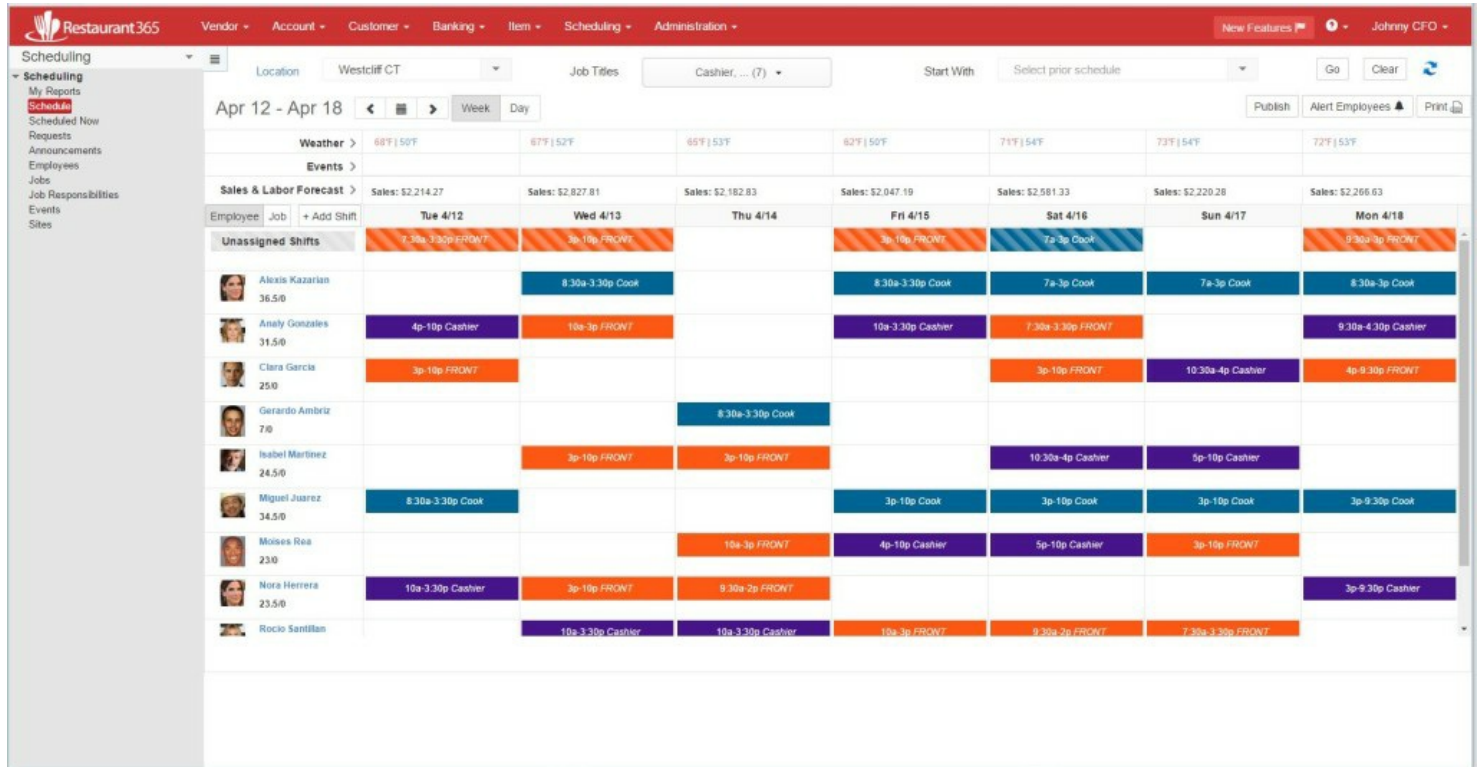# Scheduling Overview & Security

365 restaurant365training.com /scheduling-overview/

Tony Smith

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Overview

The scheduling module is a full scheduling software to manage employee schedules. There are 2 parts to scheduling inside of Restaurant365:

1. Manager functions: managers can create the schedule, send out text/email alerts to employees for scheduled shifts, alert employees of open shifts, manage employee info including uploading pictures, put out announcements to employees, and review schedule vs actual reports

2. Employee functions: restaurant employees will most commonly access scheduling info through the mobile app but they can also do so in a web browser. They can check their schedule, make requests such as time off and shift trades, claim open shifts, and view manager announcements

In order to access the Scheduling module it must be activated, so if you are interested in activating Scheduling please email support@restaurant365.net.

Below is a list of training articles to learn more about each part of scheduling and also a detailed explanation of security and navigation within the module.

Security

Once the module is activated, it can be accessed by Users or Employees as described below. Employees don't

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need a separate user record created to access the employee features of scheduling.

User Access

Users with the Accounting Manager or Restaurant Manager roles can access scheduling by default. Other users can be assigned the Scheduler role specifically. The Scheduler role will generally be given to shift leads who should be able to help manage the schedule but not effect other parts of the system. The Scheduler role hides pay rates. Click here for training on **assigning security roles**

Employee Access

To allow an employee to access the scheduling features, on their employee record, make sure the App Access check box is checked (its checked by default) and then press the Send Temporary Password button. Pressing this button will send a message to the employee via their Preferred Contact Method with their login and password and a link to the system. The login is their email address and the password is system generated. When they login, they will be asked to change their password.

If an employee ever forgets their password, the manager can press Send Temporary Password again and a temporary password will be sent to them.

Navigation

Both users and employees can access scheduling features by logging in through a web browser by selecting Scheduling from the module dropdown list at the top of the left hand navigation pane (pictured below). This will switch the view of the left hand navigation pane to show all scheduling options. Creating new records associated with scheduling can also be accessed from the Scheduling option in the top ribbon. Employees have limited view to features in the system as described in the training article of employee access to scheduling.

Users and employees can also access features of scheduling through the mobile app.

Employee Access to Scheduling

Employees can login to the system through a web browser or the mobile app and access certain scheduling features. Click here for training on **employee access to scheduling**

Manager Mobile Scheduling

Managers can access all scheduling features described below from the web browser, but many scheduling features are also available in the mobile app. Click here for training on **mobile scheduling features for managers**

Schedule

The schedule screen is a weekly or daily view of the schedule and where you can manage employee shifts in a simple drag and drop form. Click here for **schedule calendar training**

Shifts

Shifts are the detailed employee assignments on the schedule. The shift form can be opened from within the schedule screen or from the main menu. Click here for **shift training**

Requests

Employees can make requests for time off, shift trades, shift drops, and claiming open shifts from within the system. Managers can be alerted and approve or deny these requests and employees can be alerted of the status. Click here for **schedule request training**

Employees

Employees can be imported from the point of sale system and then managed in Restaurant365 or you can set them up directly in Restaurant365 if they haven't clocked in the POS yet but you still want to put them on the schedule. Important info managed on the employee form for scheduling purposes is the preferred contact method and also the employee's general availability on different days of the week. Click here for **employee training**

Jobs

Jobs can be imported from the point of sale system and then managed in Restaurant365 or you can set them up directly in Restaurant365 if you don't need them in the POS. Click here for **job training**

Job Responsibilities

Job Responsibilities allow you to put more detailed qualifications on a job and specify which employees have those qualifications. Then when assigning shifts you can tell which responsibilities/qualifications are required and limit which employees are eligible for that shift. Click here for **job responsibility training**

Local Events

Local Events allow you to enter or import a list of events happening in the area (local sporting event, conference, etc) that might effect the restaurant and these will show on the scheduling screen to help when scheduling. Click here for **local event training**

Sites

Sites are places an employee might be assigned to work that is away from the restaurant such as at a banquet room, wedding, etc. A site can be recorded on a shift so the employee can see the address where they'll be working that shift. Click here for **site training**

Announcements

The manager can create announcements and give them start dates and expiration dates for when they'll show up for the employees and they can also be sent out via text/email. Click here for **announcement training**

Scheduled Now

This view in the system gives the manager a quick view to who should be working right now. They can also change the date and time for a quick view of who is scheduled at other times too. Click here for **scheduled now view training**

Labor Actual vs Scheduled Report

This report can be run once actual labor has been imported from the POS system to then compare the actual labor results vs what was originally scheduled. This report is run from the My Reports page under the Labor section. If you don't have it in My Reports, it can be added by going to Report Favorites under Accounting – Administration –

Report Favorites and checking the box next to the report and then saving. If you don't have access to Accounting Administration then please ask your accounting administrator to give you access to this report.