StaffRight

Scheduling made easy

# User Manual (v15)

❶ Settings / Group Dividers
❷ Entering Employees
❸ Entering Shifts
❹ Daily Labor Planners
❺ Realtime Labor Control
   eMailing Schedules
   FAQs

---

❶ Settings

After agreeing to terms of service and entering your name, you'll likely need to change a few things first before you start scheduling.

► Go to the Settings menu by clicking on the Settings button

► In the settings pop-up, you are offered 4 Budget choices
   • <u>Hours Allowed</u>   • Dollars Allowed   • Labor Pct Allowed   • Custom
   (NOTE: Underlined budget is default at first launch, and can be changed anytime)

► There are also 5 options to display special info on your schedule:
   • <u>Show Comments / Adjustments</u>   • <u>Show Weather Notes</u>
   • Show employees 21+ (ideal for alcohol service)
   • Show Birthdays   • Show Groups on Daily Planners

   (NOTE: Underlined options above are shown at launch, and can be changed)

► Set the Minor Guidelines for "School In Session", or "School Break"
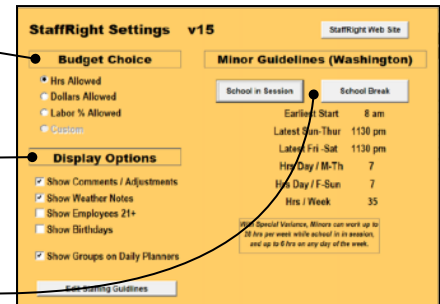
Group Dividers

**Making your schedule easy to read by adding grey "group dividers"**

You can separate employees into groups (separated by grey lines) for easy readability, and can place the grey dividers anywhere you wish.

Give some thought towards how you want to use Group Dividers....
Would you like to organize your schedule by job titles, locations, or departments?

• If you schedule by job title, the Groups might be labelled:
     " Salaried Managers", "Shift Managers", "Staff" or "Employees In Training"

• If you are organizing by work position, the dividers could named:
    " Cashiers", "Prep", "Kitchen", "Host"

     <u>BTW, each Group Divider has it's hours sub-totaled in this area</u>
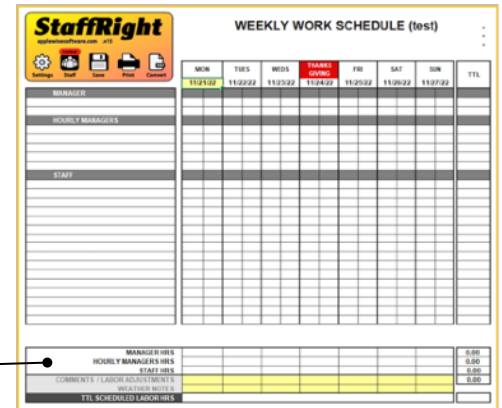
Heres how to do it!

► Click the Staff icon (upper left of the schedule) to unlock the employees column

► In the unlocked employees column below, click <u>where</u> you want the new Group Divider.

► In the pop-up window, select GROUP DIVIDER.

► Enter a name for the Group Divider in the yellow box and press the green NEW button.

   StaffRight will then lock the employee column & return to the schedule side, ready to go.
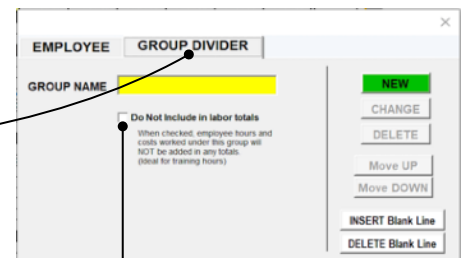
FYI Training Hours are an excellent use of a Group Divider...you can even <u>keep that group from being added to total hours scheduled!</u>

Group Dividers all in place?   The next page shows how to enter Employees! •••••▶

How to add employees to the schedule:

(This is very similar to entering the grey group dividers)-

► Click the Staff icon to unlock the employees column

► In the unlocked employees column, click <u>where</u> you want to put the new Employee.

► Choose Employee from the pop-up menu.

► Then enter name, birthdate, pay rate and hire date in the yellow boxes. Every item must be entered, or StaffRight will keep at you.

When all info has been entered, press the green ADD button and your new employee has been entered!

StaffRight then re-locks the employee section (keeping all info away from prying eyes!) and returns to the schedule side, ready for shifts to be entered!

FYI

You can make changes to your Employee <u>at any time!</u>

Unlock the employee column and <u>pick an existing employee</u>:

- Employee can be deleted, moved up or down on the schedule (ideal when promoted!)
- Additional spaces can be added below it to make room for more employees within the group.
- Empty lines under it can be deleted for neatness
- Any info can be changed: pay rate, salaried status, breaks preference!

NOTE: StaffRight <u>will not allow any duplicate names</u>, so, add the first letter of their last name to keep them unique: "Bill R" and "Bill D", for example.

Settings and employees:

There are two important employee settings for your convenience:

► Click on Settings button (upper left corner of schedule) to bring up StaffRight's Settings, then look at Display Options:

- Show Birthdays (normally off by default) will show every employees' birthdate, ideal for celebration!
- Show Employees 21+ (off by default) flags employees old enough to serve alcohol.

FYI

If you have a new employee that you do not want charged to your labor total (perhaps in training), you can do this by creating a new Group Divider and checking the box for "Do Not Count in labor totals".

Then any employee you place under that grey line <u>will not be charged in labor hours or costs.</u>

The next page shows how to enter shifts and requests, making the schedule come alive! ⋯⟩

❸ Scheduling employees

Select any spot in the schedule and start scheduling!

For the sake of accuracy, StaffRight will only accept shifts this way:

- Enter times using 15 minute increments, with No Semicolons
- Use either an 'a' or a 'p' after each entry to denote AM or PM
- No superfluous 0's

(For example: 4p is acceptable, 4PM is not
745a is acceptable, 7:45a is not
8a is acceptable, 800 is not)

StaffRight will always let you know if an entry needs to be corrected.
It will also check for:

- End of shift is before start of shift
- Start of shift and end of shift are the same
- Uncompleted shifts (Start time or End time are absent)

Once a shift has been entered, the hours are added up:
- Employee hours are added to their total (far right of the schedule)
- Hours are also added to the total for the day, and the week.

FYI When entering a shift, StaffRight highlights the entire shift in yellow, and the current cursor position in orange for your convenience..

How to enter employee time off requests:

Select any spot on the schedule, and then Left-Dbl-Click!
When the Make Request pop-up comes up, there are 3 choices:

- Request Day Off   Erases any shifts on that day & locks it (grey)
- Request Week Off   Clears entire week & locks it (greys out the week)
- REGULAR Day Off   Locks off this day and marks it with distinctive grey stripes, because unlike a regular requested day off, this choice marks this day off on all future schedules (Ideal for staff who will always be unavailable on that day.)

    A "REGULAR Day Off" will survive even the "CLEAR ALL" command that is run before every new schedule (See below).

FYI The only way to remove a REGULAR DAY OFF is by selecting it and using the "Clear Day Off " option (see below).

How to undo employee time off requests:

Select any requested day off (greyed) spot on the schedule, and then Left-Dbl-Click!

The Make Request pop-up comes up, there are 3 choices:

- Clear Day Off   Unlocks the requested day off to allow changes. This command is the only way to clear a REGULAR DAY OFF (marked in grey stripes).
- Clear Week Off   Unlocks entire week off to allow changes.
- Clear All Requests Schedule-wide unlocks all requested days off (except REGULAR DAYS OFF) , ideal for a new schedule.

The next page shows you the 7 Daily Planners StaffRight creates as you schedule! • • • •➤

❹ Daily Labor Planners (Mon-Sun Line Bar Schedules)

Each Daily Labor Planner shows the day in a Line Bar format.   Here's all of the features of "your day at a glance" -

Your projected goal, and the total hours scheduled

Budgeted goals "by the hour" ribbon

Number of employees "by the hour' ribbon

Hours totaled (Less breaks)

Required breaks based on length of shift

Shifts arranged by start time

Minor Violations in green

Overtime in red

Make changes as needed on the master schedule, and check each Daily Planner for opportunities.

Every change made on the Master schedule is shown in immediately on each Daily Planner.

For effective scheduling, check the following:

▶ Compare the two black ribbons (sales & labor hrs) for consistency.

▶ Check for minor violations (green)

▶ Look for overtime (red)

Then simply return to the Master schedule and make changes.

If you have set labor guidelines (in settings), staffRight will check your schedule for you!

Selecting the CHECK icon will convert all sales history to hourly, and shows staffing alerts according to the criteria you set earlier.

A new grey ribbon shows below the two black ribbons, showing staffing recommendations.

More ways to save labor with StaffRight's Daily Planners!

. . . .>

For real-time labor control, check your sales every half hour-

StaffRight — Daily Planner for Monday 11/21/22

							Required Breaks	3a	4a	5a	6a	7a	8a	9a	10a	11a					6p	7p	8p	9p	10p

ACTUAL ORDERS: 5 19 71 105 113

800	HOURLY PROJECTED ORDERS						3	15	53			19	95	85	64	36	22	8
48.50	SCHEDULED LABOR HOURS	1	2	2	3	3	3.5			3	4	3.8	3	2	0.8
	STAFFING ALERTS		1	1	2			5		3	2	1	1

Hrs	Start	End	Position	Employee	Required Breaks
8.00	6a	3p	(Salary)	Dave	10 30 10
5.50	7a	1p		PAUL	10 30
4.50	9a	2p		DEBBIE	10 30
7.00	1130a	7p		RAY	10 30
7.25	12p	745p		LARRY	10 30 10
8.50	12p	9p		SARAH	10 30 10
4.25	6p	1015p	(Minor)	ALICIA	10
3.50	7p	1030p		JANET	10

StaffRight provides a worksheet above the projected sales ribbon for you to enter hourly sales.

► If <u>actual sales are less than StaffRight's projections</u> (on the top-most black ribbon), you are currently overstaffed, and should reduce labor to stay on budget.

► If <u>you are trending up in sales</u>, keep staff (longer) to properly meet demand and build a great reputation with great service.

> **FYI**
> StaffRight can easily talk to register systems to bring hourly readings over <u>automatically.</u> Ask your I.T. dept for details.

eMailing schedules

Only StaffRight allows you to send your finished schedule as a PDF eMail attachment to any device, PC, tablet or smartphone, readable by ANY device with NO software needed.

► Click on the Convert button.

► A PDF (picture) of your schedule is saved to the desktop.

► Send the PDF <u>as an eMail attachment.</u>

> **FYI**
> The PDF file includes main schedule and ALL 7 day worksheets, and is universally accepted by all devices on the market today.

FAQs

"How do I schedule split shifts?"
Create a new line below the employee, and Add Employee with a slightly different name (add PM, for example), as StaffRight will not allow duplicate names.

"My schedule is quite large, can I get to the Sales Plan and Budget areas more quickly?"
The three dots on the upper right of your schedule take you to each section directly.
Once there a return dot will bring you back to your schedule.
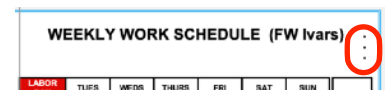
"How can I tell how strong my staffing is, when every employee is different?"
Simply capitalize the names of stronger employees, then review each day for the number of them scheduled.