

Scheduling Overview & Security

OT Hours	0							
Fixed Labor Var	-142							
Sales	\$340,000	\$10,000	\$100,000	\$100,000	\$100,000	\$10,000	\$10,000	\$10,000
Labor	\$2,017 0.6%	\$145 1.5%	\$962 1%	\$449 0.4%	\$272 0.3%	\$0 0%	\$44 0.4%	\$145 1.5%
Labor +/-	-19.2%	-15.2%	-12.1%	-1%	-12.7%	-12.1%	-11.2%	-21.2%
Labor Forecast	35	1	7	6	2	1	14	4
Total Staff +/-	-13	1	4	-1	-2	-1	-12	-1

The R365 Scheduling Module is a complete scheduling solution to manage your labor workforce. Unlike other Modules in R365, the Scheduling Module contains functions and features that are specific to two different classes of Users:

1. Manager functions: Restaurant Managers have all the tools to manage their employees and schedule.
 - Create Schedules from scratch, template or prior week
 - Alert their employees about upcoming events and announcements
 - Deliver text (SMS) and email alerts to Employees for Scheduled Shifts, Shift Openings, and Request Approvals/Denials
 - Manage their Employee's information including approving Employee Availability
 - Perform limited Manager functions in the [R365 Classic App \(Black\)](#) and [R365 Red App](#). Click [here](#) for more information on these apps.
2. Employee functions: Restaurant Employees have access to their schedule via the [R365 App \(Red\)](#)
 - View upcoming Shifts and Announcements
 - View the entire Schedule
 - Bid for open Shifts
 - Request Time off
 - Update Availability (must be approved by Manager before effective)

In order to access the Scheduling module it must first be activated. This occurs by default for all new customers. If you do not currently have access to the Scheduling module, please contact [R365 Support](#).

Security

Once the module is activated, it can be accessed by Users (members of your team that have been setup with access to R365) or Employees (hourly employees that exist in your POS System), as described below:

User Access

The Permissions listed here are associated with Scheduling. These Permissions can be added to Custom User Roles or single Users. Learn more about [managing Permissions and Custom User Roles here](#).

Scheduling Permissions are found in the Permission Tree as follows:

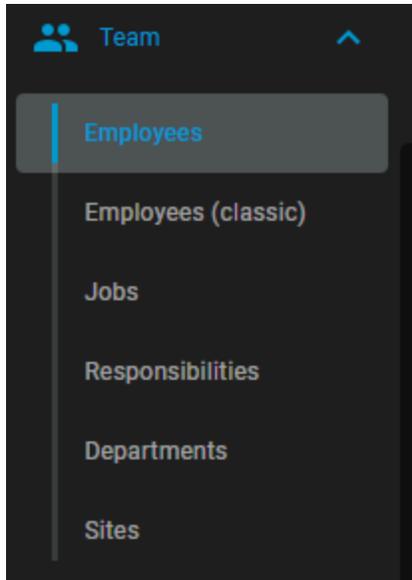
- Labor
 - Scheduling
 - View/Edit Labor Matrix Setup
 - View Labor Dashboard
 - Manager Tools
 - View Request Cutoff Settings
 - Edit Request Cutoff Settings
 - Schedule
 - View Schedule PageAdd/Edit/Delete Shifts
 - Publish/Unpublish Schedules

The [Permission Access report](#) can be used to determine which [User Roles](#) or [Users](#) already have these Permissions assigned.

Learn more about [User Setup and Security here](#).

Employee Access

For each Location that is integrated with R365, all Employees that have been set up within your POS systems will be imported and created as [Employee records](#) in Restaurant365. These records are accessible in the 'Employees' list located in the left nav under 'Teams.'



Each Employee that will be using the Scheduling module must be granted 'App Access' on their individual Employee record. This will create a R365 User profile for the Employee and automatically assign the 'Employee App Access' User Role to their profile.

App Access

Click here for more information on [Employee App Access](#).

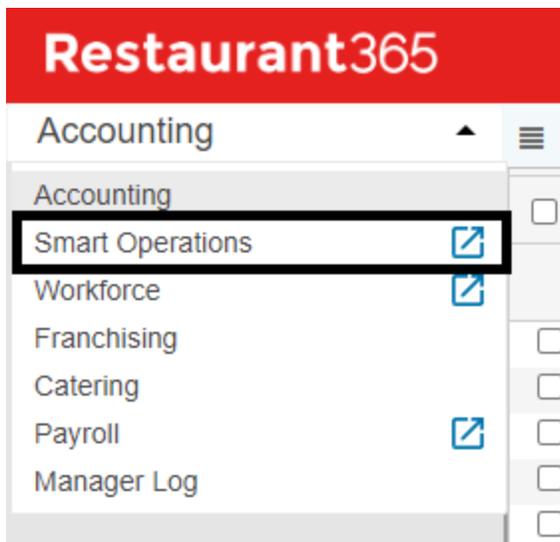
Navigation

Manager Users (non-employees) can access the Scheduling module in both the R365 Web Application [R365 Classic App \(Black\)](#).

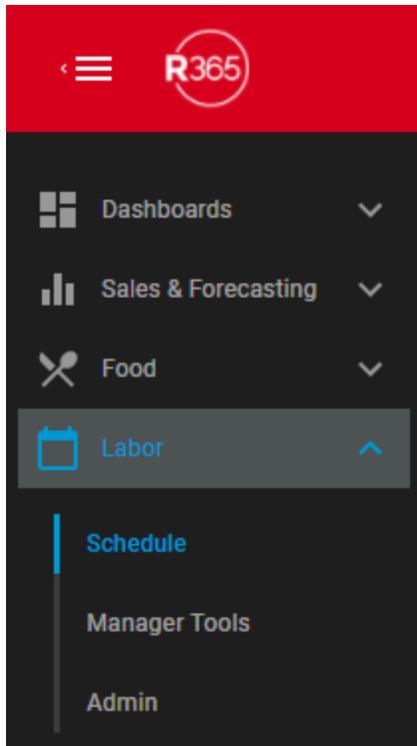
Web Application

Within a Web Browser, Users can view the Schedule Calendar from within Smart Ops.

From the Smart Ops window, Users can create a Schedule as well as view [advanced metrics](#) while creating an upcoming schedule.



Navigate to Smart Ops by opening the module selector and clicking 'Smart Operations.'



When Smart Ops opens, click 'Schedule' under 'Labor' to open the Schedule Calendar.

R365 Classic App (Black)

5:13



Username / Email

r365user

password



Domain

setup ▾

[Forgot Password ?](#)

Login

Click here for more information about downloading and logging into the [R365 Classic App \(Black\)](#). Click here for more information on [Manager Functions](#) in the R365 Classic App (Black).

Employee Access to Scheduling

Your Employees can access their Schedules through the [R365 App \(Red\)](#). The following articles can be used to train your Employees to get the most out of R365 Scheduling:

- [R365 Scheduling for Employees: Overview](#)
- [Downloading the R365 App \(Red\)](#)
- [Logging into the R365 App \(Red\)](#)
- [Viewing the Schedule and your Shifts](#)
- [Making Schedule Requests \(Trade / Offer / Claim / Time off\)](#)
- [Updating your Profile & Availability](#)

Calendar View

The 'Schedule' screen is a Weekly or Daily view of the schedule where you can manage Employee Shifts in a simple drag and drop form. Click here for more information on the [Schedule Calendar View](#).

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 more information on [Shifts](#).

Requests in the Manager Queue

Employees can make Requests for Time-off, Shift Trades, Shift Drops, bidding on Available Shifts, and updating their Weekly Availability. Each of these Requests are made in the [R365 App \(Red\)](#). Managers can be Alerted and Approve or Deny these Requests through the [Manager Queue](#) in their Web Browser. Employees are alerted when their Requests have a change in status. Click here for more information on [Managing Requests in the Manager Queue](#).

Announcements

The Restaurant Manager can create Announcements and assign them start dates and expiration dates. These dates will determine when the Announcement will appear for the Employees. Announcements can also be sent out via text or email. Click here for more information on [Scheduling Announcements](#).

Events

Events allow you to enter Events happening in the area (local sporting event, conference, etc) that might effect the Restaurant from a Scheduling standpoint. These will appear on the Scheduling Calendar view to help when determining staffing needs. Click here for more information on [Events](#).

Departments

Departments allow you to create custom groupings of your Employees for Scheduling and Goal Setting purposes. The Department record allows you to name the Department, assign it to a Location, and specify which Managers are over the

Department as well as which [Jobs](#) are included in the Department. Click here for more information on [Deartments](#).

Blackout Days

Blackout Days allow you to set specific dates on the Schedule Calendar that no Employee can request off. Click here for more information on [Blackout Days](#).

Jobs

Jobs can be imported from the Point of Sale (POS) system and then managed in Restaurant365. Additionally, you can manually create Jobs in Restaurant365. Click here for more information on [Jobs](#).

Job Responsibilities

Job Responsibilities allow you to put more detailed qualifications on a Job and specify which Employees have those qualifications. When assigning shifts you can set which responsibilities/qualifications are required and limit which Employees are eligible for that Shift. Click here for more information on Job [Responsibilities](#).

Employees

Employees can be imported from the Point of Sale (POS) system and then managed in Restaurant365. Additionally, you can manually create Employees in Restaurant365. Click here for more information on [Employee Setup](#).

Suggested Hours

The Scheduling Module can make suggestions to your team as the Schedule is created based on Forecasted Sales and SPLH Goals. Click here for more information on [Suggested Hours](#).

Scheduled Now

This view in the system gives the Restaurant Manager a quick view as 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 as well. Click here for more information on the [Scheduled Now View](#).

Manager Mobile Scheduling

Managers can access all Scheduling features described below from the R365 Web Application (Browser), but many Scheduling features are also available in the [R365 Classic App \(Black\)](#). Click here for more information on [Mobile Scheduling features for Managers](#).

Labor Actual vs Scheduled Report

This report can be run once actual labor has been imported from the POS system. The actual labor is compared against the scheduled shifts. This report is run from the ['My Reports'](#) page on the the 'Labor' tab. In order to access this report, it will

need to be assigned to your [Report Role](#). Contact the R365 administrator in your Organization to request access to this report.

R365 Messaging Audit Center

[R365 Employee Messaging](#) allows Employees the ability to communicate without having to share their personal contact information. When an Employee sends an inappropriate message to another Employee, it can be reported for Managerial review. All reported messages are sent to the R365 Messaging Audit Center, where these will be archived and used to document disciplinary actions. Click here to learn more about the [R365 Messaging Audit Center](#).