

Workforce Scheduling Guide

For Payroll
Customers





Contents

Scheduling Screen	1
How to add a shift to your schedule	6
Estimating the cost of your roster	10
How to create a timesheet from your schedule	11
Using the Agenda View	12
Assigning a Team Leader	13

Scheduling Screen

1

My Schedule

Title of the schedule you are currently viewing.

2

Filter Pending Shifts

This button allows you to show or hide pending shifts. A pending shift is one that is assigned to an employee but has not been confirmed yet.

3

Filter Activities

This button allows you to show or hide your scheduled activities. Activities are anything in your schedule which is not assigned to an employee. E.g. School time or a private appointment.

4

Filter Employee Shifts

All employees with confirmed shifts appear here. Click on an 'Employee Profile Picture' to show or hide their confirmed shifts.

The screenshot shows a scheduling interface with the following elements:

- Callout 1:** Points to the "My Schedule" title at the top left.
- Callout 2:** Points to the "PENDING" filter button in the top right.
- Callout 3:** Points to the "ACTIVITIES" filter button in the top right.
- Callout 4:** Points to the "Add Shift" button in the top right.

The main interface includes a date range selector for "Sunday, March 01, 2020 - Saturday, March 07, 2020" and a view selector with options: Day, **Week**, Fortnight, Month, and Agenda. The schedule grid shows time slots from 5:00 AM to 4:00 PM across the days of the week.

	Sun 01/03	Mon 02/03	Tue 03/03	Wed 04/03	Thu 05/03	Fri 06/03	Sat 07/03
5:00 AM							
6:00 AM							
7:00 AM		Morning Support - Confirmed - Micky Doe - 2 hours	Morning Support - Confirmed - Micky Doe - 2 hours	Morning Support - Mickey is unavailable, can you cover? - Available - Unconfirmed - 2 hours	Morning Support - Confirmed - Micky Doe - 2 hours	Morning Support - Confirmed - Micky Doe - 2 hours	
8:00 AM							
9:00 AM		Activity - School	Activity - School	Activity - School	Activity - School	Activity - School	Activity - Photography Club - Confirmed - Charlie Smith - 4 hours
10:00 AM							
11:00 AM							
12:00 PM							
1:00 PM							
2:00 PM							
3:00 PM		Afternoon Shift - Confirmed - John Smith - 2.5 hours	Afternoon Shift - Available - Unconfirmed - 1 hour	Afternoon Shift - Confirmed - John Smith - 2.5 hours	Afternoon Shift - Available - Unconfirmed - 1 hour	Afternoon Shift - Available - Unconfirmed - 2.5 hours	
4:00 PM			Activity - Work		Activity - Work		

Scheduling Screen

5

Add Shift

Click here to create or add a new shift. New shifts will appear in a separate pop up window. You can select shift start and finish times, assign an employee and send them a shift notice via email or SMS.

6

Add Activity

This button allows you to create or add a new activity. A new activity will appear in a separate pop up window, which allows you to select start and finish time within your schedule for an activity which does not require an employee to be assigned.

7

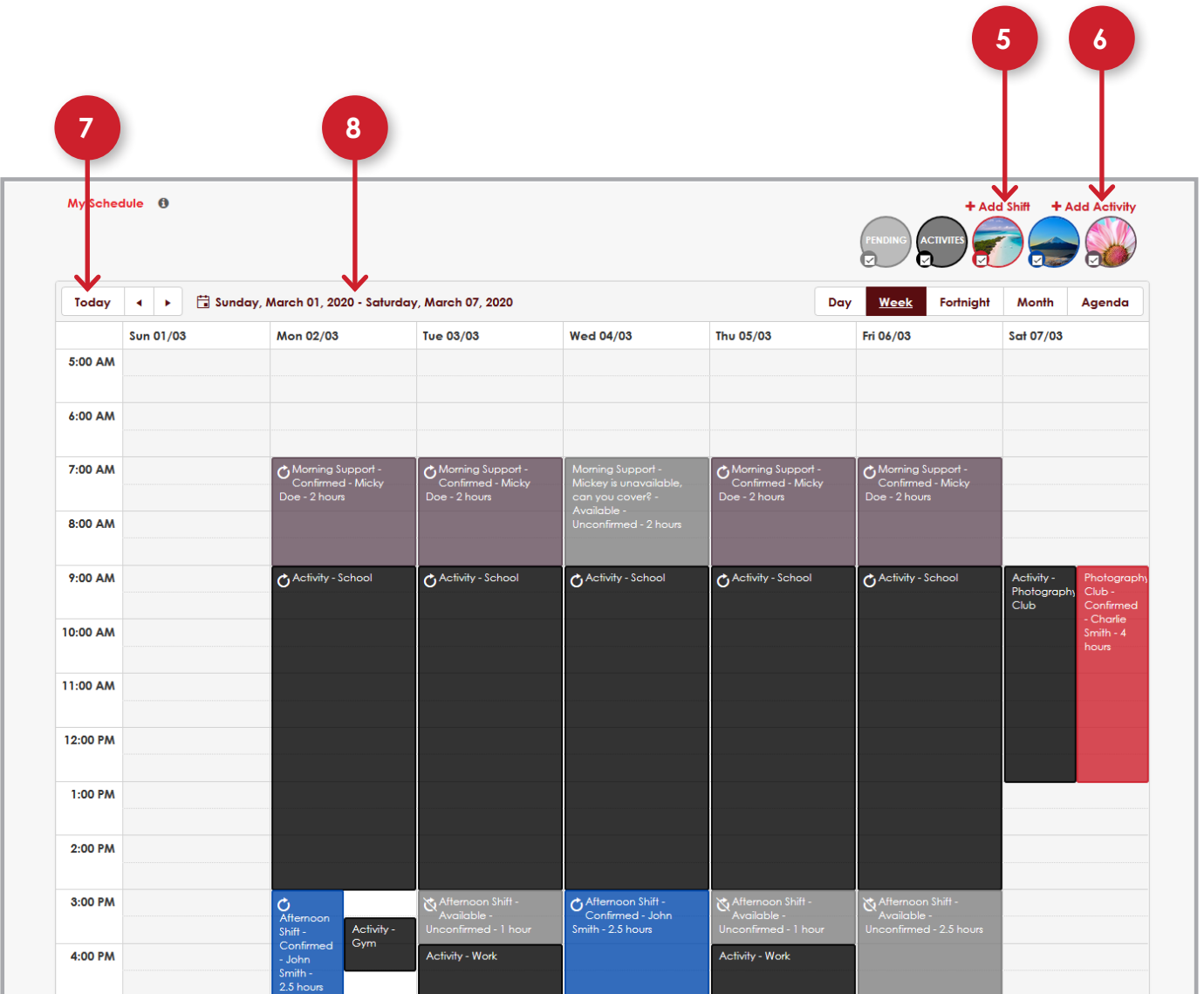
Today

This button will return the schedule back to the current day if you have used the arrows to moved forward or back in time.

8

Schedule Period

This shows you the day and date range of schedule currently on display.



The screenshot shows the Scheduling Screen interface. At the top, there is a header bar with 'My Schedule' and a help icon. Below this is a navigation bar with buttons for 'Today', 'Schedule Period', and 'Add Shift' (labeled 5). To the right of these buttons are icons for 'PENDING', 'ACTIVITIES', and 'Add Activity' (labeled 6). The main area is a calendar grid showing the schedule for the week of Sunday, March 01, 2020, to Saturday, March 07, 2020. The grid has columns for each day and rows for time slots from 5:00 AM to 4:00 PM. Various activities are scheduled, including 'Morning Support - Confirmed - Micky Doe - 2 hours', 'Activity - School', 'Afternoon Shift - Confirmed - John Smith - 2.5 hours', and 'Activity - Gym'. A red box highlights the 'Add Shift' button and the 'Add Activity' button. Callout 7 points to the 'Today' button, and callout 8 points to the 'Schedule Period' button.

9

Schedule View

These buttons allow you to choose your preferred schedule display. Select to view a 'Day', 'Week', 'Fortnight', 'Month' or 'Agenda'. 'Day' shows an individual day, 'Week' shows seven days, 'Fortnight' shows two weeks, and 'Month' shows like a calendar. 'Agenda' shows a more accessible view of shift and activities in a vertical list.

10

Confirmed Shift

These shifts are confirmed. The colour of the shift matches the employee's user thumbnail image shown in the top right hand corner once confirmed.

11

Unconfirmed Shift

Unconfirmed shifts are displayed in light grey to indicate it is assigned to an employee but they have not yet confirmed/accepted the shift. Each shift shows the shift title and duration.

12

Reassigned Shift

This shift is meant to be for one employee but the title suggests they are unavailable, so it has been reassigned to another employee who is yet to confirm. If you change who is assigned to a shift, the newly assigned employee will be notified.

Scheduling Screen

The screenshot shows the 'My Schedule' interface. At the top right, there are buttons for 'PENDING', 'ACTIVITIES', and three circular icons representing different activities. Below these are '+ Add Shift' and '+ Add Activity' buttons. A red circle with the number 9 points to the 'ACTIVITIES' button. The main area is a calendar grid for the week of Sunday, March 01, 2020, to Saturday, March 07, 2020. The grid has columns for each day and rows for time slots from 5:00 AM to 4:00 PM. A red circle with the number 12 points to a 'Morning Support - Mickey is unavailable, can you cover? - Available - Unconfirmed - 2 hours' shift on Wednesday, March 04. A red circle with the number 10 points to a 'Morning Support - Confirmed - Micky Doe - 2 hours' shift on Friday, March 06. A red circle with the number 11 points to a 'Photography Club - Confirmed - Charlie Smith - 4 hours' shift on Saturday, March 07. A red circle with the number 12 points to a 'Reassigned Shift - Confirmed - John Smith - 2.5 hours' shift on Wednesday, March 04. The grid also shows other shifts like 'Activity - School' and 'Afternoon Shift - Available - Unconfirmed - 1 hour'.

13 Scheduled Activity

'Scheduled Activities' appear as black blocks with the title only. Activities are anything in your schedule which is not assigned to an employee. E.g. School time or a private appointment.

14 Approximate Cost of Roster

The 'Approximate Cost of Roster' shows you an approximate calculation of the cost of your **confirmed** roster. It will appear in a separate pop up box. It also shows the actual cost of previous pay periods.

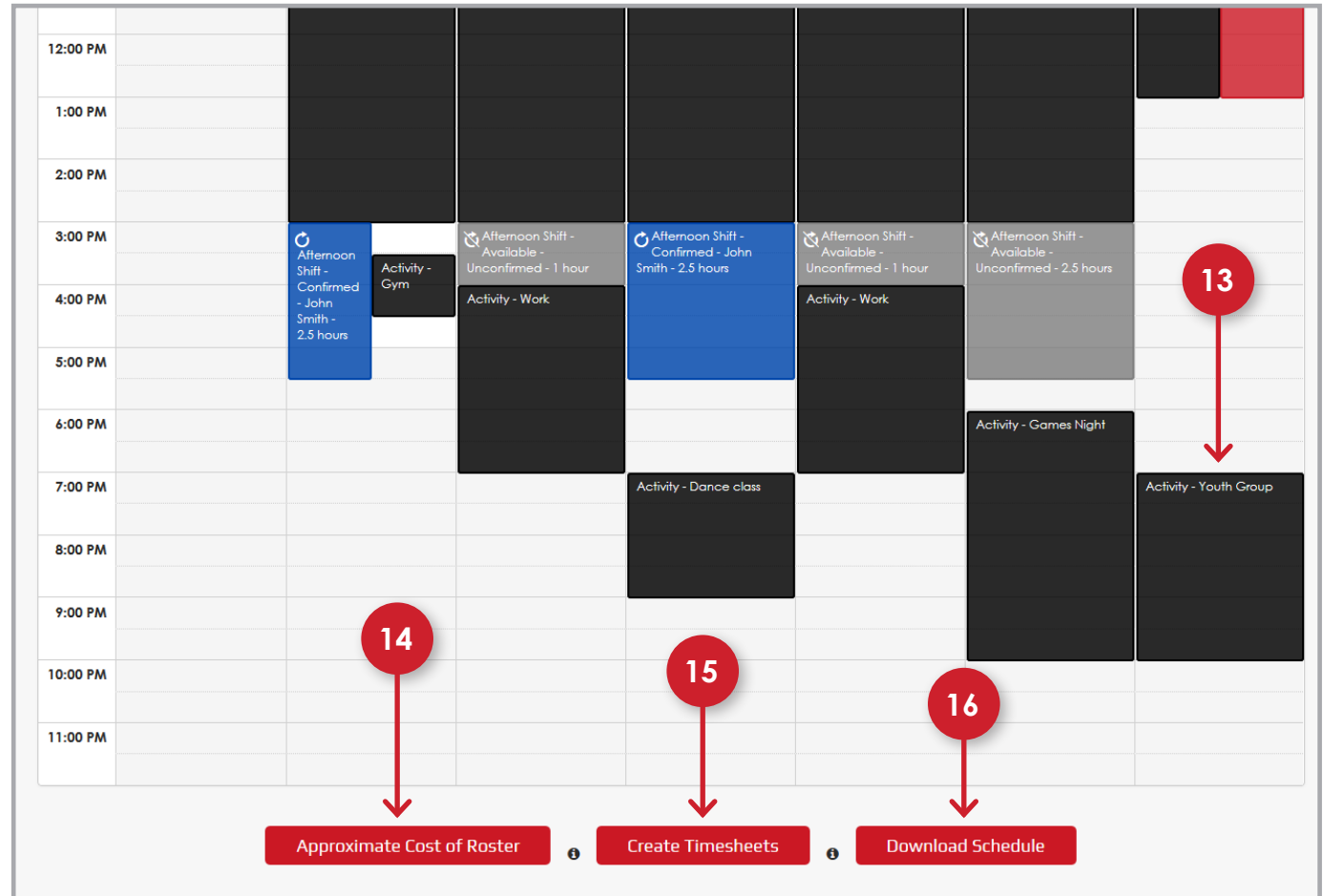
15 Create Timesheets

Click 'Create Timesheets' to open a pop up window allowing you to turn **confirmed** shifts for your employees into timesheets for the corresponding fortnight.

16 Download Schedule

This allows you to save a copy of the schedule in its current state. You can click this button to create a PDF of your schedule which you can print or save.

Scheduling Screen



1 Set as Activity

This link allows you to turn the scheduled time you're working on from a shift to an 'Activity' if there is no need to assign an employee to it.

2 Funding

If you have more than one funding stream, this allows you to select which stream this shift will be linked to. It allows for the shifts to be turned into timesheets.

3 Pay Component

Choose the 'Pay Component' to show whether it is 'Ordinary Hours', 'Leave', 'Weekend' or a 'Night' rate as required. It's the same as you find in your timesheets. **Note:** Only one pay component can be selected per shift.

4 Title

Here you can give a shift a title. You may choose a name that summarises the type of support you would like for that shift. E.g. 'Morning Routine' or 'Shopping and Doctor's Appointment'.

How to add a shift to your schedule

The screenshot shows a 'Shift' form with the following fields and callouts:

- Callout 1:** Points to the '+ Set as Activity' link in the top right corner.
- Callout 2:** Points to the 'Funding' dropdown menu, which is currently set to 'Porter Bradley (IF)'.
- Callout 3:** Points to the 'Pay Component' dropdown menu, which is currently set to 'Ordinary Hours Worked'.
- Callout 4:** Points to the 'End Time' field, which is currently set to '9:00 AM'.

The form includes the following fields:

- Shift:** Title field (currently empty).
- Funding:** Dropdown menu (currently 'Porter Bradley (IF)').
- Pay Component:** Dropdown menu (currently 'Ordinary Hours Worked').
- Title:** Text field (currently 'Morning Support').
- Start Date:** Date field (currently '02/03/2020').
- Start Time:** Time field (currently '7:00 AM').
- End Time:** Time field (currently '9:00 AM').
- Repeat:** Dropdown menu (currently 'Never').
- Notes:** Text area (currently empty).
- Shift Address:** Text field (currently '25 Old House Road, Upper Moutere 7175, New Zealand').
- Notification Type:** Dropdown menu (currently '- none -').
- Upload Attachments:** File upload button (currently 'Select files...').
- Invite To Shift:** Text field (currently 'Invite All' and '- click to select -').

Buttons at the bottom: 'Save' and 'Cancel'.

How to add a shift to your schedule

5 Start Date

Choose the 'Date' of the shift.

6 Start Time

Choose the 'Start Time' of the shift.

7 End Time

Choose the 'End Time' of the shift.

8 Repeat

Choose how often you would like this shift to appear in your schedule. E.g. You may add a morning shift that you would like to repeat daily. Select the type of frequency from 'Daily', 'Weekly', 'Monthly', 'Yearly' or 'Never' if it is a one off.

The screenshot shows a 'Shift' form with the following fields and callouts:

- 5** points to the **Start Date** field, which contains '02/03/2020'.
- 6** points to the **Start Time** field, which contains '7:00 AM'.
- 7** points to the **End Time** field, which contains '9:00 AM'.
- 8** points to the **Repeat** field, which contains 'Never'.

Other fields in the form include:

- Funding:** Porter Bradley (IF)
- Pay Component:** Ordinary Hours Worked
- Title:** Morning Support
- Notes:** (empty text area)
- Shift Address:** 25 Old House Road, Upper Moutere 7175, New Zealand (with a 'Change' button)
- Notification Type:** - none -
- Upload Attachments:** Select files...
- Invite To Shift:** Invite All (with a '- click to select -' dropdown)

At the bottom of the form are 'Save' and 'Cancel' buttons.

9

Notes

Add additional information to the 'Notes Section'. These are notes you may like the employee to be aware of before they start the shift. E.g. you can remind them to pick up pizza for games night, or bring their walking shoes.

10

Change Shift Address

The address is automatically set to your home address. This can be amended by clicking the red 'Change' button to set the shift address to another location, E.g. local pools.

11

Notification Type

Choose how the employee will be notified about the shift when it is assigned. You can choose from 'Email', 'SMS' or both.

12

Upload Attachments

Add documents that you need your employee to see or use. Add these before the shift so they're all ready. E.g. if they need to complete a Kiwisaver form and sign it before they come for the shift.

How to add a shift to your schedule

The screenshot shows a 'Shift' form with the following fields and callouts:

- 9** points to the 'Notes' text area.
- 10** points to the 'Change' button next to the 'Shift Address' field.
- 11** points to the 'Notification Type' dropdown menu.
- 12** points to the 'Upload Attachments' section, specifically the 'Select files...' button.

The form includes the following fields:

- Funding:** Porter Bradley (IF)
- Pay Component:** Ordinary Hours Worked
- Title:** Morning Support
- Start Date:** 02/03/2020
- Start Time:** 7:00 AM
- End Time:** 9:00 AM
- Repeat:** Never
- Notes:** (Empty text area)
- Shift Address:** 25 Old House Road, Upper Moutere 7175, New Zealand
- Notification Type:** - none -
- Upload Attachments:** Select files...
- Invite To Shift:** Invite All, - click to select -

Buttons at the bottom: Save, Cancel.

How to add a shift to your schedule

13 Invite to Shift

This is a dropdown list of all your active employees. Use this to select one or multiple employees per shift. Employee information is gathered from the Employee/Payee tab in the portal.

14 Invite All

You can use this button to add all employees to a shift, or if you would like them to attend a team meeting. Simply click this link instead of inviting them one at a time.

15 Save

Click 'Save' when you are ready to finalise and add the shift to your schedule. By doing this, it will send a notification to the assigned employee(s). Make sure everything is correct before you save.

16 Cancel

If you decide the shift is unnecessary or you need to start over, you can click 'Cancel' and nothing will be saved.

The screenshot shows a 'Shift' form with the following fields and callouts:

- Shift** (Title)
- + Set as Activity** (Link)
- Funding**: Porter Bradley (IF) (Callout 13)
- Pay Component**: Ordinary Hours Worked (Callout 13)
- Title**: Morning Support (Callout 13)
- Start Date**: 02/03/2020 (Callout 13)
- Start Time**: 7:00 AM (Callout 13)
- End Time**: 9:00 AM (Callout 13)
- Repeat**: Never (Callout 13)
- Notes** (Callout 13)
- Shift Address**: 25 Old House Road, Upper Moutere 7175, New Zealand (Callout 13)
- Notification Type**: - none - (Callout 13)
- Upload Attachments**: Select files... (Callout 13)
- Invite To Shift**: Invite All (Callout 13)
- Save** (Callout 15)
- Cancel** (Callout 16)

Arrows indicate the flow from the 'Invite To Shift' dropdown (13) to the 'Invite All' button (14), then to the 'Save' button (15), and finally to the 'Cancel' button (16).

Estimating the cost of your roster

1 Past Fortnights

The approximate cost of previous fortnights are shown in light grey.

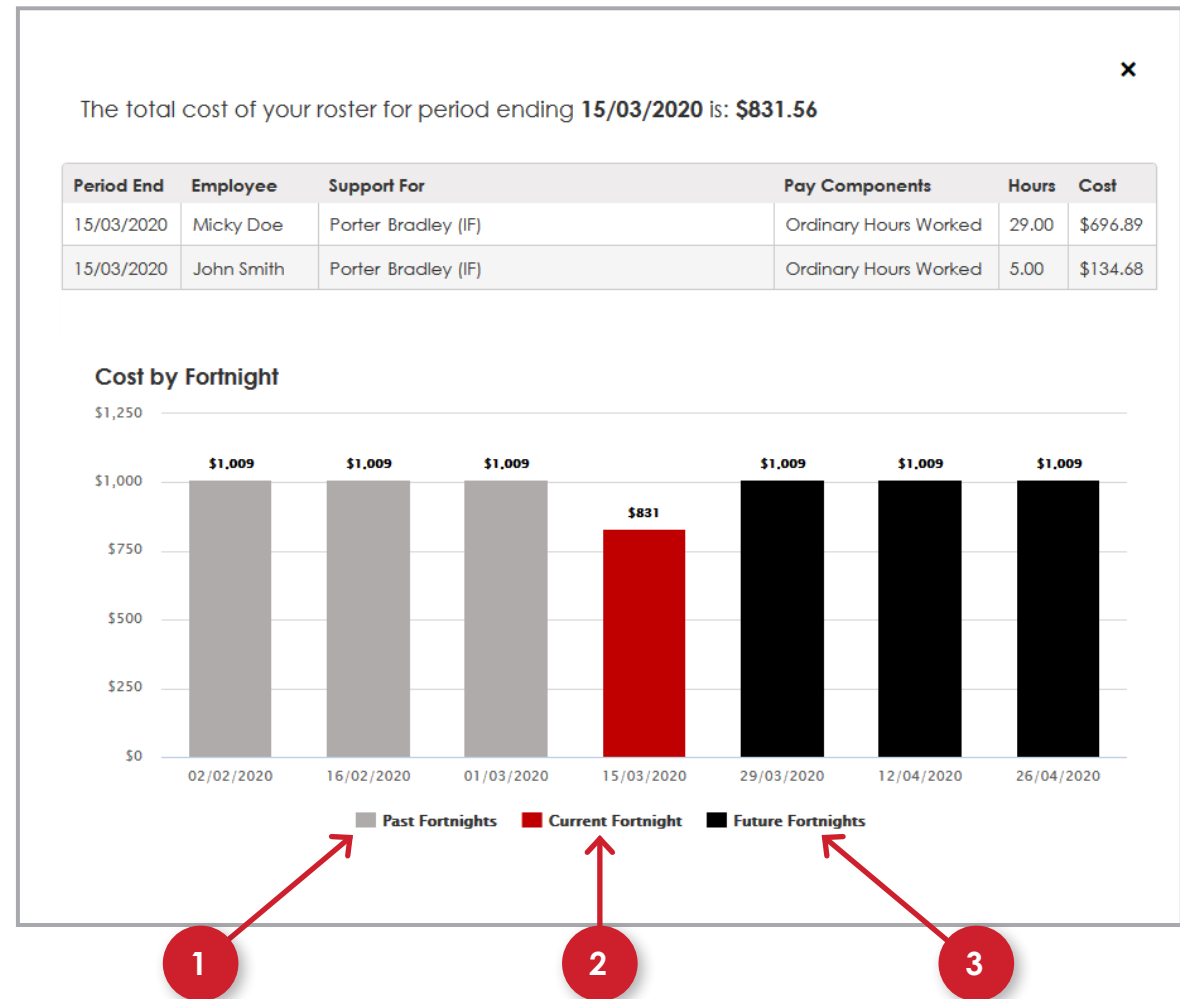
2 Current Fortnight

The approximate cost of the current fortnight is shown in red.

3 Future Fortnights

The approximate cost of the shifts created for future fortnights is represented in black.

Note: The cost indicated is an approximation. The exact cost is calculated as a part of the payroll payment process.



1

Generate Time Sheet

You must tick the box for each employee you want to create a timesheet for. Then click the red 'Generate' button and the Portal will create timesheets for those employees based on **confirmed** hours.

Note: If a timesheet has already been generated, this will show as 'Already Exists.'

Employees can also create timesheets.

If you make changes to the schedule after generating a timesheet, you will need to reflect these amends in the 'Timesheet Tab', where you can also add expenses.

Timesheets still need to be verified and submitted following the normal process.

How to create a timesheet from your schedule

Create New Timesheets

i Please note you can submit only 1 timesheet per employee per pay period

Add	Employee	Period End	Support For	Pay Components	Hours	Status
<input checked="" type="checkbox"/>	Rachel Bradley	15/03/2020	Porter Bradley (IF)	Ordinary Hours Worked	29.00	
<input checked="" type="checkbox"/>	Rachel Bradley	15/03/2020	Porter Bradley (IF)	Ordinary Hours Worked	5.00	

1

→

Generate

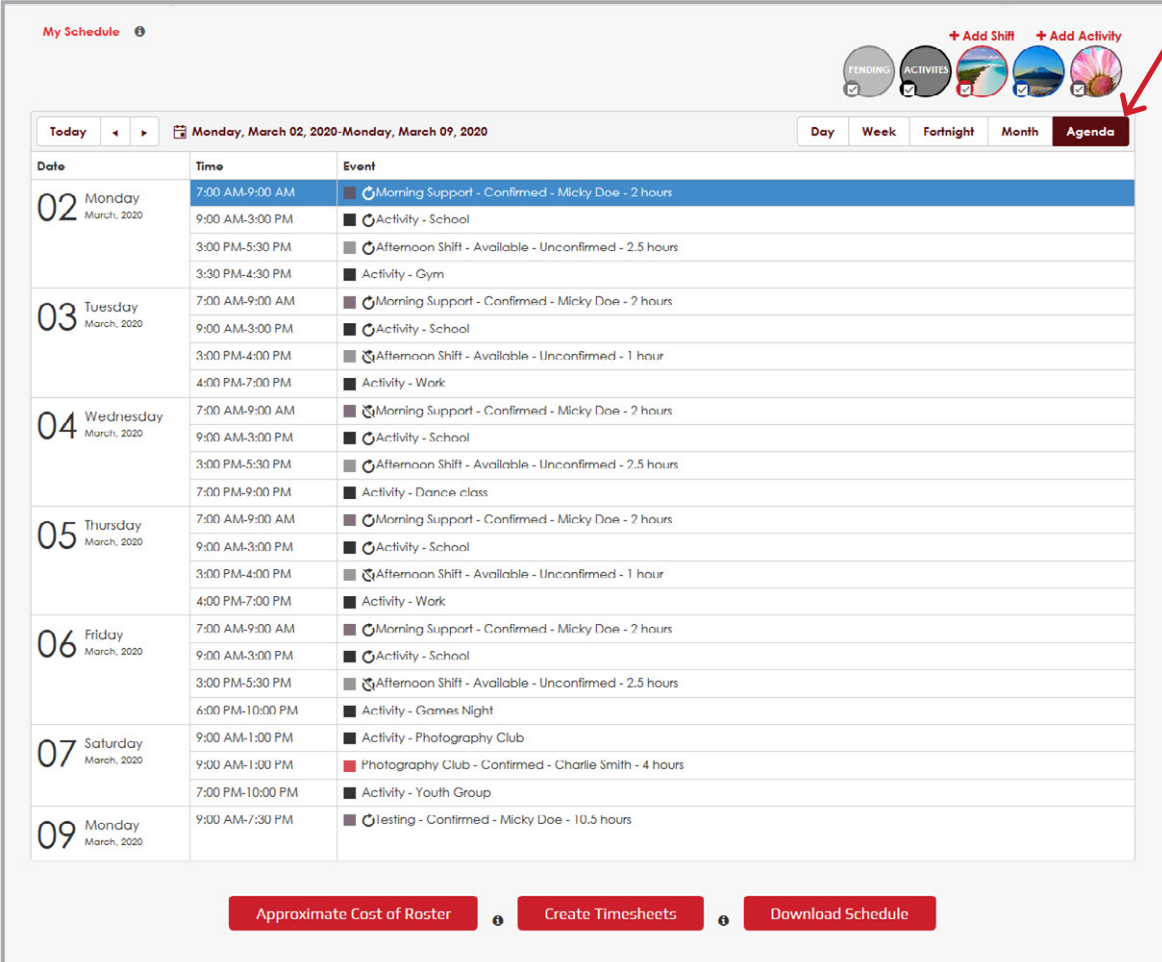
Cancel

Using the Agenda View

1

Agenda View

The 'Agenda View' is to simplify the schedule. Here you can see a list of shifts and activities in date order from earliest to latest. The Agenda view is more accessible and shows shifts and activities in a vertical list.



My Schedule ⓘ

⊕ Add Shift ⊕ Add Activity

PENDING ACTIVITIES

Today < > Monday, March 02, 2020 - Monday, March 09, 2020

Day Week Fortnight Month **Agenda**

Date	Time	Event
02 Monday March, 2020	7:00 AM-9:00 AM	Morning Support - Confirmed - Micky Doe - 2 hours
	9:00 AM-3:00 PM	Activity - School
	3:00 PM-5:30 PM	Afternoon Shift - Available - Unconfirmed - 2.5 hours
	3:30 PM-4:30 PM	Activity - Gym
03 Tuesday March, 2020	7:00 AM-9:00 AM	Morning Support - Confirmed - Micky Doe - 2 hours
	9:00 AM-3:00 PM	Activity - School
	3:00 PM-4:00 PM	Afternoon Shift - Available - Unconfirmed - 1 hour
	4:00 PM-7:00 PM	Activity - Work
04 Wednesday March, 2020	7:00 AM-9:00 AM	Morning Support - Confirmed - Micky Doe - 2 hours
	9:00 AM-3:00 PM	Activity - School
	3:00 PM-5:30 PM	Afternoon Shift - Available - Unconfirmed - 2.5 hours
	7:00 PM-9:00 PM	Activity - Dance class
05 Thursday March, 2020	7:00 AM-9:00 AM	Morning Support - Confirmed - Micky Doe - 2 hours
	9:00 AM-3:00 PM	Activity - School
	3:00 PM-4:00 PM	Afternoon Shift - Available - Unconfirmed - 1 hour
	4:00 PM-7:00 PM	Activity - Work
06 Friday March, 2020	7:00 AM-9:00 AM	Morning Support - Confirmed - Micky Doe - 2 hours
	9:00 AM-3:00 PM	Activity - School
	3:00 PM-5:30 PM	Afternoon Shift - Available - Unconfirmed - 2.5 hours
	6:00 PM-10:00 PM	Activity - Games Night
07 Saturday March, 2020	9:00 AM-1:00 PM	Activity - Photography Club
	9:00 AM-1:00 PM	Photography Club - Confirmed - Charlie Smith - 4 hours
	7:00 PM-10:00 PM	Activity - Youth Group
09 Monday March, 2020	9:00 AM-7:30 PM	Testing - Confirmed - Micky Doe - 10.5 hours

Approximate Cost of Roster ⓘ Create Timesheets ⓘ Download Schedule

1

Employees & Payees

You can allow one or more of your employees to be a 'Team Lead' on your behalf. A Team lead only has access to your schedule, not other features of your portal account. They can make changes to the schedule and create shifts for other employees on your behalf.

Assigning a Team Leader

The screenshot shows the 'Employee - Micky Doe' form in the 'Employees & Payees' section. The form has tabs for 'Details', 'Payroll Info', 'Documents', 'Payslips', and 'Balances'. The 'Details' tab is active. The form contains various fields for employee information, including 'Payee Type', 'First Name', 'Last Name', 'Date of Birth', 'Address', 'City', 'Region', 'Known As', 'Title', 'Gender', 'Email', 'IRD Number', 'Phone Number', 'Status', 'Privacy Notice Signed', and 'Invite to Portal'. The 'Is Team Leader' checkbox is checked and highlighted with a red arrow and a red circle containing the number 1. The 'Save', 'Request MIC Help', and 'Return' buttons are at the bottom.

Field	Value
Payee Type *	Casual Employee
First Name *	Micky
Last Name *	Doe
Date of Birth *	02/02/2000
Address 1 *	G Peace Avenue
Address 2	Mt Wellington
City *	Auckland
Region	Auckland
Known As	
Title	
Gender	
Email *	permanent@manawatu.org.nz
IRD Number *	000 000 000
Phone Number	123654
Status	Active
Privacy Notice Signed	<input type="checkbox"/>
Invite to Portal	<input type="checkbox"/>
Is Team Leader	<input checked="" type="checkbox"/>

Buttons: Save, Request MIC Help, Return

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