UNIFOCUS

Optimizing Workforce Performance

Mobile App

Manager's Reference

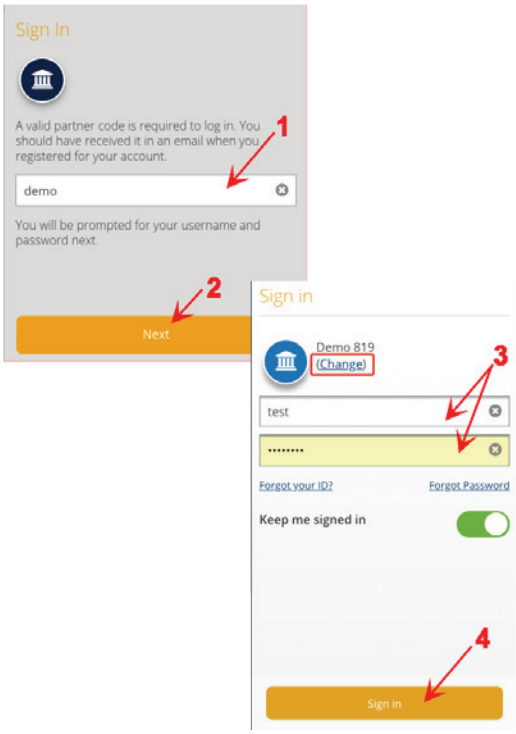
UniFocus, 2455 McIver Lane, Carrollton, TX 75006 USA

UniFocus' **Mobile App** makes communicating with employees simpler than ever. Managers can use the application to keep employees updated on the latest changes to schedules, absences, tardiness, or other schedule conflicts and openings.

Managers also use **Mobile App** to stay informed about **Late Employees**; **Call Ins**; employees who are: **Coming In Soon**, **Late To Clock Out**, **Approaching Break** and **In but Not Scheduled;** as well as **Scheduling** information. Managers can grant or deny **Approvals** for employee requests, access **Messages**, and set **Preferences** for how they wish to receive information.

Note: Mobile App can be viewed on Chrome or Safari browsers, but for optimal performance it should be viewed on Apple or Android phones and tablets.

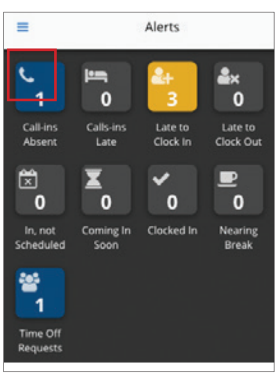
Logging in



The first time you Log In:

1. Enter a **Partner Code** *(see Note below)*.
2. Click **Next.**
3. Enter your **Login ID** and a **Password**.
4. Click **Sign In**.

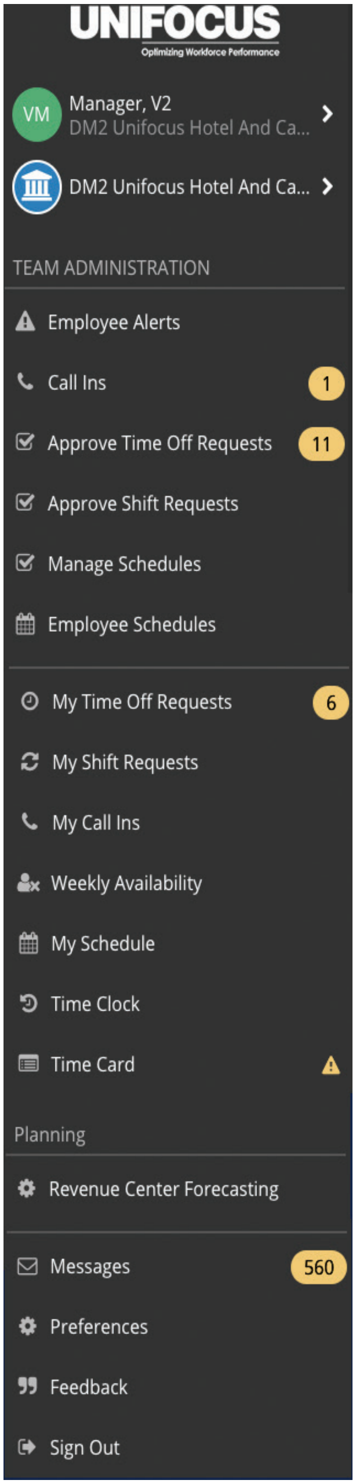
Alerts



After you log in, you will see Alerts which show the current status of your team. Clicking on many of the Alerts offers opportunities to address issues or view details. You can also access the main menu from this screen by clicking on the menu icon.

- **Call-ins** - employees have called in sick or tardy.
- **Call-ins Late** - employees should have punched IN but have not.
- **Late to Clock In** - employees should have punched IN but have not. This alert is displayed according to the criteria you set when configuring the Work Rule.
- **Late to Clock Out** - employees should have punched OUT but are still punched in. This alert is displayed according to the criteria you set when configuring the Work Rule.
- **In, not Scheduled** - an employee(s) has punched in, but is not scheduled to work.
- **Coming In Soon** - employees that should be clocking in the near future.
- **Clocked In** - number of employees who are currently punch in.
- **Nearing Break** - employees whose scheduled break is about to begin.
- **Time Off Requests** - number of employee time off request that require your attention.

Main Menu



From the main menu, click on a menu item to access the features/functions. A gold bubble indicates that you have issues that need to be addressed. The number indicates how many issues there are.

The Team Administration section of the screen assists in managing your team.

The middle section assists in managing your personal tasks.

The Planning section allows you to access and edit the reveue center forecast for their departments.

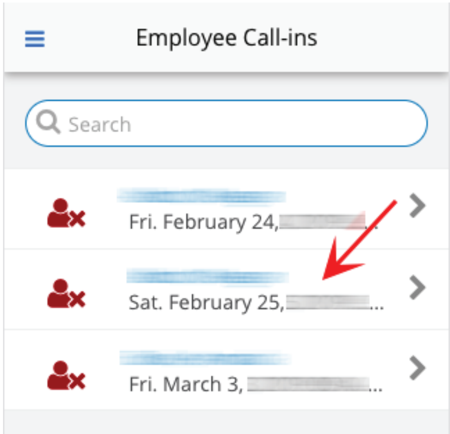
The bottom section is an Admin section.

Options

Many of the manager features employ the same options for addressing issues. In this section, we discuss all the available options and refer to this page throughout the document when indicating available options for each feature.

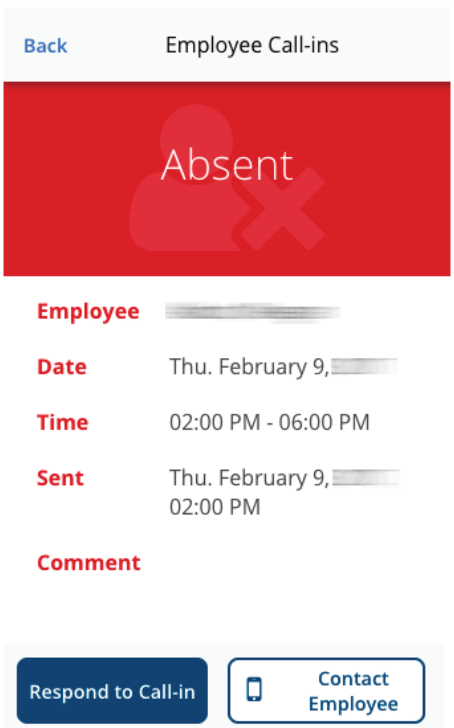
- **Assign/Reassign Shift** - Schedules a specific employee, who you select from a list, to work the shift. The employee will be notified when the schedule change takes place.
  1. Select the employee(s)
  2. Click **Assign/Reassign**.
- **Make Shift Available for Pickup** - Creates an unassigned shift and makes it available for employees to pickup. The employee who accepts the shift first, will get the shift and their schedule will be adjusted accordingly.
  1. Click **Yes** to send the blast.
- **Make Urgent Pickup Request** - Offers the shift to a specific employee(s) who you select from a list. The employee(s) is notified that they have an opportunity to pick up the shift. If sent to multiple employees, the employee who accepts the shift first, will get the shift and their schedule will be adjusted accordingly.
  1. Select the employee(s)
  2. Click **Send**.
- **Choose Recipient** - Allows you to select the recipient to whom you want to award the shift.
  1. Select the employee
  2. Click **Done**.
- **Deny the Request** - Informs the employee that their request has been denied.
- **View Request Details** - Displays details about the shift.
- **View on Calendar** - Displays the request in a Calendar format which gives perspective and allows you to see the whole picture.
- **Message Employee** - Allows you to send a message to the address the employee configured in their Preferences.

Call-Ins



The **Call-Ins** feature is used to notify you that an employee is **Tardy** or **Absent**. You can access the Call-In feature from the Alerts screen and the main menu.

1. Click **Call-ins**.
2. Click on an employee to view the details.



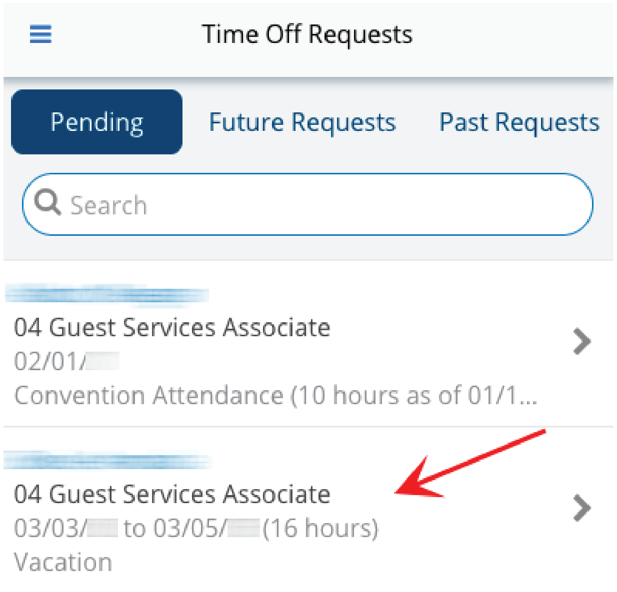
The detail screen offers you the opportunity to **Respond to** the **Call-in** or **Contact** the **Employee**.

Clicking **Respond to Call-in** provides three options for filling the shift:

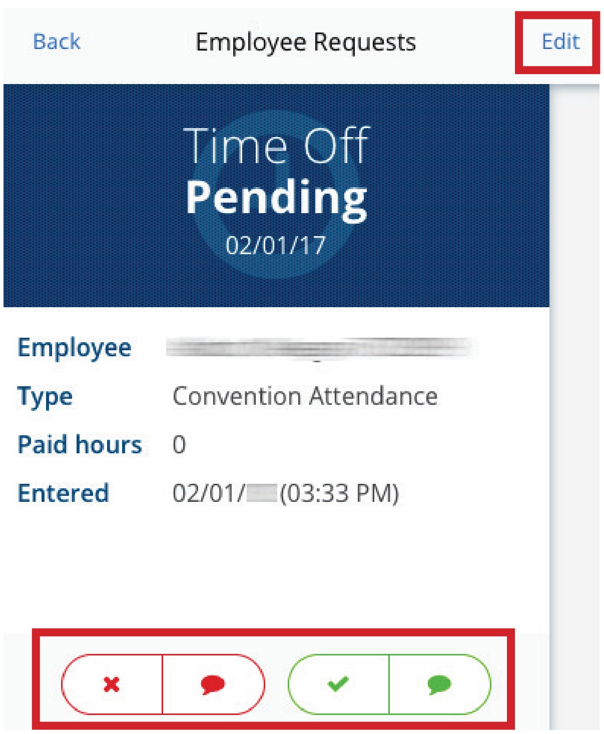
- **Reassign Shift**
- **Make Shift Available for Pickup**
- **Make Urgent Pickup Request**

Refer to page 6 for details about the options.

Approve Time Off Requests

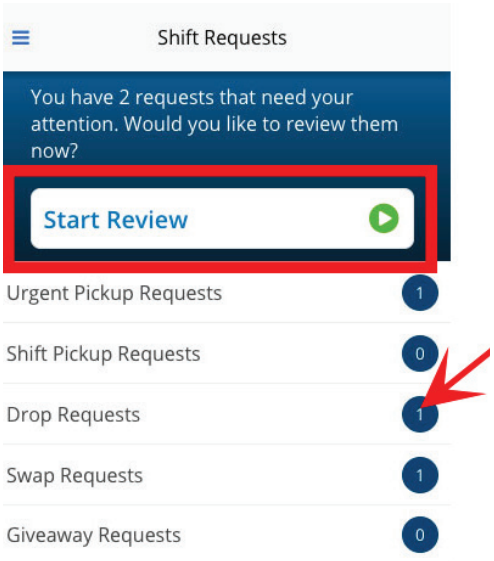


1. Click **Approve Time Off Requests** in the main menu.
   - **Pending** Requests require your attention
   - **Future Requests** have already been approved, but allow you to see what is coming up.
   - **Past Requests** allow you to view a history.
2. Click on an employee's name to view the **Request**.



3. If you need to change or cancel a request, click **Edit**.
4. Click **Deny** (red X), **Deny with Comments** (red bubble), **Approve** (green checkmark) or **Approve with Comments** (green bubble).

Approve Shift Requests

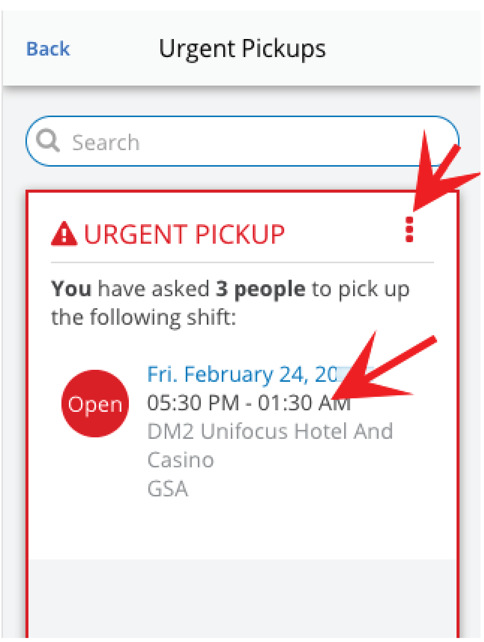


There are two ways to access Shift Requests:

- **Start Review** - opens all requests needing attention which can then be accessed by swiping
- **Direct click** - opens that specific screen only

You can access the Requests in whichever manner you prefer.

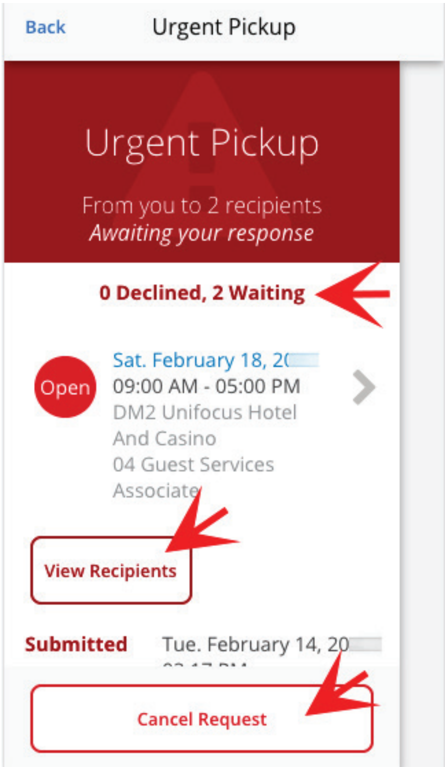
A number inside the blue circle indicates the number of requests you have in each category.



Urgent Pickup Requests

Urgent Pickup Requests are generated when you have an open shift that you offer to a specific employee(s).

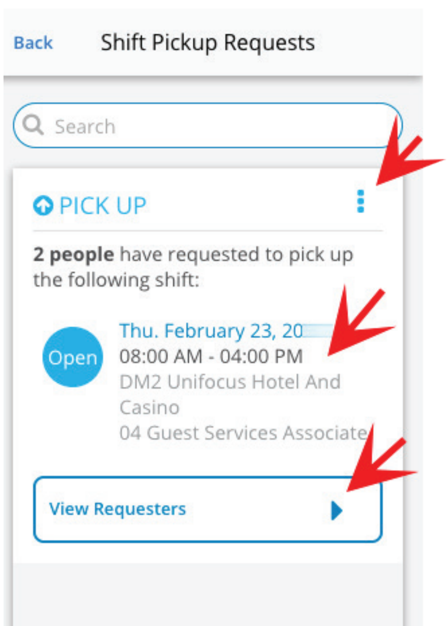
Click on the **red dots icon** or the shift to view details and options.



Check the status of the employee(s) response.

If the employee(s) hasn't responded, click **View Recipients** to see who received the Request. You can send a message the employee(s) from that screen.

You can also **Cancel** the **Request**.



Shift Pickup Requests

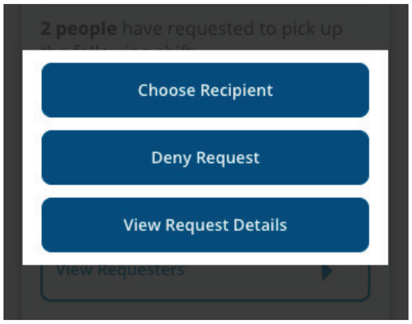
Pickup Requests are generated when at least one employee has indicated that they wish to work an Open Shift.

Options include:

- Clicking on the red dots icon for more options
- Clicking on the shift details for more options
- Clicking on **View Requesters** which lists the employees who have requested the shift

If you choose to View Requesters:

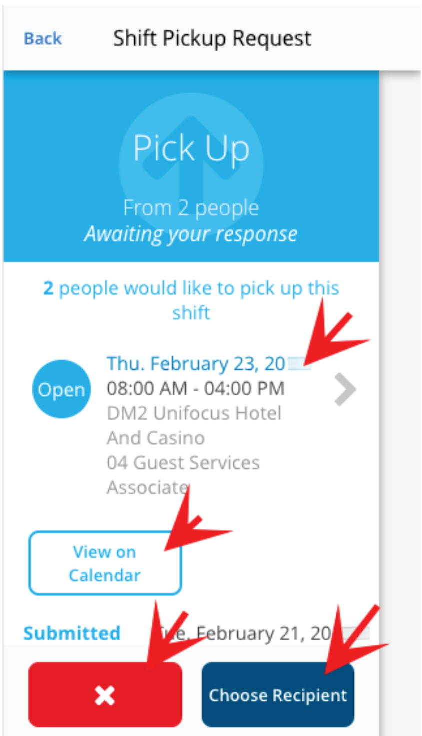
1. Select the employee to assign to the shift.
2. Click **Reassign**.



Clicking the blue dots icon provides three options:

- **Choose Recipient**
- **Deny Request**
- **View Request Details**

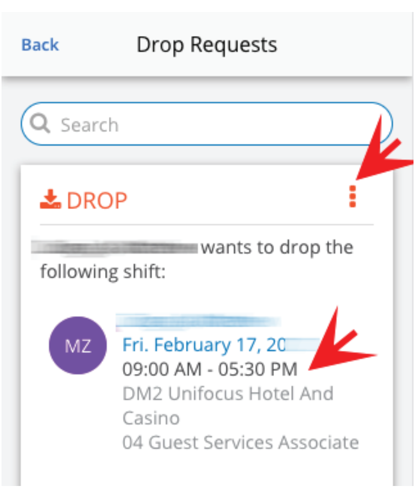
Refer to page 6 for details about the options.



Clicking on the shift provides several options:

- View request details by clicking on the shift
- **View on Calendar**
- **Deny Request**
- **Choose Recipient**

Refer to page 6 for details about the options.



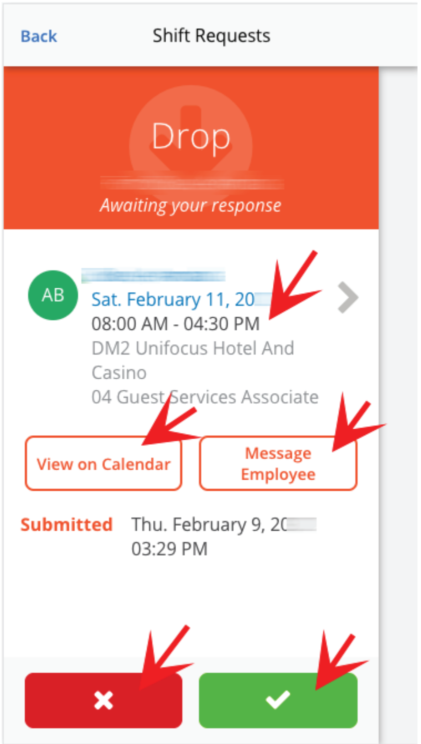
Drop Requests

Drop Requests are generated when an employee asks that they no longer be held responsible for a shift.

Click the red dots icon or on the employee name.

If you click on the red dots icon there are three options:

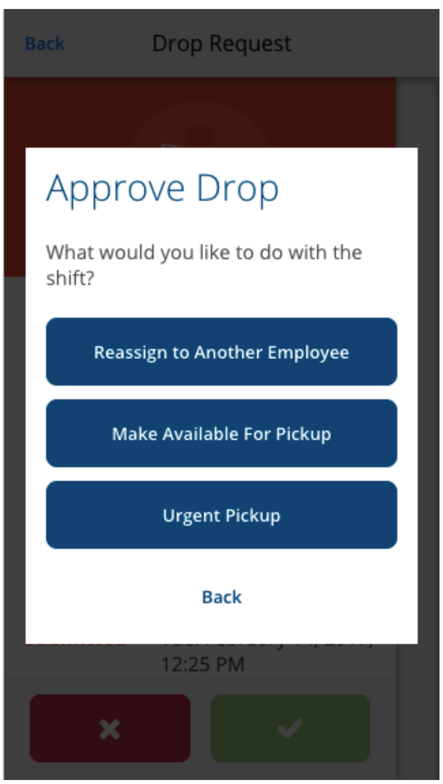
- **Approve Request**
- **Deny Request**
- **View Request Details**



If you click on the emplyee name, the following options are available:

- Click on the employee shift to view request details
- **View on Calendar**
- **Message employee**
- **Deny or Approve**

Refer to page 6 for details about the options.

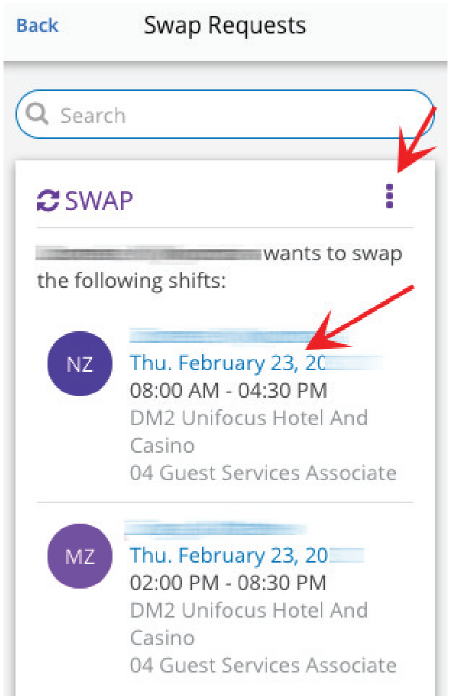


If you click **Approve** three options are displayed:

- **Reassign to Another Employee**
- **Make Available for Pickup**
- **Urgent Pickup**

Refer to page 6 for details about the options.

Note that if any of these actions create a conflict, the system will notify the manager.



Swap Requests

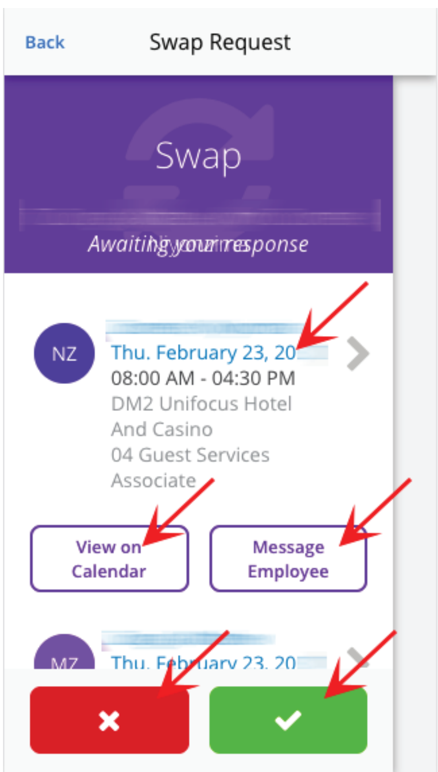
Swap Requests are generated when an employee asks to replace one of their shifts with that of another employee. The other employee will need to approve or deny the swap. You will only receive a notice if the second employee denies the request.

Click the purple dots icon or on the employee name.

If you click on the red dots icon there are three options:

- **Approve Request**
- **Deny Request**
- **View Request details**

Refer to page 6 for details about the options.

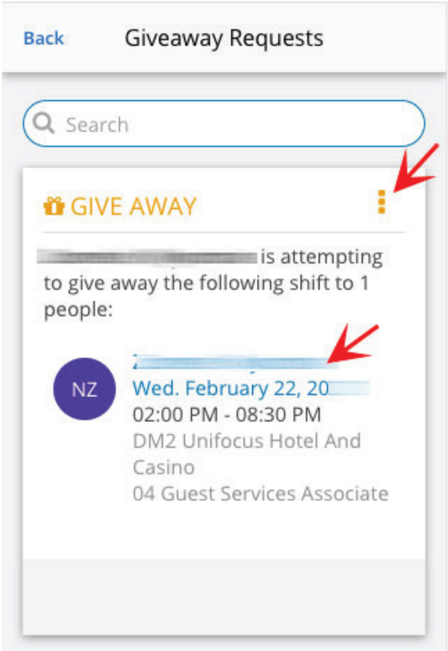


If you click on the emplyee name, the following options are available:

- **View Request Details**
- **View on Calendar**
- **Message Employee**
- **Deny** or **Approve**

Refer to page 6 for details about the options.

If you Approve the request, the schedule is adjusted accordingly.



Giveaway Requests

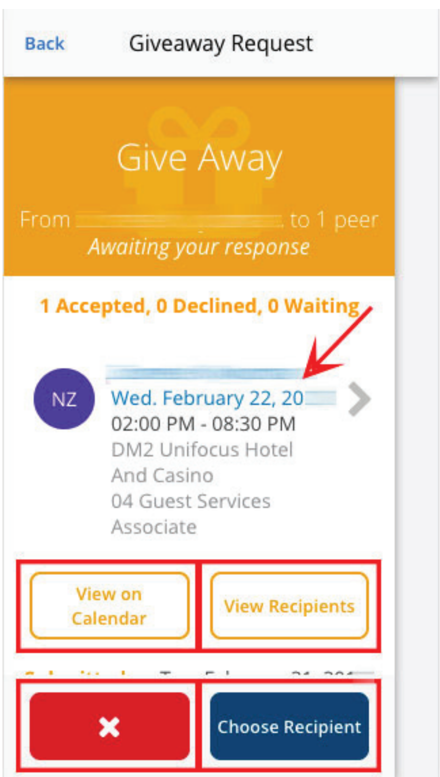
Giveaway Requests are generated when an employee transfers a shift to another employee who also works that job. You will only receive a notice if the second employee denies the request.

Click the gold dots icon or on the employee name.

If you click the gold dots icon there are three options:

- **Choose Recipient**
- **Deny Request**
- **View Request Details**

Refer to page 6 for details about the options.



If you click on the emplyee name, the following options are available:

- Click the **employee shift** to view request details
- **View on Calendar.**
- **View Recipients.**
- **Deny the request.**
- **Choose Recipient**.

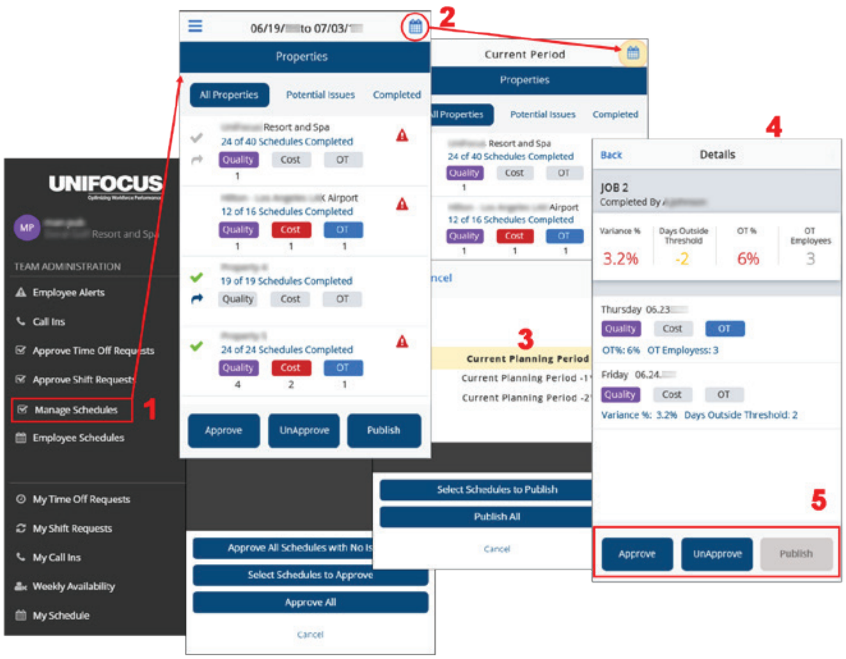
Refer to page 6 for details about the options.

Manage Schedules

The Manage Schedules option opens the Schedule Approvals screen. This screen is used for writing, approving, and publishing schedules. There are three separate permissions to address the three types of tasks that users can perform on the Schedule Approvals screens:

- **Write schedules and mark schedules as complete**—Users will see the Mark as Complete button if they have access to the Scheduling screens and have Labor Structure permissions to jobs requiring approval.
- **Approve/unapprove schedules**—Users with Labor Structure permissions to approve schedules will see the Approve and UnApprove buttons.
- **Publish schedules**—Users with this permission will see the Publish button. They are authorized to publish schedules.

From the Team Administration section of the main menu, select Manage Schedules.



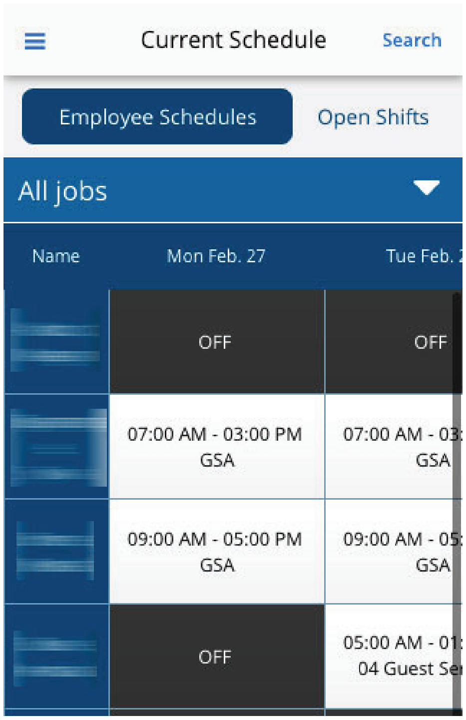
To Manage Schedules:

1. From the Team Administration section of the main menu, select **Manage Schedules**.
2. Click the calendar icon.
3. Select a planning period.
4. Click on a job to view scheduling details.
5. Select **Approve, UnApprove or Publish,** as appropriate.

All users can do the following:

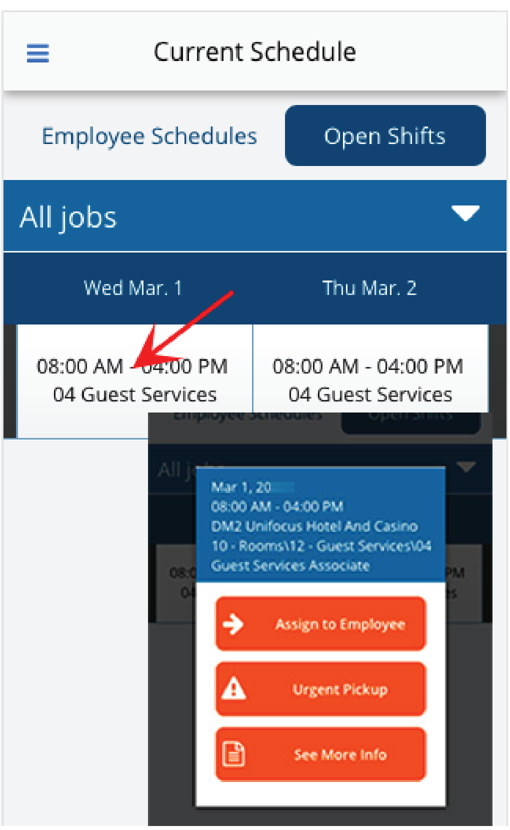
- Tap a labor structure level to drill down to lower levels.
- View a variety of scheduling information that will help to determine whether schedules should be approved and published.

Employee Schedules



The Employee Schedules screen allows you to view employee schedules in a calendar format.

Clicking on a shift allows you to see more details.



Open Shifts

Open Shifts displays shifts that have not been assigned to an employee.

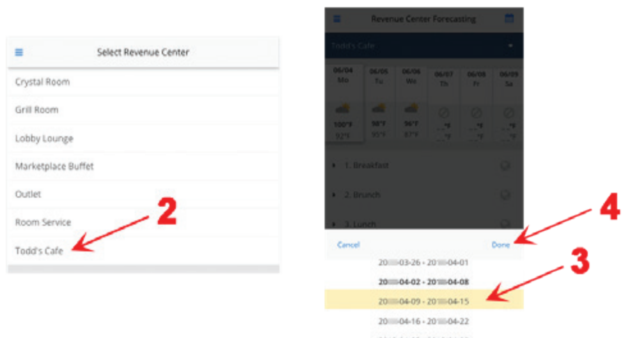
Clicking on a shift displays three options:

- **Assign to Employee**
- **Urgent Pickup**
- **See More Info**

Refer to page 6 for details about the options.

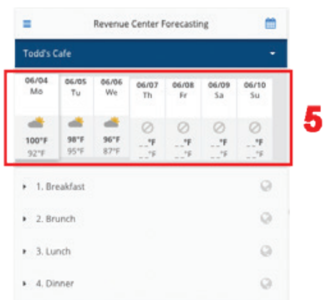
Revenue Center Planning

Revenue Center Planning provides the manager with the ability to access and edit the reveue center forecast for their departments.

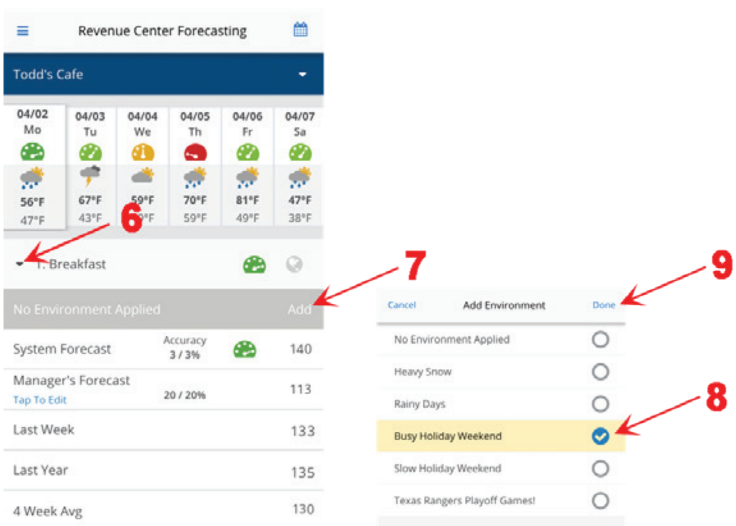


To view Revenue Centers:

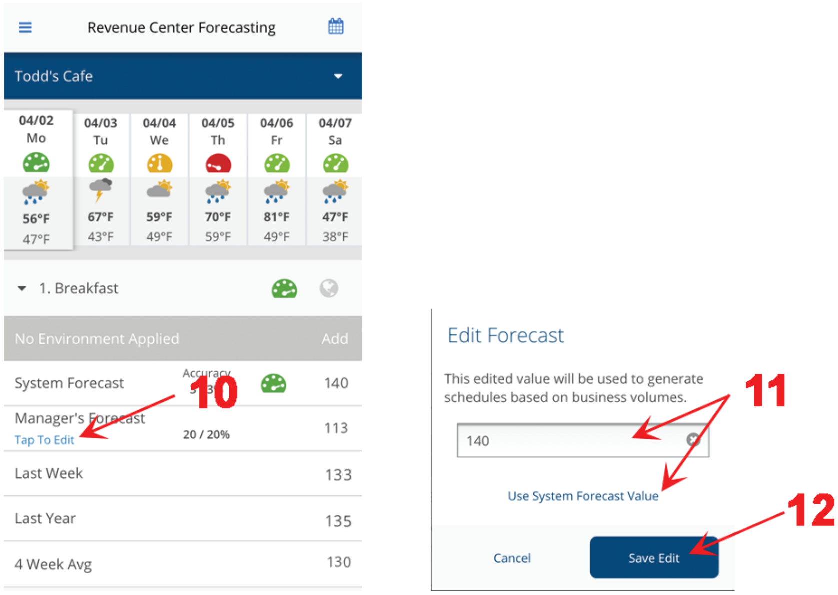
1. Click **Revenue Center Forecasting** in the main menu.
2. Choose a **Revenue Center**.
3. Select a **planning period**.
4. Click **Done**.



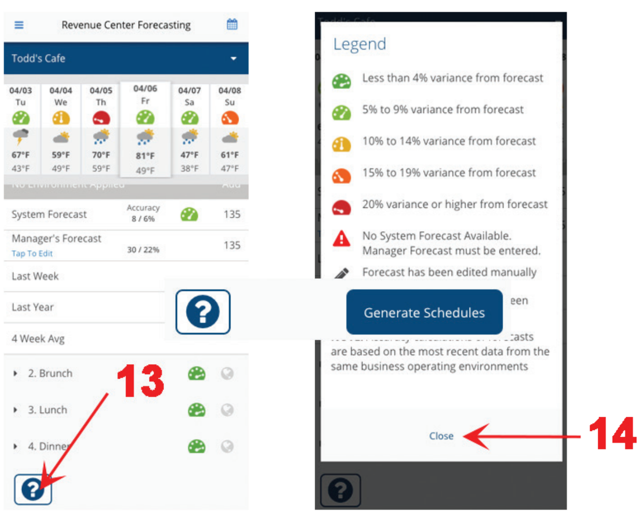
5. Scroll horizontally to select different days for which to view KBIs, forecasts and statistics.



6. Expand KBI details view.
7. Click **Add** to apply, change, or remove forecast environments.
8. Select the appropriate **Environment**.
9. Click **Done**.



10. Tap the **link** to Add/Edit a Manager Forecast to override the System Forecast.
11. Enter the **appropriate value** or click **Use System Forecast Value**.
12. Click **Save Edit**.

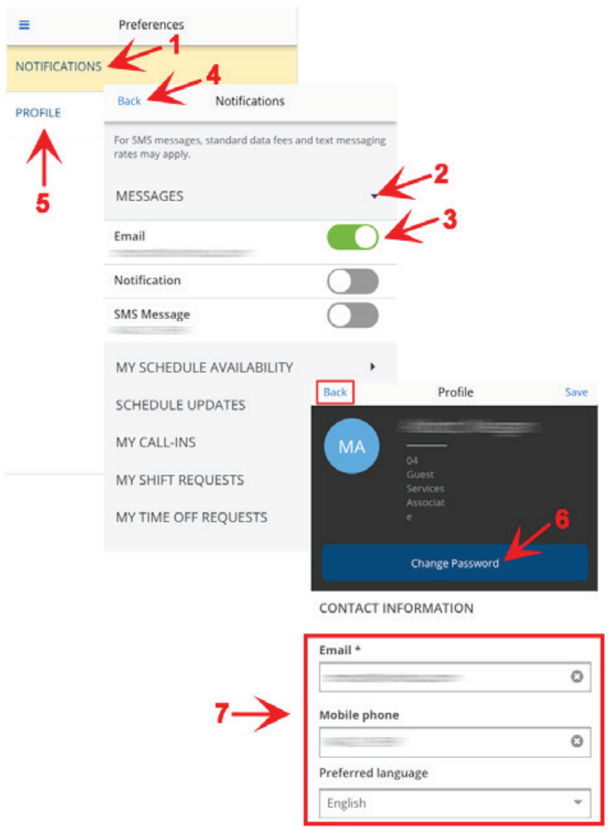


13. Click the **? icon** to view the legend for the different variance icons.
14. Click **Close**.

Preferences

The Preferences screen features controls for you to update your notification settings and user profile. In Notifications, you can forward schedules and messages to SMS and/or email. In Profile settings, you can change your password, email, and home and mobile phone numbers.

Note: All team members should set preferences first to ensure that they are able to view and receive needed messages and information. Note that standard SMS/texting fees apply.

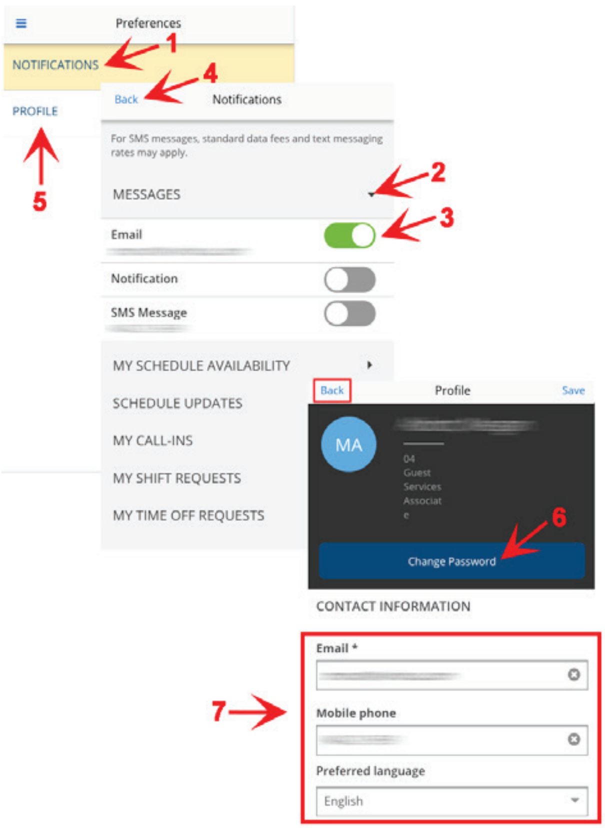


Configuring Preferences

There are two types of Preferences:

- **Notifications** - sets your notification preferences
- **Profile** - allows you to Change your Password and Contact Information.

1. Click on **Notifications**.
2. Click on the arrow next to the type of notification you wish to view.
3. Click on the **buttons** to turn Notifications on/off.
4. Click **Back**.
5. Select **Profile**.
6. Select **Change Password** if desired and enter the appropriate information.
7. Enter your new **Contact Information** if desired.
8. Click **Back**.



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