The ShiftNote Scheduler User Guide

Getting Started

The Setup Wizard

The first time you access the ShiftNote Scheduling Tools, you will be asked to go through a series of setup steps via the setup wizard. You can go back to edit this information in the Settings section of the Schedules area at any time.

Setting up Day Parts

Day Parts are a way to section the day so it is easier to schedule your team (e.g Lunch/Dinner or AM/PM.) You need to have a minimum of one Day Part defined so that you can schedule employees during that time frame. It is suggested that you do not have more than 3 day parts in order to keep the schedules to a manageable size.

- Go to Schedules > Settings > Manage Day Parts
- Type in a Day Part name, choose a start and end time, and click add
- To edit a Day Part, click on the Day Part name to the left, and edit the information to the right

Setting up Areas

Areas are a way to organize your employees into groups so that when you create a schedule, you can pull in all the employees that belong to that group. For example, if you wanted to create a schedule for the Front of House, you would create an area FoH. Then when you create positions, you can choose which area(s) that position belongs to. A host, server, and busser might all be a part of the FoH area. Employees can belong to more than one area.

- Go to Schedules > Settings > Manage Areas
- Type in an Area name and click add
- To edit an Area, click on the Area name to the left, and edit the information to the right

Adding Positions

Positions are titles for job responsibilities in your business. Employees can be assigned more than one position.

- Go to Schedules > Settings > Manage Positions
- Type in a Position name, choose a default wage if desired, and select which area(s) the Position belongs to, and click add
- To edit a Position, click on the Position name to the left, and edit the information to the right

Managing Employees

Add Employees

The final setup step before you can create a schedule is adding employees. You must have at least one employee in your account with an assigned position in order to create a schedule. If you would like to add multiple employees at once, please contact support@shiftnote.com and we will coordinate an import process with you. If you are adding Managers that you would like to have access to the rest of ShiftNote, use the Admin Area to add the users.

- Go to Schedules > Employees > Add Employee
- Enter the first and last name of the new employee and their email address. If you do not add in the email address, the employee will not get notified that they have been added, and they will not be able to log in to ShiftNote. You can add an email address at a later date as well.
- Click Save. Once the employee has been added, you will be taken to their account screen to add more information, assign positions and set availability.

Assign Positions

An employee must have at least one position assigned to them in order to be added to a schedule.

- Go to Schedules > Employees > Click the Edit link next to the employee
- Click the Positions tab and choose a position in the drop down menu, choose the desired wage and an order of importance. The order of importance will determine which positions to schedule an employee for first when using the auto scheduling feature. 0 is the highest, then 1, 2, and so on.

Set Availability

Currently only management can set employee availability. If availability is not set, the employee will be marked as available for all shifts by default.

- Go to Schedules > Employees > Click the Edit link next to the employee
- Click the Availability tab and use the time and day fields to set availability. You can also click and drag to set availability blocks, or double click the day header to select the entire day.

Creating a Schedule

- Go to Schedules > Create New Schedule
- Name your schedule, choose a date range, and select a template if you wish to use one.
- Decide which area(s) you will be scheduling, and select which manager(s) will be notified for any shift changes.
- Enter any optional stats such as projected sales or labor hours and hit Create Schedule.
- The schedule will stay in draft mode, as in no employees will be able to see it, until you choose to publish it.

Assign Shifts

- To add shifts to your schedule, click into a day part block for the employee you would like to give a shift. Choose the position, in and out times, and any additional attributes, hit Add.
- Clicking and holding will highlight all other spots in which you could possibly move the shift. If you are using a template, you can drag and drop the predetermined shifts into appropriate spots.
- If an employee is not available to work, the day part block will be marked with grey diagonal lines. You can override this by hitting Ctrl and clicking the day part block to add a shift.
- If an employee is already scheduled on another schedule for the same time, the day part block will be shaded grey.

Publish a Schedule

- Once you have completed creating a schedule, click the green Publish Schedule button
- You can choose whether you would like to notify employees that the new schedule has been posted, and also to hide the end/out times from employees so that they only see when they are scheduled to come in, not when they are scheduled to leave.

Print a Schedule

- Locate the schedule you would like to print, click the PDF Quick Link next to the schedule. This generates a more condensed, printer friendly version of the schedule.

Duplicate a Schedule

- Locate the schedule you would like to duplicate and click the duplicate link in the quick links section.
- Name the schedule and choose the start date, click duplicate.
- If there are employees that have availability that has changed or have approved time off requests during the new schedule time period that conflict with a shift they were scheduled during the original schedule, the shifts will be moved to the top of the schedule so that you can re-assign them to someone else.

Using Templates

Create a Template

Templates can be used to setup predetermined shifts so that it is easier to create schedules. You can choose how many of each shift is needed for a given day. You can create a template from scratch, or you can setup a schedule and then save it as a template.

- To create a template from scratch go to Schedules > Templates > Create Template
- Then save a name, schedule length, and area(s) to schedule
- Last, add in your preset shifts

Additional Settings

Set Holiday Pay

Define what holidays your employees will get paid extra for working, and set their holiday pay wages.

- Go to Schedules > Settings > Set Holiday
- A the holiday name and date, indicated if the location is close for business, and select a percent or dollar amount to show how much more than their hourly rate and employee will earn if they are scheduled to work during that holiday
- Click Add

Set Overtime

Define what holidays your employees will get paid extra for working, and set their holiday pay wages.

- Go to Schedules > Settings > Set Overtime
- Choose from the drop down how many hours need to be worked before overtime starts to occur, set an optional wage increase as a percent or dollar amount, and hit save

Scheduling Tool Access

You can decide which type of user(s) in ShiftNote will have access to the scheduling tools. If they do not have access, they will not be able to add, edit, or delete schedules, or see any of the reports or settings.

- Go to Schedules > Settings
- Under the Permissions heading, select which type of user(s) will have access to the scheduling tools.

Reporting

Creating a Daily Roster

- Go to Schedules > Reports
- Choose Roster as the report type, then use the report criteria options to decide what to show on your roster, including the date range, and hit generate report.
- To print the Roster, click the View PDF button and print.

Shift Change & Time Off Request Reports

You can track how often your employees are trading shifts or requesting time off by running a report.

- Go to Schedules > Reports
- Choose either Shift Change or Time Off Request as the report type, then use the report criteria options to decide what to show on your report, including the date range, and hit generate report.

Shift Trading

Releasing a Shift for Pickup

- Go to Board > My Schedules tab
- Click the release shift link next to the shift you would like to release for pickup. List the reason you would like to release the shift and click release shift.
- An employee is still responsible to work a shift until another employee picks up the shift, and a manager approves the swap.

Creating a House Shift

In the occasion that a shift needs to be added to a schedule that has already been published, but you do not wish to assign it to a particular employee; you can create a house shift. Creating this shift will send a notification to all employees available to work the new shift.

- Go to Schedules
- Click to edit the published schedule you would like to add the house shift to. In the top link set next to the Publish button, click the Create House Shift link and enter the requirements of the shift.

Picking a Shift Up

- Go to Board > Open Shifts tab
- Locate the shift you wish to pickup, and click the green Pickup Shift button
- You will not be scheduled to work this shift until a manager approves the change

Approving a Shift Trade

- Go to Board > Pending Requests tab
- Select the approve or deny button next to each pending shift request
- If the shift trade is approved, the associated schedule will automatically be updated and the involved employees will be notified.
- Only the managers that were selected to be notified for shift changes on the associated schedule will see the pending requests

Time Off Requests

Request Time Off

- Go to Board > Request Time Off
- Select the day(s) and times you need off, and then list your reason for needing the time off. Hit the submit button.
- You are not guaranteed this time off until the request has been approved by a manager

Approve a Time Off Request

- Go to Board > Pending Requests tab
- Select the approve or deny button next to each time off request
- If the time off request is approved, the associated schedule will automatically be updated as will any new schedules that are created that include the time off request date(s).
- To see what other employees have approved time off requests during the same time period, click the date link under the Time Off Needed header.

Notifications

Set Email and Text Alerts

- Go to Board > Employee Info > Notifications tab
- Check the notifications you wish to receive and by which method, text, email or both
    1. In order to receive text alerts, you must enter your mobile number and carrier
    2. Depending on your carrier plan, they might charge you for incoming text messages

Set Email and Text Alerts for Employees

Employees have the ability to set their own notification preferences. By default, they will receive all notifications via email. If you wish, you can set the notification settings for an employee.

- Go to Schedules > Employees > Edit link next to an employee > Notifications tab
- Check the notifications you want the employee to receive and by which method, text, email or both
    1. In order to receive text alerts, you must enter their mobile number and carrier
    2. Depending on their carrier plan, they might get charged for incoming text messages