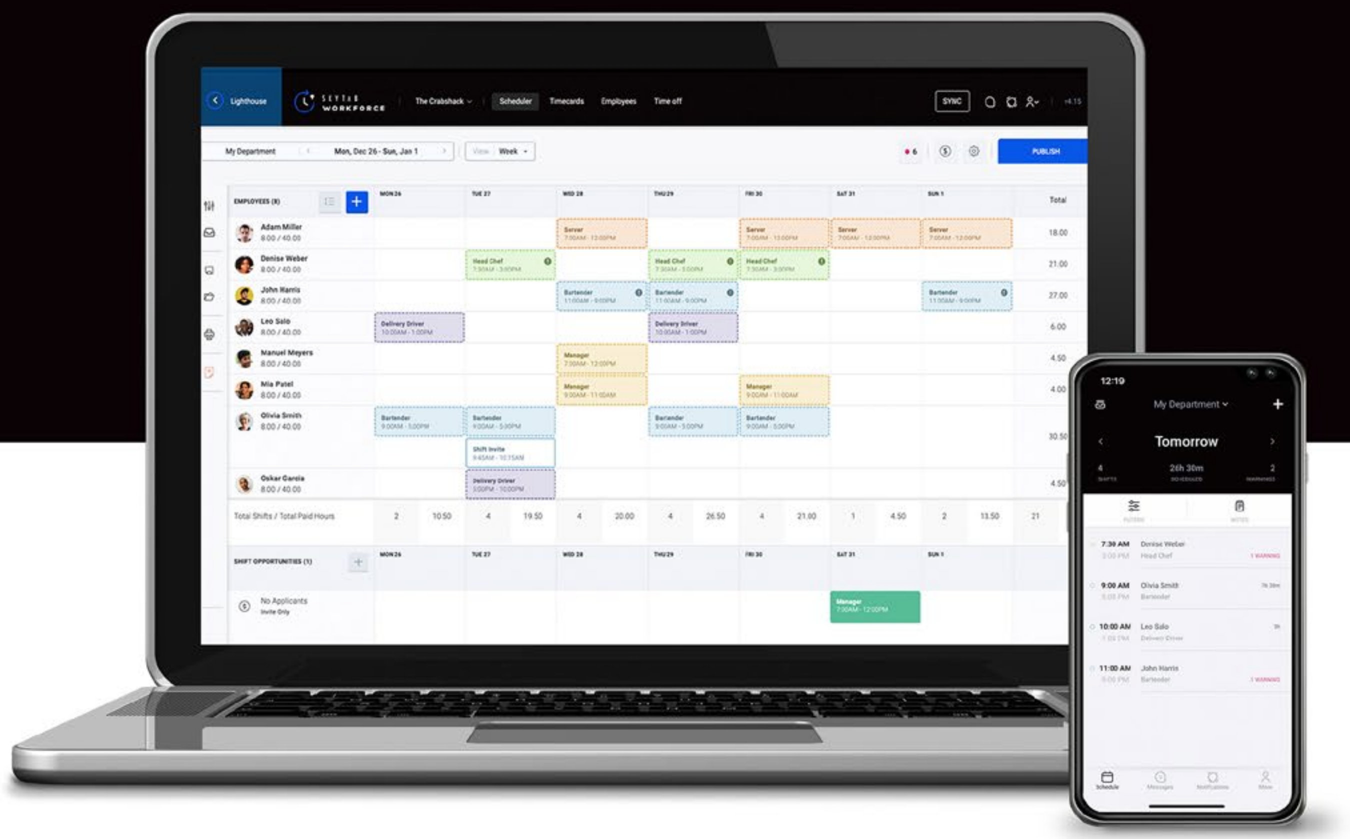
SKYTAB

WORKFORCE



GETTING STARTED GUIDE

skytab.com/features/labor-management

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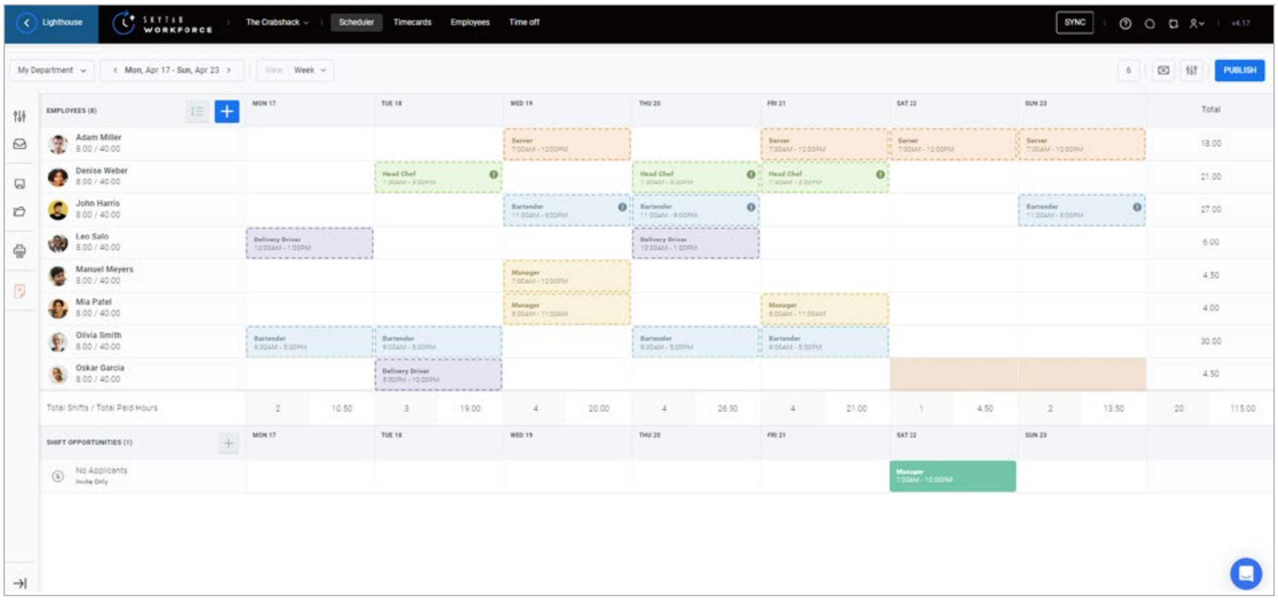
INTRODUCTION

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.



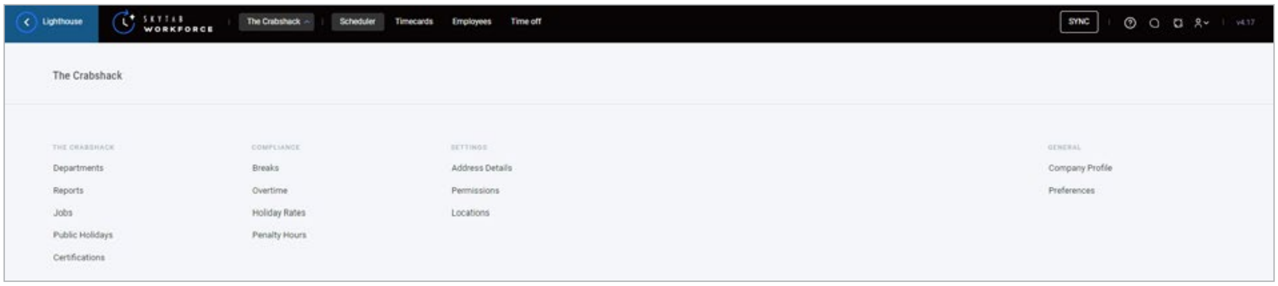
Workforce can be accessed via [Lighthouse Business Manager]() or by downloading the SkyTab Workforce mobile app.

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.



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.

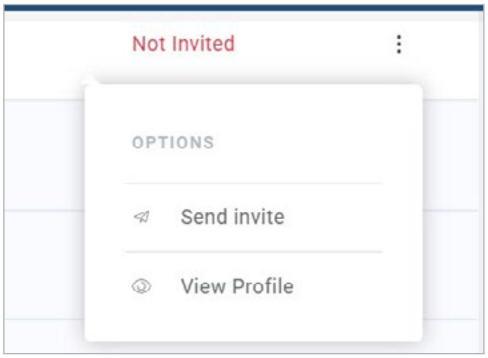
All other employees will need to be invited to the app. Inviting employees to the app will set up an account for them and allow them to log in to the Workforce mobile app, where they can view their shifts, apply for time off requests, and submit their availability to their managers.

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**.

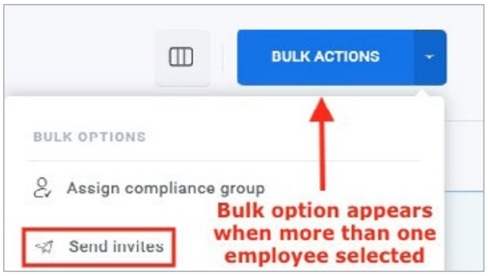
Note: *Employees must have a phone number set in their profile to be invited to Workforce. If they do not, you will be prompted to enter one.*



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**.

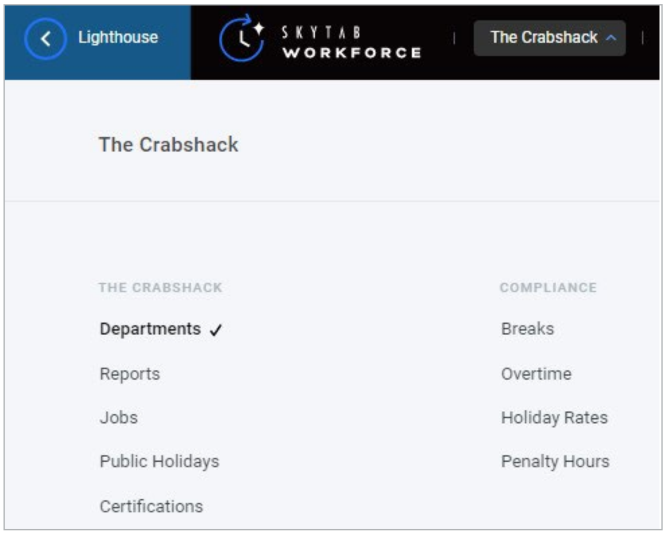
Any employees selected who do not have a phone number set will not be invited, as invites are sent via text message.



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).

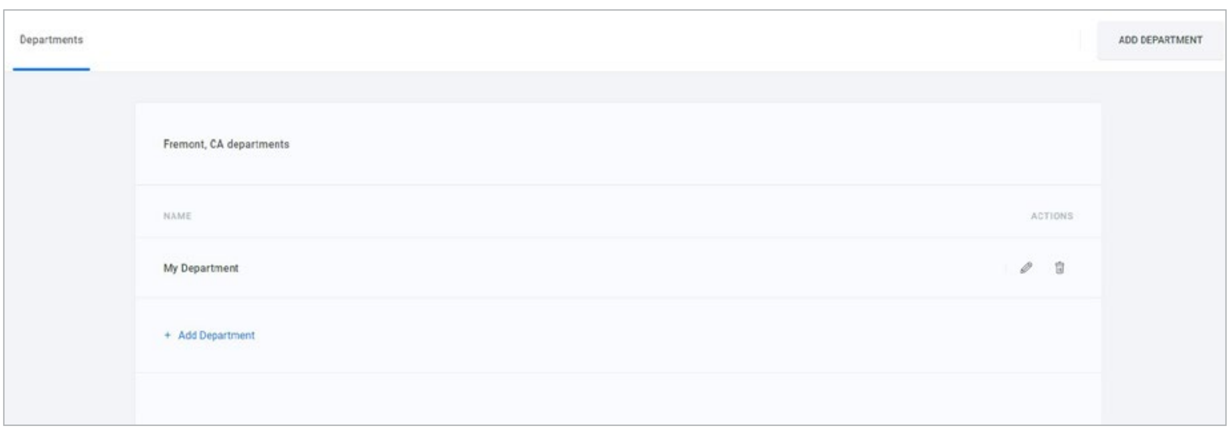
A department is set up by default when your Workforce account is first created. To view it, navigate to your **Company Name > Departments** in the top bar.



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.



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.

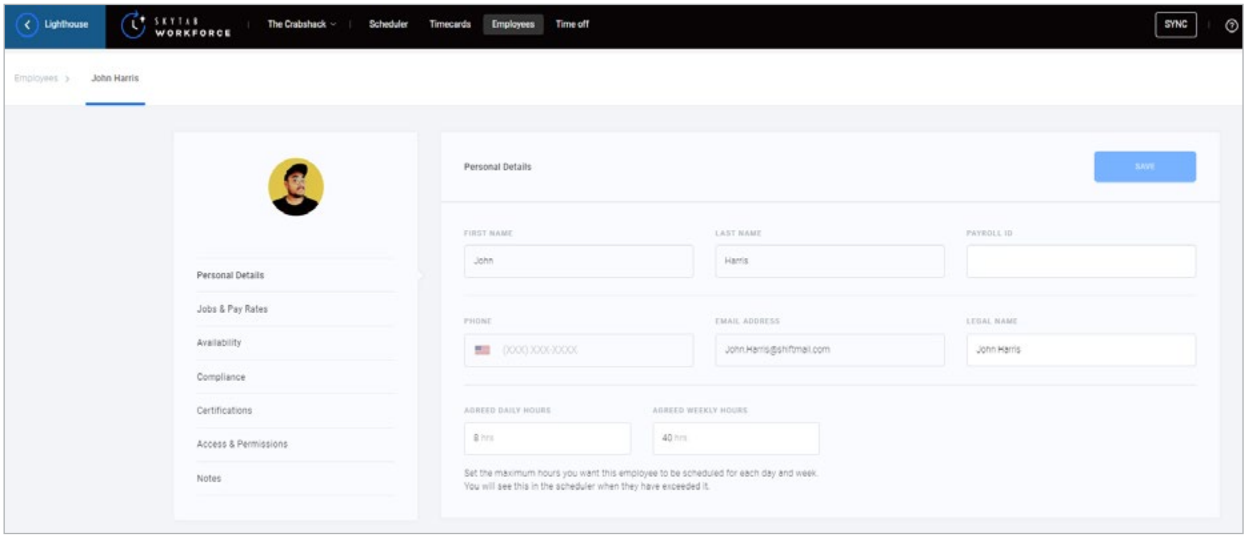
Access levels and individual manager user permissions are inherited from the permissions defined within Lighthouse Business Manager.

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.

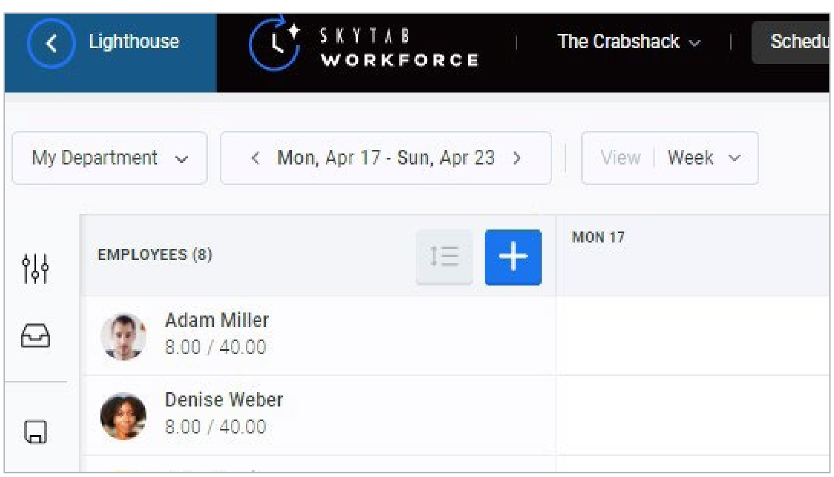


Assign Employees

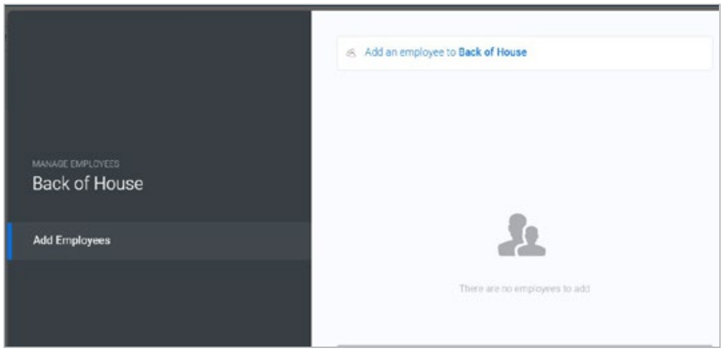
Employees will need to be added into their relevant departments. Once added, they are able to be scheduled for shifts and invited to shift opportunities.

To add employees to a department:

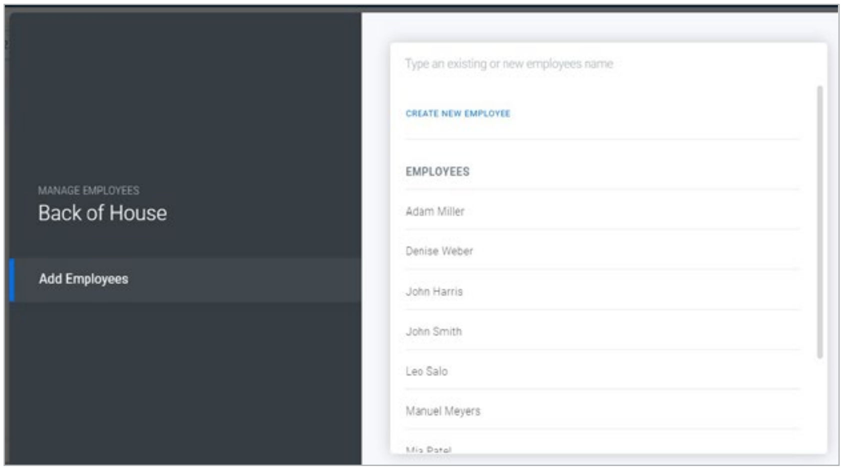
1. Click **Scheduler** in the top bar.
2. Click on the **blue plus sign** to bring up the ‘Manage Employees’ option.



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



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



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

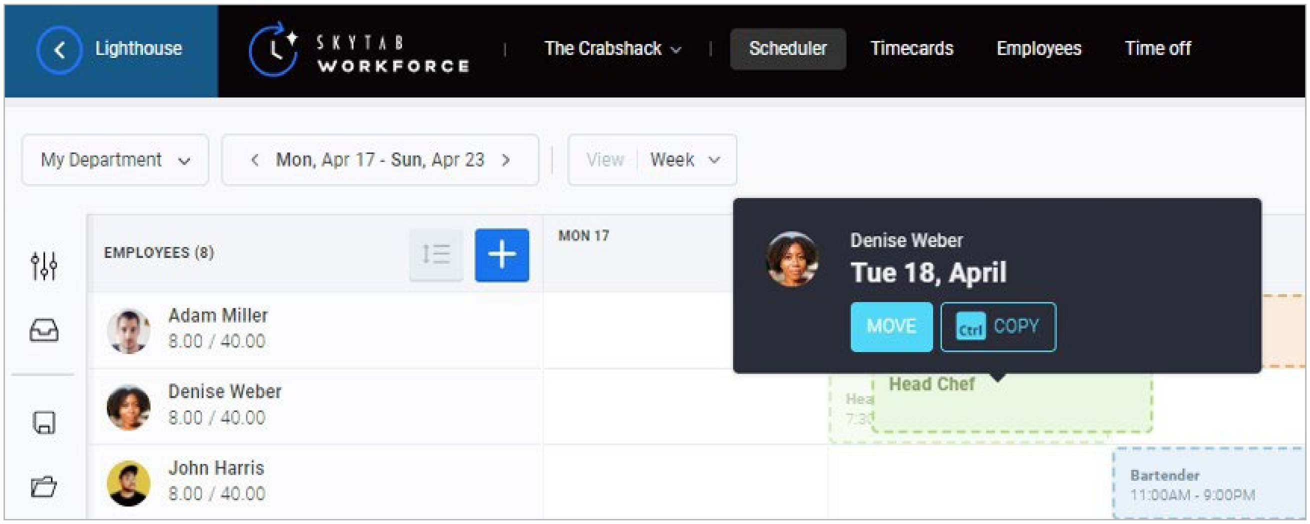
1. Select an Employee and a Day for the shift.
2. Click in the cell.
3. The shift creation window will display.
4. Add their shift, then click **CREATE SHIFT** when done.

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

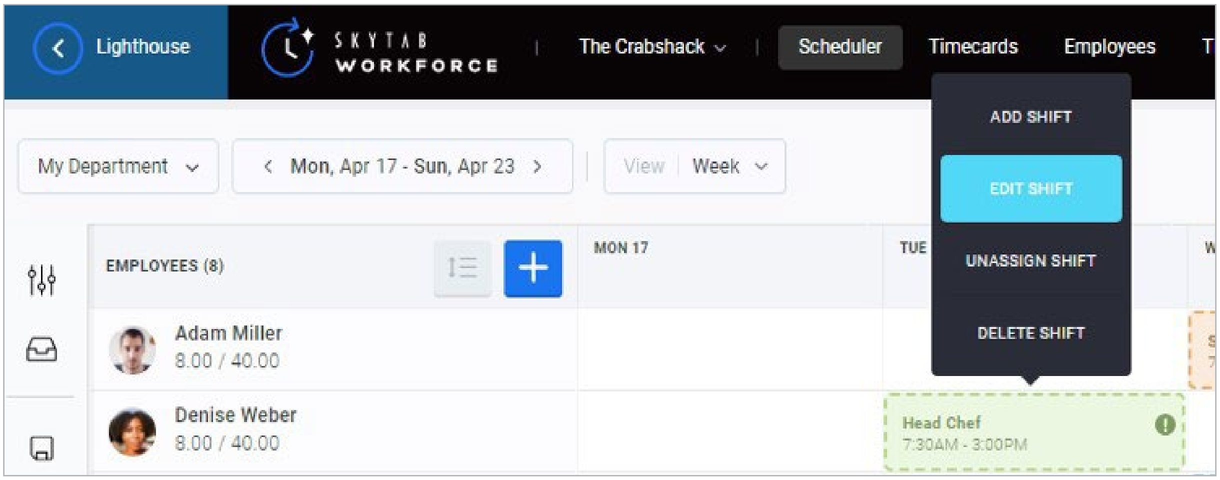
A single shift for an employee can be copied to another day in the current work week, or copied to another employee for any day within the same workweek. Here are the steps:



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.

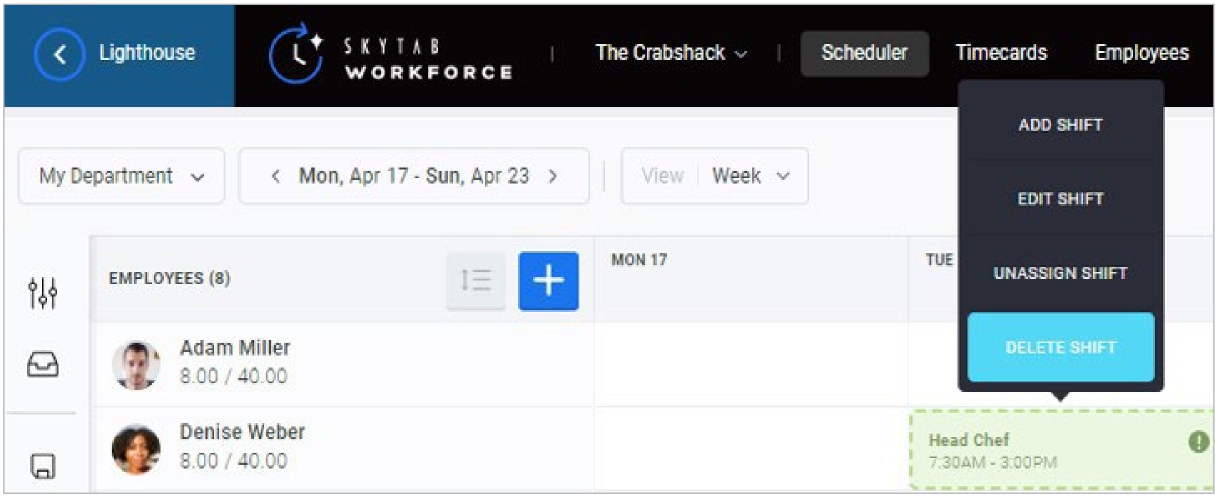
Edit Shift

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.



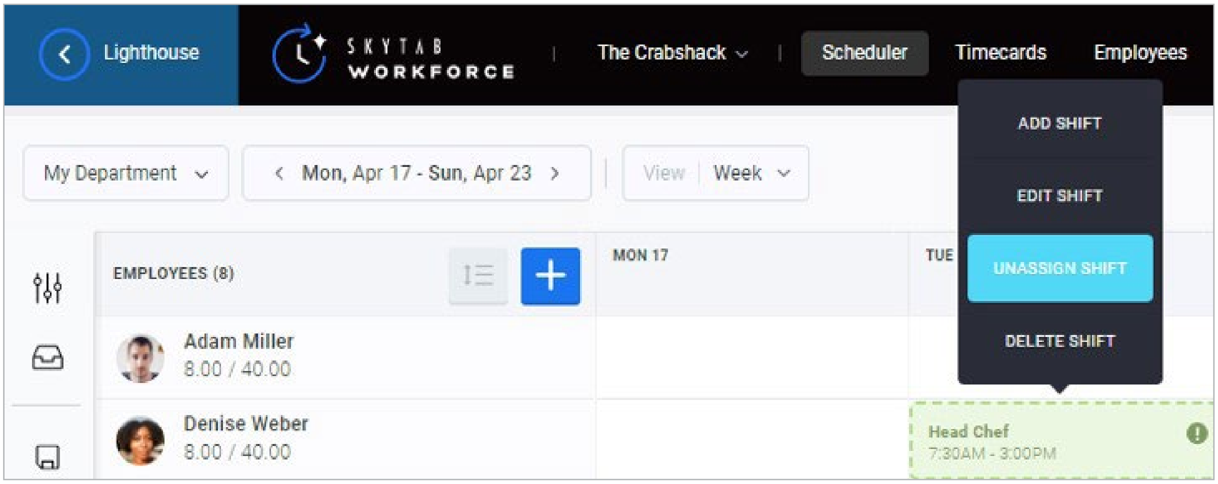
Delete Shift

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



Unassign Shift

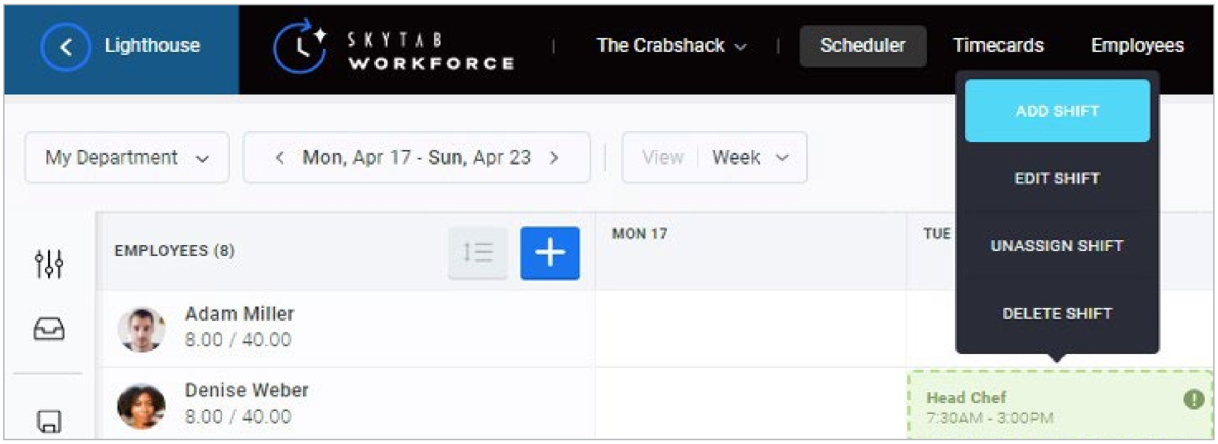
An assigned shift can be unassigned from an employee at any time. Doing so will convert the shift into a shift opportunity and it will be moved down to the Shift Opportunity section.



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.

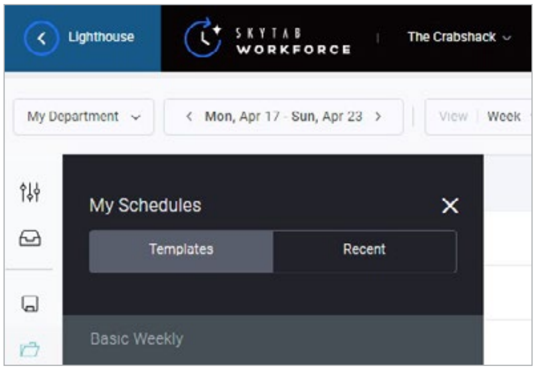
Note: *The shifts cannot overlap.*

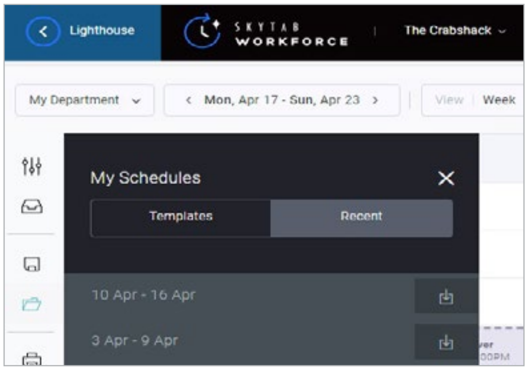


Schedule Templates

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.

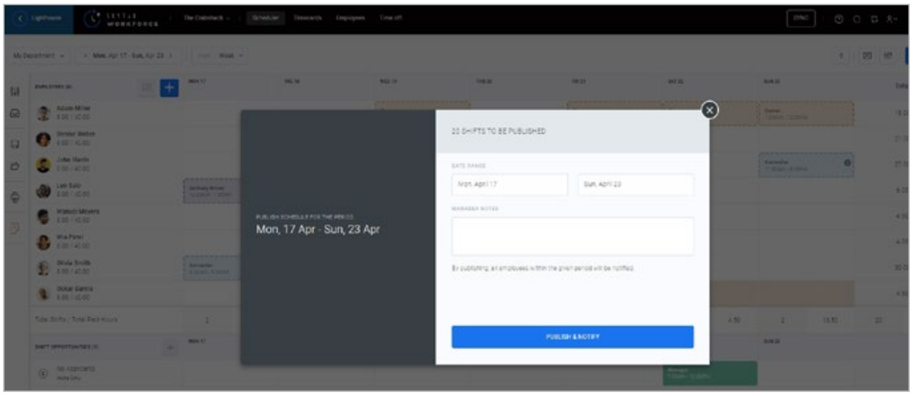




Publish Schedule

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.



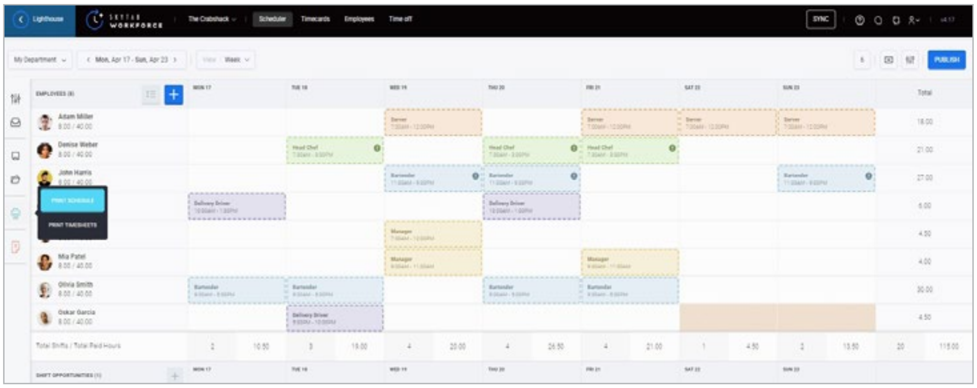
Print Schedules

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

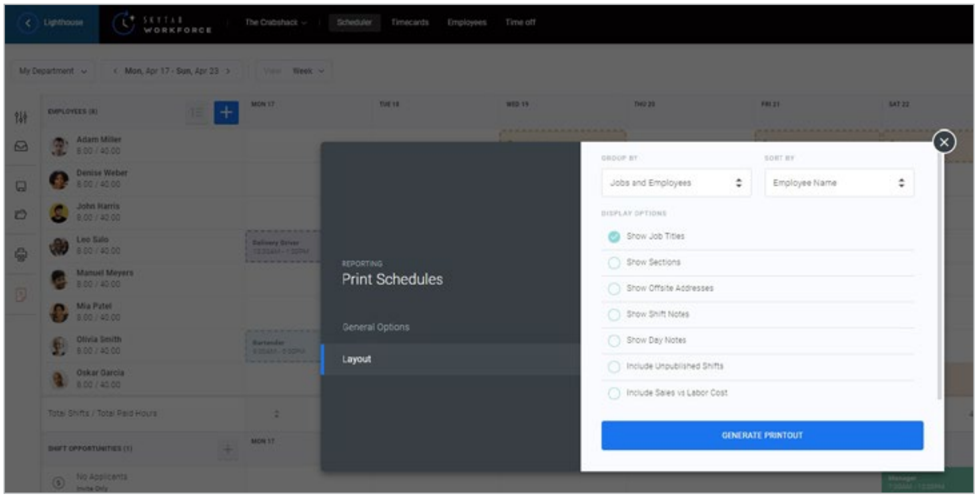
- Print to PDF or export to Excel.
- Daily, weekly, and multi-week options.
- Report layout flexibility, including comprehensive ‘Group By’ and ‘Sort By’ variations.

Print Process

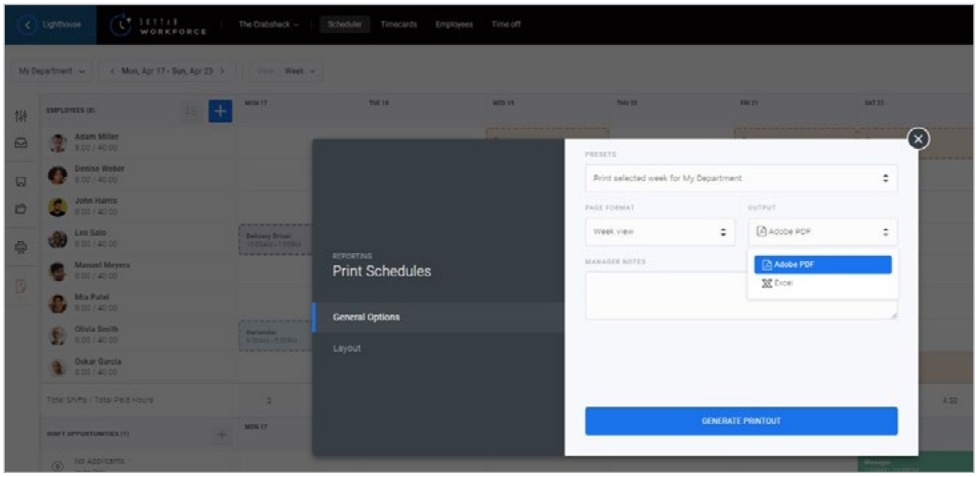
1. Click on the **Print** icon and select **PRINT SCHEDULE.**



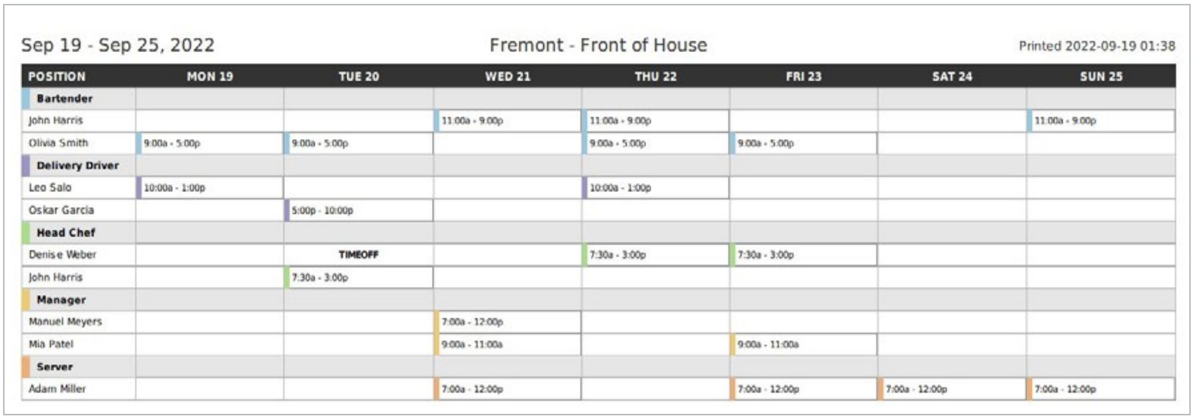
2. Click **GENERATE PRINTOUT** to print a default report.



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



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



Sep 19 - Sep 25, 2022 Fremont - Front of House Printed 2022-09-19 01:38

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			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.

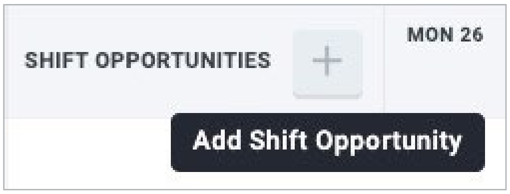
SHIFT OPPORTUNITIES

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.

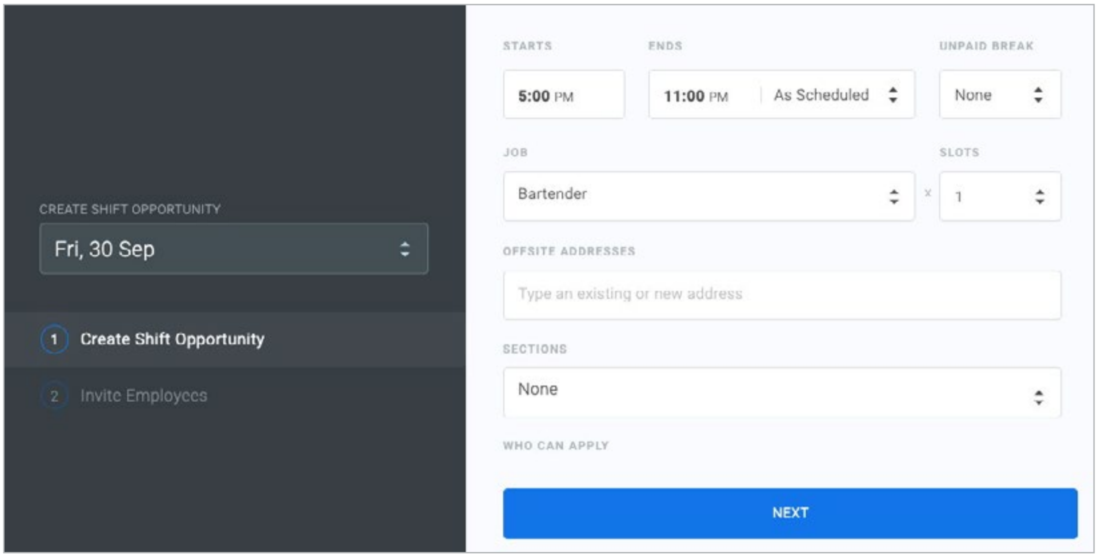
Note: *Employees must be connected to the company before they will be returned in search results.*

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.

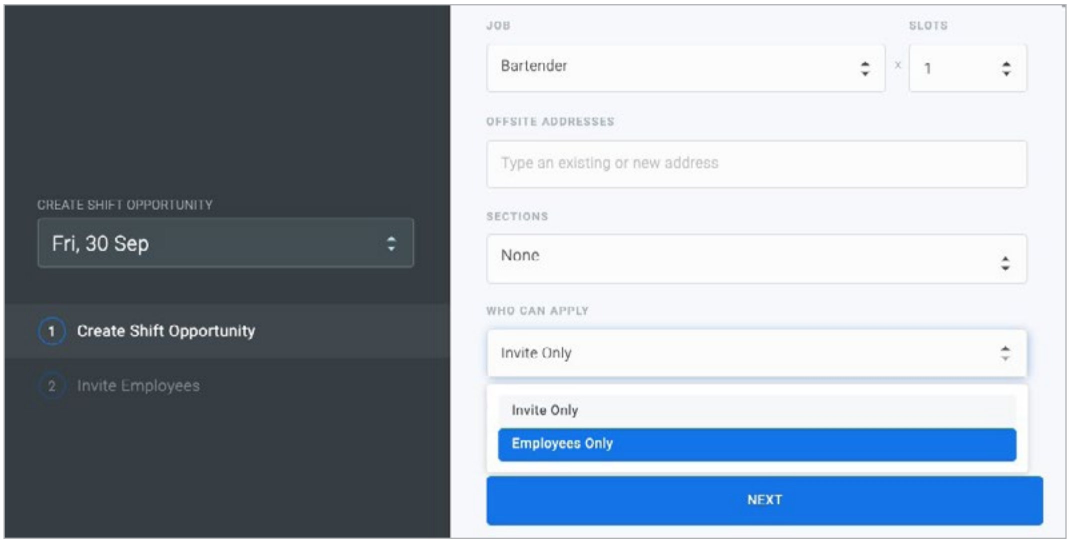


2. Add the appropriate shift details
   - **Date**
   - **Start time**
   - **End time**
   - **Shift end option** (as scheduled, until required, or until close)
   - **Unpaid break** (five-minute increments)
   - **Job required** (i.e., bartender)
   - **Slots:** Number of open shift opportunities required (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)



3. Click **Next.**

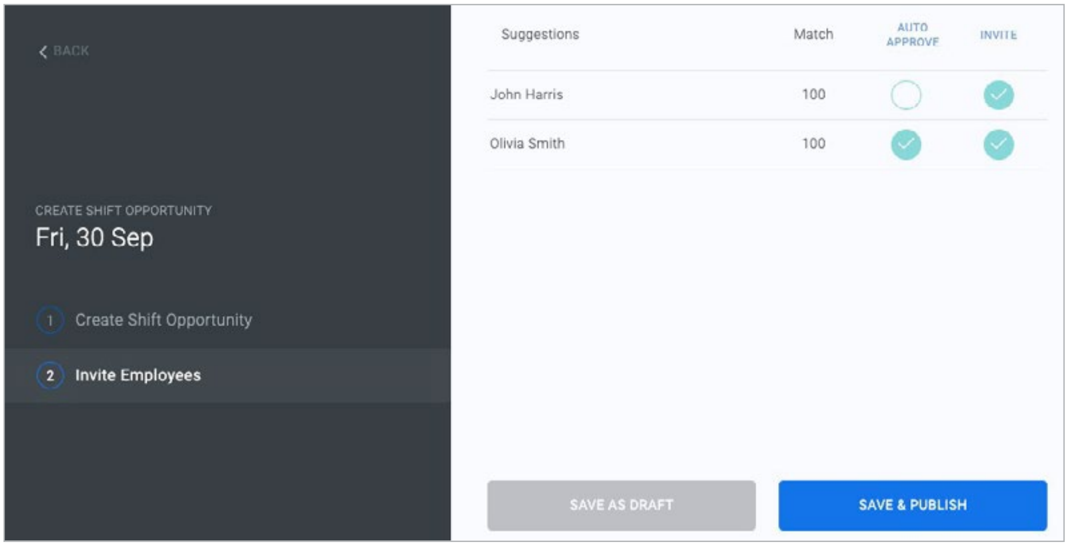
4. Select who can apply to work the shift.
   - **Invite Only:** Select one or more employees who will be sent an invitation to apply.
   - **Employees Only:** Automatically send an invitation to all employees with the job assigned in their employee profile.



5. Click **Next.**

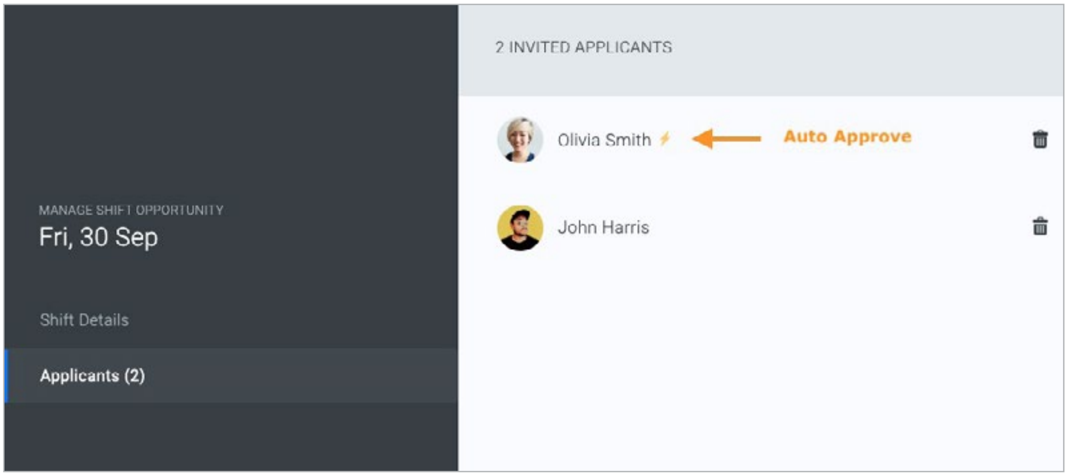
Invite Employees

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.



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.



- To see applicants that have been invited, and those that have applied, click on the **Shift Opportunity** and then select **MANAGE SHIFT**.

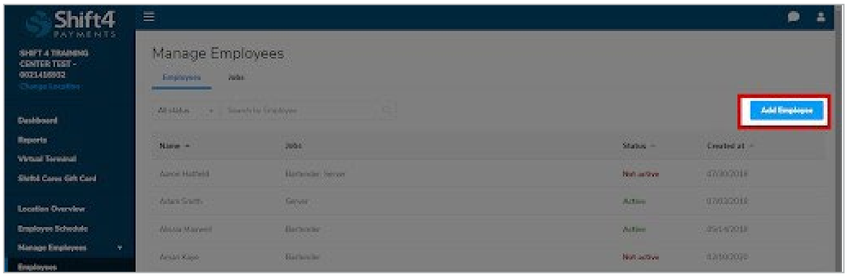
11. Here, applicants will be listed. The top section includes those that have applied and the bottom section shows those that have been invited but have yet to apply, or decided not to apply.
12. Once an applicant is accepted, the shift is removed from the Opportunities section, moved to the Schedule 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

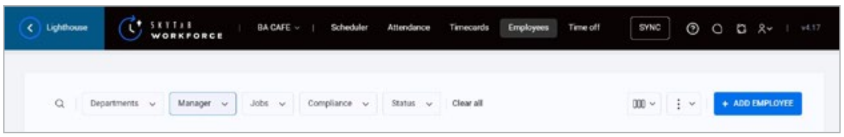
Add Employee

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

1. Click on **Workforce > Employees > Add Employee**.



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



2. Complete the relevant employee information.

   The required fields are:

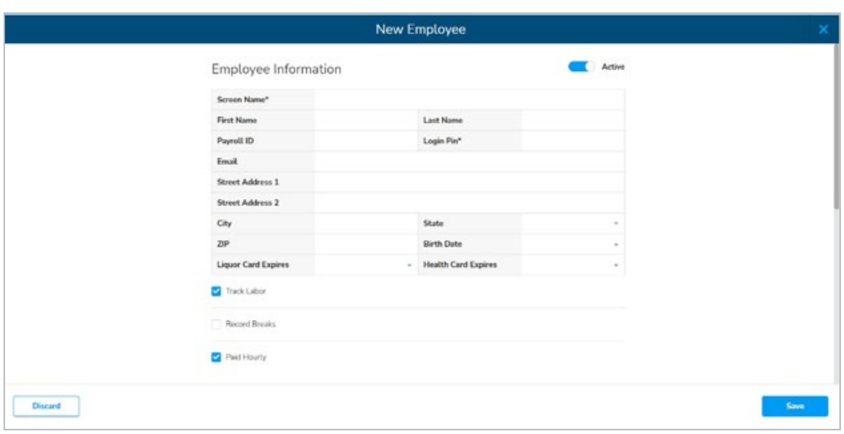
   - **Screen Name:** This screen name will be shown on the SkyTab POS screens, employee schedule and time clock records, and the printed guest checks for the employee.
   - **Login PIN:** The PIN code they will use to log in to the POS.
   - **Jobs:** The job they will be assigned to.

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.



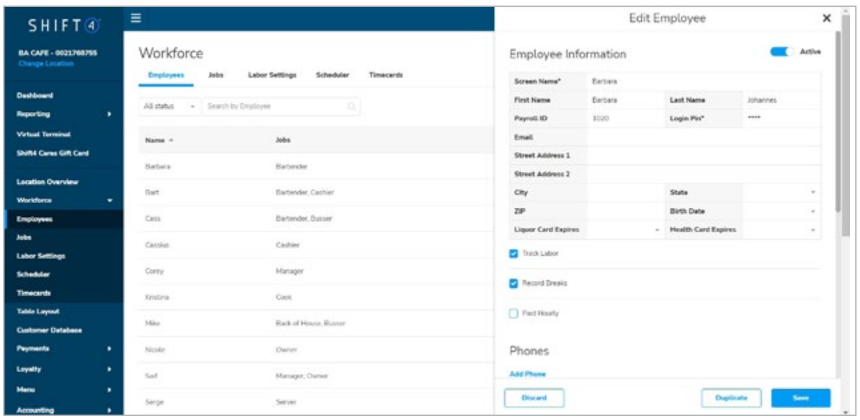
3. Click **Save** to add the new employee record. The new employee record will appear in Workforce after the next sync, which occurs approximately every 15 minutes.

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.



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.*

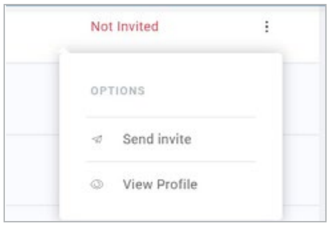
Invite Employees

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.

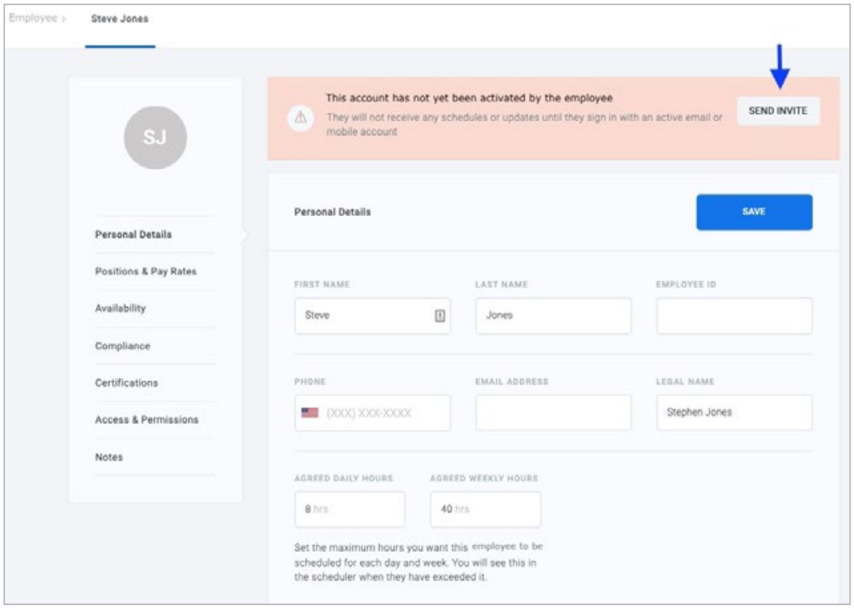
All other employees will need to be invited to the app. Inviting employees to the app will set up an account for them and allow them to log in to the Workforce mobile app, where they can view their shifts, apply for time off requests, and submit their availability to their managers, along with other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



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



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.

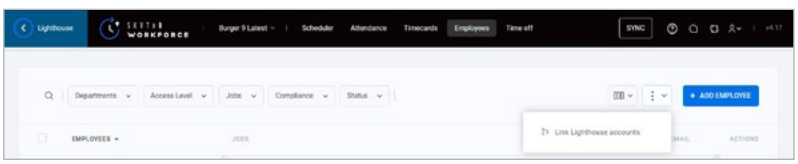
Note: *Employees must have a phone number to be invited to use Workforce. If the employee does not have a phone number set, go to the employee’s profile under* ***Workforce > Employees*** *and add their phone number. Alternatively, you can enter it in the form that appears when you click on Send Invite.*

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**.

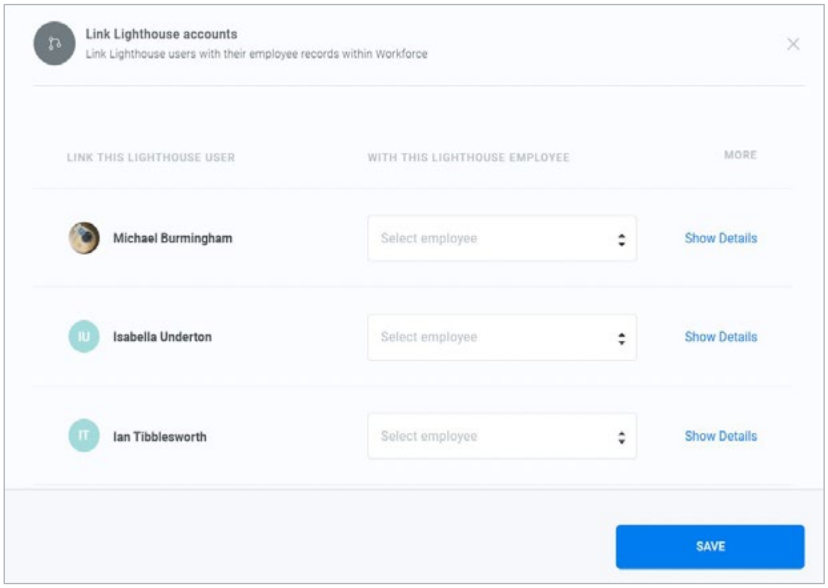


2. The Link Lighthouse Accounts module will appear.

- 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.*



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

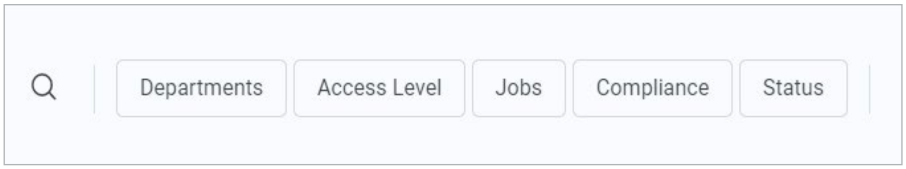
Notes:

- 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**

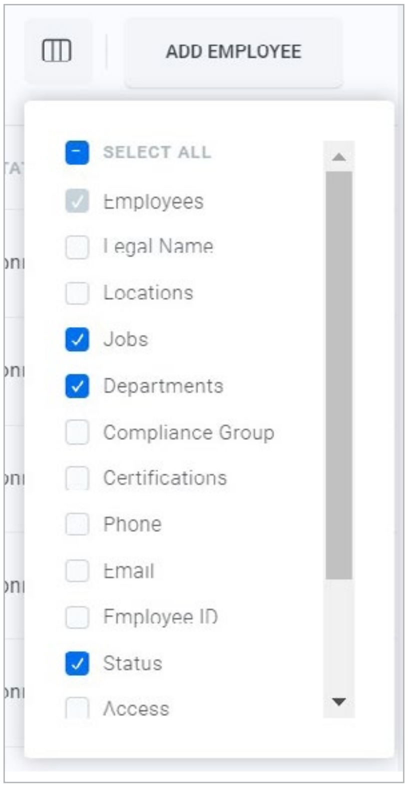


Selected filters are highlighted in blue. Filters that you set for a specific query are retained for that active session only. The next time you navigate back to the Employees page, the default sort order is returned. Use the **Search by Name** field to search for a specific employee.

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.

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)

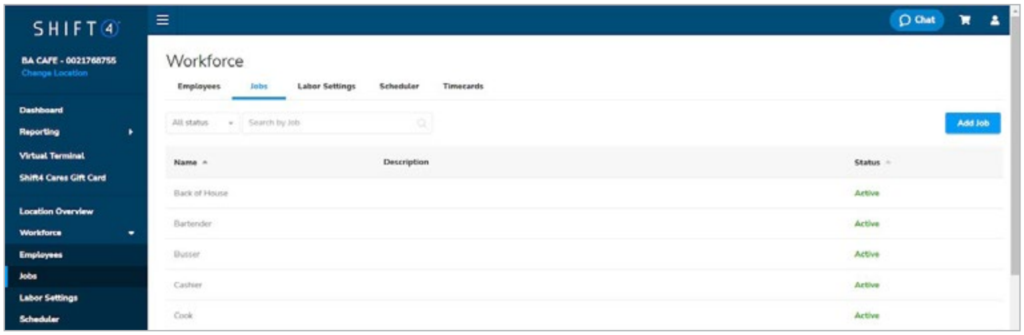
MANAGE JOBS

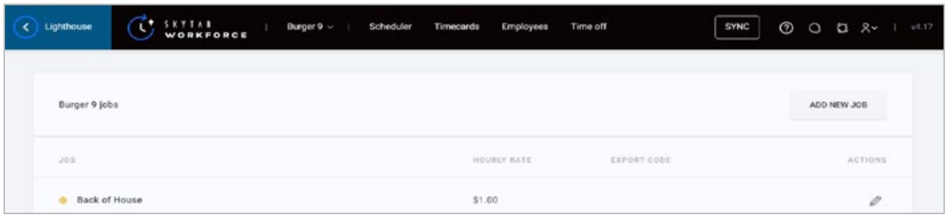
Add Job

Employee records are maintained within Lighthouse Business Manager.

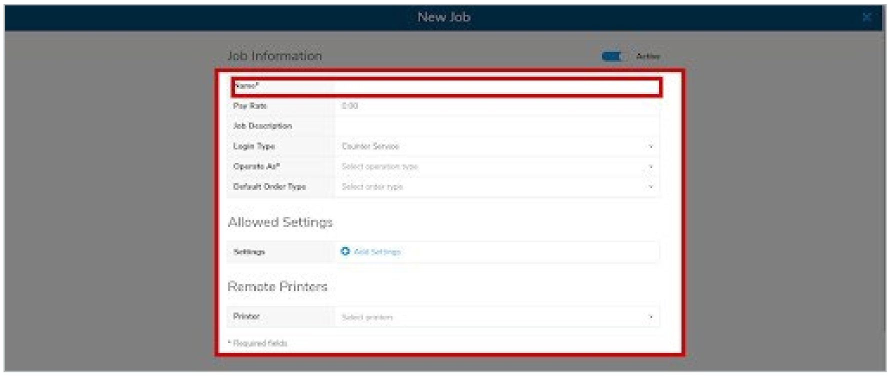
To add an employee:

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.

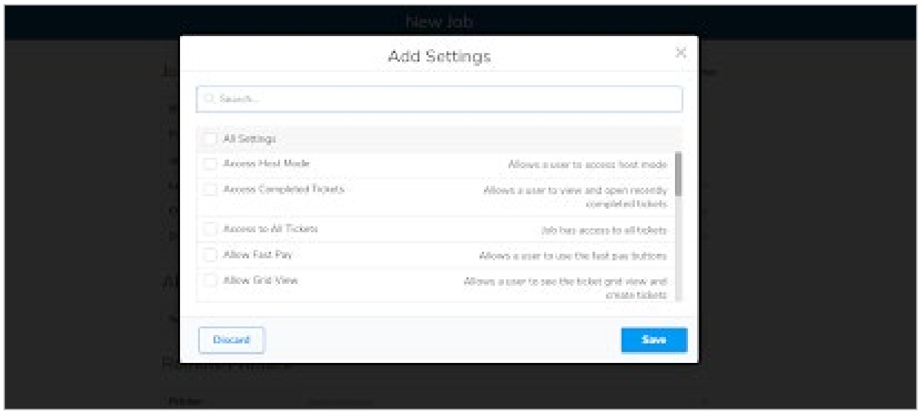




2. Complete the relevant job information, which includes:
   - **Name of the Position** (required)
   - **Pay Rate:** The base hourly pay rate for the job. This is used for labor tracking purposes. If the job is not tracked for labor, you can leave it as zero.
   - **Job Description:** Add a description 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.



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



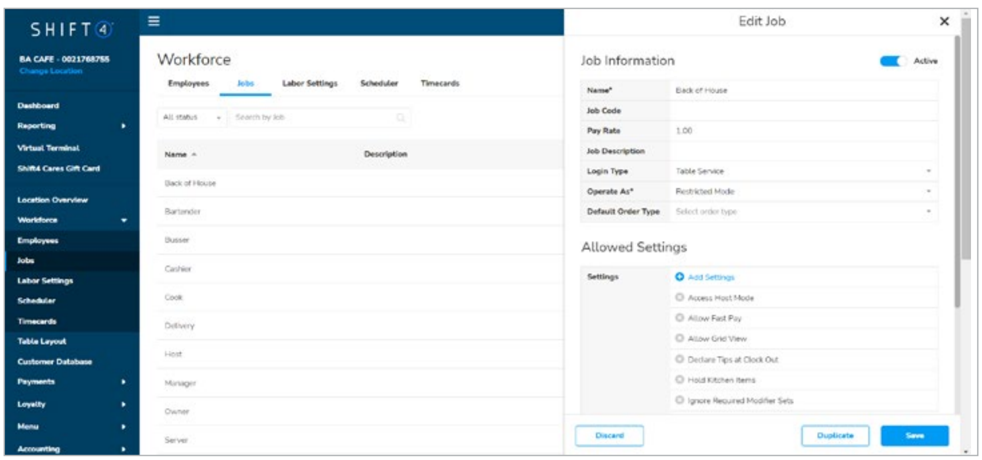
3. Click **Save** to create the new job. The new job record will appear in Workforce after the next sync, which occurs approximately every 15 minutes.

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:

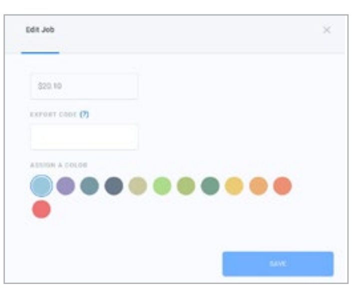
1. Click **Workforce > Jobs**, then select the one you wish to edit from the list of jobs on the screen.
2. This will open the Edit screen, where you can edit details such as job name, pay rate, job description, settings, and more.



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.



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.

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.*

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
Manage timecards Can edit, approve, and export timecards.	Not Allowed
Manage sales and labor costs Can view employee and job hourly rates and schedule sales & labor costs.	Not Allowed
Manage certifications Can create and manage company certifications.	Not Allowed

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.

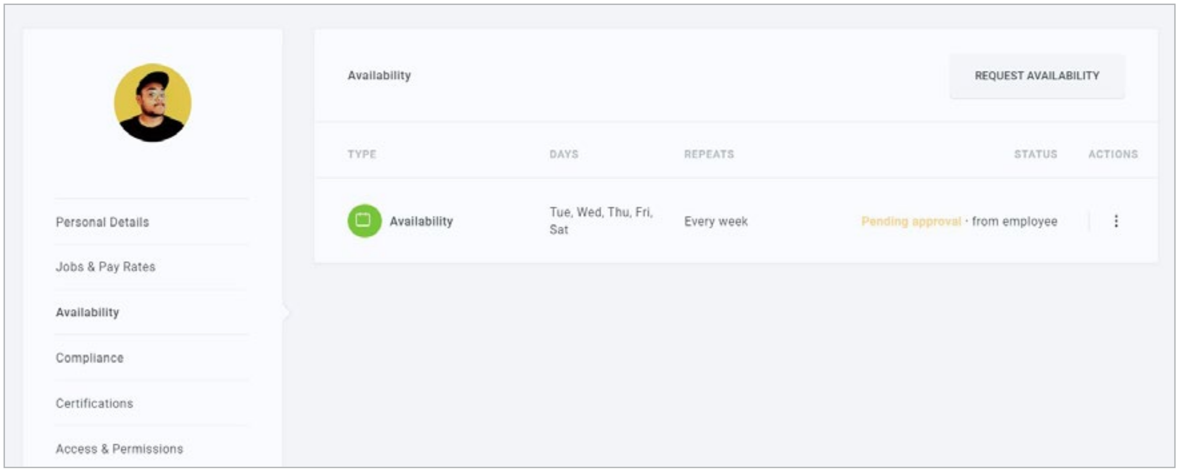
  - Date-specific (or one-off) availability is when an employee is not available to work on a specific date and/or specific time period within that day.
  - For example, they may have a dentist appointment between 1:00 - 3:00 p.m. on Friday, May 12, or they are planning to go on vacation from June 1 - 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

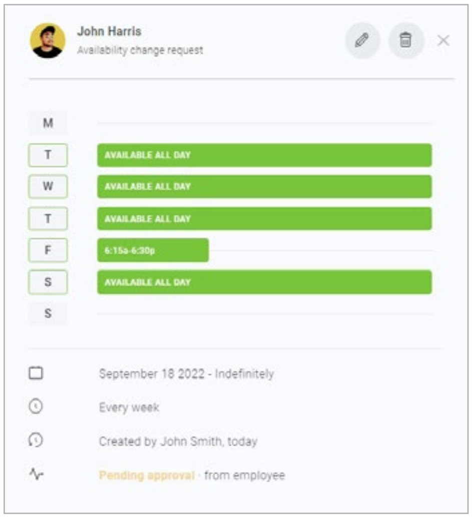
You can view employee availability from your mobile device or desktop computer.

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.



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

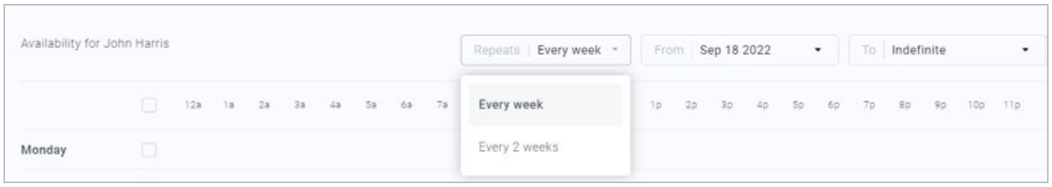


Create Availability

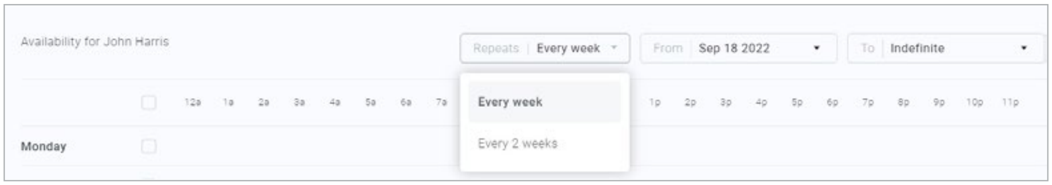
Managers require the Manage Availability permission in order to create, edit, approve, decline, and delete availability sets, or to receive availability related notifications.

To create availability on behalf of an employee:

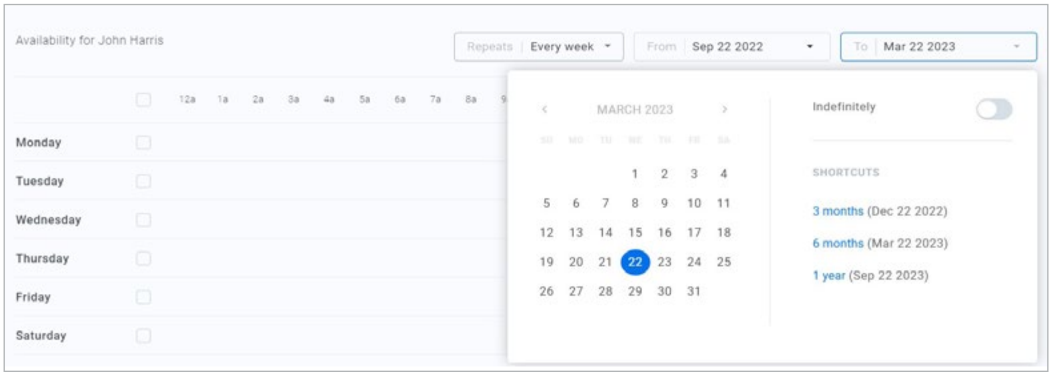
1. Click **REQUEST AVAILABILITY** button on the Availability screen.



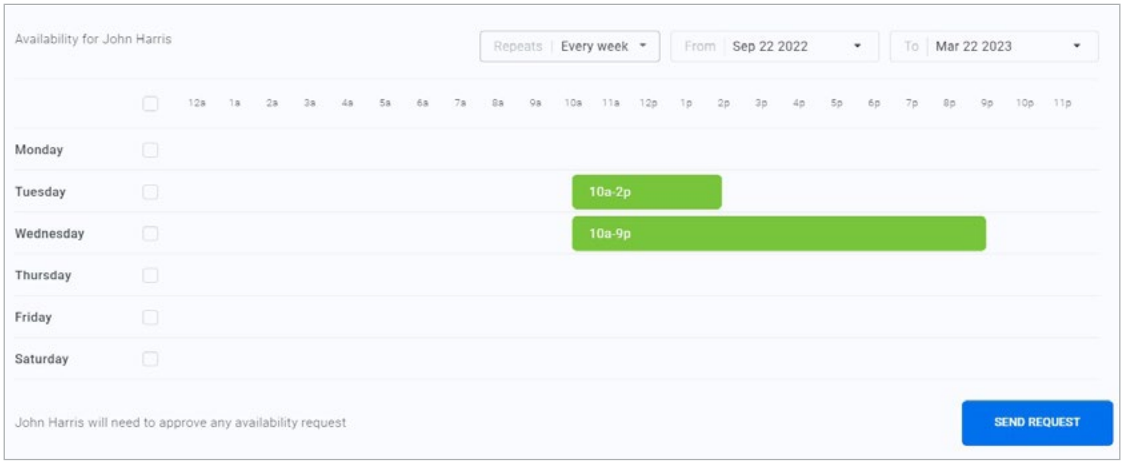
2. Select whether the availability set will repeat every week or every two weeks.



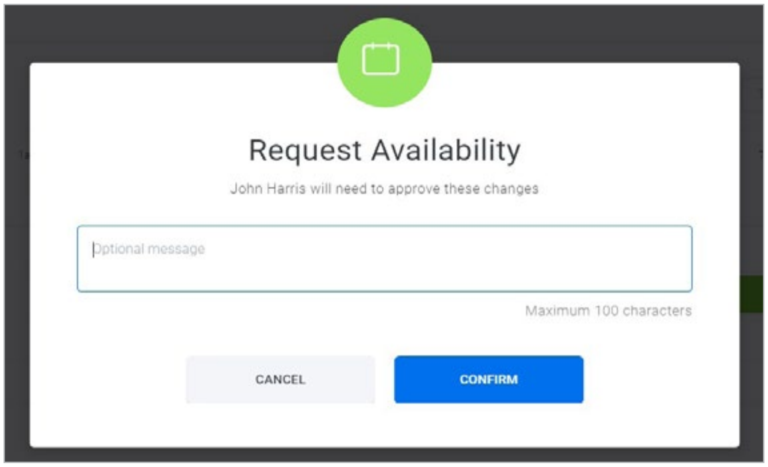
3. Select when the availability set will start and end. You can also select ‘indefinitely’ as the end date, meaning there is no end date for the availability set.



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.



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.



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

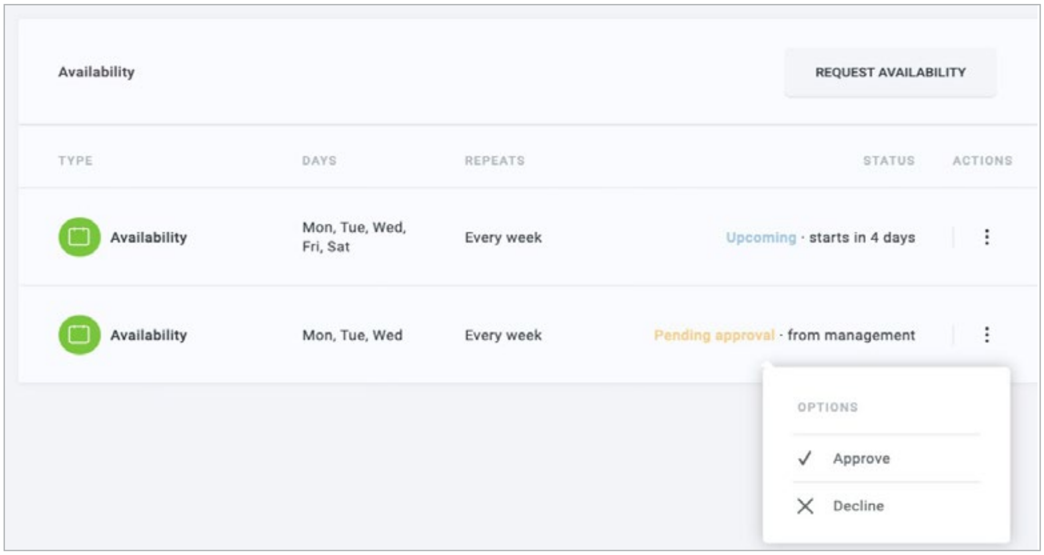
When an employee edits an existing available set, you must approve it before it is considered live. Changes to unavailable sets do not require manager approval.

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

There are two ways to approve or decline a request:

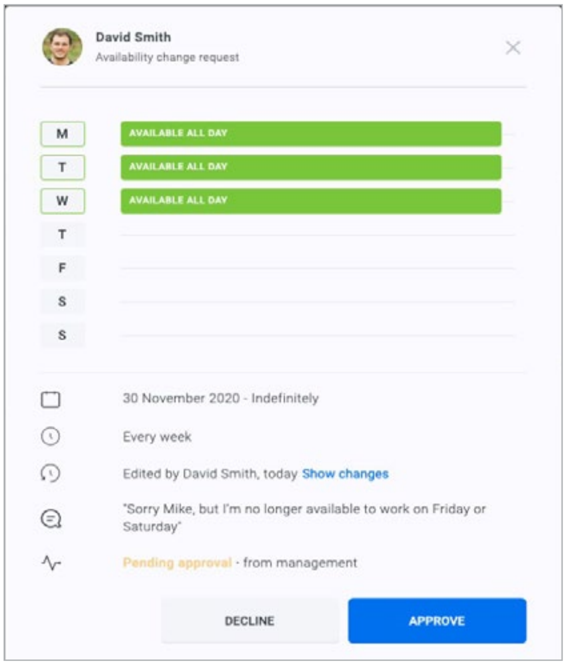
From the Availability View

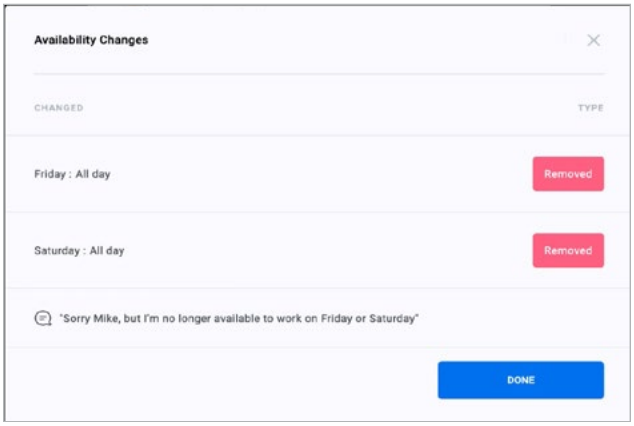
1. Click on the **three vertical dots** under the Actions column next to the set you wish to action.
2. Choose **Approve** or **Decline.**



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.



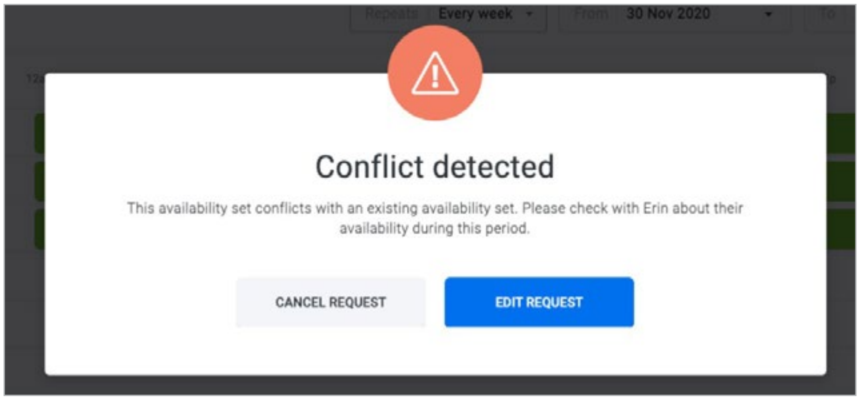


2. Click **APPROVE** or **DECLINE** to take action on the request.

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.



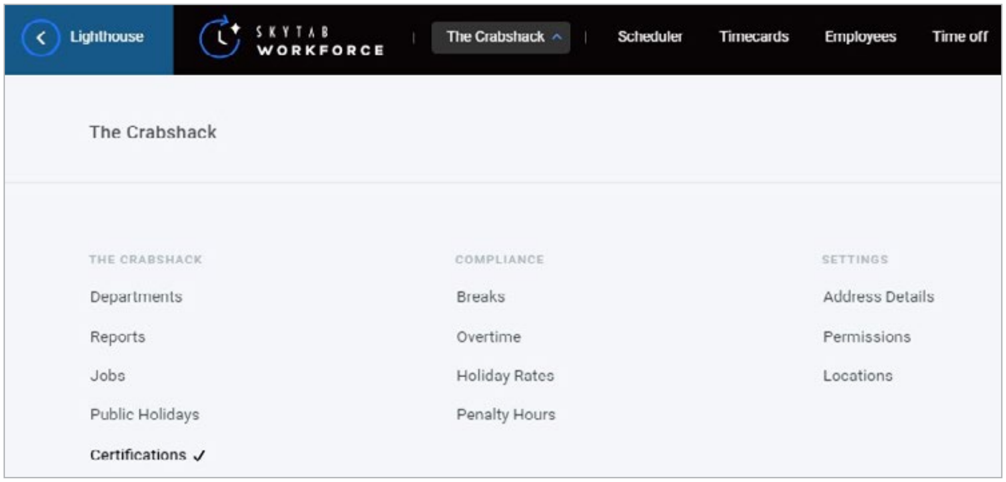
EMPLOYEE CERTIFICATIONS

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.

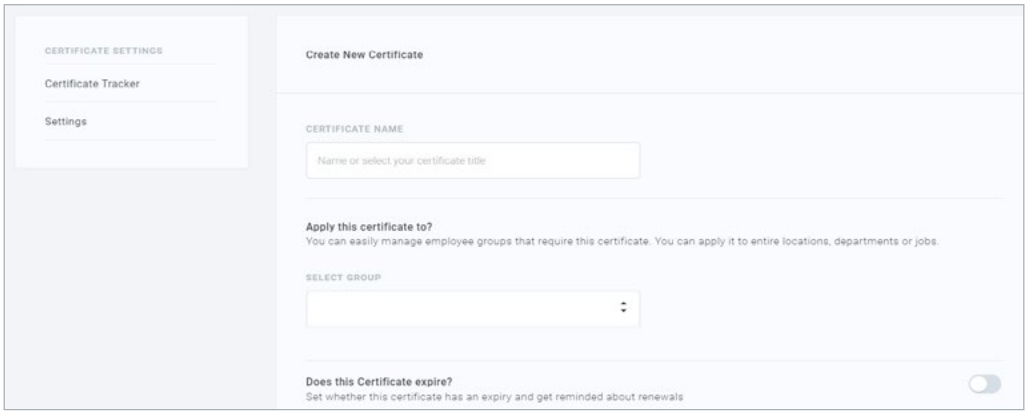
Access Certifications

Navigate to **Main Menu > Certifications.**



Create a New Certification

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



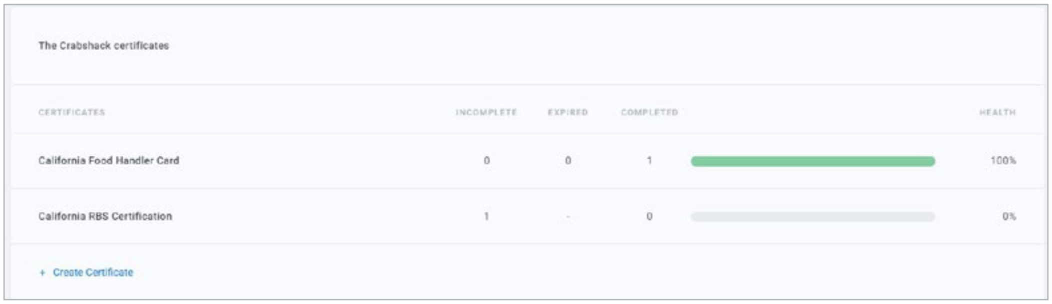
1. **Name Your Certificate**
   Name your certificate or select a name from the suggested list.
2. **Apply Your Certificate**
   Choose who to apply the certificate to. This can be all employees at the location, all employees within a specific department or all employees who have a specific job in their 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).



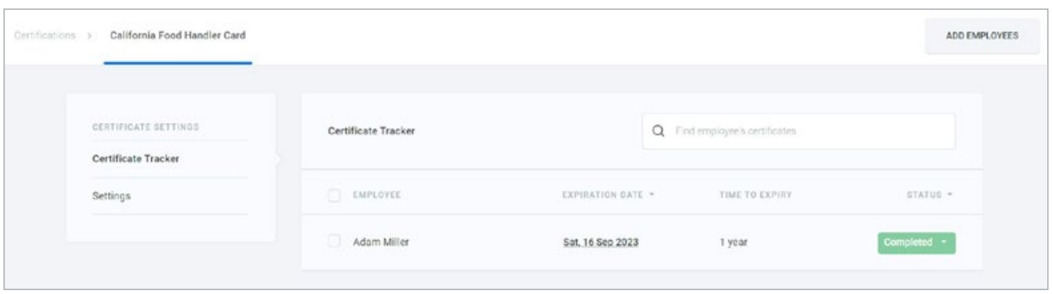
Individual Certificates

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:

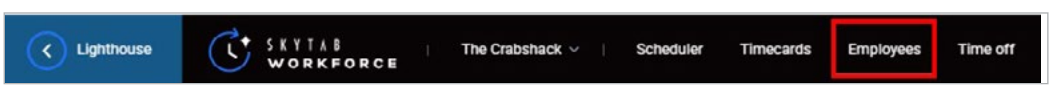
- Employee name
- Certificate expiry date
- Period to expiry
- Status

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



Certificates by Employee

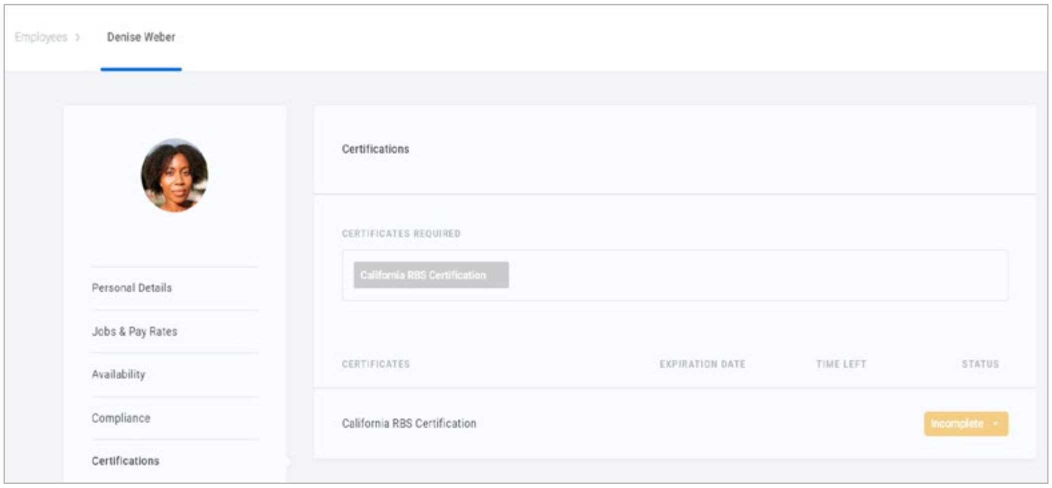
To view certificates for a specific employee, navigate to **Employees > Employee Name > Certifications.**



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.*



TIME OFF REQUESTS

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

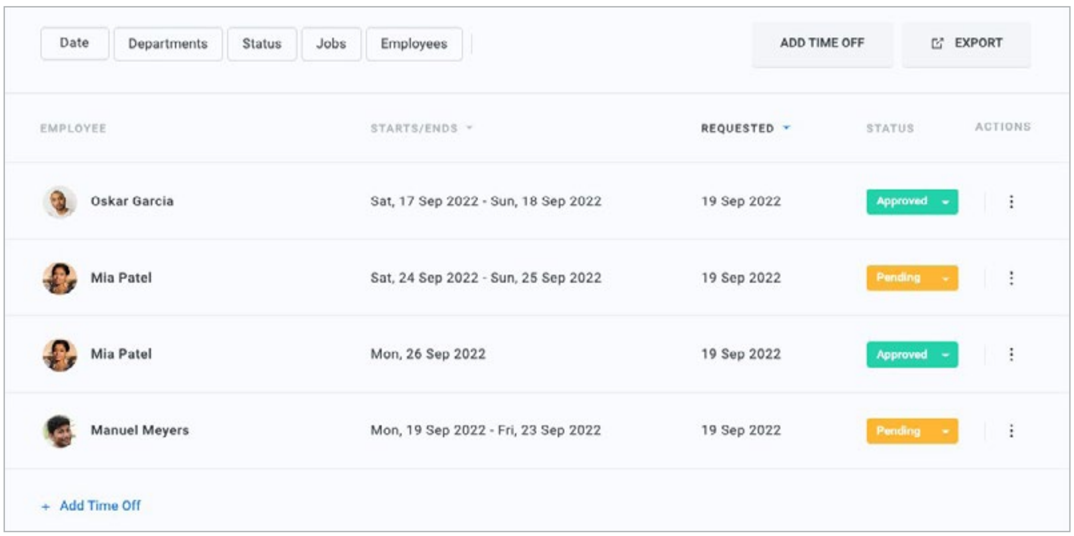
Department managers will receive a notification when an employee submits a time off request.

Access Time Off Requests

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

Time Off Dashboard

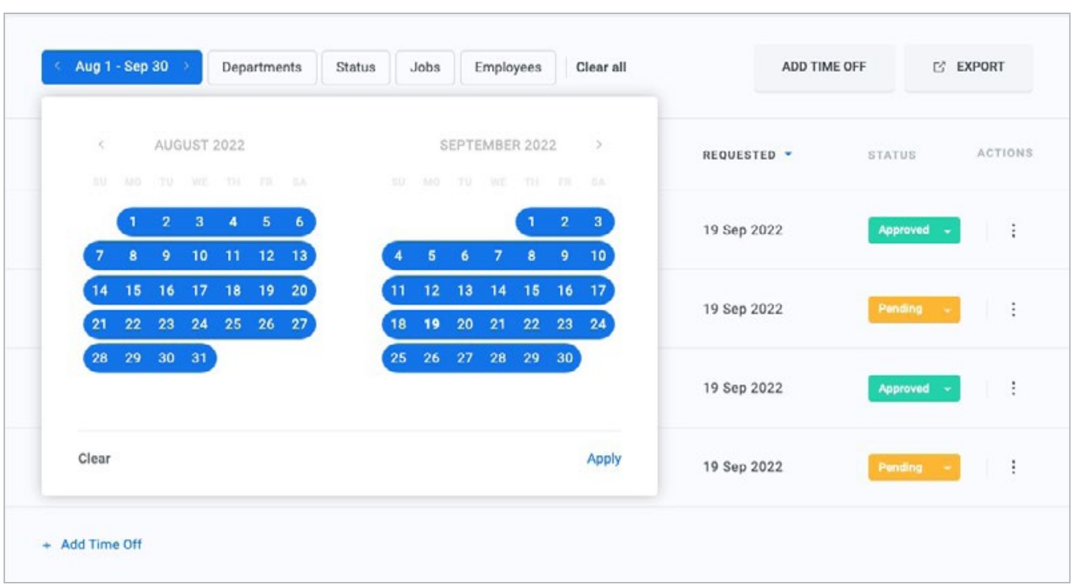
All requests are managed from the dashboard. The initial display lists all entries. The use of advanced filtering lets you quickly find relevant results. You can apply a single filter or a combination of filters.



Filtering Options

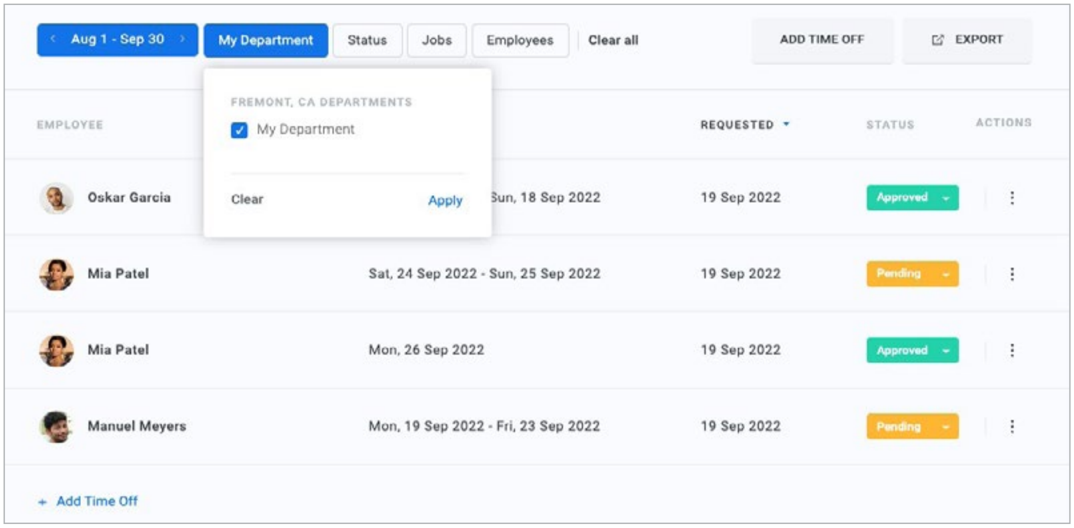
Date

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.**



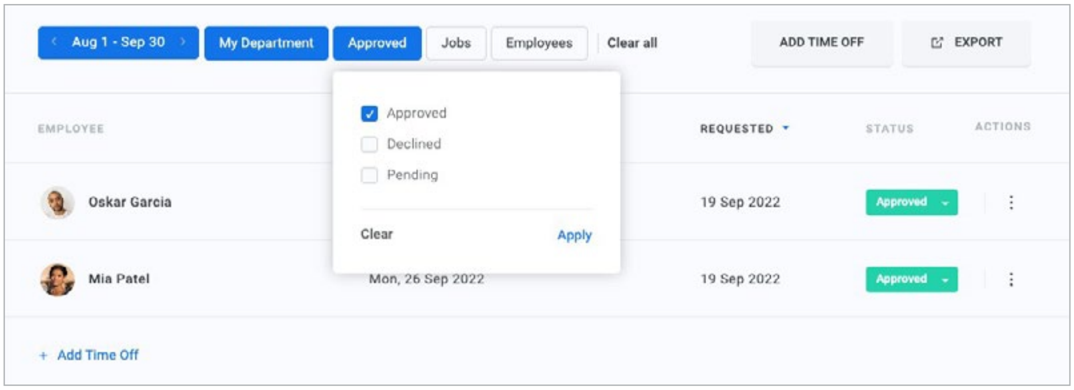
Departments

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



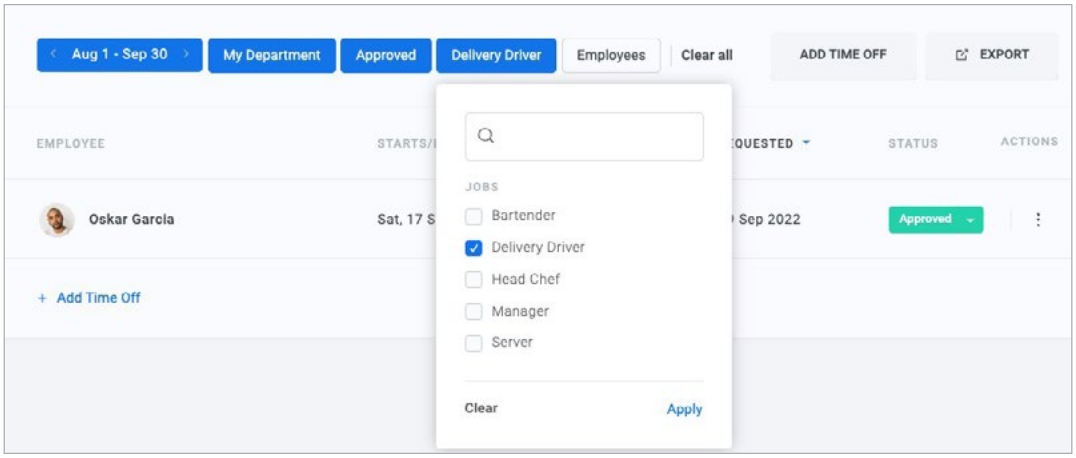
Status

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



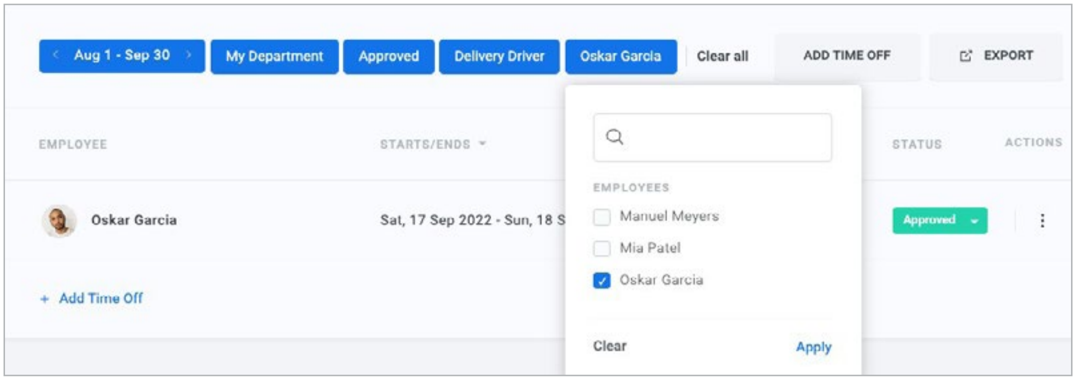
Jobs

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



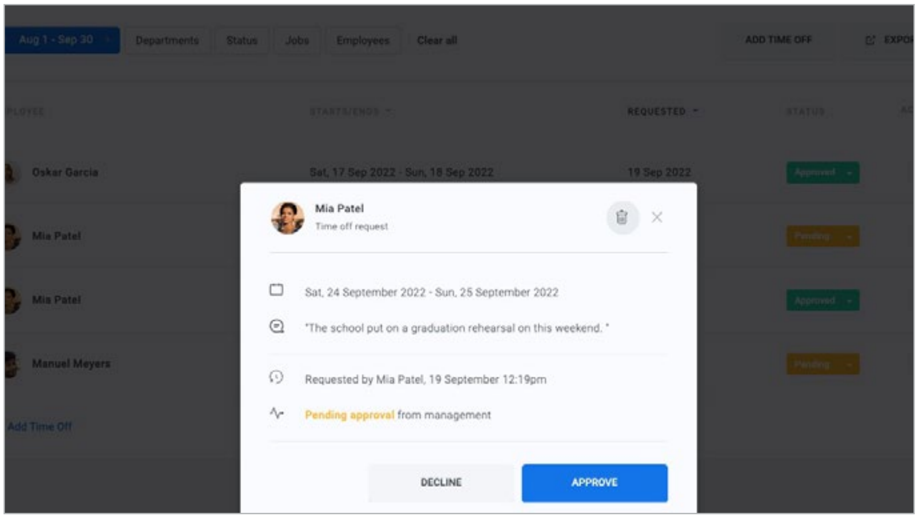
Employees

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

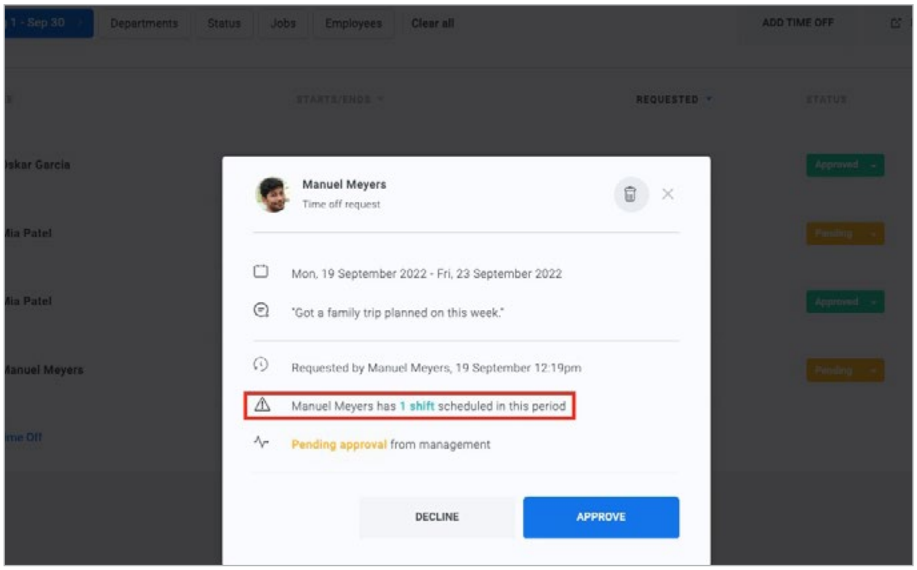


Review and Approve/Decline

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.



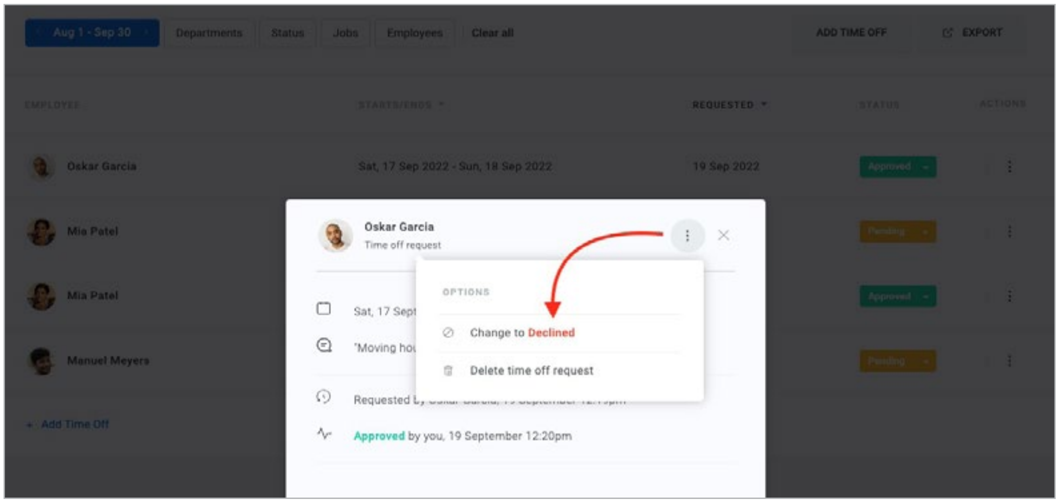
If the employee has a shift published or drafted during this time, you will see a notification on the details page. Click on the **shifts** hyperlink to view the details of that shift. If their time off request is approved, any future shift(s) will be converted into shift opportunities.



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.

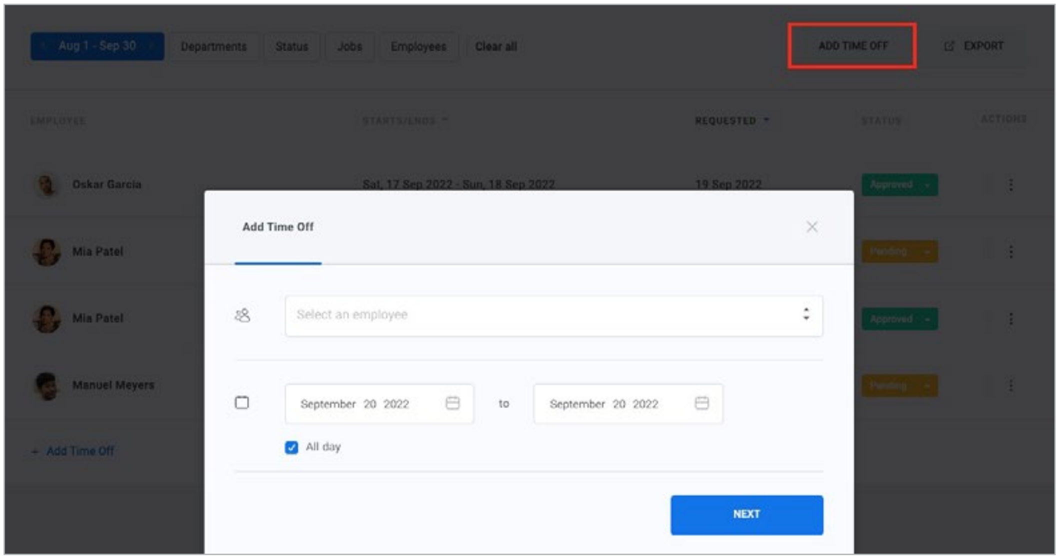


- **From the Time Off Dashboard:** Simply change the status to Declined.

Manual Time Off Creation

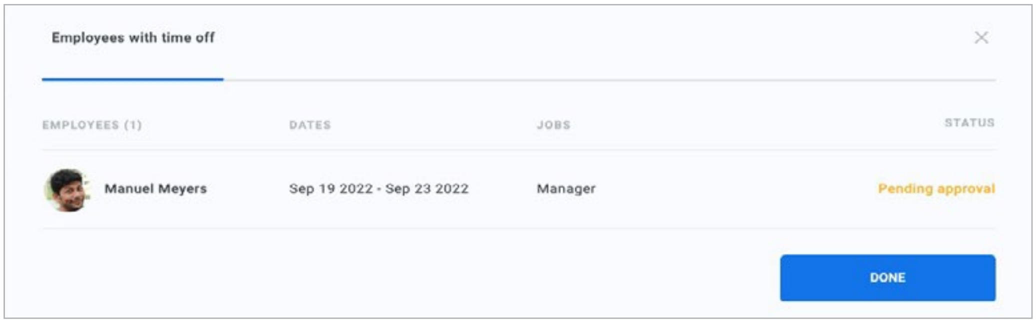
On occasion, you may need to create a time off request on behalf of an employee. For example, this can happen when an employee approaches you last minute with an urgent request, which was not foreseen and cannot be prevented.

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



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.



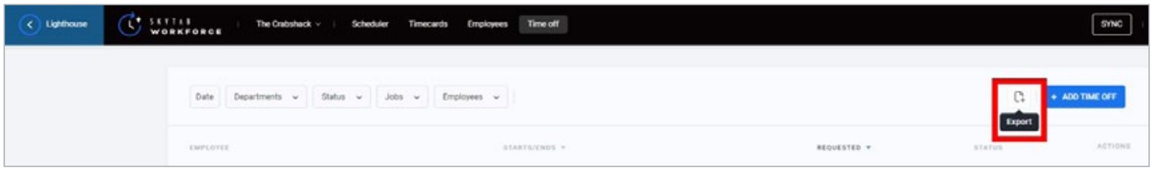
5. Once the request has been reviewed, select **Approve** to finalize. The employee will receive a notification the request has been approved.

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.



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.

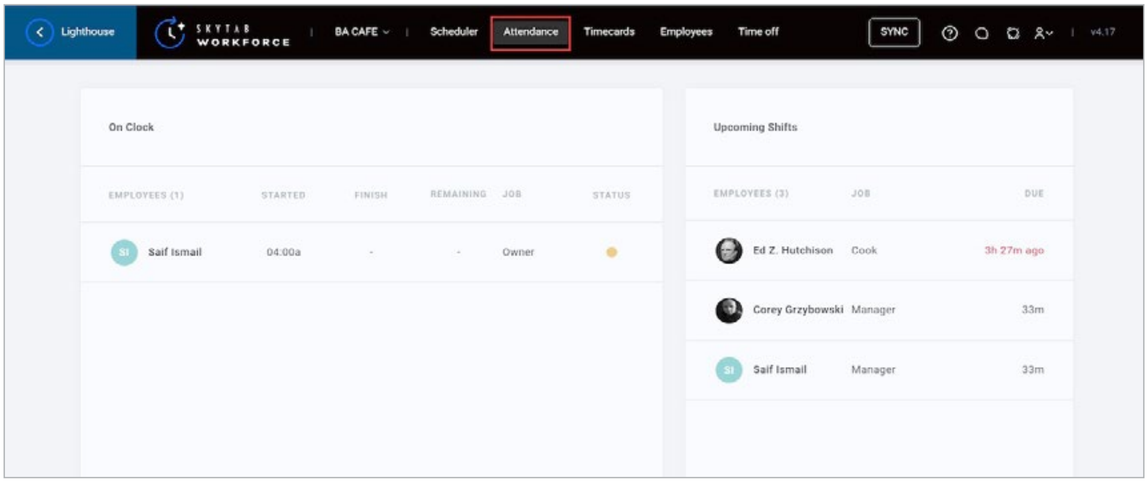
Those with the Administrator permission or managers with the Manage Timecards permission can view this information.

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



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.

Timecard Filters

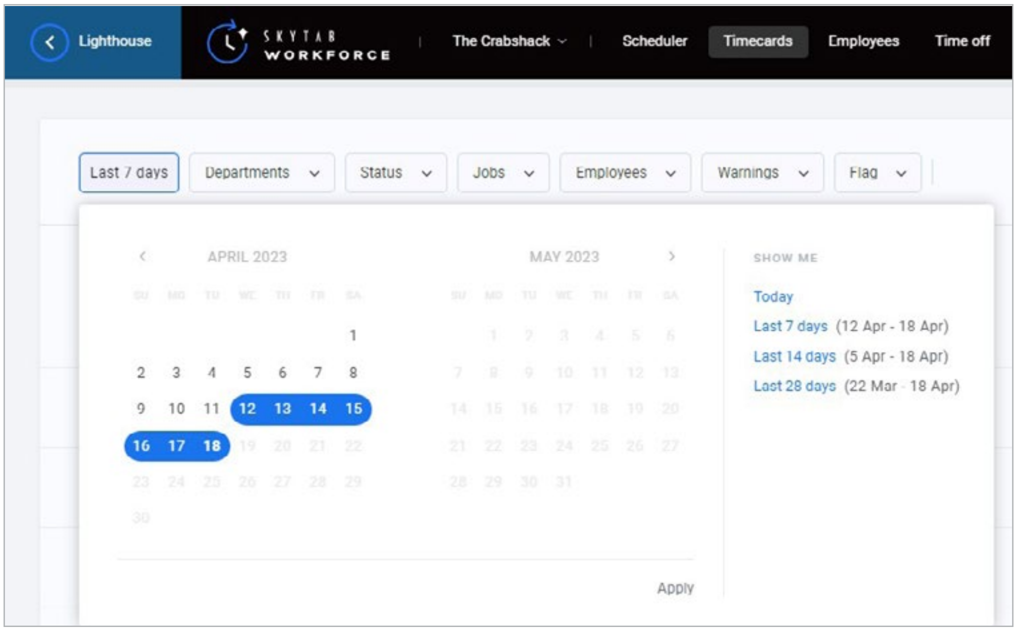
All timecards are available in one place, but you can apply filters to help so that you only see the timecards that you are interested in. Specifically, you can filter using any combination of the following:

- 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.).



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***.**

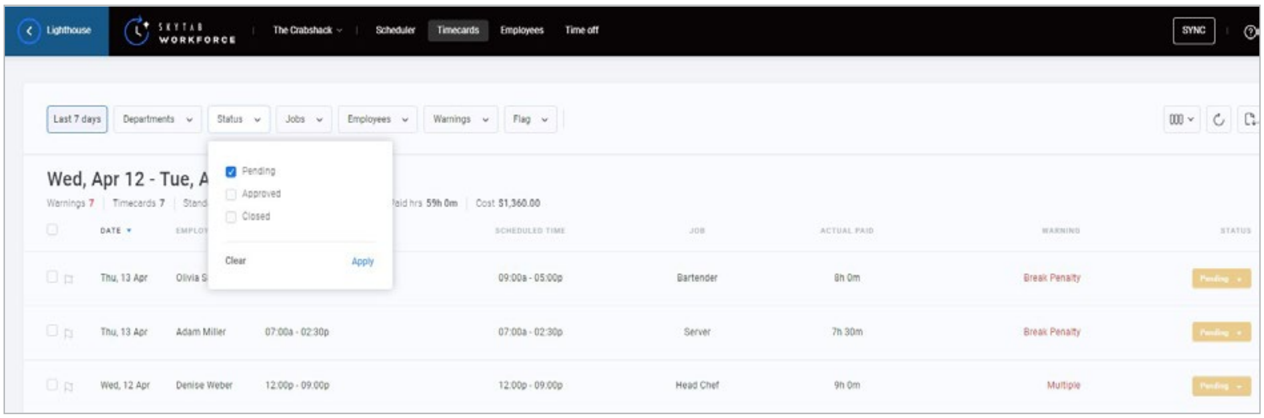
Timecard Status

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:

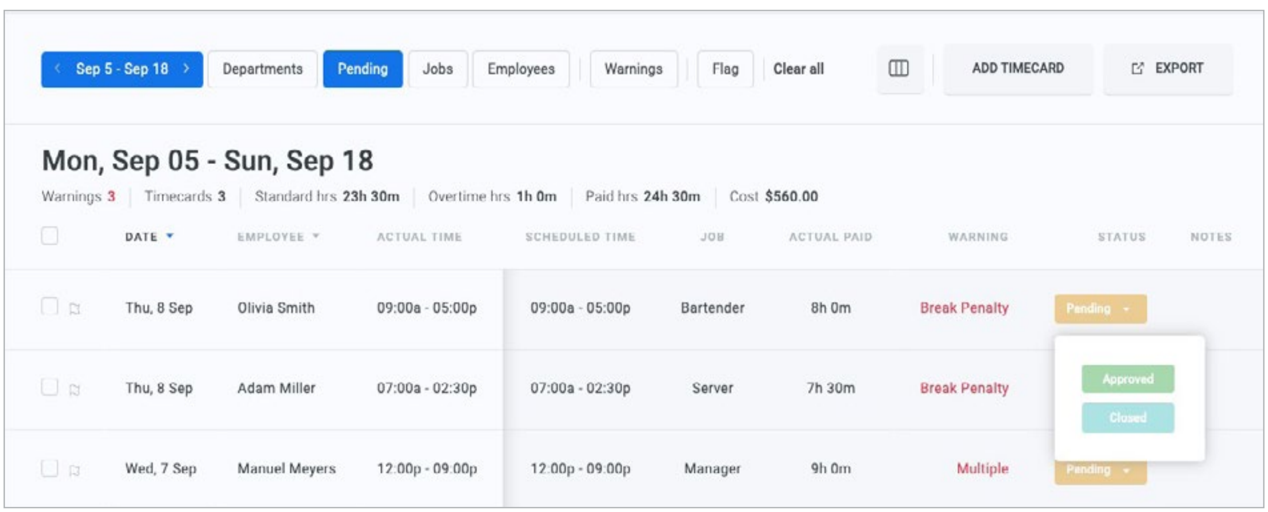
1. **Pending:** Timecard is awaiting processing.
2. **Approved:** Timecard has been approved.
3. **Closed:** Timecard has been processed.

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.*



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.



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.

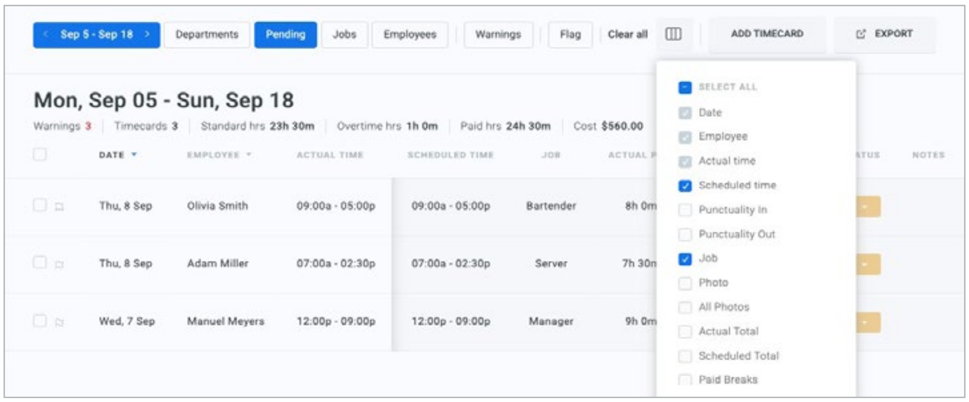
Custom Columns

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.



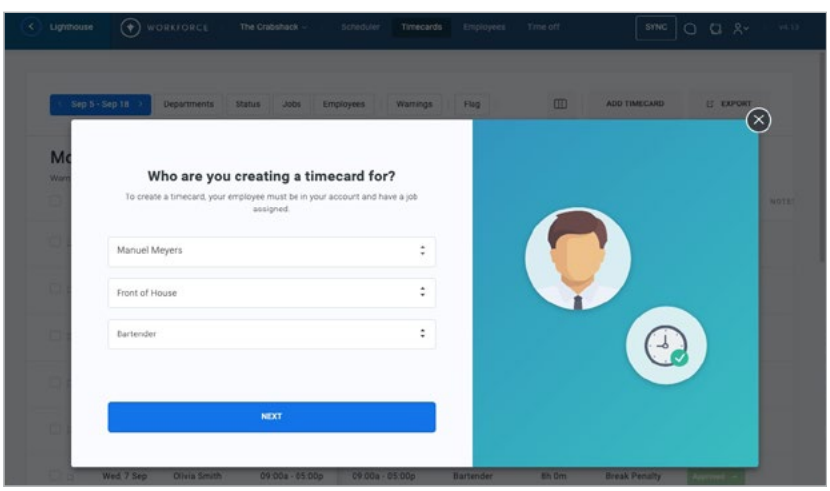
Add a Timecard

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.

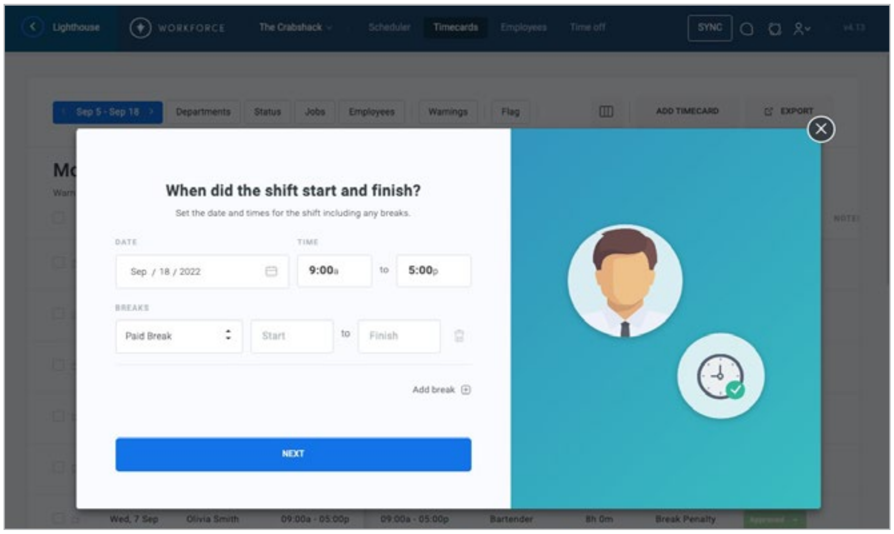
To manually add a timecard:

1. Select **ADD TIMECARD** from within the Timecard Dashboard.

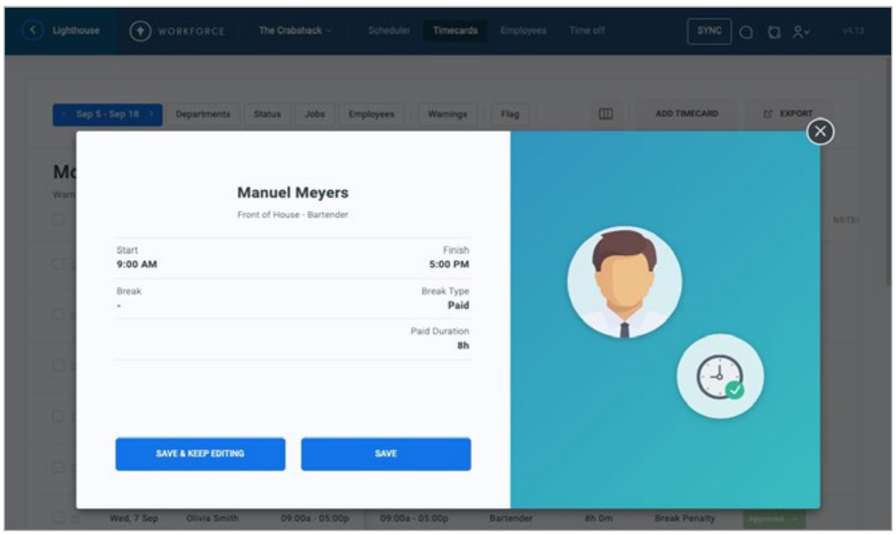
2. Select the employee you are creating the timecard for, then click **NEXT.**



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.**

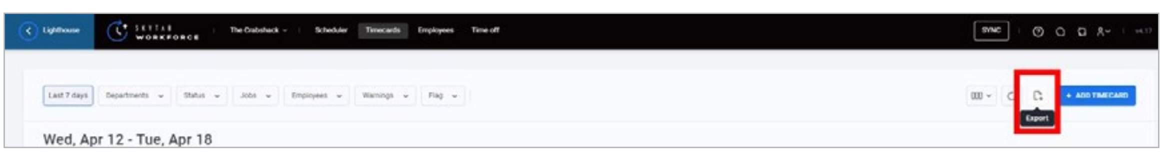


Export Timecards

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.**



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.

Export as CSV

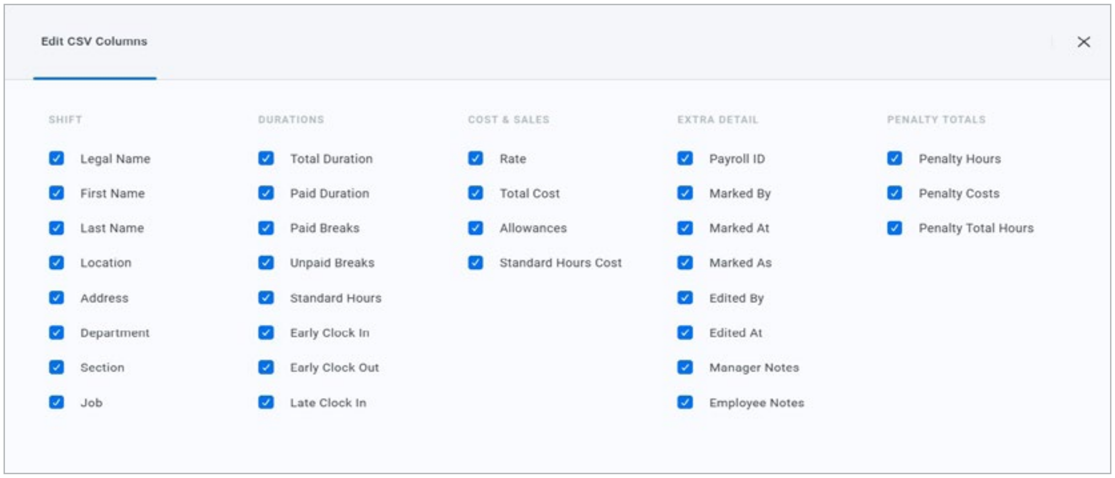
When exporting as a CSV file, four export options are available:

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

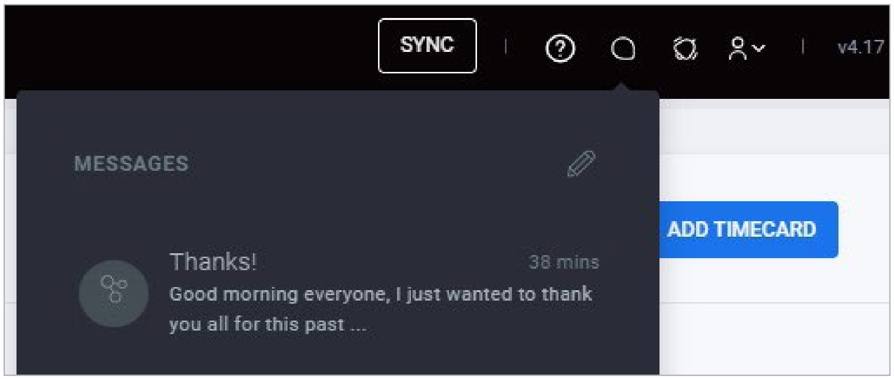
When exporting as a PDF, two printable export options are available:

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

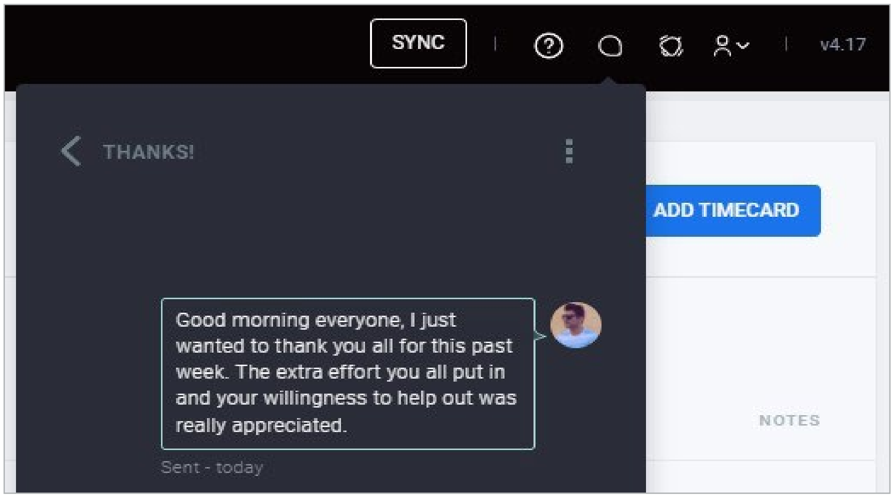
USING THE WORKFORCE IN-APP MESSAGING FEATURE

Workforce provides a messaging function to enable communication with employees.

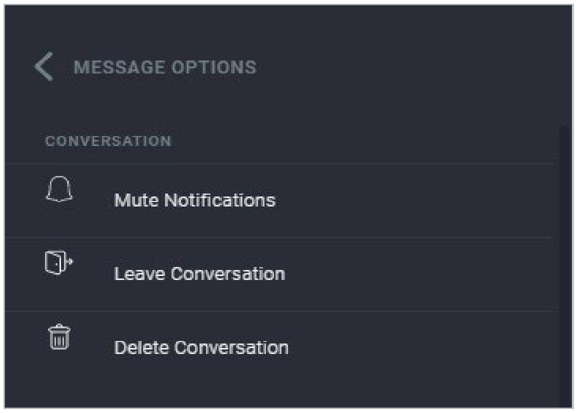
1. The messaging feature can be found by clicking the chat icon in the top-right corner.



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



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

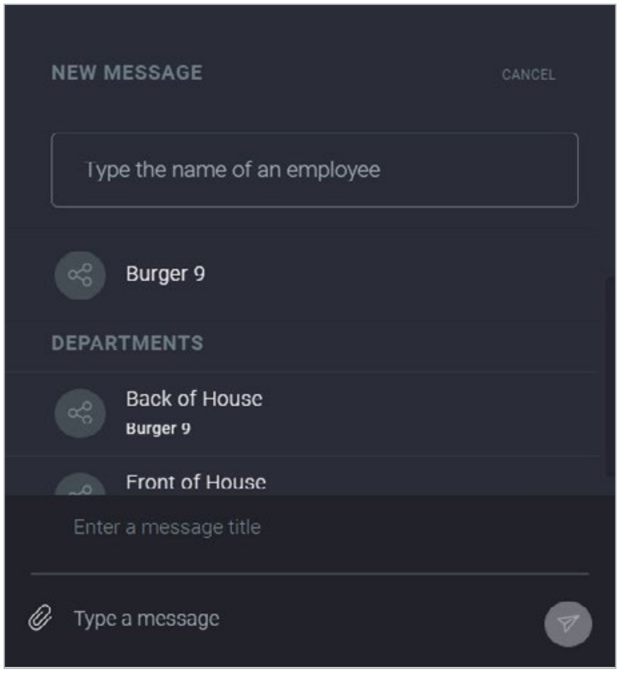
1. To send a message, click on the **pencil icon**.

Messages can be sent:

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

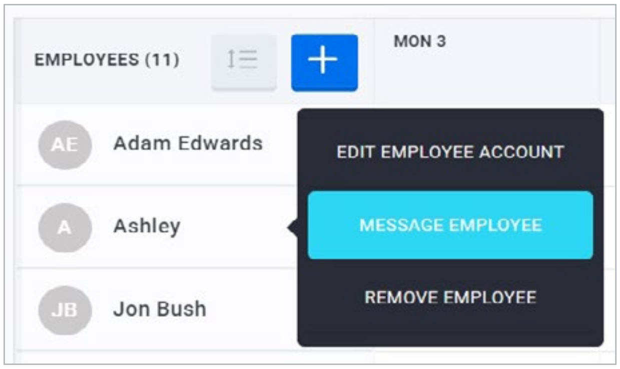
2. Add a message title and enter your message at the bottom of the screen.

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



Scheduler

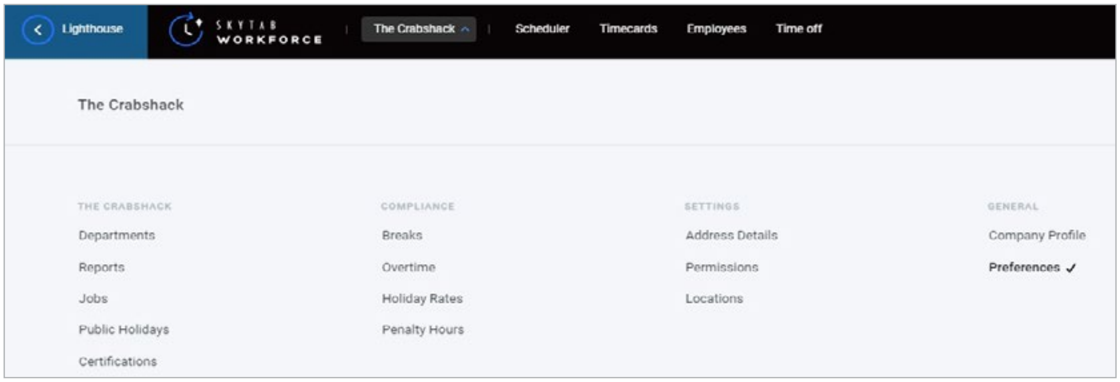
Messages can also be sent from the Scheduler. To send from the Scheduler, click on the **three vertical dots** beside the Employee's name and choose **MESSAGE EMPLOYEE**. This will bring up the messaging module with the name of the employee pre-populated.

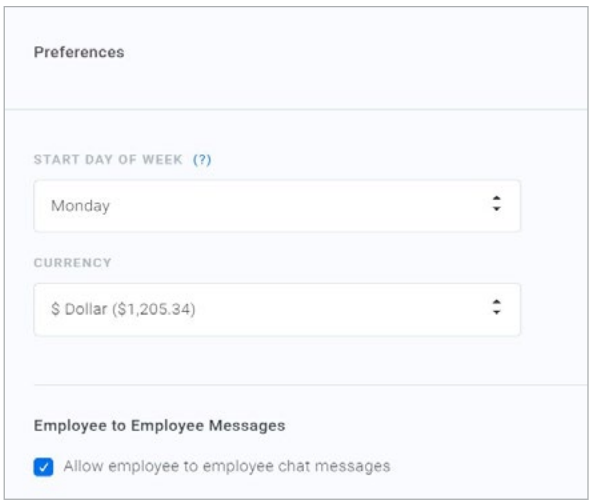


Permissions

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.





SKYTAB WORKFORCE

skytab.com/features/labor-management