new request created.

Export Time Off

You can export a CSV file of all time off requests. To do so:

1. Click the **Export** button.

C Lighthouse	C SETTLE I The Crabshack v I Sche WORKFORGE	duler Timecards Employees Time off		SINC
	Date Departments v Status v	Jobs v Engloyees v		Ct + ADD TIME OFF
	EMPLOYEE	STARTS/CNDS *	REQUESTED .	ACTIONS

2. Apply the appropriate filters to define what should be included in the export.

Note: Departments and Jobs are not included in the export. Time off requests are at the company level and are associated with the employee.

- 3. Once filters are set, click **EXPORT.**
- 4. A notification will appear advising you that an email will be sent when the export is available for download. Typically, this is available within a few minutes.
- 5. Once you receive the email which notifies you that the CSV file is available for downloading to your local machine, click on the **DOWNLOAD** link within the 48-hour window.

LIVE ATTENDANCE

Overview

You can use this feature to view which employees are currently working and which are scheduled to start working soon. The data displayed is based on timecard data from SkyTab POS.

Those with the Administrator permission or managers with the Manage Timecards permission can view this information.

Access Live Attendance

To access the live attendance data, click Attendance in the top navigation bar.

The screen is divided into two parts:

- On Clock
- Upcoming Shifts

< Lighthouse	C SKYTAB WORKE	ORCE	BA CAFE 🗸 🔢	Scheduler	Attendance	Timecards	Employees	Time off	SYNC	002.8~	v4.17
On Cl	lock							Jpcoming Shifts			
EMPL	OVEES (1)	STARTED	FINISH	REMAINING	JÓB	STATUS		IMPLOYEES (3)	JOB	DUE	
81	Saif Ismail	04:00a		÷	Owner			Ed Z. Hutchison	Cook	3h 27m ago	
								Corey Grzybowski	Manager	33m	
							1	3 Salf Ismail	Manager	33m	

On Clock

Here you can see which employees are currently on the clock, along with information including:

- The time they clocked in on SkyTab POS.
- When they are due to finish as per the Workforce schedule (not available for unscheduled shifts).
- The remaining shift time (not available for unscheduled shifts).
- The job the employee is currently clocked in for.
- The current status (either working or on a break).

Upcoming Shifts

This section lists out those employees who are either scheduled to clock in within the next 120 minutes or whose scheduled shift start time was within the last 120 minutes, but have not yet clocked in.

The name of the employee, job, and due time are shown.

TIMECARDS

Overview

A timecard is a record of the hours worked during a single shift. Timecards contain 'clock events' (i.e., when the employee started/finished their shift and any breaks taken during their shift).

Timecards are created in SkyTab POS and automatically sent over to Workforce. Once in Workforce, timecards can be edited and subsequently exported.

Those with Administrator permission or Managers with Manage Timecards sub-permission can view this information.

Note: Live timecards are not currently available in Workforce. Timecards are only sent to Workforce when completed.

Access Timecards

To access the timecards, click **Timecards** in the top navigation bar.

C Lighthouse SKYTAB The Crabshack V Scheduler Timecards Employees Time off

Timecard Filters

All timecards are available in one place, but you can apply filters to help so that you only see the timecards that you are interested in. Specifically, you can filter using any combination of the following:

- Date
- Departments
- Status
- Jobs
- Employees
- Warnings
- Flag

Selected filters are highlighted in blue. Once you have set your filters, they will be remembered so that next time you come back to timecards, they will still be in effect.

Select a Date Range

Date range is a primary filter used for accessing timecards. You can select any date range and view all timecards within that range. The date range should represent a pay cycle (i.e., weekly, bi-weekly, etc.).

l	Last 7 da	ys	Dep	artm	ents	~	Status v	Jobs	~	ł	Emplo	yees	~	Warnings 🗸	Flag 🗸
_	¢		AP	RIL 2	023				M	AY 20	23		5	SHOW ME	
														Today	
							1							Last 7 days	s (12 Apr - 18 Apr)
	2	3	4	5	6	7	8								ys (5 Apr - 18 Apr)
	9	10	11	12	13	14	15							Last 28 day	ys (22 Mar - 18 Apr)
_	16	17	_	-		21									
	23	24	25												

Once you have set your date range you can move forward and backward by clicking the side arrows found in the date filter.

Additionally, you can select one of the shortcuts, such as Last 7 days or Last 14 days.

Timecard Status

Along with the date range filter, status is the primary method of managing timecards. Status is a simple, yet powerful tool to help support your internal operational processes, such as approving timecards and exporting them for payroll.

There are three statuses available:

- 1. **Pending:** Timecard is awaiting processing.
- 2. Approved: Timecard has been approved.
- 3. Closed: Timecard has been processed.

Note: Workforce does not enforce a workflow when it comes to changing status, so you can change the status of any timecard at any point. Please use the status feature, as it best suits your business.

Lighthouse C SETTAB WORKED	I The Crabshack ~ P R C E	Scheduler Timecards Employees Time off				SYNC
Last 7 days Departments v	Status v Jobs v I	Employees v Warnings v Flag v				- C
Wed, Apr 12 - Tue, A Warnings 7 Timecards 7 Stand	Pending Approved Closed	fold hrs 59h 0m Cost 51,360.00 .	JOB	ACTUAL PAID	WARNING	
🗌 🌐 Thu, 13 Apr 🛛 Olivia S		Apply 09:00a - 05:00p	Bartender	Sh Om	Break Penaity	Paulo
🗌 🌐 Thu, 13 Apr 🛛 Adam N	tiller 07:00a - 02:30p	07:00a - 02:30p	Server	7n 30m	Break Penalty	Paulo
Wed, 12 Apr Denise 1	Weber 12:00p - 09:00p	12.00p - 09.00p	Head Chef	9h Om	Multiple	Paralle

When exporting timecards, there is an option to mark exported timecards as closed. The intent here is that, once a timecard is finalized, exported, and ready for payroll, then it is considered closed.

You can change the status of a single timecard directly from the **Timecard Listing** page by selecting another status.

Mon	Son 05	Sun, Sep 1	0					
Warnings				rs 1h 0m Paid hrs 24	lh 30m Cost \$	\$560.00		
	DATE 💌	EMPLOYEE *	ACTUAL TIME	SCHEDULED TIME	BOL	ACTUAL PAID	WARNING	STATUS NOTI
a 🗆	Thu, 8 Sep	Olivia Smith	09:00a - 05:00p	09:00a - 05:00p	Bartender	8h 0m	Break Penalty	Panding -

To change the status of timecards in bulk, multi-select the relevant timecards and then use the **Mark As** option to select the desired status.

Custom Columns

You can pick and choose which columns you would like to see on your timecard dashboard. By default, you will see:

- Date
- Employee
- Actual Time
- Scheduled Time
- Job
- Actual Paid
- Warning
- Status
- Notes

To customize this view, select the **columns icon** in the top menu, then select the information you wish to see. A blue check mark means that information will display on the dashboard.

Date, Employee, and Actual time will always be displayed. This cannot be changed.

	Sep 05 -	Sun, Sep 1 3 Standard hrs 2		rs 1h 0m Paid hrs :	24h 30m Cos	1 \$560.00	Date	
٥	DATE *	EMPLOYEE *	ACTUAL TIME	SCHEDULED TIME	80L	ACTUAL P	Employee	ATUS NOTE
	Thu, 8 Sep	Olivia Smith	09:00a - 05:00p	09:00a - 05:00p	Bartender	8h Om	Scheduled time Punctuality In Punctuality Out	
	Thu, 8 Sep	Adam Miller	07:00a - 02:30p	07:00a - 02:30p	Server	7h 30n	Job	
	Wed, 7 Sep	Manuel Meyers	12:00p - 09:00p	12:00p - 09:00p	Manager	9h 0m	All Photos	

Add a Timecard

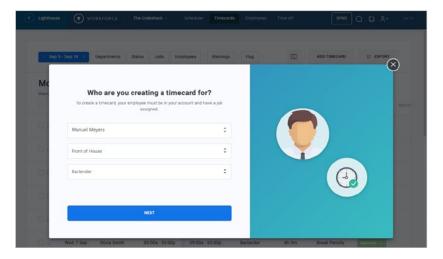
On occasions, there may be a need to manually create a timecard for an employee. Typically, this may be due to an employee not clocking in for their scheduled shift.

To manually add a timecard:

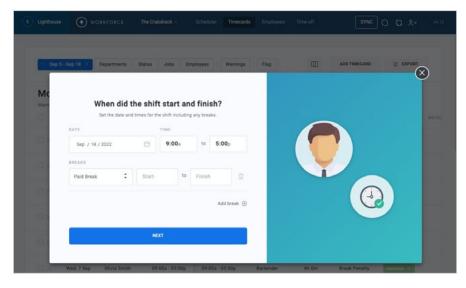
1. Select ADD TIMECARD from within the Timecard Dashboard.

C Lignmouse	C 15111-1 He Casonac + Boneouer Innecasis Employees Time on	SINC
Last 7 days	Departments v Status v Jacos v Employees v Mamings v Riag v	IIII - C C + ACO TANICARD

2. Select the employee you are creating the timecard for, then click NEXT.



3. Add their shift information, then click NEXT.



4. Review the timecard details to ensure everything is correct. Once the details are confirmed, click SAVE.

C Lighthouse	WORKFORCE The Crabahack -	Scheduler Timecards Employees	Time off	3 8× - ***
Sep 5	S-Sep 18 > Departments Status Jobs	Employees Warnings Flag	ADD TIMECARD 5	
Mc	Manuel Meye Front of House - Barter			NOTES
03	Start 9:00 AM	Finish 5:00 PM		
124	Break -	Break Type Paid		
.0.2		Paid Duration 8h		
	SAVE & KEEP EDITING	SAVE		
	Wed, 7 Sep Olivia Smith 09:00a - 05:	00p 09:00a - 05:00p Bartender	8h Om Break Penalty	

Export Timecards

Timecards can be exported as CSV or PDF for any date range and status. We recommend exporting as a CSV file whenever you can, as it provides flexibility and is most suited for subsequent importing into third party payroll processing systems.

Export Process

1. From within the Timecard Dashboard, select Export.

5mc O C D A~ +17
000 ~ C C + Add TanicAnt

- 2. Apply the relevant filters.
- 3. Click **EXPORT**, then select an export format.

A summary of your selection is also displayed. Click **EXPORT** to download the file.

	511111 BY
EXPORT TO PAYROLL	SUMMARY
Select payroll system	\$ Starting Thu, Apr 27
0/2511 (5.	Ending Wed, May 10
	Export Filtered
	Timecards 6

Export as CSV

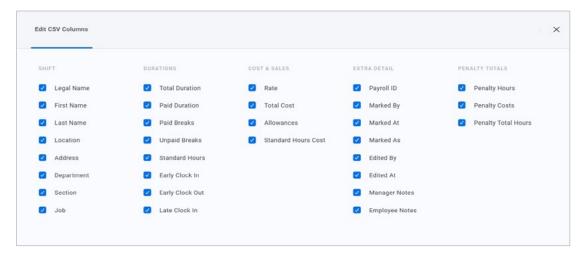
When exporting as a CSV file, four export options are available:

- 1. All Timecards: Individual timecards for each employee are displayed as separate rows in the file.
- 2. Timecard Totals by Employee: Summary of timecard details grouped by employee.
- 3. Timecard Totals by Job: Summary of timecard details grouped by job type.
- 4. Timecard Totals by Rate: Summary of timecard details grouped by employee pay rate.
 - This option is not visible to the manager if they have not been assigned the Manage Sales and Labor Costs sub-permission.

For each export option, you can choose which fields to include or exclude in the export file by selecting **Edit CSV Columns.** Your selection is remembered next time you access the export feature.

You can also choose to mark timecards as Closed. This is applicable when selected timecards are in a Pending or Approved status.

Note: Time values are formatted as decimal hours (i.e., 2hrs 45min is exported as 2.75).



Export as PDF

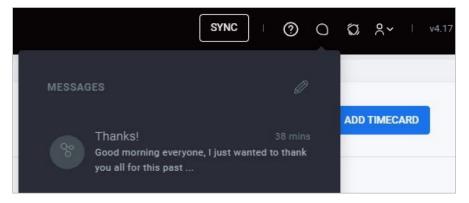
When exporting as a PDF, two printable export options are available:

- 1. All Timecard Details: All information related to the selected timecard for an employee.
- 2. List Summary: Group by Employee or Group by Date.

USING THE WORKFORCE IN-APP MESSAGING FEATURE

Workforce provides a messaging function to enable communication with employees.

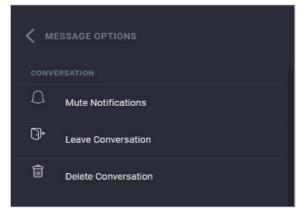
1. The messaging feature can be found by clicking the chat icon in the top-right corner.



2. Click on an individual message to expand it. You can then choose to reply to the message at the bottom of the screen.

	SYNC	?	0	Ø	°,		v4.17
🕻 THANKS!							
				ADD	TIMEC	ARD	
Good morning ever wanted to thank yo week. The extra eff and your willingnes really appreciated.	u all for this past ort you all put in				1	NOTE	S
Sent - today							

- 3. Click the **three vertical dots** to bring up message options. You can then choose to Mute Notifications or Leave or Delete Conversation.
 - Users can also opt-in to receive a push notification when they have received a new message.



Send a Message

1. To send a message, click on the **pencil icon**.

Messages can be sent:

- To an individual employee/employees
- To an entire location
- To an entire department(s)



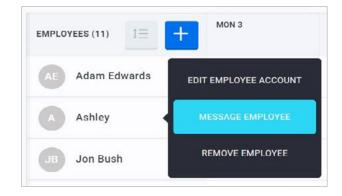
2. Add a message title and enter your message at the bottom of the screen.

You may also add an attachment if you wish. Supported file types include PDF, PNG, JPEG, CSV, and MOV.

NEW MESSAGE	
Type the name of an employee	
Burger 9	
DEPARTMENTS	
Back of House Burger 9	
Front of House	
Enter a message title	
🖉 Type a message	

Scheduler

Messages can also be sent from the Scheduler. To send from the Scheduler, click on the **three vertical dots** beside the Employee's name and choose **MESSAGE EMPLOYEE**. This will bring up the messaging module with the name of the employee pre-populated.



Permissions

Administrators can choose whether employees can send messages directly to another employee.

To do so, navigate to **General > Preferences** under the Company menu and define the setting.

< Lighthouse	C SKYTAB WORKFORCE	The Crabshack 🔨 🛛 Sch	heduler Timecards	Employees Time off	
The Crabs	hack				
THE CRABSH	ACK	COMPLIANCE		SETTINGS	GENERAL
Departmen	s	Breaks		Address Details	Company Profile
Reports		Overtime		Permissions	Preferences 🗸
Jobs		Holiday Rates		Locations	
Public Holic	lays	Penalty Hours			
Certification	15				

TART DAY OF WEEK (?)	
Monday	:
URRENCY	
\$ Dollar (\$1,205.34)	:



s к ү т л в **W O R K F O R C E**

skytab.com/features/labor-management