

Scheduling Module Overview & Security

Jul 11, 2023 15:12

Week of Jan 28, 2020		Tue Jan 28	Wed Jan 29	Thu Jan 30	Fri Jan 31	Sat Feb 1	Sun Feb 2	Mon Feb 3
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 +/-	-13.9%	-15.2%	-12.1%	-12%	-12.7%	-12.1%	-11.2%	-21.2%
Labor Forecast	35	1	7	6	2	1	14	4
Total Staff +/-	-13		+4	-1	-2	-1	-12	-1
Unassigned >	81h 10sh	3 Shifts > 25h		4 Shifts > 32h		PREP 7a-3p 8h		2 Shifts > 16h
Ask, Mitch 8h 1sh CASHIER	Unavailable all day	Unavailable all day	Unavailable all day			CASHIER 12p-8p 8h		
Beckett, Debbie 50h 6sh BAR TRAIN PREP + 8 jobs	CASHIER 5:15a-1:15p 8h	CASHIER 5:15a-1:15p 8h	BROIL 1p-11p 10h	CASHIER 5:15a-1:15p 8h			CASHIER 5:15a-1:15p 8h	CASHIER 9:15a-5:15p 8h
Bedford, Carlton 56h 9sh FOOD RUN MOURLY	2 Shifts > 12h	FOOD RUN 8a-2p 6h	2 Shifts > 12h	FOOD RUN 8a-2p 6h	MAINTENANCE 5a-1p 8h	FOOD RUN 8a-2p 6h	FOOD RUN 8a-2p 6h	FOOD RUN 8a-2p 6h
Behr, Willie 30h 4sh FOOD RUN BROIL + 5 jobs		FOOD RUN 8a-2p 6h	BROIL 6a-2p 8h	Unavailable all day	Unavailable all day	BROIL 6a-2p 8h	BROIL 6a-2p 8h	BROIL 6a-2p 8h
Benito Osorio 9.5h 1sh FOOD RUN PREP + 4 jobs		Approved time off: 12a-1p	Approved time off: 4p-11:59p	FRY 11a-8:30p 9h	Approved time off: All day	Approved time off: All day	Approved time off: All day	Approved time off: All day
Bryant, Hunter 24h 3sh MAINTENANCE BAR + 2 jobs	CASHIER 9a-5p 8h		CASHIER 5:15a-1:15p 8h		CASHIER 5:15a-1:15p 8h			
Butler, Andrew 0h 0sh								
Butler, Nicole 24h 3sh PREP	Unavailable all day	Unavailable all day		PREP 7a-5p 8h	PREP 7a-5p 8h	PREP 7a-5p 8h	PREP 7a-5p 8h	
Forrey, Maralah 24h 3sh	PREP 7a-5p 8h		PREP 7a-5p 8h		PREP 7a-5p 8h			

The R365 Scheduling Module is a complete scheduling solution to manage your labor workforce.

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** (<https://help.restaurant365.net/en/support/tickets/new>).

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 - **Managing Employee App Access**
 - **Manager Access to Scheduling**
 - **Mobile Access**
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Overview

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The main page for the Scheduling Module is the **Scheduling Calendar** (<https://help.restaurant365.net/en/support/solutions/articles/12000055797>). Here, Users manage the day-to-day tasks of Schedule creation, including creating and editing shifts, assigning shifts to Employees, publishing shifts, and managing Employee requests for time off and shift swaps.

Each Schedule is for a full operational week. The start day of the Schedule is determined by the **Operational Calendar** (<https://help.restaurant365.net/en/support/solutions/articles/12000039155>) for the Location. If an Operational Calendar is not configured, the first day of the Schedule is determined by the Fiscal Calendar for the Location.

While almost all of the day-to-day tasks involved in scheduling are performed on the Scheduling Calendar, there are many other R365 features that tie into the Scheduling Module. Features that feed into Scheduling include **Employee Records** (<https://help.restaurant365.net/en/support/solutions/articles/12000077333>), **Jobs** (<https://help.restaurant365.net/en/support/solutions/articles/12000077332>), **Departments** (<https://help.restaurant365.net/en/support/solutions/articles/12000077346>), **Labor Rules** (<https://help.restaurant365.net/en/support/solutions/articles/12000091679>), **Labor Matrix** (<https://help.restaurant365.net/en/support/solutions/articles/12000077440>), and **Forecasting** (<https://help.restaurant365.net/en/support/solutions/articles/12000066710>). Maintaining these areas of R365 will improve the experience of Users managing the day-to-day Schedule.

Scheduling also feeds into other features of R365, including the **R365 Red App** (<https://help.restaurant365.net/en/support/solutions/articles/12000055812>), **Smart Ops Dashboards** (<https://help.restaurant365.net/en/support/solutions/articles/12000077171>), the **DSS** (<https://help.restaurant365.net/en/support/solutions/articles/12000077521>), and the **Actual vs Scheduled Report** (<https://help.restaurant365.net/en/support/solutions/articles/12000059472>).

Employee Access to Scheduling

Unlike most other Modules in R365, the Scheduling Module contains functions accessible by restaurant Employees.

The **R365 Red App** (<https://help.restaurant365.net/en/support/solutions/articles/12000055812>) is used by Employees to view their Schedules, request time off, request availability changes, request shift swaps, bid for open shifts, and **message managers and other Employees** (<https://help.restaurant365.net/en/support/solutions/articles/12000070200>). It is recommended that all Employees on the Schedule be **granted App Access** (<https://help.restaurant365.net/en/support/solutions/articles/12000039120>) on their **Employee Records** (<https://help.restaurant365.net/en/support/solutions/articles/12000077333>).

Employee Training Articles

To get the most out of R365 Scheduling, the following articles can be used to train your Employees:

- **R365 Scheduling for Employees: Overview** (<https://help.restaurant365.net/en/support/solutions/articles/12000056461-r365-scheduling-for-employees-overview>).
- **Downloading the R365 Red App** (<https://help.restaurant365.net/en/support/solutions/articles/12000055812-r365-app-red>).
- **Logging Into the R365 Red App** (<https://help.restaurant365.net/en/support/solutions/articles/12000056462-logging-into-the-r365-app-red>).
- **Viewing the Schedule and Your Shifts** (<https://help.restaurant365.net/en/support/solutions/articles/12000056463-viewing-the-schedule-and-your-upcoming-shifts>).
- **Making Schedule Requests (Trade / Offer / Claim / Time Off)** (<https://help.restaurant365.net/en/support/solutions/articles/12000056464-making-schedule-requests-trade-offer-claim-time-off>).
- **Updating Your Profile & Availability** (<https://help.restaurant365.net/en/support/solutions/articles/12000056465-updating-your-profile-and-availability>).

Managing Employee App Access

Each Employee that will be using the Scheduling Module must be granted 'App Access' in the 'Access' section of the **'Basic Info' tab** (<https://help.restaurant365.net/en/support/solutions/articles/12000089740>) on their individual **Employee Record** (<https://help.restaurant365.net/en/support/solutions/articles/12000077333>). This will create an R365 User Record for the Employee and automatically assign the 'Employee App Access' User Role.



Learn more about **Employee App Access here**. (<https://help.restaurant365.net/support/solutions/articles/12000039120-employee-app-access>).

Manager Access to Scheduling

It is recommended that managers have access to both the mobile scheduling features and the traditional web version. The mobile version is designed to help busy managers stay out of the office, allowing them to view the Schedule and approve shift swaps on their mobile devices. The traditional web version is where Schedules are built, and provides more robust reporting and auditing tools.

Mobile Access

Managers can use the **R365 Red App** (<https://help.restaurant365.net/en/support/solutions/articles/12000055812>) to view Schedules and communicate with Employees. Learn more about **Mobile Scheduling Features for Managers here** (<https://help.restaurant365.net/en/support/solutions/articles/12000089248>).

It is recommended that managers who are on the Schedule be **granted App Access** (<https://help.restaurant365.net/en/support/solutions/articles/12000039120>), on their **Employee Record** (<https://help.restaurant365.net/en/support/solutions/articles/12000077333>).

Managers who are not on the Schedule can have the 'Employee App Access' Permission added to their **User Roles** (<https://help.restaurant365.net/en/support/solutions/articles/12000087495>) or **User Record** (<https://help.restaurant365.net/en/support/solutions/articles/12000039184>).

Scheduling-Related Permissions

The Permissions listed here are associated with day-to-day Scheduling tasks. These Permissions can be added to Custom User Roles or single Users. Learn more about **managing Permissions and Custom User Roles here** (<https://help.restaurant365.net/en/support/solutions/articles/12000088619>).

Scheduling-related Permissions are found in the Permission Tree as follows:

- Labor
 - Scheduling
 - View Labor Dashboard
 - Manager Tools
 - View Request Cutoff Settings
 - Edit Request Cutoff Settings
 - Schedule
 - View Schedule Page
 - Add/Edit/Delete Shifts
 - Employees
 - View Employees
 - Edit Employees
 - Can Grant/Remove Employee's Access to R365
 - Create Employees
 - Merge Employees
 - Employment
 - Hourly Job Info
 - View Hourly Job Info
 - Edit Hourly Job Info
 - Integrations
 - View Integrations
 - POS Employees
 - View POS Employees
 - Map Employee Records
 - Schedule
 - View Schedule Availability
 - Edit Schedule Availability
 - Events
 - View Events
 - Edit Events
 - Create Events
 - Delete Events
 - Announcements
 - View Announcements
 - Edit Announcements
 - Create Announcements
 - Delete Announcements
 - Blackout Days
 - View Blackout Days
 - Edit Blackout Days
 - Create Blackout Days
 - Delete Blackout Days

The **Permission Access Report** (<https://help.restaurant365.net/en/support/solutions/articles/12000090234>) can be used to determine which **User Roles** (<https://help.restaurant365.net/en/support/solutions/articles/12000087495>) or **Users** (<https://help.restaurant365.net/en/support/solutions/articles/12000089855>) already have these Permissions assigned. Learn more about **User Setup and Security here** (<https://help.restaurant365.net/en/support/solutions/articles/12000038910>).

Publishing Permissions

Depending on the structure of your organization, Users who create and edit Schedules may not be able to publish them without additional review/approval. Only Users with the following Permission will be able to publish and unpublish shifts and full Schedules:

- Labor → Schedule → Publish/Unpublish Schedules

Learn more about **managing Permissions and Custom User Roles here** (<https://help.restaurant365.net/en/support/solutions/articles/12000088619>). The **Permission Access Report** (<https://help.restaurant365.net/en/support/solutions/articles/12000090234>) can be used to determine which **User Roles**

(<https://help.restaurant365.net/en/support/solutions/articles/12000087495>), or **Users** (<https://help.restaurant365.net/en/support/solutions/articles/12000089855>), already have these Permissions assigned. Learn more about **User Setup and Security here** (<https://help.restaurant365.net/en/support/solutions/articles/12000038910>).

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Manager Tools and Schedule-Related Tasks

Other than creating and editing Schedules, there are a handful of day-to-day scheduling tasks that managers are frequently responsible for. These include approving or denying Employee scheduling requests, sending announcements, creating blackout days, and reviewing reports of inappropriate Employee messages.

Employee Requests in the Manager Queue

Employees can make scheduling-related requests via the R365 Red App. When these requests are made, they will appear in the **Manager Queue** (<https://help.restaurant365.net/en/support/solutions/articles/12000056435>) within the Scheduling Calendar. Here, managers can review each request before approving or denying it. Employees are alerted when their requests have a change in status.

Employee requests managed in the Manager Queue include:

- Availability Changes
- Time Off
- Shift Trades
- Shift Offers

Learn more about **Managing Requests in the Manager Queue here** (<https://help.restaurant365.net/en/support/solutions/articles/12000056435-new-scheduling-managing-requests-in-the-manager-queue>).

Manager Notifications

Managers who should receive notifications for Employee Schedule Requests can be assigned in the following two ways:

Location Record

On the Location Record, a single Employee can be (<https://help.restaurant365.net/en/support/solutions/articles/12000077333>) assigned as the 'Location Manager'. When an Employee is assigned as the 'Location Manager', they will receive notifications for all Employee Schedule Requests for that Location.

The 'Location Manager' field is located on the 'General' tab of **Location Records** (<https://help.restaurant365.net/en/support/solutions/articles/12000039165>). One Employee can be selected from the drop-down menu. Only Employees with an **Employee Record** (<https://help.restaurant365.net/en/support/solutions/articles/12000077333>) that is associated with the Location will be listed in this menu.

The screenshot shows the 'Location Record' form with the following details:

- Location Name:** Location 5
- Location Number:** 500
- Legal Entity:** Legal Entity 5
- Street 1:** 19402 Wacker Way
- City:** Murieta
- Time Zone:** (UTC-08:00) Pacific
- Location Manager:** Isabelle Taylor (selected in dropdown)
- POS Import Type:** Sales and Labor
- Date Established:** [Calendar icon]
- State:** CA
- Sales Tax Rate:** 8.750
- Phone 1:** 9515555555
- Phone 2:** [Empty]
- Fax:** [Empty]

Department Record

On the Department Record, one or more Users (<https://help.restaurant365.net/en/support/solutions/articles/12000039184>) can be assigned as 'Department Managers'. When a User is assigned as a 'Department Manager', they will receive notifications for Employee Schedule Requests submitted by Employees who are associated with that Department's Jobs.

The 'Managers' field is located in the 'Department Information' section of **Department Records** (<https://help.restaurant365.net/en/support/solutions/articles/12000077346>). Only Users with an Employee Record linked to their **User Record** (<https://help.restaurant365.net/en/support/solutions/articles/12000039184>), access to the Location, **and** the following Permission can be assigned:

- Labor → Scheduling → Schedule → Add/Edit/Delete Shifts

BOH

SAVE DELETE ? [] X

GENERAL INFORMATION LABOR GOALS

Department Information

Title *
BOH

Description
Add you're description here

Location *
Location 1

Managers
1 Assigned

Manager Tools

The **Manager Tools page** (<https://help.restaurant365.net/en/support/solutions/articles/12000077367>), contains a collection of scheduling-related features that managers can use to communicate with Employees and manage time off requests

Announcements

The Restaurant Manager can create Announcements with start dates and expiration dates. These dates will determine when the Announcement will appear for Employees. Announcements can also be sent out via text or email. Learn more about **Scheduling Announcements here** (<https://help.restaurant365.net/en/support/solutions/articles/12000077370>).

Events

The 'Events' tab allows Users to enter Events happening in the area (local sporting events, conferences, etc) that might affect the Restaurant from a Scheduling standpoint. These will appear on the Scheduling Calendar. Learn more about **Events here** (<https://help.restaurant365.net/en/support/solutions/articles/12000077396>).

Blackout Days

The **Blackout Days tab** (<https://help.restaurant365.net/en/support/solutions/articles/12000077395>), allows Users to set specific dates on the Schedule Calendar that no Employee can request off.

Time Off

Employee time off requests can be managed from the **Time Off tab** (<https://help.restaurant365.net/en/support/solutions/articles/12000089833>), of the Manager Tools page as well as the Manager Queue. On the Time Off tab, Users can enter time off requests on behalf of Employees.

R365 Messaging Audit Center

R365 Employee Messaging (<https://help.restaurant365.net/en/support/solutions/articles/12000070200-r365-employee-messaging>), allows Employees 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 they will be archived and used to document disciplinary actions. Learn more about the **R365 Messaging Audit Center here**. (<https://help.restaurant365.net/en/support/solutions/articles/12000070607-r365-messaging-audit-center>)

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Schedule Calendar

The **Schedule Calendar** (<https://help.restaurant365.net/en/support/solutions/articles/12000055797-scheduling-schedule-calendar>) is where Schedules are built and published. This page offers multiple views, informational areas, and schedule management subpages.

Locations: Hamburger Hunters | Departments/Jobs: | Week Day | Employee Job Department | New Shift | 13 | 2 | [] [] [] [] [] [] []

PUBLISH []

Week of May 24, 2023

	Wed May 24	Thu May 25	Fri May 26	Sat May 27	Sun May 28	Mon May 29	Tue May 30
OT Hours							
Unassigned		Server 3:30 p - 11:00 p 7.5 h			3 Shifts > 24 h	Busser 12:00 p - 8:00 p 8 h	4 Shifts > 28.5 h
Aaron Shiftlead					Cook App 8:30 a - 4:00 p 7.5 h		
Abraham Rojas	Available 12a - 3p				Available 8:30a - 12a		Available 12a - 7:30p
Adan Rosas	Host 12:00 p - 8:00 p 8 h				Busser 12:00 p - 8:00 p 8 h		
Addyson Carver			Host 12:00 p - 8:00 p 8 h				
Agustin Gutierrez				Bartender 4:00 p - 11:00 p 7 h			
Alan Foster			Server 11:00 a - 4:00 p 5 h				

One Schedule per Workweek per Location can be created in the Schedule Calendar. The Schedule Calendar offers filtered views that allow for focusing on a specific Job or Department while viewing, building, and printing the Schedule.

Learn more about the Schedule Calendar:

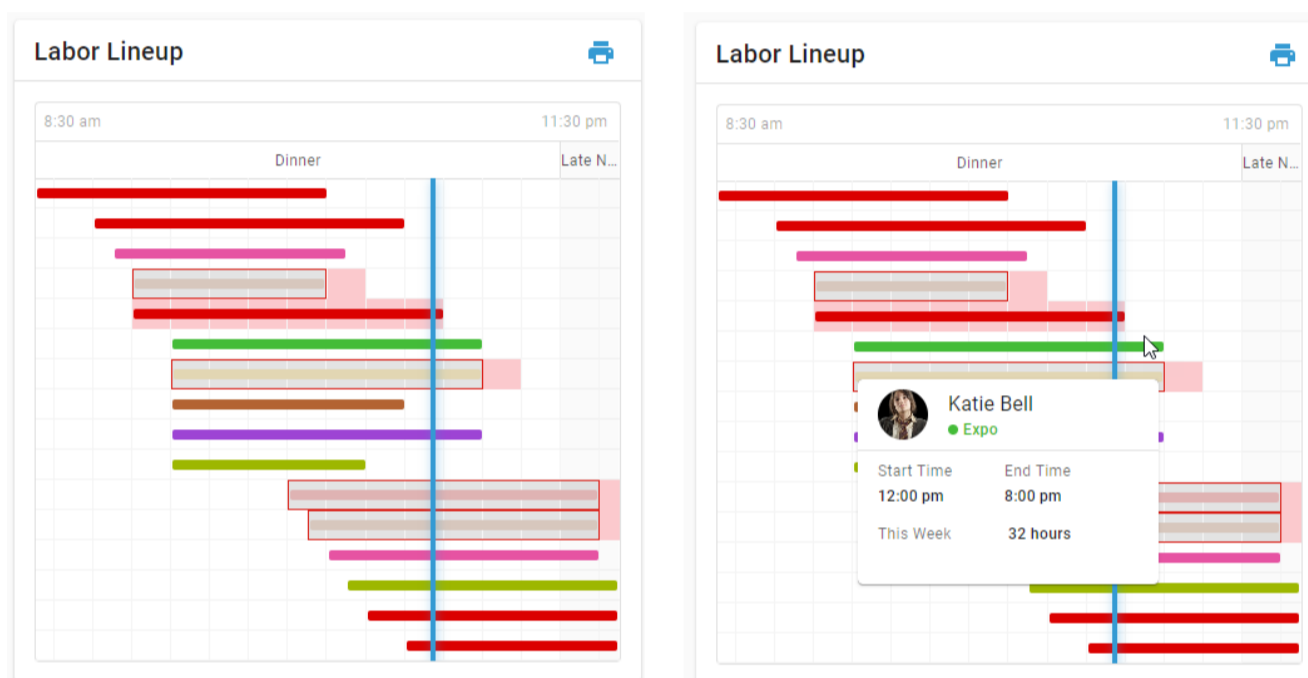
- [Scheduling Calendar Overview](https://help.restaurant365.net/en/support/solutions/articles/12000055797) (https://help.restaurant365.net/en/support/solutions/articles/12000055797)
- [Creating and Editing Schedules](https://help.restaurant365.net/en/support/solutions/articles/12000094373) (https://help.restaurant365.net/en/support/solutions/articles/12000094373)
- [Publishing and Unpublishing Schedules](https://help.restaurant365.net/en/support/solutions/articles/12000070790) (https://help.restaurant365.net/en/support/solutions/articles/12000070790)
- [Printing Schedules](https://help.restaurant365.net/en/support/solutions/articles/12000070789) (https://help.restaurant365.net/en/support/solutions/articles/12000070789)
- [Schedule Shifts](https://help.restaurant365.net/en/support/solutions/articles/12000055802) (https://help.restaurant365.net/en/support/solutions/articles/12000055802)
- [Scheduler Templates and Shift Templates](https://help.restaurant365.net/en/support/solutions/articles/12000094372) (https://help.restaurant365.net/en/support/solutions/articles/12000094372)
- [Labor Forecasts in Scheduling](https://help.restaurant365.net/en/support/solutions/articles/12000066710) (https://help.restaurant365.net/en/support/solutions/articles/12000066710)
- [Schedule Settings and Saved Views](https://help.restaurant365.net/en/support/solutions/articles/12000070562) (https://help.restaurant365.net/en/support/solutions/articles/12000070562)

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Viewing Scheduling and Reports

Labor Lineup

The Labor Lineup on the [Smart Ops 'Home' page](https://help.restaurant365.net/en/support/solutions/articles/12000078266) (https://help.restaurant365.net/en/support/solutions/articles/12000078266) displays a Gantt chart of all published shifts for the day. Hovering over a shift within the Labor Lineup shows shift details:



Scheduled Now

The [Scheduled Now page](https://help.restaurant365.net/en/support/solutions/articles/12000055799) (https://help.restaurant365.net/en/support/solutions/articles/12000055799) displays a list of all Employees who should be working right now.

Scheduled Now

Employee Name	Position	Start time	End Time
Aimee Rodriguez	Line Cook	8:30AM	4:00PM
Alejandro Ballesteros	Server	8:30AM	4:15PM
Exantel Saint Louis	Dishwasher	8:30AM	3:30PM
Alberto Druyat	Line Cook	8:30AM	3:30PM
Glen Gil	Bartender	8:30AM	3:30PM

Labor Actual vs Scheduled Report

The [Labor Actual vs. Scheduled Report](https://help.restaurant365.net/en/support/solutions/articles/12000059472) (https://help.restaurant365.net/en/support/solutions/articles/12000059472) compares the Actual Labor versus the Scheduled Labor for a selected Location and date range. This report is one way to review the accuracy of Forecasting and Scheduling.

Labor Actual vs Scheduled

5/29/2023 - 5/30/2023

Show All: All Locations

	Actual Hrs	Sched Hrs	Variance	Var Hrs %	Actual \$	Sched \$	Var \$	Var %
Hamburger Hunters	604.85	180.50	424.35	235.1 %	7,224	1,936	5,288	273.1 %
Barlender	34.57	26.00	8.57	32.9 %	415	143	272	190.1 %
Busser	22.17	0.00	22.17	0.0 %	199	0	199	0.0 %
Cook	163.68	79.00	84.68	107.2 %	3,215	1,271	1,944	153.0 %
Dish	38.82	19.00	19.82	104.3 %	680	91	589	647.8 %
Expo	14.08	16.00	-1.92	-12.0 %	253	256	-3	-1.2 %
Host	30.80	16.00	14.80	92.5 %	234	116	118	101.6 %
Maintenance	20.13	0.00	20.13	0.0 %	84	0	84	0.0 %
Prep	82.22	0.00	82.22	0.0 %	1,655	0	1,655	0.0 %
Server	194.57	24.50	170.07	694.1 %	431	59	372	630.0 %
Server Prep	3.82	0.00	3.82	0.0 %	57	0	57	0.0 %

ALL LOCATIONS

Barlender	34.57	26.00	8.57	32.9 %	415	143	272	190.1 %
Busser	22.17	0.00	22.17	0.0 %	199	0	199	0.0 %
Cook	163.68	79.00	84.68	107.2 %	3,215	1,271	1,944	153.0 %
Dish	38.82	19.00	19.82	104.3 %	680	91	589	647.8 %
Expo	14.08	16.00	-1.92	-12.0 %	253	256	-3	-1.2 %
Host	30.80	16.00	14.80	92.5 %	234	116	118	101.6 %
Maintenance	20.13	0.00	20.13	0.0 %	84	0	84	0.0 %
Prep	82.22	0.00	82.22	0.0 %	1,655	0	1,655	0.0 %
Server	194.57	24.50	170.07	694.1 %	431	59	372	630.0 %
Server Prep	3.82	0.00	3.82	0.0 %	57	0	57	0.0 %
GRAND TOTAL	604.85	180.50	424.35	235.1 %	7,224	1,936	5,288	273.1 %

DSS

When reviewing Employee details within the DSS, Scheduled Hours, Scheduled Shifts, and the variance with actual Hours Clocked are displayed.

Adan Rosas
Sunday - May 28, 2023

? ×

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Shifts for Sunday, May 28, 2023

Scheduled Hours	Hours Clocked	Variance
8h 0m	6h 58m	- 1h 2m

Scheduled Shifts

	Job Code	Start Time	End Time	Hours
Shift 1	Busser	05/28/23 12:00 PM	05/28/23 08:00 PM	8h 0m

Actual Shifts

	Job Code	Clock In	Clock Out	Hours
Shift 1	Cook	05/28/23 03:37 PM	05/28/23 10:35 PM	6h 58m

+ ADD SHIFT

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Setup and Related Smart Ops Features

Employee Records

In order for Employees to be assigned to shifts on the Scheduling Calendar and have access to the R365 Red App, they must have an **Employee Record** (<https://help.restaurant365.net/en/support/solutions/articles/12000077333>) in R365. Employee Records can be viewed and edited on the **Employees page** (<https://help.restaurant365.net/en/support/solutions/articles/12000077267>).

Employee Records are automatically created for each Employee in polled POS data. POS Integration information for an Employee can be viewed on the **Integrations tab** (<https://help.restaurant365.net/en/support/solutions/articles/12000089748>), of Employee Records.

The Jobs and Locations associated with an Employee will determine which Locations and Shifts that Employee can be scheduled for. Job information for an Employee can be viewed and edited on the **Employment tab** (<https://help.restaurant365.net/en/support/solutions/articles/12000089742>), of Employee Records.

It is common for Employees to work at multiple Locations, and therefore have multiple/duplicate Employee Records imported from multiple POS systems. These records must be merged into a single master record for correct Employee identification throughout R365. Learn more about **Merging Employee Records here** (<https://help.restaurant365.net/en/support/solutions/articles/12000039121>).

Departments

Departments (<https://help.restaurant365.net/en/support/solutions/articles/12000077346>) create custom groupings of Jobs associated with Employees for Scheduling. Departments are used throughout Scheduling to view and filter the Schedule Calendar.

Users assigned as 'Managers' will receive Employee Schedule Request notifications for Employees associated with the Department's Jobs.

Schedule Grouped by Department

Week of May 24, 2023		Wed May 24	Thu May 25	Fri May 26	Sat May 27	Sun May 28	Mon May 29	Tue May 30
OT Hours	481.07		Server 3:30 p - 11:00 p 7.5 h			3 Shifts > 24 h	Busser 12:00 p - 8:00 p 8 h	4 Shifts > 28.5 h
Unassigned > 68h 9sh								
BOH v 1,256.52h 8sh		Cook Ariana Dumbledore 8:30 a - 4:00 p 7.5 h	Cook James Gazlay 8:30 a - 4:00 p 7.5 h	Cook Ariana Dumbledore 8:30 a - 4:00 p 7.5 h	Cook Ariana Dumbledore 8:30 a - 4:00 p 7.5 h	Cook Aaron Shiffield 8:30 a - 4:00 p 7.5 h	Cook James Gazlay 8:30 a - 4:00 p 7.5 h	Cook Ariana Dumbledore 8:30 a - 4:00 p 7.5 h
		Cook Saul Palacios 10:00 a - 6:00 p 8 h	Cook Saul Palacios 10:00 a - 6:00 p 8 h	Cook Jaime Smith 10:00 a - 6:00 p 8 h	Cook Saul Palacios 10:00 a - 6:00 p 8 h	Cook Vernon Dursley 10:00 a - 6:00 p 8 h	Cook Saul Palacios 10:00 a - 6:00 p 8 h	Cook Saul Palacios 10:00 a - 6:00 p 8 h
		Cook Rubeus Hagrid 11:00 a - 7:00 p 8 h	Cook Rubeus Hagrid 11:00 a - 7:00 p 8 h	Cook Rubeus Hagrid 11:00 a - 7:00 p 8 h	Cook Rubeus Hagrid 11:00 a - 7:00 p 8 h	Dish Ximena Lobo 12:00 p - 5:00 p 5 h	Cook Rubeus Hagrid 11:00 a - 7:00 p 8 h	Cook Rubeus Hagrid 11:00 a - 7:00 p 8 h
		Dish Ismelda Alverto 12:00 p - 5:00 p 5 h	Dish Ismelda Alverto 12:00 p - 5:00 p 5 h	Dish Ismelda Alverto 12:00 p - 5:00 p 5 h	Dish Ximena Lobo 12:00 p - 5:00 p 5 h	Expo Katie Bell 12:00 p - 8:00 p 8 h	Dish Ismelda Alverto 12:00 p - 5:00 p 5 h	Dish Gabriel Lopez 12:00 p - 5:00 p 5 h
		Expo Christian Montgomery 12:00 p - 8:00 p 8 h	Expo Katie Bell 12:00 p - 8:00 p 8 h	Expo Christian Montgomery 12:00 p - 8:00 p 8 h	Expo Christian Montgomery 12:00 p - 8:00 p 8 h	Dish Gabriel Lopez 4:30 p - 11:30 p 7 h	Expo Katie Bell 12:00 p - 8:00 p 8 h	Expo Katie Bell 12:00 p - 8:00 p 8 h
		Cook Olivin Garcia 3:00 p - 11:00 p 8 h	Cook Olivin Garcia 3:00 p - 11:00 p 8 h	Cook Olivin Garcia 3:00 p - 11:00 p 8 h	Cook James Gazlay 3:00 p - 11:00 p 8 h	Cook Jaime Smith 5:00 p - 11:30 p 6.5 h	Cook Olivin Garcia 3:00 p - 11:00 p 8 h	Dish Ismelda Alverto 4:30 p - 11:30 p 7 h

Jobs

Jobs (<https://help.restaurant365.net/en/support/solutions/articles/12000077332>) are associated with all scheduled shifts. Employees can only be assigned to shifts when they have the corresponding Job assigned to them on their Employee Record.

Scheduled Shift

Edit Shift

Jobs *
Bartender

Responsibility
Select responsibility

Rating
☆☆☆☆

Employee
Select employee

Business Date *
June 6th

Start time *
12:00 PM

End time *
8:00 PM

Create template

Save Cancel

Employee Record

Jobs

+ ADD JOB

Search

Filter Columns

Job Title	Department	Location	Pay Rate	Responsibilities	Re
Bartender	BOH	Location 6	\$ 15		

1 - 1 of 1 Item

Job Records (<https://help.restaurant365.net/en/support/solutions/articles/12000077332>) are created for all Jobs imported from the Point of Sale (POS) system. If needed, Job Records can be manually created in Restaurant365. However, since the Job associated with Employees in the POS is used for Actual Labor Reporting, it is recommended to use Jobs created through the POS Integration for Scheduling.

Occasionally, Jobs are imported from the POS that are not needed for Scheduling, such as '3rd Party Delivery'. Excluding these, and other unneeded Jobs, can reduce clutter and confusion when creating new shifts. Learn more about [Excluding Jobs from Scheduling here](https://help.restaurant365.net/en/support/solutions/articles/12000080738) (<https://help.restaurant365.net/en/support/solutions/articles/12000080738>).

Jobs are also used throughout Scheduling to view and filter the Schedule Calendar.

Schedule Grouped by Job

Week of May 24, 2023		Wed May 24	Thu May 25	Fri May 26	Sat May 27	Sun May 28	Mon May 29	Tue May 30
OT Hours	481.07		Server 3:30 p - 11:00 p 7.5 h			3 Shifts > 24 h	Busser 12:00 p - 8:00 p 8 h	4 Shifts > 28.5 h
Unassigned > 68h 9sh								
1. Test Host 0h 0sh								
Bartender v 184.07h 2sh		Amelia Bones 10:30 a - 4:30 p 6 h	Dedalus Diggle 10:30 a - 4:30 p 6 h	Nicolette Curry 10:30 a - 4:30 p 6 h	Nicolette Curry 10:30 a - 4:30 p 6 h	Shift this shift 10:30 a - 4:30 p 6 h	Dedalus Diggle 10:30 a - 4:30 p 6 h	Shift this shift 10:30 a - 4:30 p 6 h
		Shift this shift 4:00 p - 11:00 p 7 h	Amelia Bones 4:00 p - 11:00 p 7 h	Andrew Reynolds 4:00 p - 11:00 p 7 h	Agustin Gutierrez 4:00 p - 11:00 p 7 h	Dedalus Diggle 4:00 p - 11:00 p 7 h	Amelia Bones 4:00 p - 11:00 p 7 h	Amelia Bones 4:00 p - 11:00 p 7 h
Bartender 0h 0sh		Fleur Delacour Bar Point 12:00 p - 8:00 p 8 h						
Busser 124.78h 0sh		Cedric Diggory 12:00 p - 8:00 p 8 h	Cedric Diggory 12:00 p - 8:00 p 8 h	Cedric Diggory 12:00 p - 8:00 p 8 h	Cedric Diggory 12:00 p - 8:00 p 8 h	Adan Rosas 12:00 p - 8:00 p 8 h		

Job Responsibilities and Ratings

Job Responsibilities and Ratings are used to restrict which Employees can be assigned to specific scheduled shifts. Only Employees whose Job Responsibilities and/or Ratings match that of the Job assigned to a specific scheduled shift will be assignable to that shift.

Job Responsibilities

Job: Bartender

Department: BOH Location: Location 6 Responsibilities: Close Register

Rating: ☆☆☆☆☆ Pay Rate: \$ 0.00 Primary:

(<https://help.restaurant365.net/en/support/solutions/articles/12000077339>).

Job Responsibilities (<https://help.restaurant365.net/en/support/solutions/articles/12000077339>) are associated with Jobs on Employee Records and can be used to restrict a scheduled shift that requires extra training or certification. For example, the Job Responsibility of 'Closing Cash Out' could be used to restrict which Employees are assignable to the last 'Cashier' shift of the day.

Job Responsibilities can also be used to break up a generalized Job into specific stations. For example, the Job Responsibilities of 'Grill', 'Salad', and 'Fryer' could be used to restrict which Employees are assignable to shifts with the Job 'Cook'.

Ratings

Job: Bartender

Department: BOH Location: Location 6 Responsibilities: Close Register

Rating: ★★☆☆☆ Pay Rate: \$ 0.00 Primary:

Ratings are associated with Jobs on **Employee Records** (<https://help.restaurant365.net/en/support/solutions/articles/12000089742>) and can be used to indicate the Employee's proficiency with that Job. When a Rating is set on a scheduled shift, only Employees with that Rating or higher will be assignable to the shift.

Work Week / Operational Calendar

The first day of the work week is determined by the Location's **Operational Calendar** (<https://help.restaurant365.net/en/support/solutions/articles/12000039155>). The work week is used to determine the order of days on the Schedule Calendar, as well as calculate scheduled weekly hours and overtime.

If the Operational Calendar for the Location is not configured, the Location's Fiscal Calendar is used to determine the first day of the work week.

Business Days

A 'Business Day' refers to the 24-hour period that makes up a 'day' in R365, starting from a Location's Start of Business Day Time. By default, the Start of Business Day in R365 is 12:00 am. When a shift starts on one Business Day but ends on the next Business Day, this is considered a **Cross-Day Shift** (<https://help.restaurant365.net/en/support/solutions/articles/12000091849>).

Start of Day (<https://help.restaurant365.net/en/support/solutions/articles/12000092280>) configurations allow for changing the Start of Day in R365 to match the POS Business Day. Contact your CSM or **R365 Support** (<https://help.restaurant365.net/en/support/tickets/new>) to learn how Start of Day configurations can enhance your R365 experience!

Operating Hours

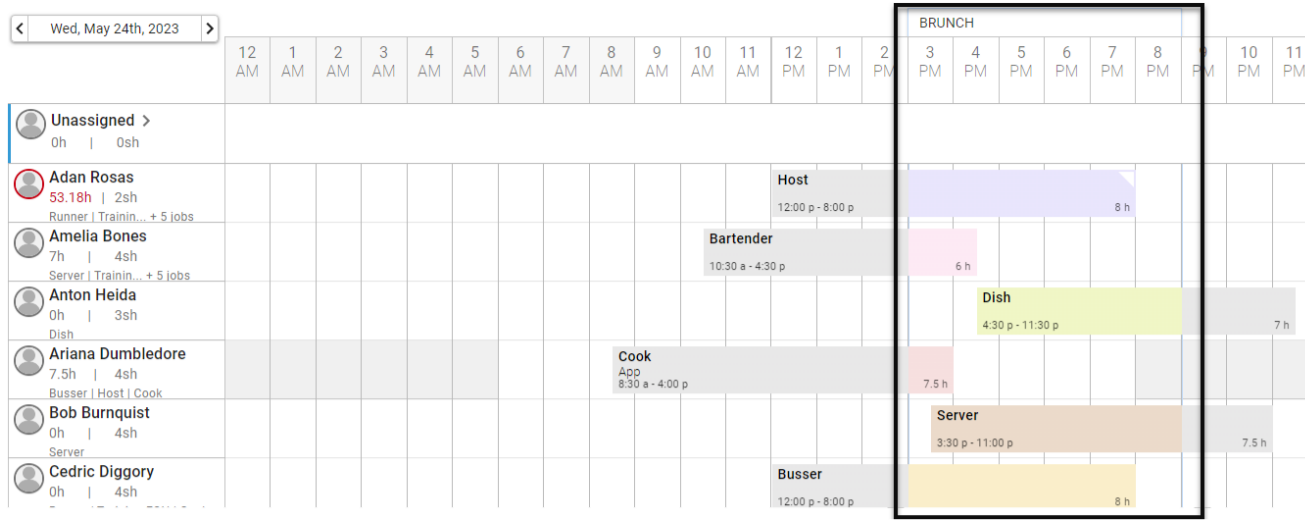
Defining **Restaurant Operating Hours** (<https://help.restaurant365.net/en/support/solutions/articles/12000090402>) on the Labor Matrix will focus attention on the hours that labor should be scheduled. Hours outside of the defined Operating Hours will have a darker background. This will give a visual cue for shifts, hours, and overtime placed outside of Operating Hours while scheduling.

- Note:** Shifts outside of Operating Hours will still be included in Scheduled Labor reporting.

		Operating Hours																							
		4 AM	5 AM	6 AM	7 AM	8 AM	9 AM	10 AM	11 AM	12 PM	1 PM	2 PM	3 PM	4 PM	5 PM	6 PM	7 PM	8 PM	9 PM	10 PM	11 PM	12 AM	1 AM	2 AM	3 AM
Labor +/-	-5.5%																								
Fixed Labor Var	-14.06																								
Sales	\$4,365	\$-	\$-	\$-	\$-	\$-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$-	\$-	\$-
Labor	\$633.2 14.5%	\$-	\$-	\$-	\$-	\$15.89	\$52	\$52	\$52	\$46.17	\$49.08	\$51.43	\$39.63	\$50.04	\$49.75	\$49.75	\$42.4	\$49.75	\$30.97	\$0	\$0	\$0	\$-	\$-	\$-
Labor Forecast	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Total Staff +/-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Unassigned																									
allison Sevier		BARTENDER 2:00 a - 8:00 a																							
Amy Hall		MIT 12:00 p - 8:00 a																							
Ruiz Cruz, Elvia		COOK 1:00 a - 9:00 a																							

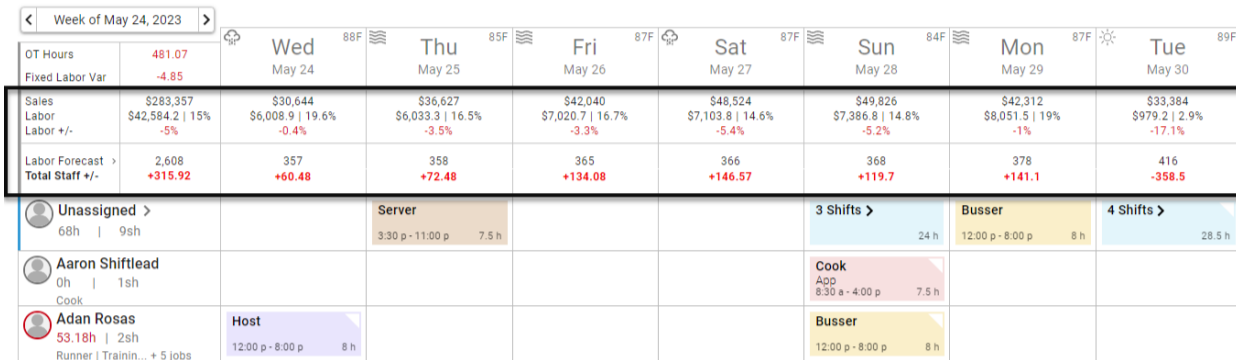
Dayparts

Configuring **Dayparts** (<https://help.restaurant365.net/en/support/solutions/articles/12000090405>) provides an additional view option for the Day View of the Schedule Calendar where shifts within the hours of the selected Daypart are highlighted.



Forecasting

When **Daily** (<https://help.restaurant365.net/en/support/solutions/articles/12000077211>) and **Hourly Forecasts** (<https://help.restaurant365.net/en/support/solutions/articles/12000077212>) are published, the Sales and Labor Forecast, as well as projected labor metrics, can be displayed above the Schedule.



Labor Matrix

The **Labor Matrix** (<https://help.restaurant365.net/en/support/solutions/articles/12000077440>) is used in conjunction with **Hourly Forecasting** (<https://help.restaurant365.net/en/support/solutions/articles/12000077212>) to determine the amount of fixed and variable labor hours needed per Job per hour.

GENERAL
FIXED LABOR
VARIABLE LABOR
DAY PARTS

Suggest Hours

By Sales

By Entree

Labor by Day Part

Single Labor Matrix

Labor Matrix for Each Day Part

Scheduled Labor Period Time Frame

Week

Day

Labor Rules

When configured for a Location, the following **Labor Rules** (<https://help.restaurant365.net/en/support/solutions/articles/12000091679>) will be applied on the Schedule Calendar for that Location:

- Overtime Rules
- Break Rules
- Split Rules
- Spread of Hours Rules
- Shift Differential Rules
- Minor Rules

Users will then receive warnings when creating or publishing shifts, and projected penalties and earnings will be included in Scheduled Labor reporting.

Scheduling Conflicts



Cloping Rule Violation

- Cloping Rule Violation: The shift will cause a cloping rule violation because two shifts (10:00 P - 3:00 A Thu Feb 9 - Hamburger Hunters | 12:00 P - 11:00 P Fri Feb 10 - Hamburger Hunters) are within 15 hours of each other. This will result in a Penalty of \$30.00.

Spread of Hours Rule Violation

- Spread of hours Rule Violation: The shift will cause a Spread of hours rule violation because the shift (12:00 P - 11:00 P Fri Feb 10 - Hamburger Hunters) spans greater than 10 hours. This will result in a Penalty of \$15.00.

Overtime Rule Violation

- Overtime Rule Violation: (Daily) - The shift will cause the employee to incur overtime because the employee's total hours for the day are greater than the threshold of 8.00. The premium cost of the overtime will be \$40.50.

IGNORE CANCEL

Request Cutoffs

The **Request Cutoff tab** (<https://help.restaurant365.net/en/support/solutions/articles/12000077397>) of the Manger Tools page is used to set the day and time limitations for when Employees can submit time off requests and how many requests can be approved for the same day/week.

If an Employee submits a time off request after the cutoff time, or after the max amount of requests for the requested day/week have already been approved, it will be auto-denied, and the Employee will receive an error message.

Schedule Writeback

Schedule Writeback (<https://help.restaurant365.net/en/support/solutions/articles/12000069936>) is an add-on feature that prevents Employees from clocking in early, and provides your organization with more control over Labor costs. Once Schedule Writeback is enabled, Schedules that are created in Restaurant365 will then be sent to the POS when published.

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Scheduling Without Smart Labor

Week of Dec 14, 2022		Wed Dec 14	Thu Dec 15	Fri Dec 16	Sat Dec 17	Sun Dec 18	Mon Dec 19	Tue Dec 20
OT Hours	54.12							
Sales	\$284,302	\$28,170	\$35,112	\$39,599	\$49,019	\$44,997	\$45,488	\$41,916
Labor	\$7,373.8 2.6%	\$6,620.1 23.5%	\$0 0%	\$120 0.3%	\$67.5 0.1%	\$348.8 0.8%	\$112.5 0.2%	\$105 0.3%
Labor +/-	-16.1%	+3.5%	-18%	-17.7%	-16.9%	-17.2%	-19.8%	-19.7%
Hrs (Suggested)	663.1 (6,021.5)	584.3 (626)	0 (780.5)	18.8 (792)	7.5 (980.5)	26.3 (900)	18.8 (1,011)	7.5 (931.5)
Staff +/-	> +5,358.5	+41.7	+780.5	+773.3	+973	+873.8	+992.3	+924

When Smart Labor is not enabled, the Forecasting and Labor Metrics section of the Schedule Calendar is replaced by **Suggested Hours** (<https://help.restaurant365.net/en/support/solutions/articles/12000055798>). Suggested Hours are based on Forecasted Sales and the SPLH Goals for each **Department** (<https://help.restaurant365.net/en/support/solutions/articles/12000077346>).

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Note: This article was rewritten in June 2023. [View the previous version here](http://restaurant365training.com/wp-content/uploads/2023/06/Scheduling-Overview.pdf) (<http://restaurant365training.com/wp-content/uploads/2023/06/Scheduling-Overview.pdf>).