

Resource Guide for: Account Holders, Managers & Supervisors

Getting Started

- We're here to help!
- Customize App Settings

Where do my shifts take place?

- When to use Schedules & Job Sites
- Create Schedules

What do my employees do?

• Create Positions

Who are my employees?

- Add Employees or Import Employees
- Sort Employees
- Send Registration Invites
- Approve Pending Employees
- Tag Employees to Positions and Schedules

When do my employees work?

• Create Shift Templates

Scheduling 101

- Schedule Shifts
- Scheduling Shortcuts
- Publishing the Schedule
- How do multiple schedules work?

Advanced Scheduling

- Schedule OpenShifts
- Finding a Replacement for a Shift
- Giving Your Team Schedule Flexibility
- <u>Creating Schedule Templates</u> or <u>Setting up Shifts to Repeat</u>

Views & Filters

- Schedule Views
- Filtering the Schedule

Managing Employee Availability

- Editing an Employee's Availability
- <u>Setting Availability Preferences</u>

Processing Requests

- <u>Submitting Time Off Requests for Employees</u>
- Processing Time Off Requests
- Processing Shift Requests

Reporting

- Exporting Data
- <u>Exporting Timesheets</u>
- Custom Timesheet Export
- Labor History Report

Get Training

- Education Page
- <u>Download Mobile App Resource Guide</u>