Scheduling

Intelligent scheduling maximizes job productivity in a 100% web-based solution that delivers easy access to schedules 24×7. Manage and share employees across restaurant locations and across different job codes. Track overtime and other state and local regulatory requirements as well as productivity across multiple locations.

Common efish Schedule Questions:

- **Efish vs ShiftX: What's the difference?**
  - **efish** is the software that you have already been using for reporting and any other modules you may be subscribed to. efish is where users with permission can create, edit/manage and publish schedules as well as manage employees, invite them to ShiftX and approve or deny time off and shift trade requests.
    - Most of our clients choose to have a separate Role for Scheduling in efish and add a GM or whichever employee is going to manage the schedule for each location as an efish user with that role in **administration > User Settings > Add User.**
    - That role will allow them to manage the schedule from efish as well as get time off request emails live as employees request them.
  - **ShiftX is the employee App:** This is where all employees will manage their schedule and time off as well as shift trades, employees must be invited via efish > Employee Admin > Find and edit the employee to add their email and click the "Invite to ShiftX" Checkbox before clicking save. This will invite them to ShiftX via email. See the ShiftX how too guides for more information.
- **Why are some employee's missing from my employee admin list?**
  - Usually this is because since connecting the POS with efish, the employee has not yet clocked in and out for a shift. Efish brings employees in for most POS's the day AFTER they have clocked in and out for at least one shift.
- **Why are some job codes missing?**
  - Similarly to missing employees, sometimes jobs will not come into efish from the POS until the employee has clocked in and out at least once in the POS with that job code.
- **Why are my Labor Departments Missing or Incorrect?**
  - Efish gets labor departments from the POS but some POS's do not provide these to 3rd parties or allow you to set them up so all jobs may just show up under one group named "no job group"
  - If your POS does send this info to efish but there are incorrect jobs or names for the departments you must fix this in the POS but do NOT CHANGE THE NAME OF ANYTHING, if the name is wrong you must delete the old one and add a new one with the correct name.

Employee Admin Pre Schedule Set Up

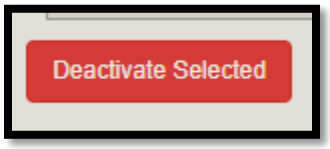
Before you Create your first schedule in efish you must first complete the following steps ensure everything works correctly and all your employees are notified once the first schedule is published. This includes deactivating any employees who no longer work at a location, merging any employees who work at multiple locations or are duplicated in the POS for any reason, and updating the email on file for current employees. This guide will walk you through each step.

Deactivating any old employees (those you do not wish to appear on the schedule):
Efish brings in all employees in the POS, however some of the older employees who may no longer work there may show as active in efish. To deactivate them you must follow the steps below.

1. Navigate to **[Administration > Employee Admin]**
2. In the Location Field select one or more locations (if you are responsible for all locations, you may select them all at once using the **[Toggle]** button. Ensure that the **"Hide Inactive"** checkbox is checked and the **[Worked Since]** drop down shows **"Show All"** then click **[Refresh]**

3. Click the **[Last Shift]** Column Heading to sort by the last shift (there may be several employees whose last shift is missing which means they have not clocked in recently enough for the system to recognize the last shift they worked and are likely no longer working there)
4. Select all employees who no longer work there or whom you do not wish to be on the schedule by clicking the empty checkbox to the left of the **[Active]** Checkbox. To select all employees on a page you can click the **[checked checkbox]** above the far left column.

5. Next click the red **[Deactivate Selected Button]** to deactivate them in the system.



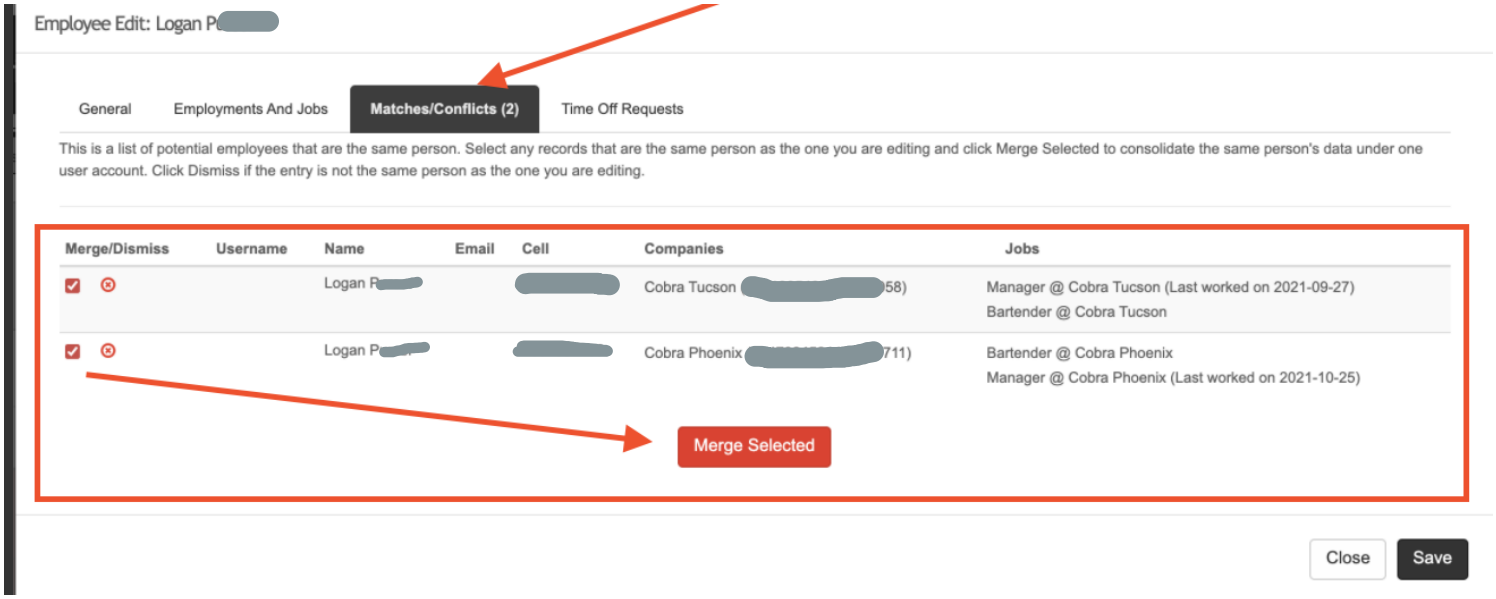
6. Do this for all employees who you do not wish to appear on the schedule (those that no longer work there) There may be several pages of old employees to deactivate before you get to your current employees. Do not deactivate any current employees.

Merging Employees who work at 2 or more locations: Once you are done going through all employees and have deactivated any that no longer work there. You must merge any employees who work at multiple locations. This will ensure that there is one employee record in the system linked to all their current locations and jobs. Follow the steps below to complete this process.

1. Navigate to **[Administration > Employee Admin]**
2. Ensure All locations are selected in the **[Location Field]** by clicking the **[Toggle]** button then click **[Refresh]**

3. Click the **[Matches/Conflicts]** column heading to sort bringing only those employees who have matches in the system to the top of the list. The red number indicates how many other employee records efish thinks may be the same employee. For example, if an employee works at 3 locations you may see a red 3 which means the 3 employee records need to be merged into one.
4. To merge click the **[edit box]** in the far-right column

5. At the top of the Pop Up click the **[Matches/Conflicts Tab]**
6. This is a list of potential employees that are the same person. Select any records that are the same person as the one you are editing and click **[Merge Selected]** to consolidate the same person's data under one user account. Click **[Dismiss]** (the x icon) if the entry is not the same person as the one you are editing.
7. Click **[Save]** when done, do this for all employees who work at more than one location.



Updating Email on File for all Current Employees & Invite to ShiftX: It is very important to update all current employees' emails in efish to ensure that they are all sent the initial email which will have a link to create their Shift X app account. Once they sign up for and download the Shift X app from the app store they will receive push notifications, however an email is required for each employee in efish. **NOTE:** ShiftX is the **EMPLOYEE SIDE** of the schedule and is used by employees to view and manage their schedule from their phones, it is **NOT** where you would create, edit, publish a schedule, or invite employees to ShiftX

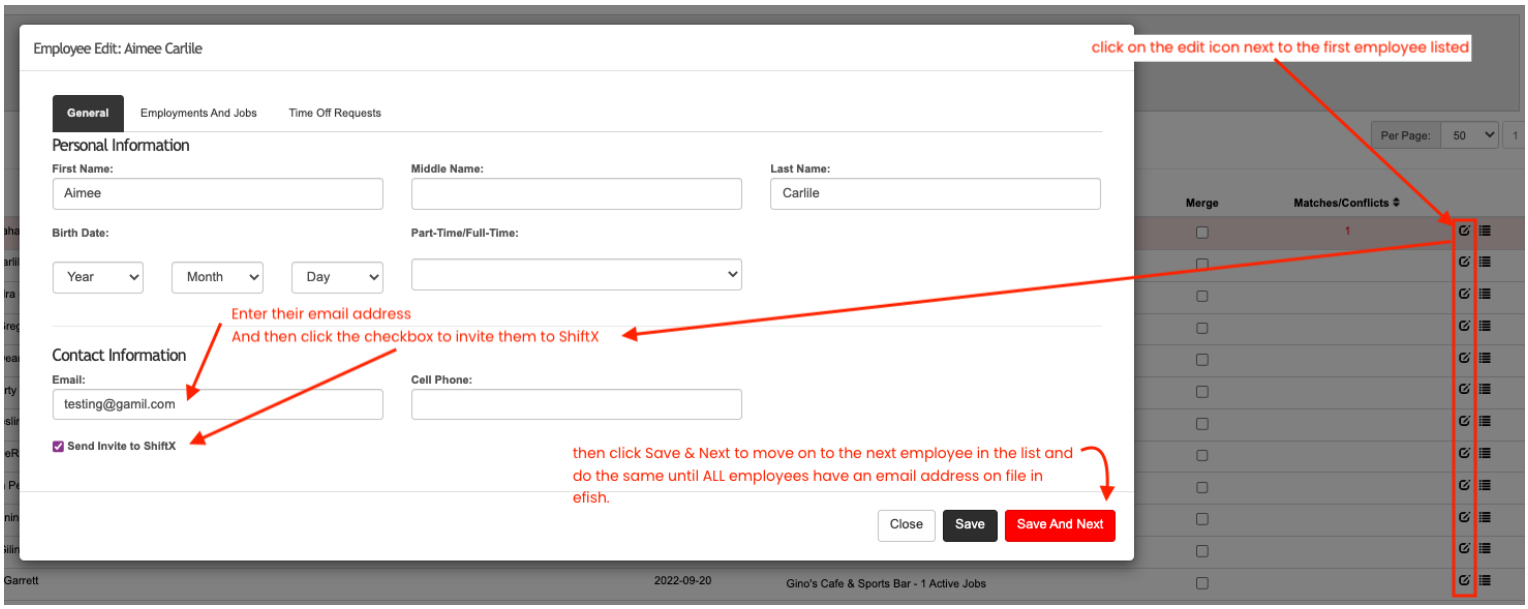
To update each employees email in efish follow the steps below:

1. Navigate to **[Administration > Employee Admin]**
2. In the Location Field select one or more locations (if you are responsible for all locations you may select them all at once using the **[Toggle]** button. Ensure that the **"Hide Inactive"** checkbox is checked and the **[Worked Since]** drop down shows **"Show All"** then click **[Refresh]**

3. click the **[edit box]** in the far right column

To INVITE EMPLOYEES TO ShiftX so they can create their account and view/manage their schedule:

1. you must first log into efish and navigate to [Administration > employee Admin]
2. Here you must add everyone's email address:
    a. click on the edit icon next to the first employee listed,
    b. Enter their email address
    c. And then **click the checkbox to invite them to ShiftX**
    d. then click Save & Next to move on to the next employee in the list and do the same until ALL employees have an email address on file in efish.



- Employees will each be sent an invitation via email to ShiftX with a link to set up their account & Password. Once they complete that step, they are all set to view and manage their schedule in ShiftX. (example of email invite to example employee Mathew Melrose below)

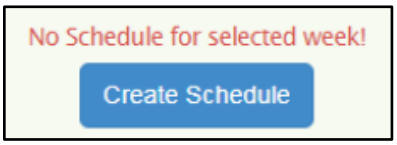
Hello Matthew Melrose,
This email is to invite you to create a user account with eFish, where you can view your schedule, trade shifts, and update their info. Click here to create an account.

To Create, Edit, Publish your schedule AFTER everyone has been invited with the steps above:

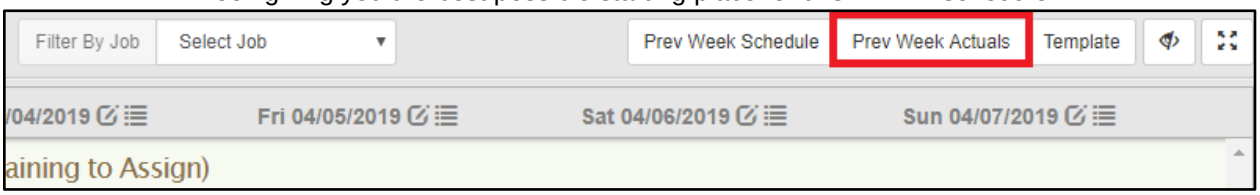
1. Log into efish and navigate to [Operations > Scheduling]
2. Click the **[Create Schedule]** button to start building your schedule, you can save it to come back to it later or Publish it to send out invite emails to every employee with an email address on file, employees can see all published updates in ShiftX

Efish Create Schedule Quick Start: How to setup your first schedule as efficiently as possible within efish!

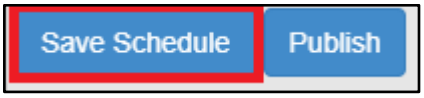
1. Navigate to **[Operations>Scheduling]**, select your desired week and click **[Create Schedule]**



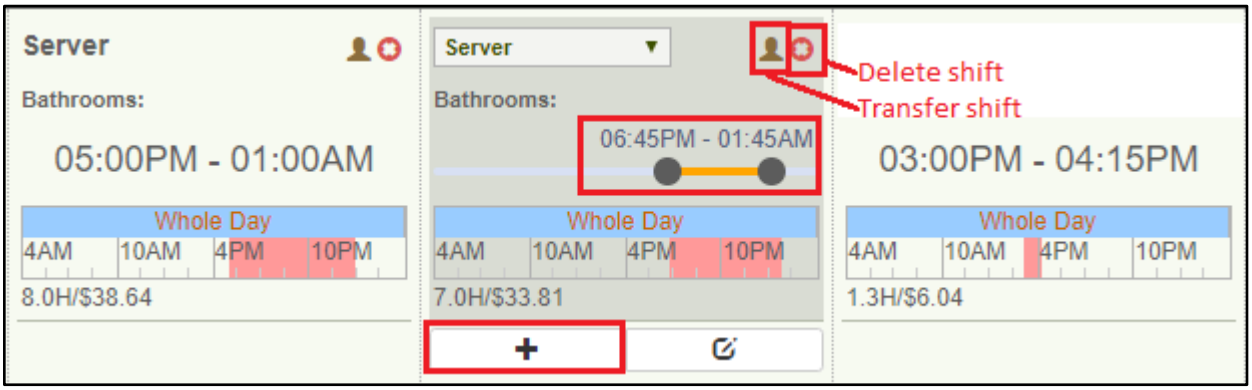
2. Click on **[Previous Week Actuals]** click **[Continue]** on the first pop up, then **[OK]** on the second pop up.
    - This will automatically load everyone and their clock-in/clock-out times for the previous week giving you the best possible starting place for this week's schedule.



3. Click **[Save Schedule]** in the lower left.
    - If you do not save the schedule before leaving the page you will lose everything.



4. **Edit your Schedule:**
    - **Edit Time:** adjust the **[Start/End Time Sliders]** by clicking on the end you wish to adjust and dragging it to the desired time.
        - You can click/drag the full **orange** **[Shift Bar]** to keep the # of hours the same.
    - **Add Shifts**: Click the **[+ Icon]**, choose the position, move the sliders to set the shift time.
    - **Transfer Shifts:** Click on the **brown** **[Head Icon]**, this will pull up everyone who can work that position & shows their current shifts, unavailability or days of requested.
    - **Delete Shifts:** Click on the red **[X Icon]** in the upper right of the shift.
        - *if you accidentally delete a shift, simply add it again using the **[+ Icon]***



*****Remember to click [Save Schedule] so you do not lose your work*****

5. **Print:** Once you are done creating the schedule, easily print out the weeks schedule for employees by navigating to **[Reporting> Week Schedule> Generate]** and clicking on **[Print]** in the upper right.

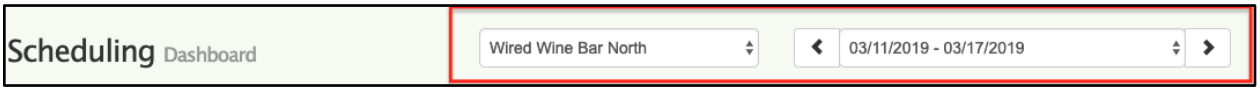
- You can print out a Daily Roster Report (shows everyone's shifts for that specific day) by navigating to **[Reporting > Roster Report> Generate]**and clicking on **[Print]** in the upper right.

Congratulations on creating your first schedule with our simplified intelligent scheduling system! It's that easy. The following information will provide you with drill down detail on all areas of our scheduling module for your reference.

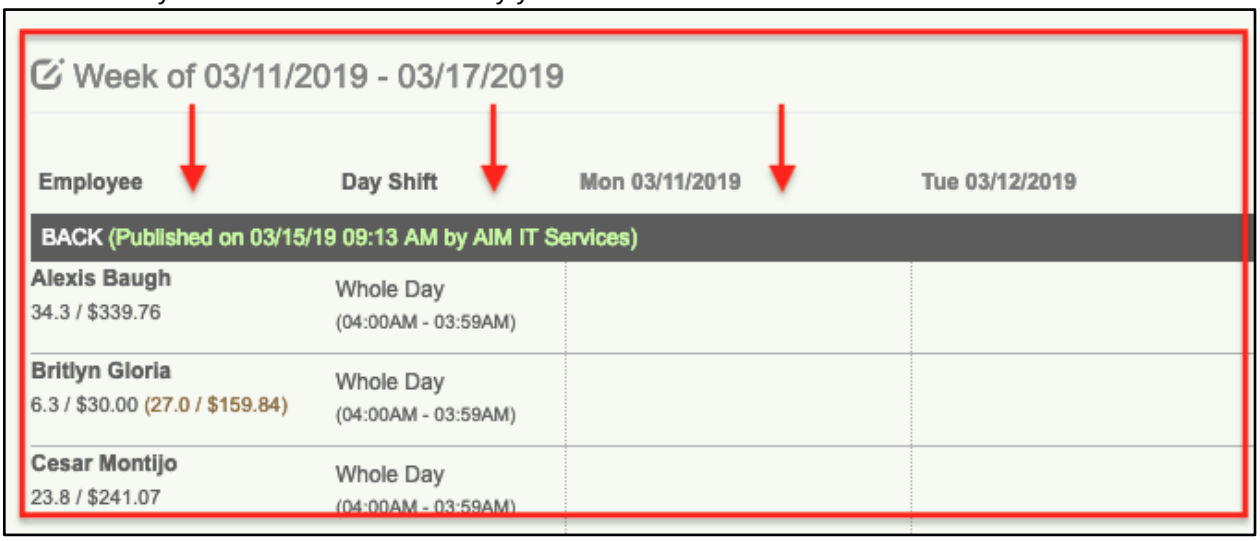
Note: The Quick Start Guide does not include the employee administration piece which must be completed Prior to creating your first schedule. For help, see the Employee admin – Pre Schedule Set up How to Guide & video.

Schedule > Dashboard: This is the landing page when you navigate to **[Operations> Schedule]** here you can see the schedule for your entire staff for the week broken down by category (i.e. Bar, Front, Back, etc..) & Employee.

- choose the desired location & week from the dropdown or by clicking on the **[Arrows]** around the current date range (default is the current week. you may schedule as many weeks in the future you like)

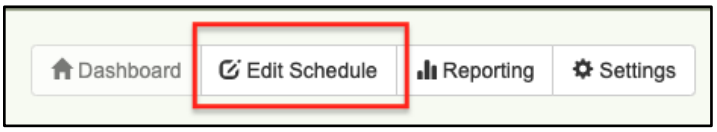


- The 1st column in the table shows the employee & hours/cost. The 2nd column shows you the "part of day" (i.e. Whole Day, Morning. Evening, etc.) The 3rd column is the day on which you start your work week as defined by your POS.

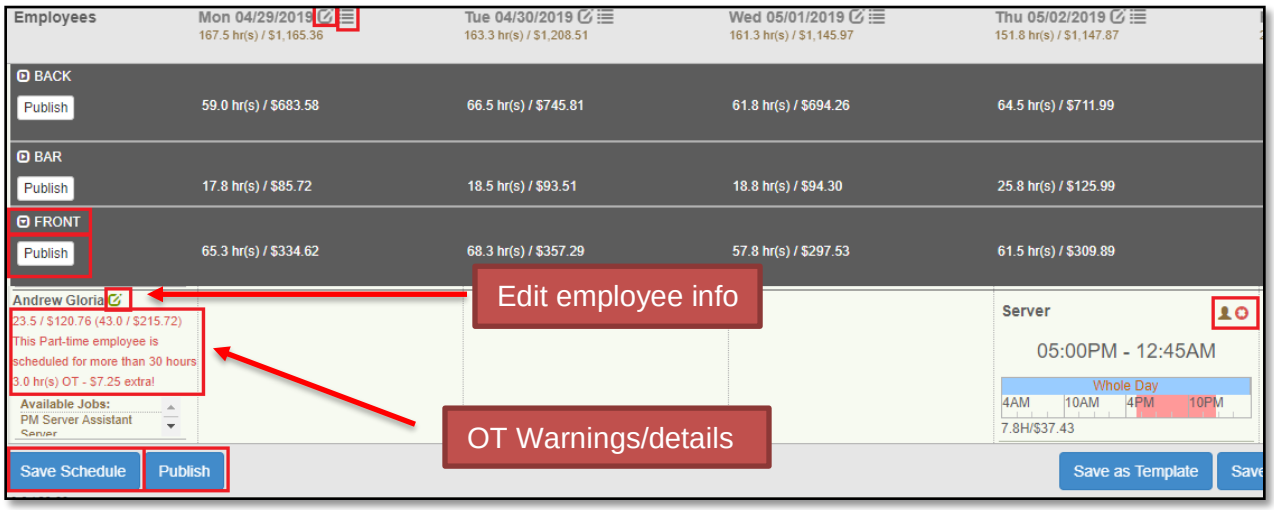


- **Note:** you cannot edit the schedule directly from the dashboard.

Schedule > Edit Schedule: you can edit the schedule either by clicking on the **[Edit Icon]** next to "Week of" or clicking on the **[Edit Schedule]** button in the upper right.



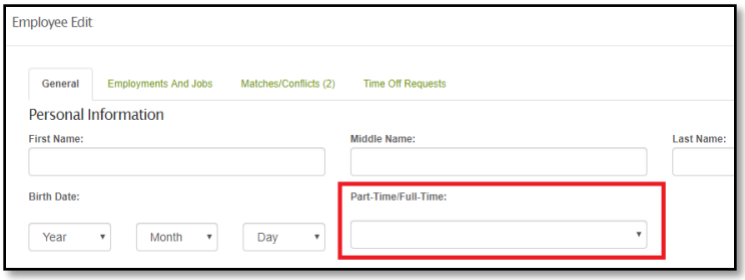
This will populate the schedule editing screen where you can see the hour/cost details as well as OT details per day broken down by Labor Department (i.e. Bar, Back, Front, etc.) Departments come from the POS and some POS's do not allow for Departments such as Toast. Changes to Labor Departments must be done in the POS and will not be reflected till the following day in efish.



Click on the **[Expand Icon]** next to the section(s) you wish to view (Bar, Back, Front etc.)

- This will show you all employees under that section and their shifts for the week. you can make changes and add shifts from here. (Refer to step 4 from the Quick Start section on page 2.)
- The far-left column will show you the employees information including pay rate, and total hours for their job group per cost as well as OT warnings based on whether they are Full-Time or Part Time.

- You can edit an employee information directly from the far-left column by clicking on the **[Edit Icon]** which will populate a new window with the General, Employment & Jobs, and Time Off Requests tabs for that employee. Easily make changes directly from here, once you save your changes and close the window, they will be displayed within the scheduling view.



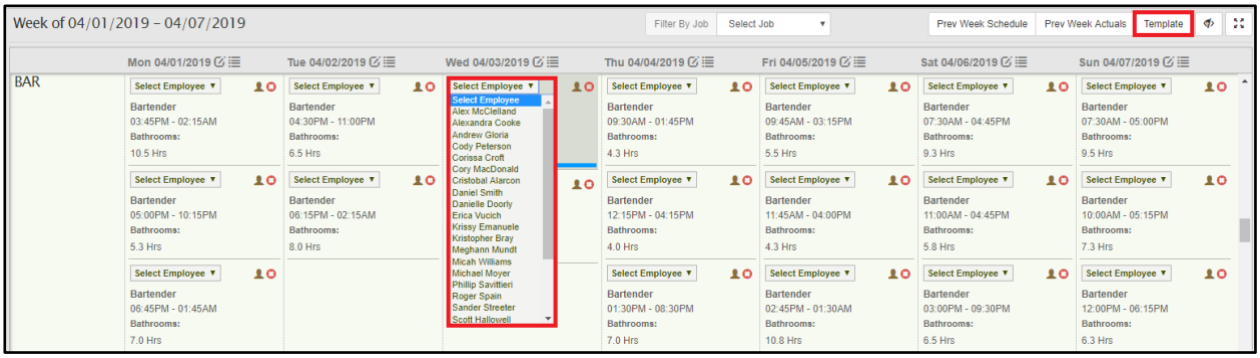
Note: You can also edit employee information from the daily scheduling view with the **[Edit Icon].**

- **Save/Publish:** Make sure you click on the **[Save Schedule]** button before you navigate from the page so as not to lose what you have worked on. Once you are set to post the schedule just click on the **[Publish]** button.

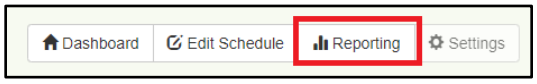
  - **Note:** any time you make a change to the schedule this will alert any affected employees. This keeps you safe and ensures your employees always know what is going on and what is expected as far as their schedule.

Templates: Once you have your schedule the way you want it you can save it as a template in one of 2 different ways:

- **With employees:** This allows you to save the shifts for each individual employee, which saves you time since you will not need to fill in anything at all next time. To do this click on the **blue** **[Save as Template with employees]** button in the lower right.
  - when selecting **[Save as a Template w/ employees]**, this will save that template as your active schedule for each week in the future until you re-save.
- **Without employees:** This allows you to save the shifts for each job type without associating a specific employee to each shift, to do this just click on the **[Save as Template]** button at the bottom of the screen.
  - Next time just click on **[Template]** in the upper right and select **[OK]** on the pop up, this will populate the template at the top of the screen with your job types saved from last time, you just need to select the names of the employees you want to drop in. (only employees of that job type will be able to be added saving you time) You can also make any needed adjustments before publishing.



Schedule > Reporting: This is where you can print the schedule once published.



Roster Report: by clicking on **[Roster Report]** and setting your desired filters, create a printout of the day - lists all employees with full shifts listed for the day broken down by job type and part of day.

Roster Report - Wired Wine Bar North

Tuesday, March 19, 2019

Generated On: 03/20/2019 03:48PM

efish efish

Whole Day		
BACK		
Line Cook	08:00AM	04:30PM
Line Cook	08:15AM	04:15PM
Line Cook	08:15AM	04:15PM
AM Server Assistant	12:00PM	04:30PM
Line Cook	02:00PM	06:15PM
Line Cook	03:45PM	01:15AM
Line Cook	03:45PM	01:15AM
Line Cook	03:45PM	11:15PM
Line Cook	03:45PM	01:15AM
Line Cook	04:00PM	09:30PM
Line Cook	06:00PM	10:00PM
BAR		
Bartender	09:00AM	05:00PM
Bartender	03:30PM	09:45PM
Bartender	07:00PM	11:15PM
FRONT		
Server	09:00AM	05:15PM

- **Weekly schedule:** easily create and print out your weekly schedule as shown on the Scheduling Dashboard. Simply click on the **[Week Schedule]** option. This allows you to provide a hard copy to your employees any time.

Wired Wine Bar North - Week of 03/11/2019 - 03/17/2019

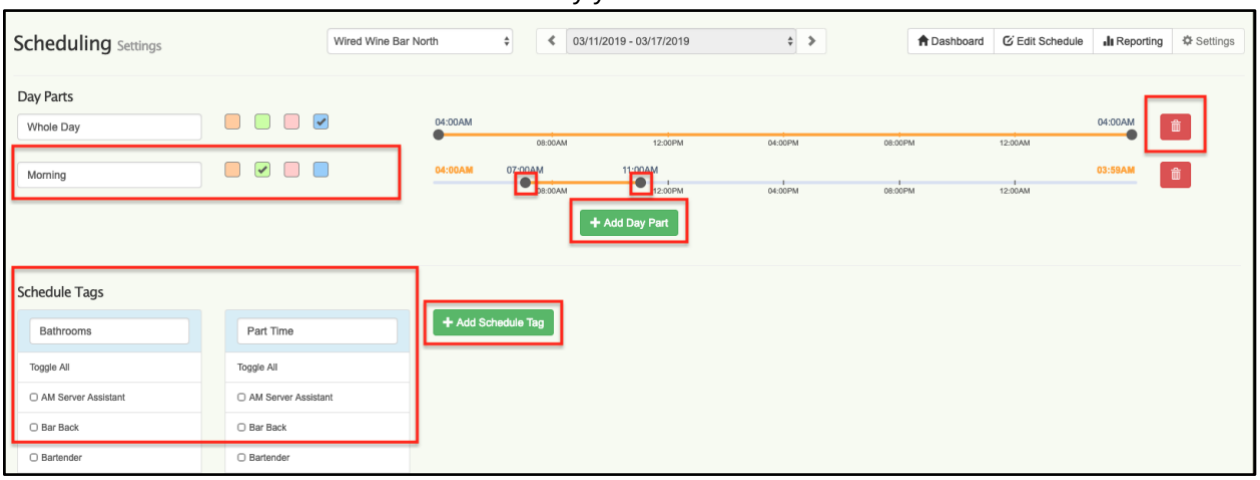
Generated: 03/20/2019 01:56PM

Employee BACK	Day Shift	Mon 2019-03-11	Tue 2019-03-12	Wed 2019-03-13
Alexis Baugh	Whole Day			Line Cook 05:00PM - 12:00AM
Britlyn Gloria	Whole Day			
Cesar Montijo	Whole Day			Line Cook 03:00PM - 11:30PM
Chandler Timmick	Whole Day		AM Server Assistant 12:00PM - 02:45PM	
Chris Turner	Whole Day	Line Cook 07:00AM - 08:00PM		
Christopher Vance	Whole Day		Line Cook 08:15AM - 04:00PM	
Dana Lillis	Whole Day	AM Server Assistant 11:45AM - 04:30PM		AM Server Assistant 12:00PM - 04:30PM
Dennis Ward	Whole Day	Line Cook 04:00PM - 12:30AM	Line Cook 04:00PM - 09:30PM	
Eric Grant	Whole Day	Line Cook 02:15PM - 10:15PM	Line Cook 12:15PM - 09:15PM	
Fernando Franco	Whole Day			Line Cook 08:00AM - 03:30PM

Schedule > Settings: this is where you can set day parts for your schedule as well as add schedule tags to different job codes.

Day Parts: break your day down the way it makes sense for you - easily add parts of the day such as (morning, night, mid)

- Click on the **[+ Add Day Part]** button, enter the desired name of the day part in the empty field, select the color you wish the day part to appear, and use the **[end points]** on the timeline to set the time of day you wish to label.



Schedule Tags: Set up Schedule tags that allow you to assign side work or additional tasks/duties as well as locations and or roles to an employees scheduled shift, you can use this for things that normally are assigned by the manager during the shift saving time and setting that expectation before they even arrive for their shift. You can set them up by job type so that only the tags applicable to a certain job type will appear for an employee of that job type.

To set up a schedule tag:

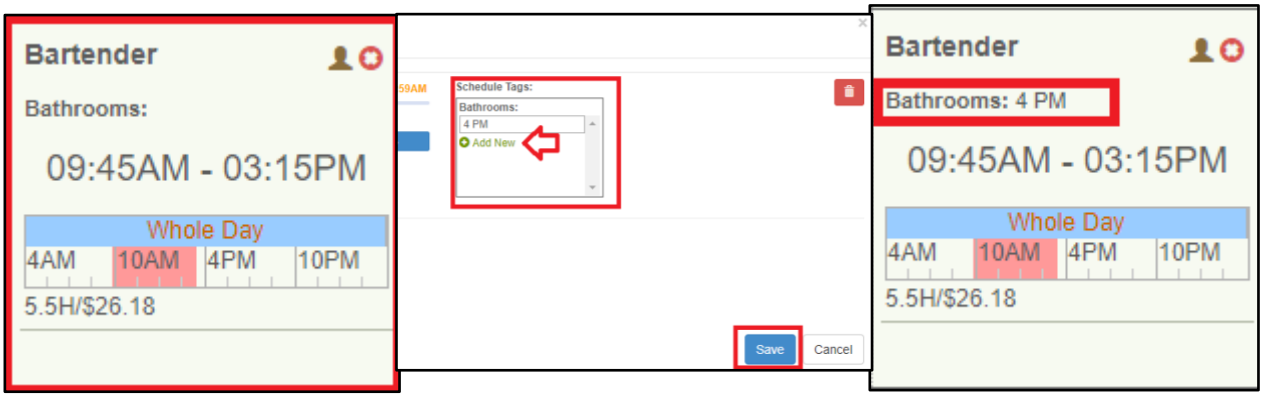
- Click on the **[+ Add Schedule Tag]** button, Type in the desired tag name in the **[Enter new tag name]** field.
- Click the **[Check Box]** to the left of any job types who you may wish to apply the tag to, click **[Toggle All]** to select all job types. This will apply the tag to everyone.
    - **Note:** you can always edit your tags any time by navigating to **[Operations> Scheduling> Reporting> Schedule Tags]**

You can add notes to a Schedule Tag for an individual shift. For example, a time to complete the task. Keep in mind task details will only be displayed in the edit schedule section if the **[eye icon]** in the upper left does NOT Have a line through it, if it has a line through it then task details will be hidden, Click the **[eye icon]** to toggle this state.

To add notes to a tag:

- From the weekly view find the shift you wish to tag, Double Click the **[Shift Box]**, this will open a pop up where you can add a tag on the right-hand side,

- Simply click on the **green** **[Add New]** button and add your note in the field. Click the **blue** **[Save Button]** In the lower left to save.



  - ***Example:*** *Joe is a Bartender and tonight you need him to take care of the bathrooms at 4pm. By setting up a Bathrooms tag and applying it to Bartenders along with any other job type that may handle bathrooms, you can easily add a "4pm" Note to the bathrooms tag on Joe's shift which notifies him that he will be responsible for taking care of the bathrooms at that time during that shift.*