Associate Schedule

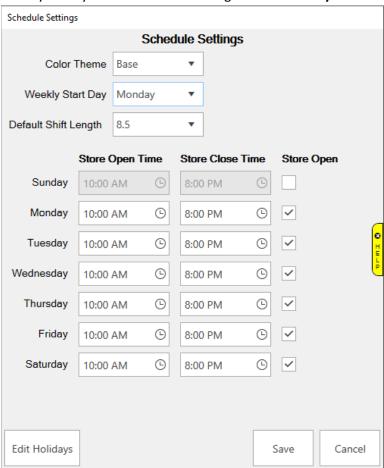
Overview

The Associate Schedule feature allows you to manage your employees' shifts and time off.

Creating a Schedule

To create a new schedule:

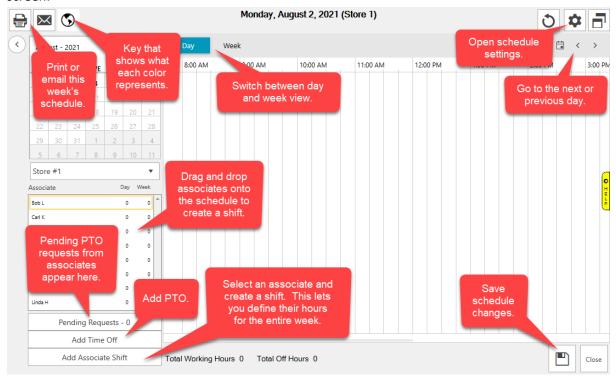
- 1. Click Associate > Schedule > Admin > Modify Schedules.
- 2. The first time you create a schedule you will be asked to set up the **Schedule Settings**. This is where you set your store hours, select a color theme, and set the default shift length. You can also define any holidays that your store is closed using the **Edit Holidays** button.



3. After completing setup click **Save.** This will bring you to the schedule management screen. Each row here represents one week. The first week is automatically created for you.



4. Select the first week and click **Edit**. Alternatively, you can double click. This will open the schedule screen.

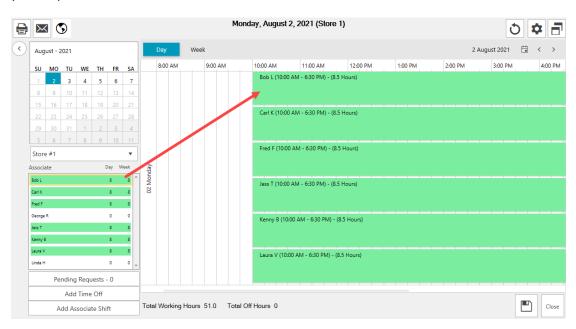


Adding a Shift

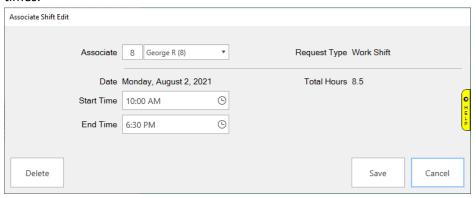
There are two ways to add associate shifts to the schedule. Once scheduled, the associate's name will be highlighted green and the **Day** and **Week** columns will indicate the number of hours scheduled so far.

Drag and Drop

Click and drag the associate from the list on the left onto the schedule. The shift will appear at whatever time you drop it.

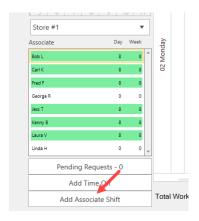


You can drag the shift to move it to a different time. To change the duration of the shift, mouse to the edge and resize it. Alternatively, you can double click to open the **Associate Shift Edit** window where you can type in times.

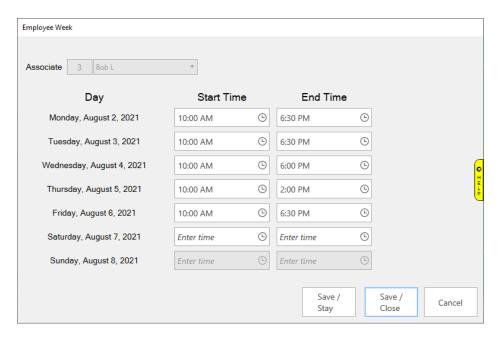


Add Associate Shift

The Add Associate Shift button lets you set an associate's schedule for the entire week.



Select the associate and click this button to open the shift screen. Alternatively, you can double click on the associate's name.



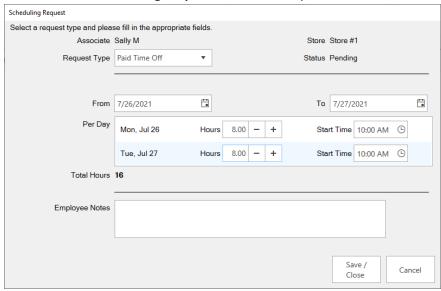
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Managing Time Off

Associates can request time off. A manager must review and approve these requests. Approved requests will show on the schedule.

To request time off:

- Click Associate > Schedule > My Time Off.
- 2. Click **Add**. The **Scheduling Request** window will open.



- 3. Choose the **Request Type** and choose the **Dates**.
- 4. Optionally, enter any Employee Notes.
- 5. Click Save/Close.

To approve/deny time off:

- Click Associate > Schedule > Admin > Manage Time Off. Any pending requests will be listed. To see
 previously approved or declined requests check the Show Approved/Denied Requests box at the
 bottom.
- 2. Edit the request.
- 3. In the bottom left, click either **Deny & Close** or **Approve & Close**.

Note: Time off requests are also accessible via the **Pending Requests** button found in the lower left of the schedule screen.

Manager - Add Time Off

A manager can add time off manually directly from the schedule. This can be useful for tracking sick time which is not generally scheduled ahead of time.

To add time off:

- 1. Click Associate > Schedule > Admin > Modify Schedules.
- 2. Click the Add Time Off button in the lower left.
- 3. Choose the associate and type of time off, then click **Approve & Close**.

Viewing the Schedule

Any associate can view the schedule without needing any special permissions by clicking **Associate > Schedule > See Schedule**.

Reporting

The schedule report works in conjunction with the time card feature to show hours scheduled vs worked for each associate. To run the report:

- 1. Click Reports > Management > Staff > Attendance.
- 2. Choose **Date Range** you wish to run the report for and click **OK**.