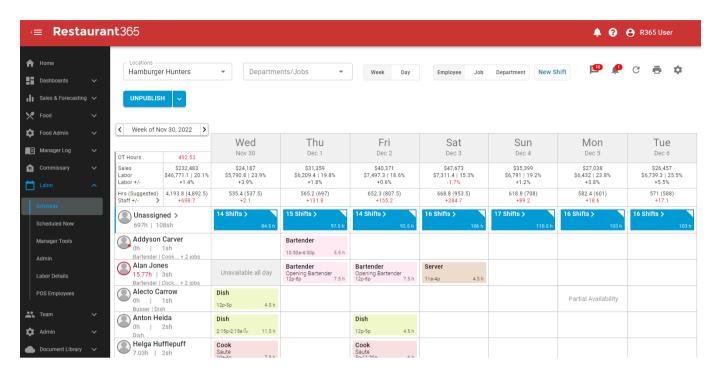
Scheduling: Schedule Calendar

Jul 11, 2023 14:28

This article reviews the Schedule Calendar, which is the main page of the **Scheduling Module**

(https://help.restaurant365.net/en/support/solutions/articles/12000055795-scheduling-v2-overview-security). Here, Users can view, create, edit, publish, and print Schedules.



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Overview

The Schedule Calendar is where Schedules are built and published. Schedules are displayed and edited by Location and Operational Week. When a blank Schedule is first viewed, the User will be prompted to create a Schedule based on a Schedule Template
(https://help.restaurant365.net/en/support/solutions/articles/12000094372) or Prior Week. The User can also start with a blank Schedule.

All Employees for the selected Location are scheduled on one Schedule. The Department/Job filter can be used to view, edit, print, and publish only selected <u>Departments</u> (https://help.restaurant365.net/en/support/solutions/articles/12000077346) or <u>Jobs</u> (https://help.restaurant365.net/en/support/solutions/articles/12000077332).

Employees can **only** be assigned to Shifts when the associated Job has been assigned to them on their **Employee Record** (https://help.restaurant365.net/en/support/solutions/articles/12000089742). Employees with no Jobs assigned to them will be hidden from the Schedule Calendar.

Both <u>Scheduler Templates and Shift Templates (https://help.restaurant365.net/en/support/solutions/articles/12000094372)</u> can be created and used on the Schedule Calendar to reduce time when creating Schedules.

Shifts can be <u>published by Employee</u>, <u>by Job</u>, <u>by Department</u>, <u>or one Shift at a time</u>

(https://help.restaurant365.net/en/support/solutions/articles/12000070790). Employees associated with published Shifts will be able to view and transfirst via the R365 Red App (https://help.restaurant365.net/en/support/solutions/articles/12000056461).

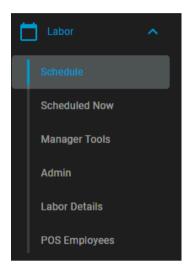


Related Articles:

- Creating and Editing Schedules (https://help.restaurant365.net/en/support/solutions/articles/12000094373)
- Publishing and Unpublishing Schedules (https://help.restaurant365.net/en/support/solutions/articles/12000070790)
- Printing Schedules (https://help.restaurant365.net/en/support/solutions/articles/12000070789)
- Schedule Shifts (https://help.restaurant365.net/en/support/solutions/articles/12000055802)
- Scheduler Templates and Shift Templates (https://help.restaurant365.net/en/support/solutions/articles/12000094372)
- <u>Labor Forecasts in Scheduling (https://help.restaurant365.net/en/support/solutions/articles/12000066710)</u>
- Schedule Settings and Saved Views (https://help.restaurant365.net/en/support/solutions/articles/12000070562)
- Manager Queue (https://help.restaurant365.net/en/support/solutions/articles/12000056435-scheduling-manager-queue)
- Messaging Audit Center (https://help.restaurant365.net/en/support/solutions/articles/12000070607-r365-messaging-audit-center)
- Cross-Day Shifts (https://help.restaurant365.net/en/support/solutions/articles/12000091849)

Navigation

To access the Schedule Calendar, navigate to <u>Smart Ops (https://help.restaurant365.net/en/support/solutions/articles/12000077625)</u>. In the left navigation menu, click 'Schedule' under 'Labor' to open the Schedule Calendar.



Header



- 1) Location Selector The Location of the currently-displayed Schedule. By default, the Location displayed is the User's default Location.
- 2) Department / Jobs Filter Select which <u>Departments (https://help.restaurant365.net/en/support/solutions/articles/12000077346)</u> or <u>Jobs (https://help.restaurant365.net/en/support/solutions/articles/12000077332)</u> will be displayed in the Schedule Calendar.
- 3) Week / Day Toggle Switches the view between 'Week' view (default) and 'Day' view
- 4) Employee / Job / Department Grouping Set the rows in the Schedule Calendar to display Employees (default), Jobs, or Departments
- 5) New Shift Button Click 'New Shift' to open the 'Create New Shift' prompt and add a <u>Shift</u> (https://help.restaurant365.net/en/support/solutions/articles/12000055802-scheduling-shifts) to the Schedule.
- 6) Messaging Audit Center Click to open the R365 Messaging Audit Center

(https://help.restaurant365.net/en/support/solutions/articles/12000070607). This center works in conjunction with R365 Employee Messaging (https://help.restaurant365.net/en/support/solutions/articles/12000070200-r365-employee-messaging), where Employees can communicate via the R365 Red App (https://help.restaurant365.net/en/support/solutions/articles/12000055812-r365-app-red-) without providing any personal contact information. The Messaging Audit Center is where messages that were reported as inappropriate can be reviewed.

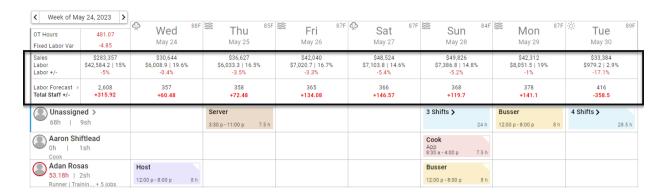
- 7) Manager Queue Click this alert icon to open the <u>Manager Queue</u> (<u>https://help.restaurant365.net/en/support/solutions/articles/12000056435-scheduling-manager-queue</u>) page, where Schedule-related requests from Employees can be approved or denied.
- 8) Refresh Refresh the view
- 9) Print Click to open the 'Print Schedule' page (https://help.restaurant365.net/en/support/solutions/articles/12000070789-schedule-calendar-print-options)
- **10) View & Template Options** Click to open the '<u>View/Template Options (https://help.restaurant365.net/en/support/solutions/articles/12000070562)'</u> sidesheet, where Users can adjust and save their current view, manage Saved Views, and save and use Schedule Templates.
- 11) Publish / Unpublish Click this button to open the 'Publish Shifts' prompt, where the Schedule can be published by Department, by Job, or by Employee. Learn more about <u>Publishing, Unpublishing, and Alerting Employees here</u>

 (https://help.restaurant365.net/en/support/solutions/articles/12000070790-schedule-calendar-publish-unpublish-and-alert-employees).
- 12) Week / Day Selector Click to select a new Week (or Day). Click the '<' arrow to go back one Week (or Day). Click '>' to go forward one Week (or Day).

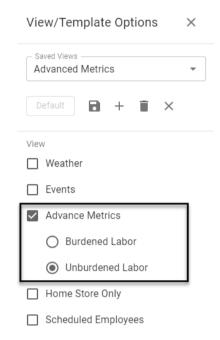
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Forecasts and Advanced Metrics

When <u>Daily (https://help.restaurant365.net/en/support/solutions/articles/12000077211)</u> and <u>Hourly Forecasts</u>
(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. Learn more about the <u>Advanced Metrics section of the Schedule Calendar here</u>
(https://help.restaurant365.net/en/support/solutions/articles/12000066710).



Forecasts are not displayed on the Schedule Calendar by default. To show Forecasts, enable 'Advanced Metrics' in the 'View/Template Options (https://help.restaurant365.net/en/support/solutions/articles/12000070562)' menu.



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Shift Tiles

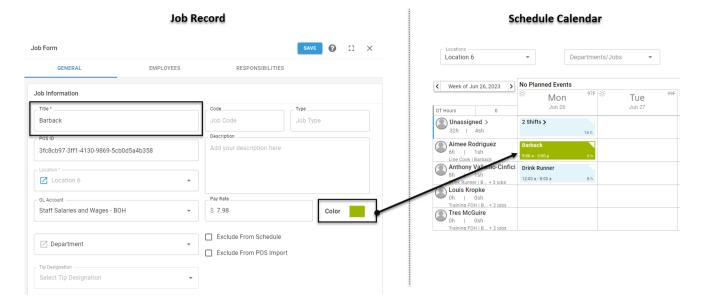
Each Shift on the Schedule is represented by a Shift tile. Learn more about <u>creating and editing Shift here</u> (https://help.restaurant365.net/en/support/solutions/articles/12000094373).

Each Shift tile will display basic information regarding the Shift. The information displayed is dependent on how the Schedule is being viewed.

Schedule Grouped By	Included Information	Example
Employee	Job Responsibility Start Time - End Time Shift Length	Bartender Close Register 12:00 p - 8:00 p 8 h
Job	Employee Responsibility Start Time - End Time Shift Length	Alan Daniel Armas Close Register 12:00 p - 8:00 p 8 h
Department	Job Employee Start Time - End Time Shift Length	Bartender Alan Daniel Armas 12:00 p - 8:00 p 8 h

<u>Color</u>

The color of the Shift tile is the color assigned to the associated Job. Colors are assigned to Jobs on the <u>Job Record</u> (https://help.restaurant365.net/en/support/solutions/articles/12000077332).



Shift Tiles Showing Employee Availability

An Employee's Availability can be viewed and edited on their Employee Record. Employees can also request to change their Availability using the R365 Red App (https://help.restaurant365.net/en/support/solutions/articles/12000055812-r365-app-red-).

(https://help.restaurant365.net/en/support/solutions/articles/12000041819-employee-record)

• Unavailable All Day:

Unavailable all day

• Partial Availability: (hours that the Employee is available will be displayed)

Available 6:30a - 3:30p

• Approved Time Off: (approved hours will be displayed)

Approved time off: 12a-1p

Cross Location Employee Shift Tiles



If an Employee works at more than one Location, the scheduled Shifts for other Locations will appear as greyed-out Shifts in the 'Employee' view of each Location's Schedule Calendar. These are shown for reference only to prevent double-booking when creating the Schedule. These Shifts will not impact labor metrics nor be printed for the selected Location.

To ensure that Employees who work at multiple Locations are displayed properly, the R365 Employee Records created through the POS Integration for each Location should be <u>merged into one Employee Record (https://help.restaurant365.net/en/support/solutions/articles/12000039121)</u>.

Quick Shift/Job Filter

When viewing the Schedule Calendar by Employee, a User can select any Shift to automatically filter for only Employees who are able to be assigned to that Shift. An Employee is considered assignable when they have the Shift's Job associated with them on their Employee Record **and** they are available for that Shift (meaning they are not already scheduled for another Shift at the same time or have approved time off).

Shifts are selected by left-clicking on them. Once selected, the Shift tile will be displayed with a darker color, indicating that it is selected and a filter is in place.



Clicking on any blank space on the Schedule Calendar will de-select the Shift and disable the filter.

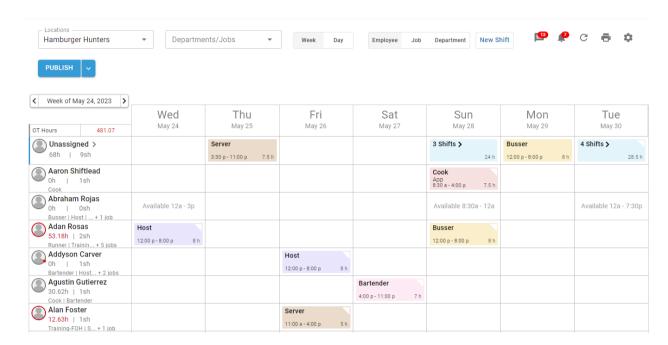
Week View and Day View

The Schedule Calendar can be viewed and edited by 'Week' or by 'Day'. Both of these views offer drag-and-drop functionality for <u>building and editing</u> <u>Schedules (https://help.restaurant365.net/en/support/solutions/articles/12000094373)</u>.



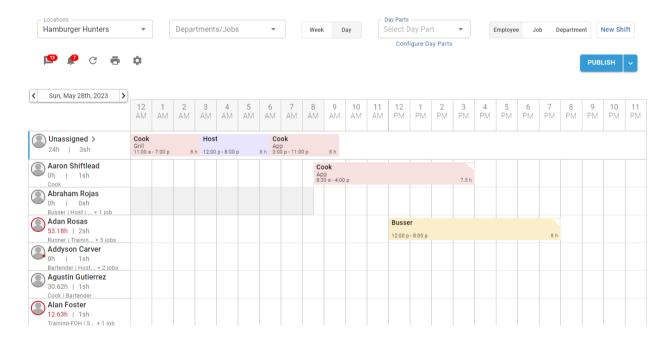
Week View

The 'Week' view shows all days in a week, with each Shift represented as a single tile.



<u>Day View</u>

The 'Day' view shows all hours within a single day, with each Shift represented by a tile that spans the associated hours. If Day Parts are configured, the Schedule Calendar can be filtered by Day Part in this view.



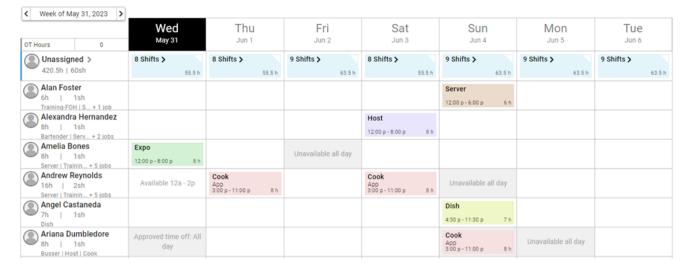
Grouped by Employee, Job, or Department

The Schedule Calendar can also be grouped by Employee, Job, or Department. These groupings can be applied to both the 'Week' and 'Day' views.



Employee

The 'Employee' grouping displays one Employee per row and marks days where the Employee has availability restrictions. With this grouping, each Shift tile is titled with the assigned Job.



The first cell in each row will display the Employee's Name, Schedule Summary, and Job List. Clicking on the Employee's Name will open their Employee Record (https://help.restaurant365.net/en/support/solutions/articles/12000077333) in a sidesheet.



Employee Picture

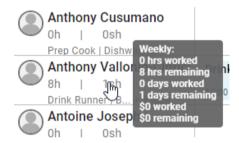
If a picture has been uploaded to the Employee's <u>Employee Record (https://help.restaurant365.net/en/support/solutions/articles/12000077333)</u>, it is displayed next to their name.

Schedule Summary

Below the Employee Name are two numbers separated by a bar.

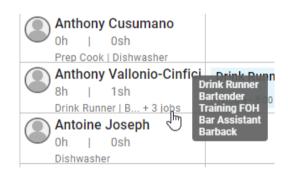
- Number 1: Total hours scheduled
- Number 2: Total Shifts scheduled for the Employee.
 - Note: If the hours the Employee is scheduled for are approaching overtime, the numbers will turn **orange**. If the numbers surpass overtime, they will turn **red**.

Hovering over the 'Scheduled Hours' summary will display weekly details for the Employee



Job Information

The third line contains a list of the Employee's Jobs. If the Employee has more than two Jobs associated with them, hovering over the Job information will display a list of all Jobs associated with the Employee.



<u>Job</u>

The <u>Job (https://help.restaurant365.net/en/support/solutions/articles/12000077332)</u> grouping displays one Job per row. With this grouping, each Shift tile is titled with the Employee assigned to it.



The first cell in each row will display the Job name and a summary of associated scheduled Shifts and hours. Clicking on the Job will open the associated Job Record (https://help.restaurant365.net/en/support/solutions/articles/12000077333) in a sidesheet.

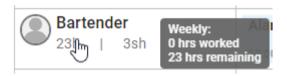


Scheduled Hours Summary

Below the Job title are two numbers separated by a bar

- Number 1: Total hours scheduled for the Job
- Number 2: Total Shifts scheduled for the Job
 - Note: If either number represents overtime values, these numbers will turn red

Hovering over the 'Scheduled Hours' summary will display weekly details.

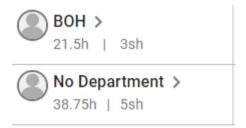


Department

The <u>Department (https://help.restaurant365.net/en/support/solutions/articles/12000077346)</u> grouping displays one Department per row. With this grouping, each Shift is titled with the associated Job and subtitled with the assigned Employee.



The first cell in each row will display the Department name and a summary of associated scheduled Shifts and hours. Shifts associated with Jobs that have not been assigned to a Department will be grouped in the 'No Department' row.



Schedule Summary

Below the Department name are two numbers separated by a bar

- Number 1: Total hours scheduled for the Department
- Number 2: Total Shifts scheduled for the Department
 - Note: If either number represents overtime values, these numbers will turn red

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Unassigned Shifts Section

(https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/12049247875/original/FaiLjKaHNWGum_9TyFi-pchXU6XXWYqyKg.png? 1555104023)

Shifts that have not yet been assigned to an Employee will appear in the 'Unassigned' section, which is collapsed by default.



(https://s3.amazonaws.com/cdn.freshdesk.com/data/helpdesk/attachments/production/12049247884/original/t8BaFy53Zu2cMiJYPReFSOGoH_rNcqo15Q.png? 1555104068)

Unassigned Shifts **cannot** be dragged to another day, and are **locked** to the date on which they were created. However, Shifts **can** be copied and pasted to/from the 'Unassigned' row in the Job and Department groupings of the Schedule. To change the date of an unassigned Shift, open the 'Edit Shift' window by double-clicking on the Shift, then manually update the date value.

Shifts that are both 'Unpublished' and 'Unassigned' can be deleted from the Schedule in bulk. Learn more about <u>deleting Unpublished</u>, <u>Unassigned Shifts here (https://help.restaurant365.net/en/support/solutions/articles/12000092157)</u>.

Business Day & Operating Hours

Business Day

When viewing the Schedule Calendar by 'Day', the page will list all hours between the first and last hour of the Location's Business Day. By default, Business Days match Calendar Days, with the first hour as 12am and the last hour as 11pm.

When a <u>Start of Business Day Time (https://help.restaurant365.net/en/support/solutions/articles/12000092280)</u> is defined for a Location, it will be reflected on its Schedule Calendar.

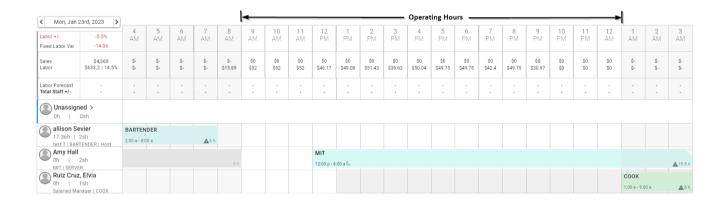
Contact your CSM or <u>R365 Support (https://help.restaurant365.net/en/support/tickets/new)</u> to learn how 'Start of Busness Day' can enhance your R365 experience!

Shifts that cross the start time of the Business Day are considered Cross-Day Shifts. These Shifts will be broken into segments for the purposes of overtime calculations and labor reporting. Learn more about Cross-Day Shifts here (https://help.restaurant365.net/en/support/solutions/articles/12000091849).

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.

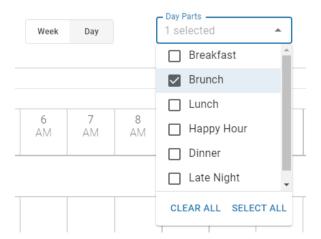
• Note: Shifts outside of Operating Hours will still be included in Scheduled Labor reporting.

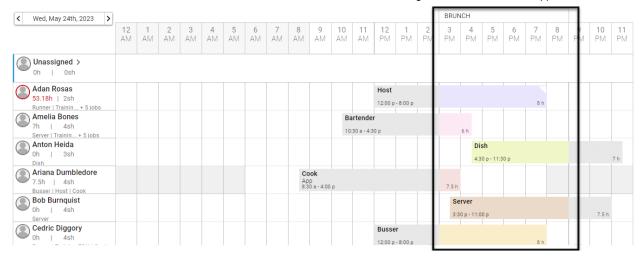


Day Parts

When in the 'Day' view, Users can filter the Schedule by Day Part.

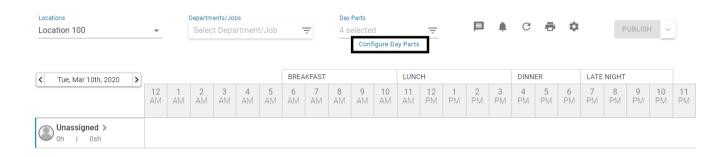
When Day Parts are selected in the Day Part selector, Shifts within the hours of the selected Day Part are displayed and highlighted.





Day Parts can be created within the Schedule Calendar by clicking 'Configure Day Parts'. Learn more about <u>Day Part configuration here</u> (https://help.restaurant365.net/en/support/solutions/articles/12000094371).

- Note: Day Parts can also be created and edited within the Labor Matrix (https://help.restaurant365.net/en/support/solutions/articles/12000090405).
- Note: Only Users with the following Permission will be able to create and/or edit Day Parts for Locations that they have access to:
 - $\bullet \quad \mathsf{Labor} \to \mathsf{Scheduling} \to \mathsf{View/Edit} \; \mathsf{Labor} \; \mathsf{Matrix} \; \mathsf{Setup}$



This article was rewritten in June of 2023. <u>A PDF version of the original article is available here (http://restaurant365training.com/wp-content/uploads/2023/06/Schedule-Calendar.pdf)</u>.