



TimeSimplicity™

Manager Guide



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TimeSimplicity – employee scheduling simplified.

Scheduling your employees doesn't have to be a weekly guessing game. TimeSimplicity's intuitive interface helps organize and bring into focus your unique scheduling challenges. TimeSimplicity's feature set will streamline the entire scheduling process to save you time, save your business money, and ultimately improve your employees' job satisfaction.

Login

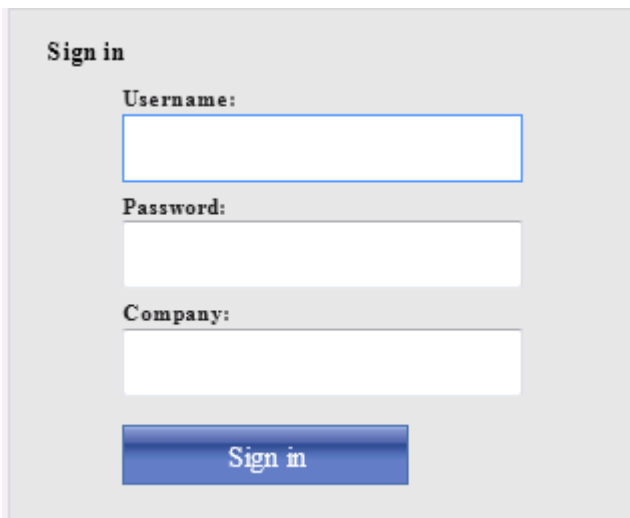
In order to successfully login into the system you are going to need the following information:

[Published URL:](#)

[Username:](#) Used to identify who is logging into the system. The default username is your TimeSimplicity employee ID.

[Password:](#) Used to authenticate you against the username provided. The default password used in the system will also be your employee id. **If your employee id is less than 6 characters you will need to add leading zeros to pad this value out to 6 characters.** For example, if your id is 1234 your password in this case would be 001234. *The username and password can be changed once you have successfully logged in using the System or Settings menu option.*

[Company Code:](#) Used to identify your company.



The image shows a login form titled "Sign in" on a light gray background. It contains three input fields: "Username:" with a white box and blue border, "Password:" with a white box and blue border, and "Company:" with a white box and blue border. Below the fields is a blue button with the text "Sign in" in white.

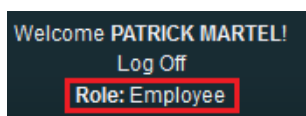
Upon a successful login, the first screen you will see is the employee portal screen. The employee portal provides the employee with access to view their published schedules as well as host of other features based upon their company's configuration.

Month: 10/01/2012

Drop Shift Pickup Shift Messages Requests

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
30	01 PM Shift 6:00P-2:00A SHIP	02 PM Shift 6:00P-2:00A SHIP	03 PM Shift 6:00P-2:00A SHIP	04 PM Shift 6:00P-2:00A SHIP	05	06
07 AM Shift 8:00A-5:00P SHIP	08 AM Shift 8:00A-5:00P SHIP	09 AM Shift 8:00A-5:00P SHIP	10	11	12 AM Shift 8:00A-5:00P SHIP	13 AM Shift 8:00A-5:00P SHIP
14	15 AM Shift 7:00A-4:00P SHIP	16 AM Shift 8:00A-5:00P SHIP	17 AM Shift 8:00A-5:00P SHIP	18 AM Shift 8:00A-5:00P SHIP Pending Drop request	19	20
21	22	23	24	25	26	27
28	29	30	31	01	02	03
04	05	06	07	08	09	10

Switching from the Employee Portal over to the Manager Dashboard you will want to click on the label in the upper right corner that displays – Role: Employee. If your employee profile isn't linked to a manager role this role the label of Role: Employee doesn't appear.



By clicking on the label (Role: Employee) in the upper right corner, a form will appear allowing you to switch from the employee portal over to the manager dashboard.

Manager Dashboard

The main screen of the manager dashboard provides you with visual indicators that identify pending items that require your attention. The following are items that may appear on your dashboard view.

[Schedule Change Request](#) – These are requests from employees who are offering to pick up schedule(s) that co-workers have placed on the trade board from a dropped shift or request to pick up open shifts that were never assigned to an employee. Once there is an offer to pick up either of these types of shifts it will appear here for the manager to review and either approve or decline these requests.

[Reference Change Request](#) – If an employee has submitted a preference change request. It will be displayed here with their existing preference for you to review.

[Alerts & Warnings](#) – Allows you to see alerts & warning for certificates that maybe expiring soon for an employee.

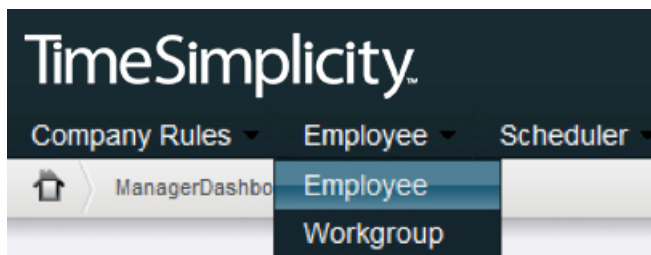
[Review Invalid Schedules](#) – Displays those employees that have been terminated and have schedules assigned to them out past their termination date. This option allows you to take action on those schedules either moving them all to open shifts to be reassigned or deleting them.

From the dashboards screen you will also be presented with other menu items based upon your defined manager role in the system. The menu options displayed below may vary for each user.



Employee Maintenance

Employee maintenance is located under the **Employee – Employee** menu option. Here you will see a list of all the employees that you have access based upon the workgroups that are assigned to you as a manager.



Employee Search

The employee search screen is the first screen you will see when going into the employee menu. To search for employees you can use the following options.

[Name](#) – This field allows you to search for an employee by the **employee's last name**.

[Employee Id](#) – Searches for employees based upon the **employee id**.

[Workgroups](#) – This option allows you to display only the employees who are assigned to the specific workgroup selected.

[Navigation buttons](#) - The last option is to use the **pages or arrows** at the bottom of the grid. This option allows you to move forward and back one page at a time or jump to a specific page.

Once you have located the employee you are looking for by clicking on their name, or highlighting the row and pressing the **edit** button will bring you into the employee demographic screen.

The screenshot shows the 'Employees' management interface. At the top, there are three buttons: 'Add >', 'Edit >', and 'Delete >'. Below these are search filters: 'Name:' with a text input and a 'Filter' button, 'Employee Id:' with a text input and a 'Filter' button, and 'Workgroup:' with a dropdown menu set to 'All Workgroups'. The main area is a table with two columns: 'ID' and 'Name'. The table contains 12 rows of employee data. At the bottom of the table, there is a pagination bar with a refresh icon, navigation arrows, a page number '1', and the text 'Displaying items 1 - 12 of 23'.

ID	Name
101	Houseman, Frank
102	McPastry, Karin
103	Bealz, Scott
104	Smith, Chris
105	Cooke, Jessica
106	Bailey, Laura
107	Narakoski, Steven
108	Lupovic, John
109	Peterson, Christy
110	Robertson, Pat
111	Clay, Liz
112	Sample, Mark

Manually Adding a New Employee

To manually add employees into the system press the **Add** button that appears above the grid on the employee search screen, a form will appear that prompts you for a unique employee id. Enter in the employee id and press Ok to continue on entering in the employee demographic information.

*** The employee id can contain both alpha and numeric characters with a max length of 9. ***

Please Note: For clients using data integration employees will be automatically added to the system by the integration.

Demographics

This tab contains standard demographic information for your employees'. If you are integrating with another system most of this information has the ability to be imported. There are, however a few fields on this demographic tab that are important to TimeSimplicity and how we send alerts and notification to employees. In order to receive alerts from TimeSimplicity make sure the following fields are populated, (**Mobile Phone and Carrier, Email Address**).

[Mobile Phone and Carrier:](#)

These fields are required in order to receive text messages from the system for both employees and managers.

[Email address:](#)

The email address supplied here will be the address that messages are sent to from the system.

Show Phone To:

This field is used to determine who will have the ability to see an employee's phone number. The default is the manager but employees can also make this available to their co-workers as well.

Show Email To:

This field is used to determine who will have access to see an employee's email address. The default value is the employee's managers but employees can also make this available to their co-workers.

Min Hours per week:

This field allows you to define the minimum hours in a week that you would like to schedule an employee for. This field can be displayed and used in ordering logic the candidate list and who can work this function.

Max Hours per week:

This field is used to help alert managers when they are scheduling employees for hours that excess of their max hours. Schedule compliance rules can also like at this field and determine if a warning or restriction is displayed when exceeding this amount.

Zip Code:

This field can be used to help identify which employees live closer to a workgroup when using candidate ordering and who can work this feature.

Seniority:

This field can be used to help order and identify those employees that have a higher seniority so that the manager can offer those employees the shifts first when it comes to filling shifts.

Gender:

This field is used to specify the gender of the employees when filling a shift that maybe gender specific.

Rules –

Employee Role

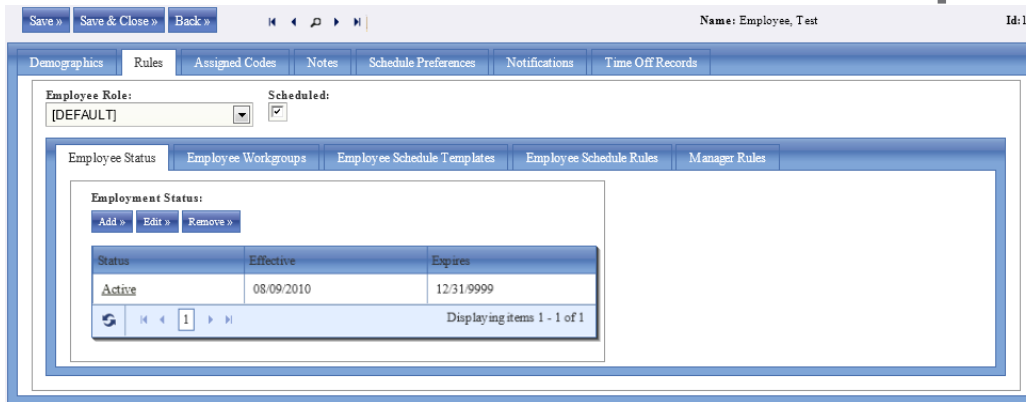
Determines what permissions and access an employee will have when signing into the employee portal.

Scheduled

This option allows you to remove employees from the scheduling screens even if they are an active employee within the system. Those are none scheduled employees. Employees that are active with this option un-checked don't count towards your active employee license.

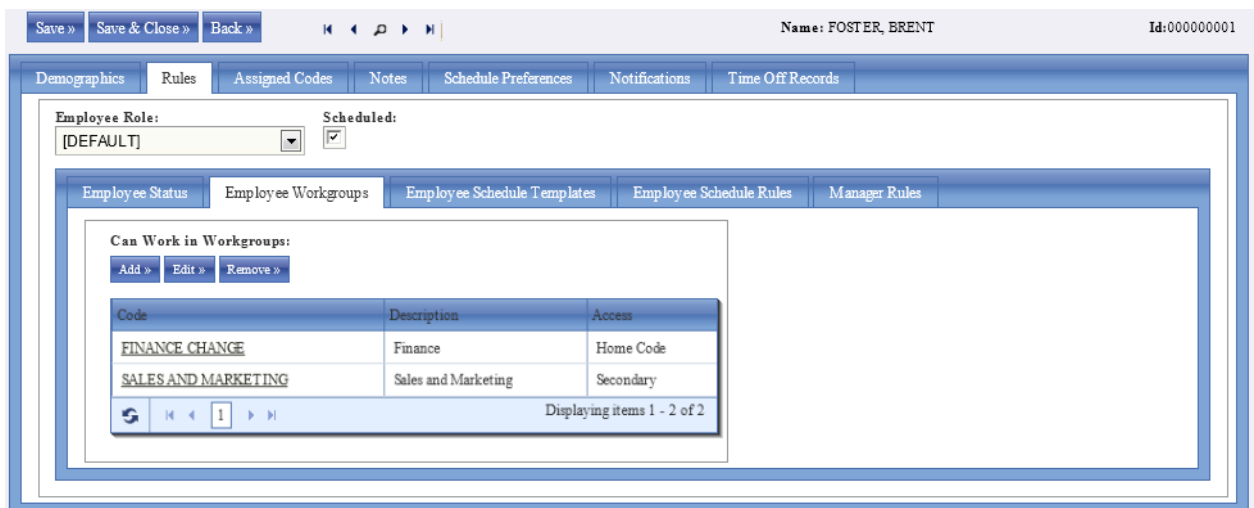
Employee Status

This displays the current status of the employee; Active, Terminated or Leave. The status field is date effective so there may be several records in this table for an employee. Employees are removed from the scheduling screen for dates outside of their active status record(s).



Assigning Workgroups

In order for an employee to appear in the schedule screen they first need to be assigned to a workgroup. A workgroup is typically defined by location, department, facility, city, etc. All employees will have a primary home workgroup but can have an unlimited number of secondary workgroups representing all areas that they can work, shared resources. The primary (home workgroup) vs. secondary workgroups is to filter out the secondary employees when using the **“Home Workgroup”** option on the scheduler. This home workgroup option allows you to see just the primary employees for that workgroup versus all employees (home and secondary).



***Note – when integrating with other system the workgroup assignment will be automatically assigned based upon the data being passed in.*

Secondary workgroup assignments will need to be manually assigned within the system.

To toggle which workgroup is an employee's home simply click on the workgroup code and a form will appear allowing you to switch from one to the other.

Removing a workgroup(s) from an employee can be done, however, if the workgroup was assigned to the employee through our integration process there is the potential that the workgroup will get added back to the employee the next time the integration runs.

Employee Schedule Templates

If schedule templates are being used, these are created under **Company Rules – Schedule Templates**, and then assigned to the individual employees. These templates can be from 1 week out to 70 weeks in length rotating. When assigning a template to an employee you will

pick the template from a drop down list and then provide an effective date, expiration date (01/01/9999) and week off set. The week offset is used to determine in those cases where there are multiple weeks within a template which week the employee is starting on. Once this is set the system will automatically adjust which week template is applied to the employee going forward.

Employee Status Employee Workgroups **Employee Schedule Templates** Employee Schedule Rules Manager Rules

Schedule Templates:

[Add >](#) [Edit >](#) [Remove >](#)

Template Class	Effective	Expires
[DEFAULT]	01/01/2001	12/31/9999

⏪ ⏩ 1 ⏪ ⏩ Displaying items 1 - 1 of 1

1. Select the Default record and press **Edit**.
2. **Effective Date** – Should represent the week start date for the week that you want to begin scheduling that employee. For example if me week layout that I am scheduling my employees for is from a Tuesday to Monday. I will want to se the effective date starting on a date that falls on a Tuesday.
3. **Expiration Date**- By default this should be set out to **01/01/9999**. Only when this template is no longer active for this employee would you need to set the expiration date.
4. **Week Offset** – If all employees are starting at the beginnig of the template this should be set to **1**. If employees have a rotating schedule this week offset needs to be set to the correct week to get the employee on the correct week of the rotation based off the effective date.

*** Note – employees can only be assigned to one active template at a time. Also you can only apply an employees schedule template from their home workgroup**.*

Edit Template ✖

Effective Date:
 📅

Expiration Date:
 📅

Schedule Template:
 ▼

Start Week Offset:

Save Cancel

Employee Schedule Rules

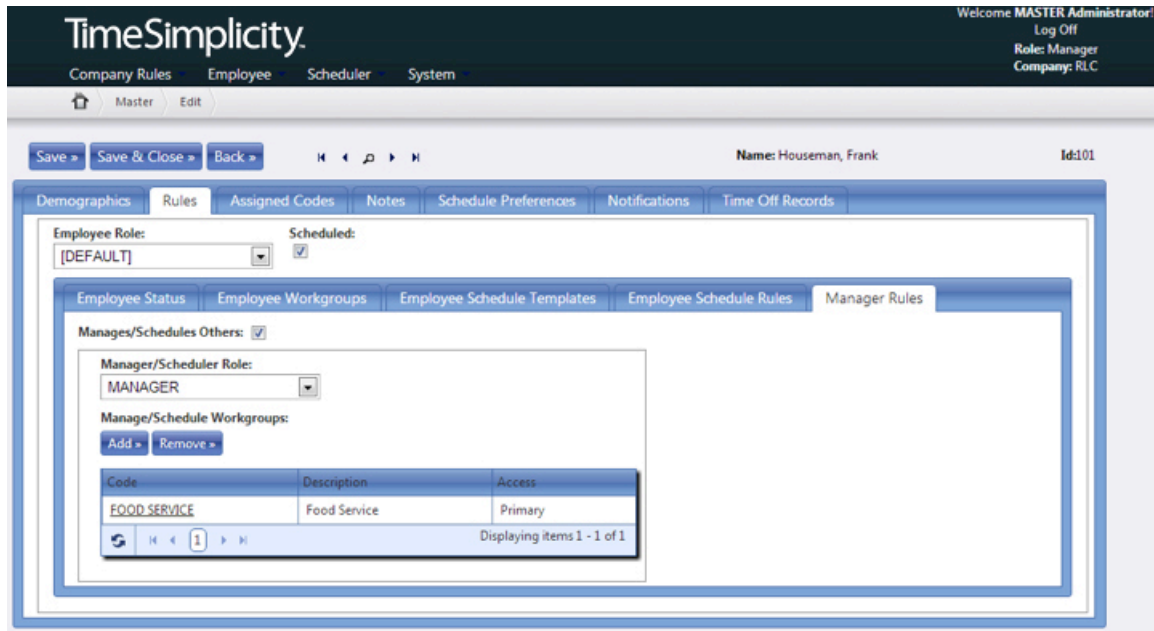
Allows you to assign a compliance rule to an employee. The compliance rules can range from Min/Max shift lengths, proximity to other shifts, 6th day, 6th consecutive, & 7th consecutive day, plus meal break rules and hours of operation.

*** If minor rules are defined in the system this is also where you would indicate that this employee is a minor and which minor rule is applied to them.***

Manager Rules

This option allows you to identify this employee as a manager within the system. Once the box is checked to Manager/Schedule others additional fields will be displayed on the screen.

Now you will need to select which manager roles you want to assign to this employee as well as which workgroup they will have access to. A manager can be assigned to multiple workgroups (home/secondary) but unlike the employee the manager is not restricted to just one home workgroup.



Assigning Codes (Org Levels)

Positions

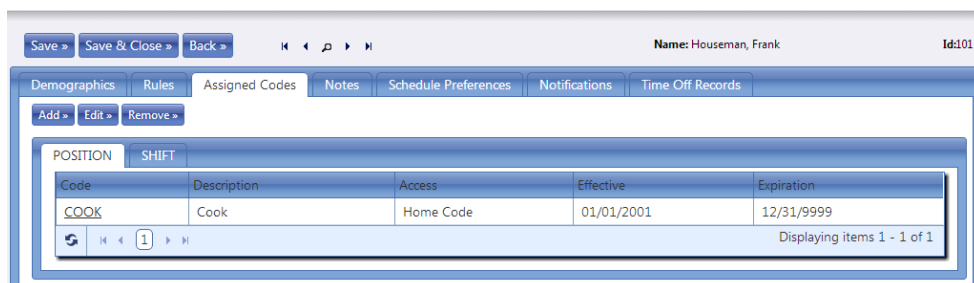
All employees need to be assigned to a position in order for them to appear on the scheduler screen. The position code allows you to identify which jobs an employees is qualified to work. When creating schedule only those jobs/positions that are assigned to the employee will be available to select from. In the case where you are trying to fill a shift only those employees who match on the position codes will appear in drop down list of candidates.

All org levels have the ability to be controlled by effective and expiration dates. Employees can't be scheduled to these org levels outside of the effective date range.

If integrating with another system the primary position will be imported and assigned to the employee. Secondary position will need to be added manually to the employees.

Assigning a new position code to an employee

Press the ADD button above the grid. Locate the position code you are looking for and press the Add & close button. Set the effective dates and select if this is the employees home or secondary position.



Notes

These are individual notes associated with this employee. Notes entered in here are also available to be viewed in the scheduling screen for reference. This information entered on the notes tab is not accessible by the employees.

Schedule Preferences

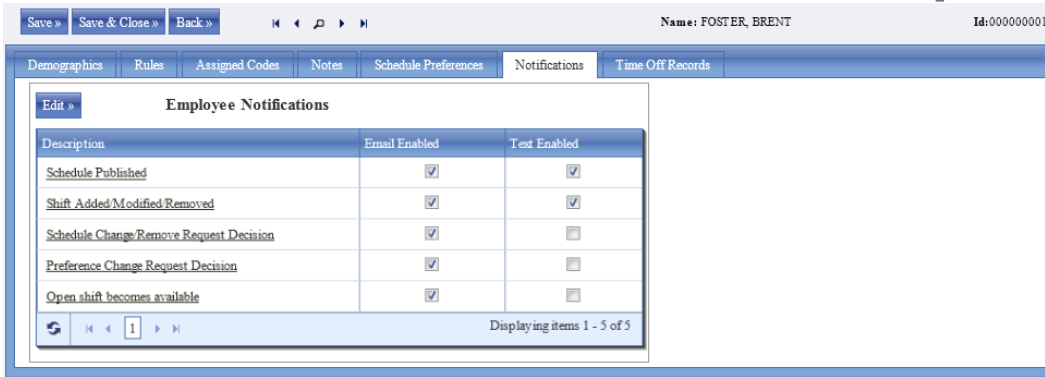
The schedule preference provides the ability for either the managers or the employees to identify days / times that they either prefer to work or that they dislike or can't work. The schedule preference can then be used to aid or assist the manager when creating schedule to avoid conflicts based upon the employees schedule preference.

Notifications

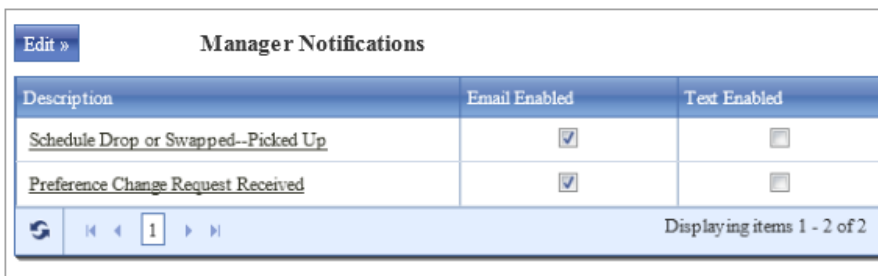
The notifications are used through the system to alert employees and managers when specific events happen within TimeSimplicity. The alert tab displays the events that will trigger alerts and then allows for the selection of either email, text, or both for the alert type.

****In order to receive text message alerts both the Cell number and mobile provider will need to be provided.****

The employees can specify their notifications preferences from within the employee portal if this option is enabled for their role in the system.

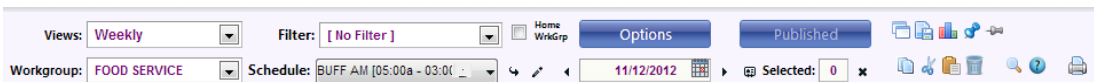


The manager can also select the preferred type of notification they would like to receive on the following events.



Scheduler

The scheduler is where the manager will spend a majority of their time. By becoming familiar with the options available on the screen will allow you to optimize your time within the system.



Basic Options

Views - Determines how many days will be displayed on the screen at once, (Daily, Weekly, 14, 21, 28, 35, 42, 49, 56 days).

Filter - If filters are created they can be applied at to reduce the number of employees being displayed on the screen. (These filters are created under the workgroup setup).


Home Workgroup - Allows you to control if you are seeing all employees or just the home employees for this workgroup.


Workgroups are assigned to the employee under the Employees > Rules tab.


Options - This button provides the manager with the ability to customize their view of the scheduler screen, from which fields they want displayed to enabling different feature for scheduling information.


Publish / Published - Unpublished schedules are that aren't visible to the employees. Once a schedule published the employees will receive alerts (notifications) and have the ability to view their schedules on the employee portal screen.

*** Once a schedule is published changes can still be made to those schedules however the employees will get notification that their schedules are being changed. ***

 - If using employee assigned schedule templates this icon will populate the current week with the employees assigned template.

 - This icon will take the employees schedule templates that are displayed from using the option above from a read only state to creating the physical schedules.


 - This icon will display graphs based upon the calculation bars. By clicking on the name of the calculation bar you will be able to see different option on how this data can be displayed.


 - The Pinned icon functionality is turned on or off from under the **OPTIONS** button. With the Pinned functionality turned on you can select and pin specific “standard” shifts to an employee. Any schedule that is **pinned** to an employee when doing a select all and copy and paste will be copied to that employee. All schedules that weren’t pinned will be move to the open shift to be reassigned.


 - This option allows you to UNPIN schedules that are pinned to an employee.

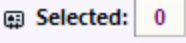
Workgroup –determines which workgroup you are viewing and working with. The workgroup list is controlled by which workgroups are assigned to you as a manager.

Schedule – This drop down list will display any predefined scheduled templates that have been setup under this workgroup. These templates can be copied into the week for creating new schedules.

 – This icon will insert the selected schedule template into the day(s) of the week that were selected. **** You can also insert these templates with a right click option OR hitting the Insert key on your keyboard. ****


 - This icon will allow you to change the start and stop time of the schedule template prior to applying it to the employees. This is only a temporary override for the schedule template. Next time you select the template it will default back to the original times.


 - The date field allows you to pick the starting date for the week(s) that are being viewed in the scheduler.

 Selected: – By using this icon you can select all schedules in the current workgroup. **** (Ctrl +A) - will also select all schedules form the workgroup. ****


 – will unselect all records that were selected.


Other Icons - in the header bar


 - Copies the highlighted schedules. (Ctrl –C copies the cells as well).


 - Cuts the highlighted schedules. (Ctrl –X also performs this action)

 - Pastes the schedules from the clipboard. (Ctrl –V also performs this action).

 - Deletes the highlighted schedules. (Delete key on the keyboard does the same thing).

 **Magnify Icon (Employee Search)** – Brings up a search form where you can type in the employee’s last name to locate them on the screen. You can also gain access to this feature by pressing F2 or under the right click menu.

 **Question Icon** – Who can work this? This option brings up a list of employees that are qualified to fill the selected shift. This option is also available under the right click menu.

 **Printer Icon** – allows you to print out the current view of the scheduler screen.

**** Don't forget to publish your schedules** Publishing schedules makes them available to your employee to see under the employee portal.**

Scheduler Basics


Selecting days in the schedule


When it comes to selecting days within the scheduler screen there are 3 options. These options can be define at a company level or open to allow each manager to select which options works best for them.

Multi-Select – Can be accomplished using one of the 3 options

1. Left Mouse click one or multiple days
2. Single select only
3. Ctrl + Left mouse click

Select All – selecting all schedules within a workgroup can be accomplished using the following methods

1. Pressing the following Icon above the schedule screen.  This icon will select all days in the schedule for all employees list.
2. Keyboard shortcut (Ctrl+A)

Select Entire Row for an employee -Under the employee name in the far left column if you press  icon that will highlight the entire row for that employee.



Select Entire column- By clicking on the column header that day of the week and all cells under it will be selected.

Options for Creating a New Schedule

Insert Schedule Template – By using the schedule template drop down list you can quickly apply standard schedules to your employees. Once you have selected your template from the list you can then select an employee or multiple employees as well as a day or multiple days and then copy the template by doing using one of the following options:

- Press the **Arrow Icon** next to the template field
- Press the **Insert** key on your keyboard
- Right clicking on a highlight cell and selecting **Apply Template**


Employee Based Schedule Template – These are specific templates that are assigned to an employee. If these type of templates are being used follow the steps below

- **Show Employee Templates** - This icon is used to display the employee assigned templates. 
- **Convert Templates to Schedules** – This icon will take the schedules that are being displayed in the read only mode from the template option above and will convert them into live schedules that can then be modified if needed.  A right click menu option is also provided to convert templates as well.

Manually creating a new schedule – Use any of the following options.

1. **Double click** on the cell to pop-up schedule edit form.
2. Click the **+** icon that appears in the lower right corner of the highlighted cell.
3. Right click menu - **Add New Schedule**
4. Or right click menu - **Edit**.

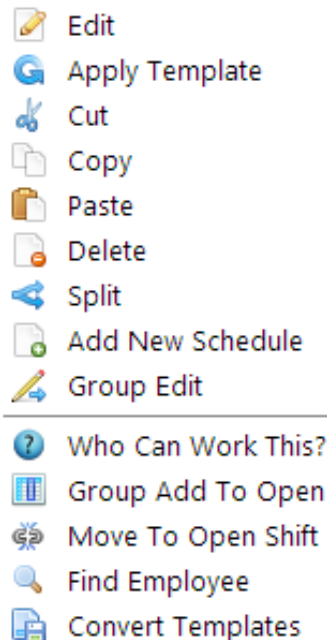
Editing options for schedules

Standard Icons – The icons that you see listed below will provide you with the options to provide the following: Copy, Cut, Paste, and Delete. 

Keyboard short cut keys- There are also standard keyboard shortcut keys that will provide you with the same functionality. Those are as follows:

- CTRL+C (Copy)
- CTRL+X (Cut)
- CTRL+V (Paste)
- Delete Key (delete)

Right Click menu- will also provide you with the options for Copy, Cut, Paste, Delete and more:



Split - This option allows you to split a single schedule into 2 allowing you to reassign the new shift to another employee using our standard functionality.

Add New Schedule - This option allows you to add an additional schedule to a day that already has a schedule.

Group Edit – This option allows you to update multiple schedules at once.

Who can work? - Feature that is used to quickly identify which employees are able to work the shift you are trying to fill and will provide you with a candidate list to select from. The list can be customized to establish the order by which the employees are

listed, by default employees that are furthest away from overtime and prefer to work those days / hours are at the top while employees that may go into overtime or don't like working those days are at the bottom.

Once you identify the qualifying candidate(s) you can send an email, text message, or call the employee to see if they can fill that shift.

Group Add to Open - Allows you to quickly create a number of shifts for a defined position by filling in the details and then specifying your shift count. Based upon the value specified for the shift count will determine how many schedules will be created. Example a putting a 2 in for the shift count will create 2 open shifts with the details provided.

Group Schedule Add for Saturday, 07/19/2014

Default Values						
Name:	Position	Part/Cust	Fund/Partjob	Start	Stop	
	[Not Specified]	[Not Specified]	[Not Specified]			

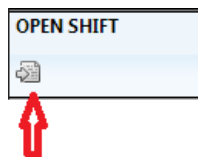
Shift Count	Position	Part/Cust	Fund/Partjob	Start	Stop	Color
0	[Not Specified]	[Not Specified]	[Not Specified]			

Save Cancel

Workgroup Notes – Provides a place where you can add notes that are visible to all employees that are assigned to this workgroup. Example- Reminder there is a mandatory meeting tomorrow @ 3pm.

Open Shift – These are shift that currently aren't assigned to an employee. If an open shift, if they are in a published those shifts can be viewed by the employees who qualify to work them and they can offer to pick these up from the employee trade board on the employee portal. The system will also provide you will a list of employees who qualify for the open shift so you can quickly see which resources are available and assign the shift to them if desired.

Auto Assign Open Shifts- Is a feature that will look at your open shifts and run the "Who can work this" logic. The who can work this logic will look at things like the employee preferences, max hours, hours remaining to determine which employee best fits this shift and automatically assign the shift to them.



Schedule Bars

Schedule bars are used to help identify and break up the information that is presented on the schedule screen. We also used schedule bars to display total hours, overtime hours or hours based upon any other information that you are scheduling. These are defined and setup under each workgroup. These bars allow for all kinds of customization to each workgroup. Some standard examples are:

- Header\Footers
- Calculation Bars:
 - Total Hours
 - Overtime hours

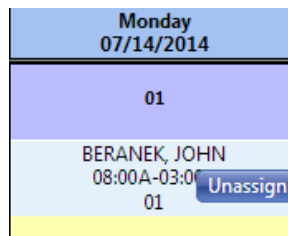
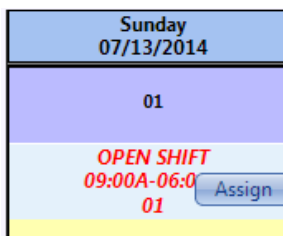
represents your stop time. This will create a new schedule shift for these times and then allow you to specify the details.

Schedule All View

Provides a calendar view that displays the position and then all the employees who are scheduled for that position. The ordering of the employees is based upon their schedule shift start times.

Views: Weekly		Workgroup: FOOD SERVICE		02/04/2013		Options	
Monday 2/4/2013	Tuesday 2/5/2013	Wednesday 2/6/2013	Thursday 2/7/2013	Friday 2/8/2013	Saturday 2/9/2013	Sunday 2/10/2013	
BUFF	BUFF	BUFF	BUFF				
Lupovic, John 5:00P-7:00P PM BUFF	Lupovic, John 5:00P-7:00P PM BUFF	Lupovic, John 5:00P-7:00P PM BUFF	Lupovic, John 5:00P-7:00P PM BUFF				
COOK	COOK	COOK	COOK		COOK		
Houseman, Frank 6:00A-2:30P AM	Houseman, Frank 6:00A-2:30P AM McPastry, Karin 10:15A-6:45P PM	Houseman, Frank 6:00A-2:30P AM McPastry, Karin 10:15A-6:45P PM	Houseman, Frank 6:00A-2:30P AM		McPastry, Karin 10:15A-6:45P PM		
DISH		DISH			DISH	DISH	
Bailey, Laura 6:30A-3:00P AM Cooke, Jessica 11:30A-8:00P PM		Cooke, Jessica 5:00A-5:00P DISH AM			Narakoski, Steven 6:30A-3:00P AM Cooke, Jessica 11:30A-8:00P PM	Bailey, Laura 6:30A-3:00P AM Narakoski, Steven 11:30A-8:00P PM	
PREP COOK			PREP COOK		PREP COOK	PREP COOK	
Bealz, Scott 11:00A-7:30P PM			Smith, Chris 11:00A-7:30P PM		Smith, Chris 6:00A-2:30P AM Bealz, Scott 11:00A-7:30P PM	Smith, Chris 10:00A-6:30P PM Bealz, Scott 11:00A-7:30P PM	
SERV	SERV	SERV	SERV	SERV	SERV	SERV	
Peterson, Christy 7:30A-1:00P FULL AM Robertson, Pat 7:30A-9:30A AM	Adorn, Suresh 7:30A-9:30A AM Robertson, Pat 7:30A-9:30A AM	Robertson, Pat 7:30A-9:30A AM Wick, Jon 11:00A-2:00P PM/SE	Adams, Jim 11:00A-2:00P PM/SE Smith, Chris 11:00A-2:00P PM/SE	Adorn, Suresh 11:00A-2:00P PM/SE Wick, Jon 11:00A-2:00P PM/SE	Clay, Liz 7:30A-1:00P FULL AM Adams, Jim 11:00A-2:00P PM/SE	Sample, Mark 7:30A-9:30A AM Zrenner, Jim 11:00A-2:00P PM/SE	

From the schedule all view you can also assign open shift to employees or unassign shift from an employee making them open shifts. To perform either of these simply place your mouse over the shift and you will see a button appear to Assign or Unassign.



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