

# 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
- Setting Availability Preferences

#### **Processing Requests**

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

#### Reporting

- Exporting Data
- Exporting Timesheets
- Custom Timesheet Export
- Labor History Report

## **Get Training**

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