



Manager's Reference

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niFocus' **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



BackEmployee Call-insLabel ConstantAbsentEmployeeImage: Constant of the constan

Respond to Call-in		Contact Employee
		Employee

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

≡	Time Off Requests	
Pending	Future Requests Past Requ	uests
Q Search		\bigcirc
04 Guest Serv 02/01/ Convention A	vices Associate ttendance (10 hours as of 01/1	>
04 Guest Serv 03/03/ to 0 Vacation	vices Associate 3/05/ (16 hours)	>
Back	Employee Requests	Edit
	Time Off Pending 02/01/17	
Employee Type Paid hours Entered	Convention Attendance 0 02/01/ (03:33 PM)	
×	•	

- 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**.
- Click Deny (red X), Deny with Comments (red bubble), Approve (green checkmark) or Approve with Comments (green bubble).



Approve Shift Requests

=	Shift Requests	
You have 2 attention. now?	2 requests that need yo Would you like to review	ur w them
Start R	eview	0
Urgent Pickup	p Requests	1
Shift Pickup R	Requests	0
Drop Reques	ts	6
Swap Reques	its	1
Giveaway Rec	quests	0

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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.



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Q Sea	Shift Pickup Requests
	ск ир
2 peo the fo	ple have requested to pick up Ilowing shift:
Оре	Thu. February 23, 20 08:00 AM - 04:00 PM DM2 Unifocus Hotel And Casino
Viev	04 Guest Services Associate

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





 Back
 Drop Request

 Approve Drop

 What would you like to do with the shift?

 Reassign to Another Employee

 Make Available For Pickup

 Urgent Pickup

 Back

 12:25 PM

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

	Current Schedule	Search
Empl	oyee Schedules	Open Shifts
All jobs		-
Name	Mon Feb. 27	Tue Feb. 2
	OFF	OFF
	07:00 AM - 03:00 PM GSA	07:00 AM - 03: GSA
	09:00 AM - 05:00 PM GSA	09:00 AM - 05: GSA
=	OFF	05:00 AM - 01: 04 Guest Sei

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 horizantally to select different days for which to view KBIs, forecasts and statistics.
- 6. Expand KBI details view.
- Click Add to apply, change, or remove forecast environments.
- 8. Select the appropriate **Environment**.
- 9. Click Done.



≡	Revenue Center Forecasting				
Todd's Cafe					-
04/02 Mo ∰ 56°F 47°F	04/03 Tu 20 7 67°F 43°F	04/04 We ⓓ️ ⓓ́ 59°F 49°F	04/05 Th 	04/06 Fr 2020 51°F 49°F	04/07 Sa ??? ??? 47°F 38°F
🔹 1. Breakfast 💮					Ø
System F	orecast	A	st 3	@	140
Manager Tap To Edit	r's Foreca	ist 2	20 / 20%		113
Last Week			133		
Last Year				135	
4 Week Avg				130	



- 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 Source Edit.
- 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.





=	Preferences		
NOTIFICATI			
ROFILE	Back Notifications		
1	For SMS messages, standard data fees an rates may apply.	id text messaging	
5	MESSAGES		
	Email		
	Notification		
	SMS Message		
	MY SCHEDULE AVAILABILITY	b.	
	SCHEDULE UPDATES	Back Profile	Save
	MY CALL-INS	MA -	
	MY SHIFT REQUESTS	Guest Services	
	MY TIME OFF REQUESTS	Associat e	
		Change Password	
		CONTACT INFORMATION	
		Email *	
			٥
	7→	Mobile phone	
			٥
		Preferred language	
		Examples	-

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- 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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