

MANAGERS START-UP GUIDE

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1

HOW DO I UPLOAD AN EMPLOYEES PICTURE?

To upload an employee's picture:

1. Go to EMPLOYEES
2. Find the employee, click EDIT
3. On the general tab, click UPLOAD PICTURE



Upload Picture

4. Click the CHOOSE FILE button

■ Upload image

Please select file to upload

Choose file

Upload

5. Find the file on your computer and select it
6. Once picked, the filename will show, click UPLOAD

File Selected: Darcy.jpeg

Upload

Remove

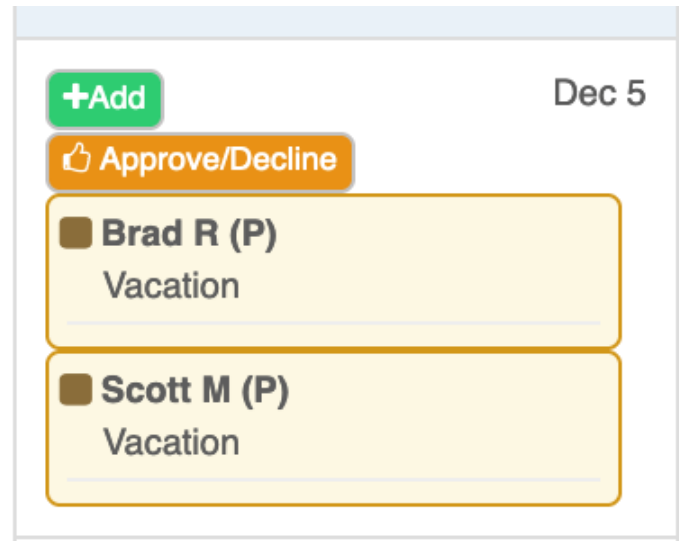
5. The file will upload (this might take a few seconds) and back in their profile you will see their image.

NOTE – If the file is too large (over 2MB) or weird characters in the filename it will not upload and you will be presented with an error message.

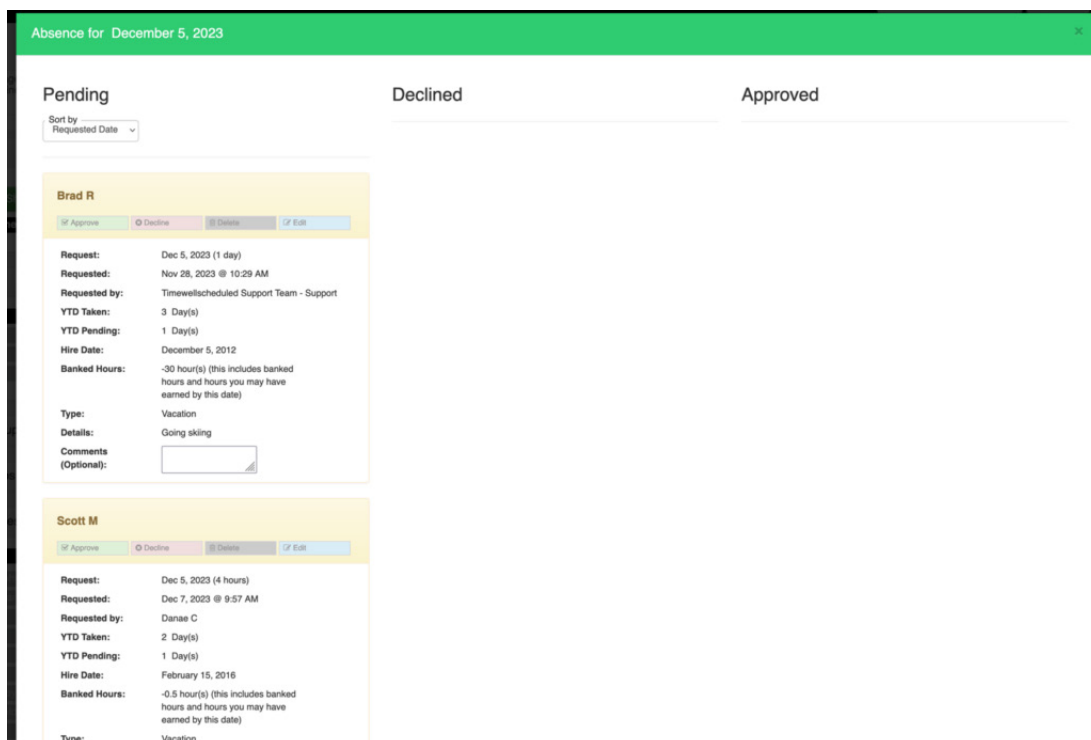
2 | HOW TO APPROVE ABSENCE REQUESTS

To approve an absence request,

1. Go to ABSENCE
2. Find the date, click APPROVE/DECLINE

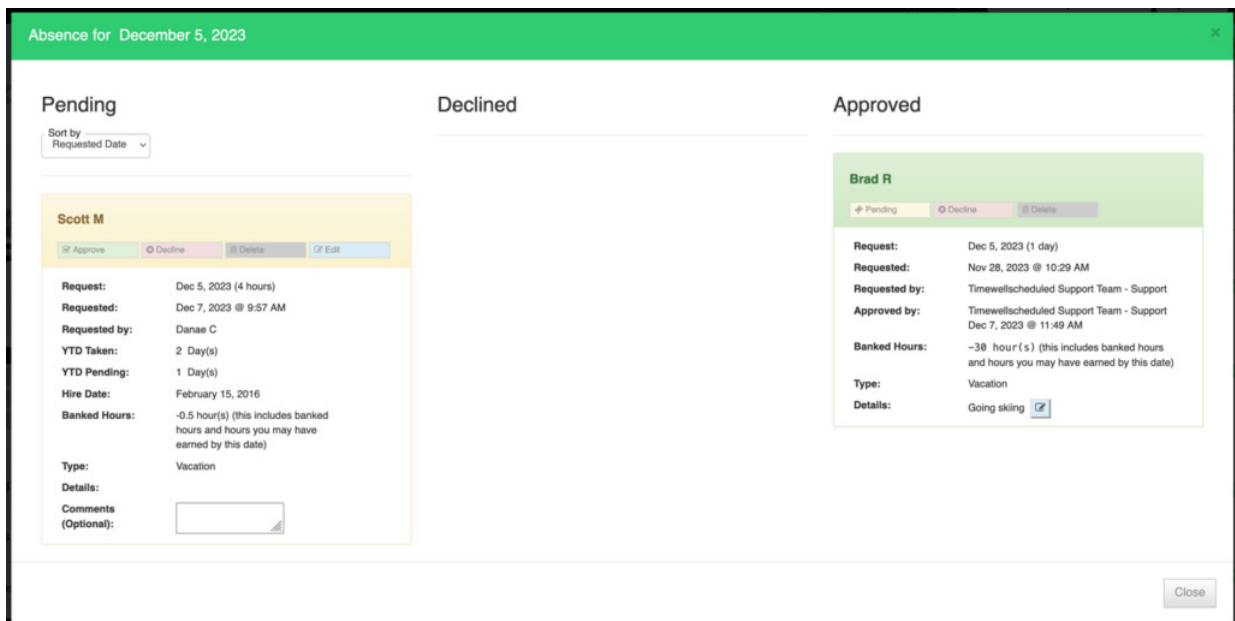


3. You can quickly see pending, declined and approved absences



4. Pick the absence to
 - a. Approve – this alerts the employee you have approved the request, moves it to the approved column and turns green. This absence WILL show on the schedule.
 - b. Decline – this alerts the employee you have declined the request, moves it to the declined column and turns red. This absence WILL NOT show on the schedule.
 - c. Delete – this removes the request. The employee is NOT alerted
 - d. Edit – Allows you to make changes to the request.

5. Continue until all requests are done



3 | HOW DO I MANAGE EMPLOYEES?

To add a new employee:

1. Go to EMPLOYEES
2. Click the green ADD button
3. Complete the forms fields with the red * beside them, ex
 - a. Payroll/punch code
 - b. Name
 - c. Security level
 - d. Primary department
4. If this employee will be a manager/supervisor, ensure you pick off the departments they will schedule
5. Payroll – Used for report filters. By default only HOURLY are part of the payroll export (as most clients only need hourly exported)
6. Role – [details here](#)
7. The remaining tabs like competencies and important dates are optional and help you manage your employees easier
8. Click the SAVE button

To edit an employee:

1. Go to EMPLOYEES
2. Find the employee, click EDIT
3. Update the fields that need changing
4. Click the SAVE button

To edit an employee:

[Follow these steps](#)

To change an employee's password

NOTE – you can not see an employee's password. It is one way encrypted and unreadable.

To change an employee's password:

1. Follow the steps above to edit an employee
2. Go to the GENERAL tab
3. Click SET PASSWORD
4. Type in the PASSWORD and click SAVEClick the SAVE button

View employee's history

[Follow these steps](#)

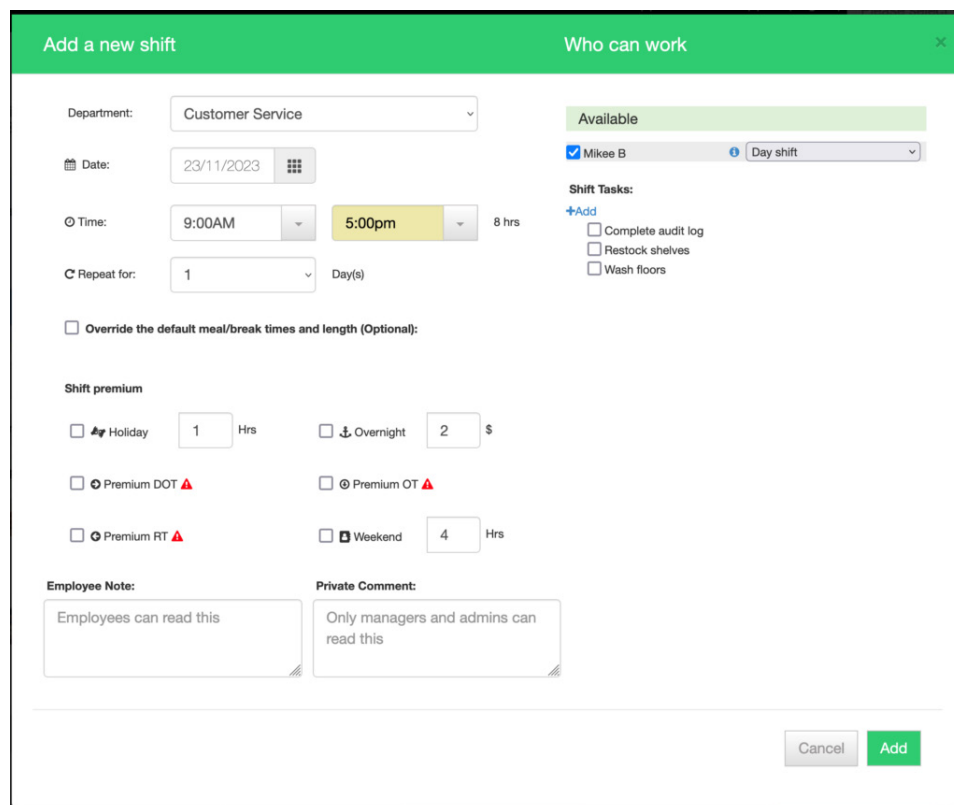
Employee ROE

[Follow these steps](#)

4 | HOW TO CREATE AND PUBLISH A SCHEDULE

To create a schedule:

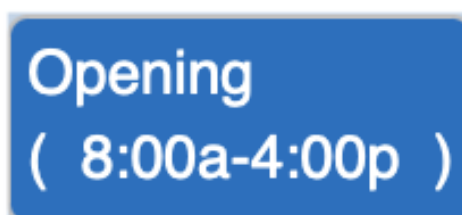
1. Go to SCHEDULING
2. Pick the department you want to schedule
3. Pick the week (make sure the week is UNPUBLISHED)
4. You can now create a schedule 4 ways
 - a. Click the + symbol for any cell for the day/employee, complete the form and click ADD



The screenshot shows a form titled "Add a new shift" with a sub-header "Who can work". The form includes the following fields and options:

- Department:** Customer Service
- Date:** 23/11/2023
- Time:** 9:00AM to 5:00pm (8 hrs)
- Repeat for:** 1 Day(s)
- Override the default meal/break times and length (Optional):
- Shift premium:**
 - Holiday 1 Hrs
 - Overnight 2 \$
 - Premium DOT
 - Premium OT
 - Premium RT
 - Weekend 4 Hrs
- Employee Note:** Employees can read this
- Private Comment:** Only managers and admins can read this
- Who can work:** Available
 - Mikee B (Day shift)
 - Shift Tasks:**
 - Complete audit log
 - Restock shelves
 - Wash floors
- Buttons:** Cancel, Add

- b. Pick a time band above the days and drag it to any cell with a + symbol on it



- c. Beside the employees name, click the + and pick a template

Add Schedule Template ✕

Department:

Schedule Templates:

Assign

[Select/Deselect all](#)

<input type="checkbox"/> Bill Benton	<input type="text" value="Manager Level 2"/>
<input type="checkbox"/> Carla C	<input type="text" value="Teacher"/>
<input type="checkbox"/> Chester Field	<input type="text" value="Day shift"/>
<input type="checkbox"/> David M	<input type="text" value="Night shift"/>
<input type="checkbox"/> Jean L	<input type="text" value="Employee (14-16)"/>
<input type="checkbox"/> Jim Bob	<input type="text" value="Employee (14-16)"/>
<input type="checkbox"/> Luis M	<input type="text" value="Servers"/>
<input type="checkbox"/> Melvin Smith	<input type="text" value="Day shift"/>
<input checked="" type="checkbox"/> Melvin Smothers	<input type="text" value="Owner"/>
<input type="checkbox"/> Mikee B	<input type="text" value="Day shift"/>

Monday: 9:00 AM - 5:00 PM

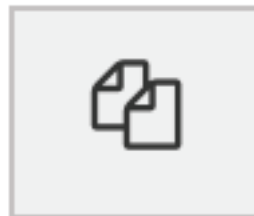
Tuesday: 9:00 AM - 5:00 PM

Wednesday: 9:00 AM - 5:00 PM

Thursday: 9:00 AM - 5:00 PM

Friday: 9:00 AM - 5:00 PM

- d. In the menu, click the copy icon to copy the current week (or previous weeks) into the future.



You will want to publish the schedule so your staff can see it. While unpublished, all shifts and changes are NOT visible to staff.

To publish a schedule:

1. Go to SCHEDULING
2. Pick the department you want to schedule
3. Pick the week (make sure the week is UNPUBLISHED)
4. Click the red button



Unpublished - Click to publish

5. Continue past the warnings (or CANCEL and fix them)
6. Pick to alert staff by email
7. Schedule is now published

To unpublish a schedule:

1. Go to SCHEDULING
2. Pick the department you want to schedule
3. Pick the week (make sure the week is PUBLISHED)
4. Click the green button



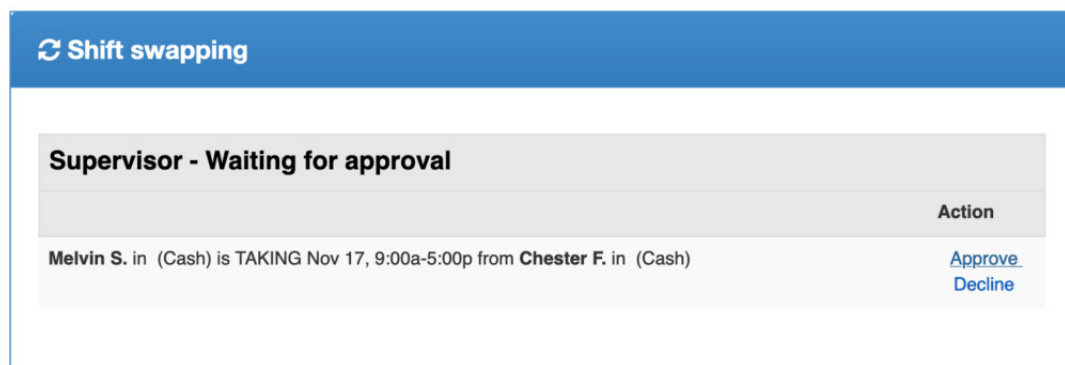
Published - Click to unpublish

5. Schedule is now ready to be changed (and invisible to staff)

5 | APPROVING SHIFT SWAPS

To approve a shift swap

1. Log into the DASHBOARD
2. Find the shift you want to APPROVE or DECLINE



- a. If you DECLINE, the employee will be alerted, the swap is done
- b. If you APPROVE, the employee will be alerted and the shifts will swap

6

HOW DO I SETUP A PUNCH CLOCK LOCATION?

If this is your first time setting up a punch clock location, make sure you have reviewed how to restrict the punch buttons. [Read this article](#) and if it applies, add the appropriate blocking.

What type of punch clock location are you setting up?

PC/Desktop

1. Go to the machine that will be used as a punch clock location
2. Load your PUNCH URL (you can find this under MANGE MY BUSINESS), it will look something like <https://my.timewellscheduled.com/default.asp?company=ABCDEFGH>
3. Follow [these steps](#) to bookmark the site.

Biometric

1. Make sure to set your punch option to [biometric](#)
2. Follow the steps on that article to setup the biometrics (you will still need to setup a punch location as per the above PC/Desktop setup)

iPad/Tablet

1. Make sure to set your punch option to [punch app](#)
2. Follow the steps on that article to setup the device

7 | SHIFT TASKS/TO-DO'S



Shift tasks allow you to assign tasks to an employee's shift and have the employee mark them completed.

Creating/Managing Shift Tasks

To create a task,

1. Go to MANAGE MY BUSINESS
 2. Go to MANAGE SHIFT TASKS
 3. Click ADD or EDIT to make changes
- You can also setup alerts for each task

Manage My Business » Business Settings » Manage Shift Tasks

[Add](#)  

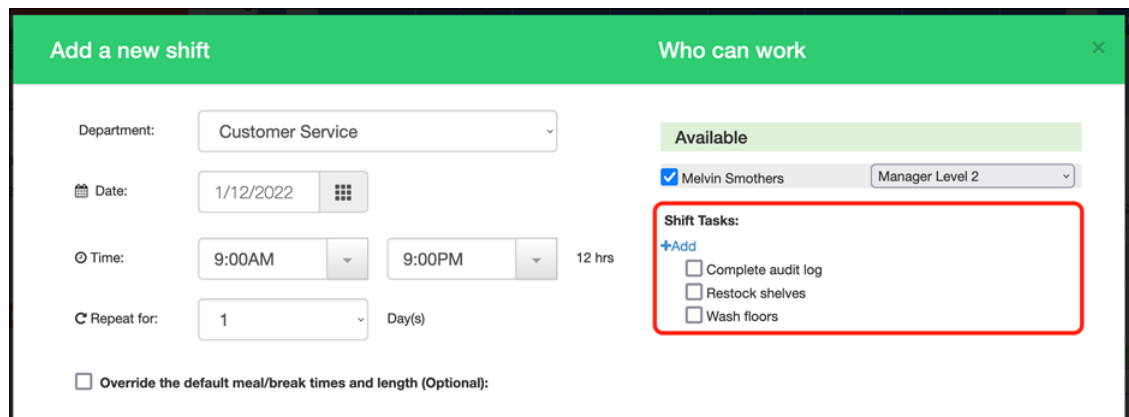
Task Name	Alert manager when this task is done	Alert manager at end of day if this task is not completed	Edit	Delete
Complete audit log	Yes	Yes	Edit	Delete
Restock shelves	Yes	Yes	Edit	Delete
Wash floors	Yes	Yes	Edit	Delete

Showing 1 to 3 of 3 rows

Assigning Shift Tasks

There are 3 ways to assign shift tasks:

1. When creating or editing a shift, on the right side you can check off the tasks to assign



2. When creating a TEMPLATE, you can check off the tasks to assign

Shift Tasks:

- Complete audit log
 Restock shelves
 Wash floors

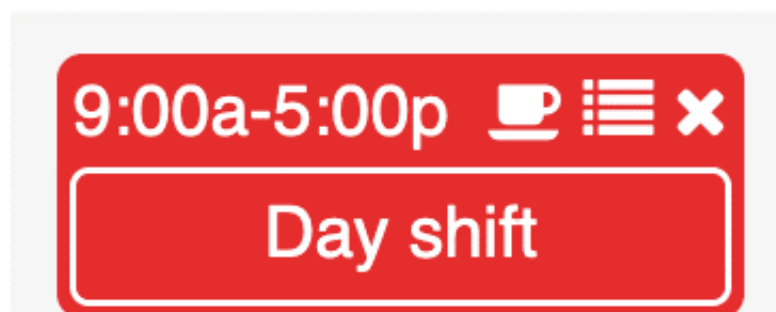
3. When create a TIMEBAND, you can check off the tasks to assign

Shift Tasks:

- Complete audit log
 Restock shelves
 Wash floors

How Can I Tell A Shift Has Task(s)

When a shift has task(s) assigned, you will see the icon that looks like a list (middle icon here)



How Can I See What Tasks Were Completed?

To view a report on completed tasks

1. Go to REPORTS
2. Go to VIEW SHIFT TASK REPORT
3. Enter your search criteria and run the report

How Do Employees Mark A Task Complete?

** For now, this can only be done via the website. It will be added to the app shortly.

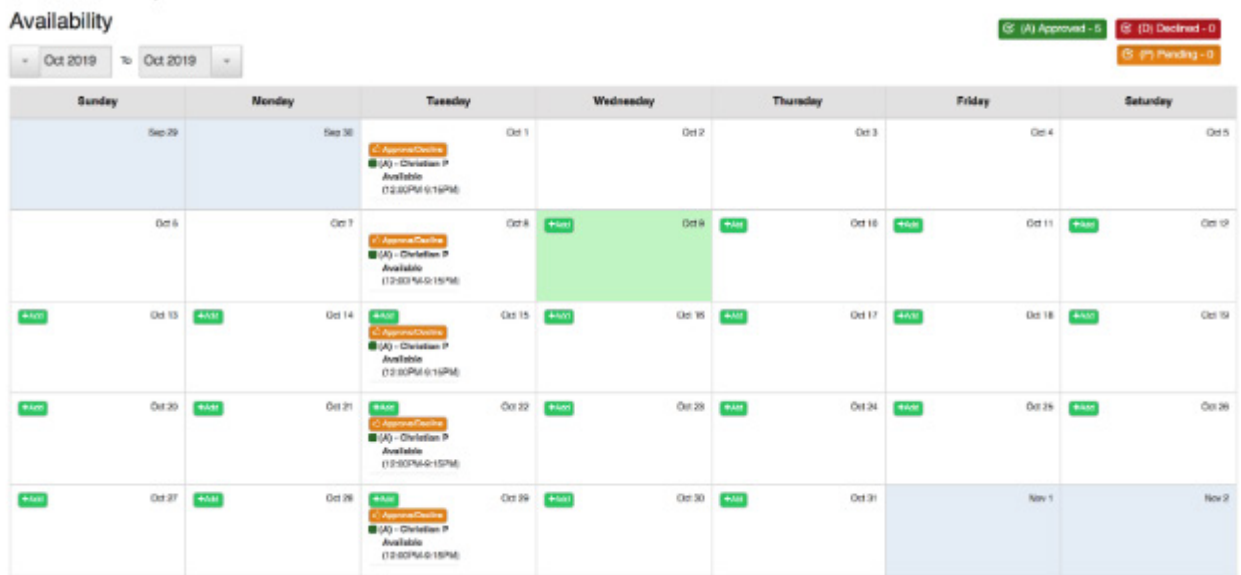
Employees can mark a task complete by


1. Visit timewellscheduled.com
2. Go to EMPLOYEE LOGIN and log in
3. On their dashboard, they will see their tasks for the day
4. When a task is completed, they click MARK AS COMPLETE

📅 TODAY'S SHIFT TASK(S), 9:00 AM-5:00 PM		
Shift Tasks	Status	
Complete audit log	Pending	Mark as Complete
Restock shelves	Pending	Mark as Complete

8 HOW TO ADD AVAILABILITY

1. In the menu, click AVAILABILITY



2. Click the ADD button on the day you want to add 
3. Complete the information and click ADD. If you're a manager/supervisor, you can select the availability for employees you manage.

You can optionally

- a. Pick if the employee is AVAILABLE or UNAVAILABLE
- b. Pick if the event to be one time or to repeat the event
- c. If the event repeats, how many weeks you want to repeat it

- When you're done, the availability will be in a PENDING state.
In this state it will show in the schedule as a yellow bar.

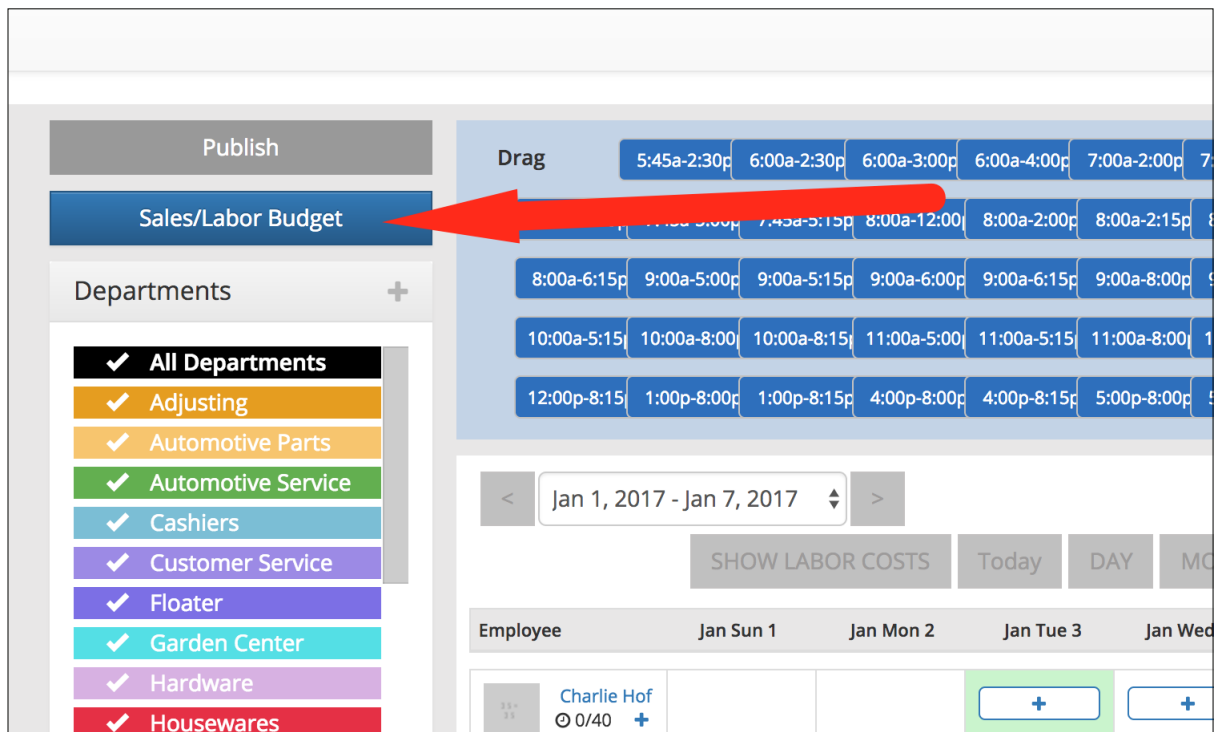


- Click the Approve/Decline to approve.
In this state it will show in the schedule as a green bar.



9 | HOW TO USE SALES/LABOR BUDGET

The Sales/Labour Budget Cost tool allows you to enter store Sales totals and compare them to you labour budget and labour costs.



The screenshot displays the 'Sales/Labor Budget' tool interface. On the left, a sidebar contains a 'Publish' button and a 'Sales/Labor Budget' button, which is highlighted with a red arrow. Below these are 'Departments' with a list of categories, each with a checkmark: All Departments, Adjusting, Automotive Parts, Automotive Service, Cashiers, Customer Service, Floater, Garden Center, Hardware, and Housewares. The main area shows a calendar grid for the week of Jan 1, 2017, to Jan 7, 2017. The grid has columns for each day and rows for time slots. A 'Drag' button is visible above the grid. Below the grid, there are navigation arrows, a date range selector, and buttons for 'SHOW LABOR COSTS', 'Today', 'DAY', and 'MO'. At the bottom, there is an 'Employee' section with a table showing 'Charlie Hof' with a status of '0/40' and a plus sign button.

- See all departments at once for a convenient view of the whole store's numbers.
- Set Sales, Labour Budget Cost and Labour Budget Hours and lock numbers in place.
- Easily copy numbers from last week's budget.

Sales/Labour Budget Cost										
<input type="text" value="Sep 13, 2015 - Sep 19, 2015"/>		<input type="button" value="Copy From Last Week"/>								<input type="button" value="Click to Lock"/>
	Sales	Labour Budget Cost	Labour Schedule Cost	Labour Cost +/-	Net Income	Labour %	Labour Budget Hours	Labour Schedule Hours	Labour Hours +/-	
Store totals:	8000	3000	\$3244.37	\$244.37	\$5000	37.5%	600	409.25	-190.75	
Adjusting	400	150	\$500.25	\$350.25	\$250	37.5%	30	56.5	26.5	
Automotive Parts	400	150	\$726	\$576	\$250	37.5%	30	107	77	
Automotive Service	400	150	\$1850.25	\$1700.25	\$250	37.5%	30	231	201	
Cashiers	400	150	\$167.87	\$17.87	\$250	37.5%	30	14.75	-15.25	
Customer Service	400	150	\$0	-\$150	\$250	37.5%	30	0	-30	
Floater	400	150	\$0	-\$150	\$250	37.5%	30	0	-30	
Garden Center	400	150	\$0	-\$150	\$250	37.5%	30	0	-30	
Hardware	400	150	\$0	-\$150	\$250	37.5%	30	0	-30	
Housewares	400	150	\$0	-\$150	\$250	37.5%	30	0	-30	
Inventory Audit	400	150	\$0	-\$150	\$250	37.5%	30	0	-30	
Maintenance	400	150	\$0	-\$150	\$250	37.5%	30	0	-30	
Management	400	150	\$0	-\$150	\$250	37.5%	30	0	-30	
Merchandising	400	150	\$0	-\$150	\$250	37.5%	30	0	-30	
Office	400	150	\$0	-\$150	\$250	37.5%	30	0	-30	
Seasonal	400	150	\$0	-\$150	\$250	37.5%	30	0	-30	
Smart Store	400	150	\$0	-\$150	\$250	37.5%	30	0	-30	
Sports	400	150	\$0	-\$150	\$250	37.5%	30	0	-30	
Training	400	150	\$0	-\$150	\$250	37.5%	30	0	-30	
Warehouse	400	150	\$0	-\$150	\$250	37.5%	30	0	-30	
We Care Ambassador	400	150	\$0	-\$150	\$250	37.5%	30	0	-30	

When a budget is set, it will show on the schedule the budgeted hours/cost and if you are over or under.

Hours: 45.00		Hours: 7.5	Hours: 7.5	Hours: 11.00	Hours: 7.50	Hours: 11.50	
Budgeted Hours: 280	Hours: 40	Hours: 40	Hours: 40	Hours: 40	Hours: 40	Hours: 40	Hours: 40
UNDER Hours: -235.00	Hours: -40	Hours: -32.5	Hours: -32.5	Hours: -29.00	Hours: -32.50	Hours: -28.50	Hours: -40

10 | APPROVE YOUR TIMECARDS

To view time cards

1. Go to TIME CARD & PAYROLL
2. Go to REVIEW, UPDATE AND APPROVE TIME CARDS
3. Pick a department (or click ALL DEPARTMENTS)

By default the report filters to show JUST those time cards that need approval. You can change the selector to SHOW ALL.

Time Card

< 01/07/2018 - 27/04/2020 > Show all Click to Lock


Select all | Approve all checked | Unapprove all checked Click the checkmark to unapprove any timecard


To:	Scheduled Hours	Actual Hours	Paid Hours	Hours
July 1, 2018	0 hours	0 hours	0 hours	0 hours
July 2, 2018	0 hours	0 hours	0 hours	0 hours
July 3, 2018				
C. Carla (Customer Service) ⚠	9:00AM - 1:00PM		Please select	
	4 hours			
July 4, 2018				
Field, Chester (Customer Service) ⚠	7:00AM - 5:00PM	8:09AM - 5:00PM	8:15AM - 5:00PM	8.25 hours
C. Carla (Customer Service) ⚠	7:00AM - 1:00PM		Please select	
Bob, Jim (Customer Service)	9:00AM - 5:00PM	9:00AM - 5:00PM	9:00AM - 5:00PM	7.5 hours
T. Diego (Customer Service) ⚠	9:00AM - 11:00AM		Please select	
	24.5 hours	16.25 hours	16.75 hours	15.75 hours

What type of time cards are there?

- Green – approved
The employee clocked in based on the schedule and grace period you entered so we assume it is right (you can edit if need be).
- Yellow – unapproved
They need to be approved to be show in payroll reports or be exported to payroll.

To approve time cards

1. Click the pencil icon in the PAID column 
2. The popup window will show
 - a. SCHEDULED – this is the times entered in on the schedule paid (can not be changed)
 - b. ACTUAL – what the employee actually punched (can not be changed)
 - c. PAID – the system auto calculates based on scheduled/actual, which you can then edit to reflect what you really want to pay the employee

Scheduled:			Actual:			Paid:			
	Time	Hours		Time	Hours		Time	Hours	Edit
Hours	8:00AM - 4:00PM	8	Hours	8:30AM - 4:00PM 	7.5	Hours	8:30AM - 4:00PM	7.5	
Breaks	2 @ 20 minutes	-0.67	Breaks			Breaks	(Add)		
Paid Breaks	2 @ 20 minutes	+0.67	Paid Breaks			Paid Breaks			
Meals	1 @ 60 minutes	-1	Meals			Meals	(Add)		
Paid Meals			Paid Meals			Paid Meals			
Total Hours		7	Total Hours		7.5	Total Hours		-1	
						Total Hours		6.5	

3. In the PAID column, click the edit icon and change the shift times to total the TOTAL HOURS for what you want to pay the employee.
4. When done, pick an option to approve the time card

Approve and Close

Approve and go to the next unapproved time card

What if an employee calls in sick?

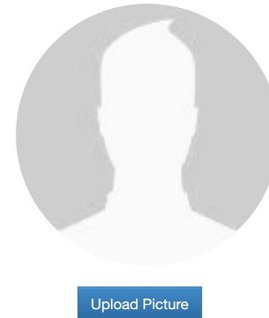
Sometimes an employee doesn't punch in at all. In those cases, you can record an absence and tie it to their shift. To do that, use the drop-down option to pick the type of absence.

Field, Chester [Customer Service] 	8:00AM - 4:00PM	✓ Please select Mark this as a DID NOT SHOW absence Mark this as a SICK DAY absence - UNPAID Mark this as a SICK DAY absence - PAID Family Emergency Jour de Vacance Medical Appointment Other Short Term Disability Vacation Mark as shift swap/delete
Tuesday Nov 28, 2023 Add Time Card		

11 | HOW DO I UPLOAD AN EMPLOYEES PICTURE?

To upload an employee's picture:

1. Go to EMPLOYEES
2. Find the employee, click EDIT
3. On the general tab, click UPLOAD PICTURE



4. Click the CHOOSE FILE button

■ Upload image

Please select file to upload

Choose file

Upload

5. Find the file on your computer and select it
6. Once picked, the filename will show, click UPLOAD

File Selected: Darcy.jpeg

Upload

Remove

7. The file will upload (this might take a few seconds) and back in their profile you will see their image.

NOTE – If the file is too large (over 2MB) or weird characters in the filename it will not upload and you will be presented with an error message.

12 | HOW TO SET AN EMPLOYEE'S PASSWORD

Passwords are one-way encrypted and cannot be viewed in the system.

But you can change them, to do this

1. Go to EMPLOYEES
2. Find the employee, click EDIT
3. On the GENERAL tab, click SET PASSWORD

*** Punch Code**

*** Payroll Code**

[Set Password](#)

4. Enter the new password

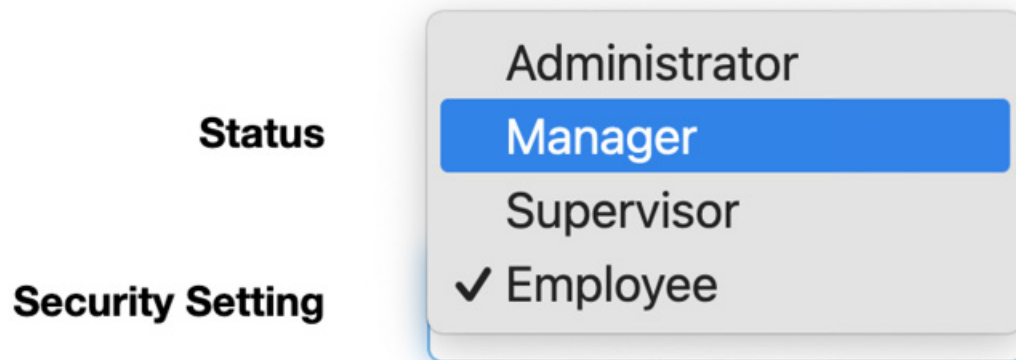
*** Password**

5. Click SAVE

13 | HOW TO SET AN EMPLOYEE AS A MANAGER/SUPERVISOR

To setup a manager/supervisor

1. Go to EMPLOYEES
2. Find the employee, click EDIT
3. On the GENERAL tab, set their SECURITY SETTING to manager or supervisor



4. Change to the DEPARTMENTS tab, check off they are a manager/supervisor and pick the departments they manage

Is this employee a manager/supervisor? Yes

Manager/Supervisor for these departments

[Select all](#)

Automotive

Cash

Hardware

Bakery

Customer Service

IT

Bureau

Food Prep

Management

14 | HOW DO I CHANGE A SCHEDULE IN THE PAST?

There may be cases in your company that requires shift start/end times to be changed after the schedule has happened. For example, if an employee worked the afternoon shift instead of the scheduled morning and you need the schedule to reflect that.

To do this, first you must enable the option:

1. Go to MANAGE MY BUSINESS
2. Go to MANAGE SCHEDULE AND TIME CARD SETTINGS
3. Go to the SCHEDULING tab
4. Enable the option

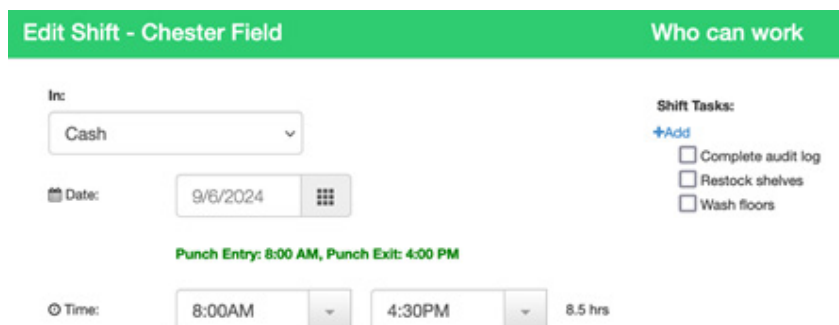
Allow administrators/managers/supervisors to modify past shift times (start/end) who's time card is NOT approved (up to 7 days in the past)

To update the shift,

1. Make sure the shift's time card is NOT approved
2. Go to SCHEDULING
3. Pick the dept, find the shift and click it



4. In the popup, change the start or end date, click SAVE



5. Approve the time card as you normally would

15

HOW TO GRANT EMPLOYEES ACCESS TO SEE THEIR TIME SHEET REPORTS

To grant access to the EMPLOYEE MANAGEMENT TIME SHEET report

1. Go to MANAGE MY BUSINESS
2. Go to MANAGE SECURITY GROUPS
3. Enable the REPORTS group for EMPLOYEES

	Administrator (Level 1)	Manager (Level 2)	Supervisor (Level 3)	Employee (Level 5)
Reports	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

4. Enable the EMPLOYEE MANAGEMENT TIMESHEET group for EMPLOYEES

	Administrator (Level 1)	Manager (Level 2)	Supervisor (Level 3)	Employee (Level 5)
Employee Management Timesheet	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

When employees log in, they will see the below option available

Messages (399)	Chat (21)	Time Card & Payroll	Reports	Absence request	My Availability	View my schedule	Library	Tra
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General Reports

 Employee Management Timesheet