

# 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
- <u>Approve Pending Employees</u>
- <u>Tag Employees to Positions and Schedules</u>

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

# **Get Training**

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