

Schedule Calendar

365 restaurant365training.com /schedule-calendar/

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The schedule screen is a calendar with weekly or daily views of the schedule. From this screen you can manage employee shifts in a simple drag and drop form. To access this form go to Scheduling – Schedule in the left hand navigation pane and the schedule calendar will be shown in the center portion of the screen. The elements of this window are described below.

Header Fields

There are a few fields and buttons at the top of the screen that allow you to select which schedule you want to view and how you want to view it. At a minimum to see a schedule you must select a location and a date. The location defaults from the user's Default Location, so that must be set on the user form in order to use the schedule calendar. The date defaults to today's date.



The screenshot shows the header fields of the schedule calendar interface. It includes a location dropdown menu set to '115 - Bar & Grill', a job titles dropdown menu set to 'A.B.O Server, ... (76)', a 'Start With' dropdown menu set to 'Week End 3/22/2016 - Bar & Gr', and buttons for 'Go', 'Clear', and a refresh icon. Below these are date navigation buttons for 'Mar 23 - Mar 29', 'Week', and 'Day' views, along with 'Alert Employees' and 'Print' buttons.

- Location – dropdown to select the location you want to view the schedule for
- Job Titles – list for you to select which jobs you want to filter in the schedule view. So if you only wanted to see the schedule for servers and hosts you would select those 2 jobs here and then tab off the field and the schedule window will update to only show those jobs
- Start With dropdown and Go button – this allows you to start a schedule by copying another schedule. To copy a prior schedule, select the schedule you want to copy in the Start With field and then click Go.
- Clear button – clears the schedule removing all shifts to start over fresh
- Refresh button – this button of blue circular arrows will refresh the schedule to update for changes made outside of this window such as in the mobile app or another window in the web app
- Week/Day view selector – this determines whether the schedule calendar will show for 1 day or for an entire week. Day view shows columns for each hour while Week view shows a column for each day
- Date selector – the forward and back arrow buttons will move forward or back 1 week (or day if in day view) and the calendar selector allows you to select a specific date
- Alert Employees button – this button will alert all employees assigned on this schedule with their scheduled shifts for the week (or day if in day view). They will each get a text or email based on the preferred contact method on their employee record which lists their shifts. This does not send out a mass alert with all employees in one alert, but an individual alert to each employee with their shifts only.
- Print button – produces a PDF file of the schedule that can be printed

Weather/Events/Sales Forecast & Labor Totals

The section below the header fields and above the calendar provides helpful info as a reference to assist when scheduling. Each section can be viewed collapsed (1 row) or expanded to show more detail. Do this by clicking the little arrow button to the right of the section title (Weather, Events, or Sales & Labor Forecast) and when expanded the arrow button will point down instead of to the right. Both images are shown below

Collapsed view

Weather >			62°F 52°F	70°F 53°F	71°F 55°F	76°F 58°F	78°F 58°F	76°F 55°F	61°F 53°F
Events >				7:30p-12a Lakers Game					
Sales & Labor Forecast >			Sales: \$1,428.57	Sales: \$1,520.00	Sales: \$1,750.00	Sales: \$2,010.00	Sales: \$1,800.00	Sales: \$1,200.00	Sales: \$1,345.00
Employee	Job	+ Add Shift	Wed 3/23	Thu 3/24	Fri 3/25	Sat 3/26	Sun 3/27	Mon 3/28	Tue 3/29

Expanded view

Weather v			62°F 52°F  clear sky	70°F 53°F  clear sky	71°F 55°F  clear sky	76°F 58°F  clear sky	78°F 58°F  clear sky	76°F 55°F  clear sky	61°F 53°F  light rain
Events >				7:30p-12a Lakers Game					
Sales & Labor Forecast v			Sales: \$1,428.57 Labor: \$102.00 Labor %: 7 % Labor % vs Goal: -6 %	Sales: \$1,520.00 Labor: \$126.00 Labor %: 8 % Labor % vs Goal: -7 %	Sales: \$1,750.00 Labor: \$126.00 Labor %: 7 % Labor % vs Goal: -6 %	Sales: \$2,010.00 Labor: \$0.00 Labor %: 0 % Labor % vs Goal: 0 %	Sales: \$1,800.00 Labor: \$51.00 Labor %: 3 % Labor % vs Goal: -2 %	Sales: \$1,200.00 Labor: \$177.00 Labor %: 15 % Labor % vs Goal: -14 %	Sales: \$1,345.00 Labor: \$0.00 Labor %: 0 % Labor % vs Goal: 0 %
Employee	Job	+ Add Shift	Wed 3/23	Thu 3/24	Fri 3/25	Sat 3/26	Sun 3/27	Mon 3/28	Tue 3/29

Here are the elements of this section:

- Weather – displays the weather forecast at this location. Weather forecast is only available 10 days in advance. Once the day passes the weather also does not show any longer. The collapsed view shows high and low temperatures for the day, and the expanded view adds an image and text description of the weather condition
- Events – displays local events entered into the system for this location such as sporting events, performances, rallies, or other things that might effect the schedule for the restaurant. An example in the image above is where it says “7:30p-12a Lakers Game” above Thu 3/24. The collapsed view shows 1 event for each day and the expanded view will show if there are multiple events on the same day. [Click here for local event training](#)
- Sales & Labor Forecast – displays the sales forecast and labor totals for each day. The collapsed view shows sales forecast only. This forecast is taken from the sales forecast entered in the forecast window ([click here for sales forecast training](#)) or if no sales forecast has been entered for this day for this location then it shows the average sales for that day of the week for the past 8 weeks. Since the Scheduler role isn’t allowed to see pay rates, this section isn’t exandable to see labor dollars for users with that role. When expanded it also shows 3 other labor fields described below
 - Labor = total labor for the day based on shifts entered in the schedule. The shift hours are multiplied by the hourly rates to get this total
 - Labor % = Labor total / Sales forecast
 - Labor % vs Goal = Labor % Goal – Labor %. Labor % Goal is found on the [Location form](#) on the [Goals tab](#) where a goal can be entered for labor as a percent of sales for each day of the week

Schedule Calendar

This is the main section of the schedule window where shifts are placed on the calendar.

Employee	Job	+ Add Shift	Wed 3/23	Thu 3/24	Fri 3/25	Sat 3/26	Sun 3/27	Mon 3/28	Tue 3/29
Unassigned Shifts					10a-4p <i>DISH</i>				
 Aaron Smith 8/0			2p-10p <i>SERVER</i>				Unavailable All Day		
 Abigail Thorn 42/0			5p-11p <i>HOST</i>	11a-5p <i>HOST</i>		10a-10p <i>HOST</i>	10a-10p <i>HOST</i>	11a-5p <i>HOST</i>	
 Amy Andrews 18/0			4p-10p <i>DISH</i>				4p-10p <i>DISH</i>	4p-10p <i>DISH</i>	
 Andy Lomas 19.5/0				3p-9.30p <i>Grill</i>	3p-9.30p <i>Grill</i>			3p-9.30p <i>Grill</i>	

Header row

The header row contains an abbreviated day name and the date at the top of each day column. It also has buttons on the far left:

- Employee/Job selector – this toggle button determines whether a row in the schedule is shown for each employee or for each job
- + Add Shift button – shifts can be added in the calendar itself which is usually faster as described below, but a new shift can also be added by clicking this button and starting with a blank shift

Unassigned Shifts row

Unassigned shifts are those not yet assigned to an employee. Unassigned shifts show on the schedule calendar with diagonal stripes for the user to quickly see its unassigned (see the shift on Fri 3/25 for “10a-4p *DISH*” in the image above). If you open an unassigned shift there is an “Open Shift Alert” button where you can alert eligible employees of the open shift so they can claim it. If an employee claims a shift then their name will be entered in the employee section and its status will be set to Requested, allowing the manager to Approve/Deny.

Unassigned shifts can also be assigned 2 other ways:

1. Drag the shift on the calendar down to the row of the employee you wish to assign. If the employee is ineligible for this job then you will receive a warning and the shift will remain unassigned
2. You can also assign by opening the shift (double click or right click and choose Edit) and selecting the employee in the dropdown

Employee/Job rows

This section behaves differently depending on if the view is set to Employee or Job. The colors of the shifts are based on job and this color can be assigned on the Job form.

When the view is set to Employee:

- Each row will display an employee
- The employee picture will be shown on the far left if one has been uploaded to their employee record
- The employee name is shown as a clickable link to open the employee record
- Below the employee name are 2 numbers. The first is total hours scheduled and the second is actual hours

worked for this employee. If the employee is scheduled for overtime, these numbers will turn red as seen in the image above for Abigail Thorn.

- If you open a new shift record (either by double clicking an empty day on that employee row, or right clicking the empty day and choosing Add) the employee for that row will default on the shift along with the date you selected
- Employee Availability – Hovering over any day in the schedule will popup a message displaying that employee’s availability on that day. If the employee has been marked as Unavailable All Day, then a gray “Unavailable All Day” box will show for that employee on that day (see Sun 3/27 for Aaron Smith in the image above). Employee availability is managed on the employee form. Click here for [employee training](#) and refer to the section titled “Availability tab”
- Shifts will display the start and end time and the job title (see the shift on Wed 3/23 for “2p-10p SERVER” in the image above)

When the view is set to Job:

- Each row will display a job with all shifts assigned to that job showing on that row
- Job title is shown as a clickable link to open the job record
- Below the job are 2 numbers. The first is total hours scheduled and the second is actual hours worked for this job
- If you open new shift record (either by double clicking an empty day on that job row, or right clicking the empty day and choosing Add) the job for that row will default on the shift along with the date you selected
- Shifts will display the start and end time and the employee name (i.e. 2p-10p Aaron S.)

Quick Tips to Add or Move Shifts

- To copy a shift, right click and select Copy and then right click in the slot you want the new shift and choose Paste. This will create a copy of that shift but will change the Date to the new day you pasted on
- To move a shift to a different date or different employee, just click the shift with the left mouse button and hold down the button while you drag it to the desired slot and then release the button. If you move it to a different day then the Date of the shift will be changed automatically. If you move it to a different employee row then the employee on the shift will be modified. Note if you try to move it to an employee who isn’t qualified for that job, you’ll receive a warning and the shift will not move
 - This works to quickly assign unassigned shifts to an employee as well by dragging it to their row
- To quickly remove a shift, right click and choose Delete. You can also open the shift and select Delete from under the Save menu in the upper left corner of the screen
- To quickly open a shift, double click it. You can also right click and choose Edit
- To quickly create a new shift, simply double click the box where you want to create the shift (on the row of the desired employee and in the column of the desired day) and it will open with those values pre-populated for you. You can also right click the spot and choose Add
- When in the Day view, to quickly adjust the time on a shift, simply left click with the mouse on the left edge (for start time) or right edge (for end time) and drag the shift wider or narrower to change the time. You can also open the shift and adjust the times on the shift form manually