

Managers -----

SETTINGS>Information

All of the company-wide settings are found on the SETTINGS>Info & Settings tab which can be accessed from any page using the top menu.

The screenshot displays the 'Sample Pharmacy' settings interface. At the top, a navigation bar includes 'HOME', 'SCHEDULES', 'EMPLOYEES', 'TRADES', 'TIME-OFF', 'MESSAGING', 'BULLETINS', 'REPORTS', 'OH NOW', 'SETTINGS', and 'HELP'. The 'SETTINGS' tab is selected. Below the navigation bar, the page title is 'Sample Pharmacy SETTINGS'. On the right, there are links for 'Live Chat Support', 'HAVE A QUESTION?', and 'SIGN-OUT'. The main content area has several tabs: 'Info & Settings' (selected), 'My Notifications', 'Employee Permissions', 'Add/Edit Managers', and 'Make a Payment'. A 'Save Changes' button is highlighted in red. The 'COMPANY INFORMATION' section includes fields for 'Company Name' (Sample Pharmacy), 'Address' (123 Main St.), 'City State Zip' (Anytown), 'Phone' (800 555-5555), 'Time Zone' (GMT-8 Pacific US), and 'Adjust for Daylight Savings Time' (Yes/No). The 'YOUR INFORMATION' section has fields for 'First Name' (John) and 'Last Name' (Smith), along with links for 'E-Mail & Text Message' and 'ID & Password'. The 'SCHEDULE SETTINGS' section includes 'Schedule START DAY: Monday', 'AutoFill MINIMUM TIME OFF Between Shifts' (12 hours), and 'SEND NOTIFICATIONS when Publish or Unpublish schedules: Yes/No'. The 'COMPANY LOGO' section shows the current logo and a link to upload a new one.

The SETTINGS>Info & Settings options include:

Your company information and contact e-mail and setting to have messages forwarded to your e-mail.

Your Schedule START DAY: during your free thirty day trial you will see a link to change the schedule start day on your weekly schedules. After your trial period is over you need to contact support using the link at the bottom of your home page to request a change to your schedule start day.

Time Zone and Daylight Savings: choose your time zone so that the time will display properly on your page while logged in.

[AutoFill Minimum time off between shifts - Click here for more information](#)

SEND NOTIFICATIONS when schedules are published or unpublished: Setting to Yes means that employees are automatically e-mailed their schedules when a week is published and receive a "schedule retraction" e-mail if a week is UNpublished. This setting takes effect immediately. For example: You can click to SETTINGS page, change this option to not send notifications and Save Changes and then unpublish and no notices will get out, then go back to the SETTINGS page and change the option back and Save Changes again to set the option back.

Company Logo

You can upload your company logo and it will be displayed on: the manager home page, all printouts and reports, all employee pages and printouts. Note our system displays your logo graphic at 150 pixels wide so for the sharpest results please resize your graphic to 150 pixels wide before uploading. If you want to change the logo you can upload a new graphic or to remove your company logo contact support using the link at the bottom of any of your account pages and we can remove it for you.

Related Topics:

- [Adding Managers & Permissions](#)
- [Sending Manager Sign-In Instructions](#)
- [Managers Who are Also Employees](#)
- [Receiving E-mails but not Messages](#)

SETTINGS>Employee Permissions (Global Settings)

EMPLOYEE PERMISSIONS

Managers (with permission to change company settings) can choose what all employees are allowed to see and do when they sign in at WhenToWork.com.

WhenToWork.com
HOME SCHEDULES EMPLOYEES TRADES TIME-OFF MESSAGING BULLETINS REPORTS ON NOV
SETTINGS
HELP

Apr 14, 2007
12:18pm

Sample Pharmacy

SETTINGS

Live Chat Support
HAVE A QUESTION?

SIGN-OUT

Info & Settings
My Notifications
Employee Permissions
Add/Edit Managers
Make a Payment

Save Changes

Preferences			
Can Set their own Prefer & Dislike work time PREFERENCES	<input checked="" type="radio"/> Yes <input type="radio"/> No		
Can Set their own CANNOT WORK times	<input type="radio"/> Yes <input checked="" type="radio"/> No		
Can Set their Preferences for POSITIONS	<input checked="" type="radio"/> Yes <input type="radio"/> No		
Time Off			
Can REQUEST TIME OFF	<input checked="" type="radio"/> Yes <input type="radio"/> No		
Display			
Can see SHIFT COLORS on schedules	<input checked="" type="radio"/> Yes <input type="radio"/> No		
Can see CATEGORIES on schedules	<input checked="" type="radio"/> Yes <input type="radio"/> No		
Can see the EMPLOYEE COMMENTS field	<input type="radio"/> Yes <input checked="" type="radio"/> No		
Viewing Other Employees & Their Schedules			
Can View EVERYONE'S SCHEDULE* <small>(use your corresponding view "Change Layout" link to set employee displays)</small>	<input checked="" type="radio"/> Yes <input type="radio"/> No		
Can see UNASSIGNED SHIFTS on Everyone's schedule view*	<input type="radio"/> Yes <input checked="" type="radio"/> No		
Can View STAFF LIST and MESSAGE OTHER EMPLOYEES* <small>(If set to No - Employees CANNOT see everyone's schedule)</small>	<input checked="" type="radio"/> Yes <input type="radio"/> No		
Can View Other Employees' AVAILABILITY*	<input checked="" type="radio"/> Yes <input type="radio"/> No		
Bulletin Board			
Can Add Entries to the BULLETIN BOARD*	<input checked="" type="radio"/> Yes <input type="radio"/> No		
Tradeboard			
(to turn off Tradeboard set all options to "Never")	Never	With Manager Approval	At Will
Employees Can Trade Shifts:*	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Employees Can Drop Shifts:*	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Can see & pickup UNASSIGNED SHIFTS:**	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
<p>**Unassigned "At Will" allows employees to see & pickup unassigned shifts themselves, but any pickup request that puts them over maximum hours per week will be sent to manager for approval</p> <p>Unassigned "With Manager Approval" allows manager to approve all requests by employees to pickup an unassigned shift (shifts remain posted until manager approves shift pickup - allowing multiple employees to request same shift)</p> <p>*To prevent employees from ever seeing other employee names set these options to No/Never</p>			

Save Changes

EMPLOYEE PERMISSIONS

PREFERENCES

Can Set their own Prefer & Dislike work time PREFERENCES:

Set to Yes means when employees sign in they can see and change the times they like and dislike working (there is no down side to allowing employees to enter this information as you can choose to ignore it when

using AutoFill) Setting to No means employees cannot view or change their prefer and dislike and cannot work times.

Can set their own CANNOT WORK times:

Set to Yes means that when an employee signs into their employee account their work time preferences will also allow them to paint times as Red (Cannot Work). (Cannot Work times are used by AutoFill). If set to No then only Managers with permission to edit employees can change the Cannot Work times for each employee.

Can set Preferences for POSITIONS:

Set to Yes to allow employees to see a list of the positions you have set them to be able to work and they can choose whether they like or dislike each position. This can be useful if you have multiple locations and want them to be able to set what locations they prefer to work. When set to No the employees do not see the Position Preferences link and are not able to set these preferences - only managers (with permission) can set what positions they prefer each employee to work.

TIME OFF

Can REQUEST TIME OFF: Set to Yes to allow employees to see and use the Time Off section where they can send in a request for days off.

DISPLAY

Can see SHIFT COLORS on Schedules: Set to Yes to have employees see the colors you set for shifts instead of seeing them displayed as all black. Some managers may not want employees seeing colors if they use colors to rate the employees performance on that shift etc. Normally it would be useful for employees to see shift colors that the manager uses.

Can see CATEGORIES on Schedules: This option allows employees to see any shift categories you have set up - ex. in the Category Chart etc. Note that if this option is set to "no" the employees will not see categories even if your corresponding manager view displays them.

Viewing other Employees & Their Schedules

Note: If you want to prevent employees from ever seeing other employee names you must set all the options highlighted below to NO.

Can view EVERYONE'S SCHEDULE: Employees can see their own schedule when they sign in - if you set this option to Yes they also can see the full schedule that includes everyone. If you set this option to Yes then the format that is displayed for the employees for each view - Daily, Weekly, Monthly, Chart, In-Out etc. is identical to the format you set on on the corresponding manager view using the Change Layout links. Ex. if you set the In-Out chart to show two weeks then the employees will see that same In-Out view when they log in.

Can see UNASSIGNED SHIFTS on Everyone's Schedule: If you allow employees to see Everyone's Schedule you can also set this option to allow any unassigned shifts to appear on that schedule view along with the assigned shifts.

Can see STAFF LIST and MESSAGE OTHER EMPLOYEES: Set to Yes allows employees to see the Staff List and whatever information each employee has set to be public. If you set this option to No employees will not be able to see other employees' names anywhere in the system. This setting overrides seeing everyone's schedule etc.

Can view other employees' AVAILABILITY: Set to Yes means that when an employee logs into their employee account and clicks on one of their own shifts a link will appear with the shift details saying "Availability of Other Employees for my Shift". If you set this option to No then the link does not appear. Clicking the link will then show the employee a list of all other employees who could work that shift along with their relative availability (their preferences, shifts already working, approved time off, etc) during their shift time. This is designed to help an employee trying to find a replacement for their shift.

Bulletin Board

Can ADD ENTRIES TO BULLETIN BOARD: The manager can always add entries to the Bulletin Board and employees can always view the Bulletin Board - to allow employees to post entries set to Yes.

Tradeboard

[Optional Tradeboard - Click here for information on tradeboard settings](#)

Related Topics:

- [Adding Managers & Permissions](#)
- [Sending Manager Sign-In Instructions](#)
- [Managers Who are Also Employees](#)
- [Receiving E-mails but not Messages](#)

WhenToWork.com Online Scheduling

SETTINGS>Add / Edit Managers (& Set their Permissions)

Each WhenToWork account has one main manager (the manager who created the account) and can have any number of other managers who can be limited in what they can see and do when they sign in. The main manager will see the Add/Edit Manager page on that Settings tab.

ONLY THE MAIN MANAGER ON EACH ACCOUNT CAN ADD & SET PERMISSIONS FOR MANAGERS - and MAIN MANAGERS HAVE ACCESS TO LOGIN INFORMATION FOR ALL SUB-MANAGERS.

Each manager has a unique manager ID and password (IN ADDITION TO any ID & Password they may have to sign in as an Employee) and can perform only the functions that you allow.

You can also create a "manager" account for a third party who needs to have access to viewing the work schedule. You can set all permissions to unchecked so that they cannot perform any scheduling functions, but can still log in to view the most up-to-date schedule information using the manager interface.

Managers can sign in and filter their own Schedule Views to only show certain Categories, Positions, Group of Positions etc. but you currently cannot restrict them from seeing particular Positions. For example if their permissions allow them to add shifts - then they can add shifts for all Positions. If you want managers to be restricted to only see and schedule certain departments or locations you may want to create separate WhenToWork accounts.

To add a new Manager

From any page

- In the top menu click **SETTINGS** to go to the Settings section
- Click the **Add/Edit Managers** tab to open the Permissions for Multiple Managers window

WhenToWork.com HOME SCHEDULES EMPLOYEES TRADES TIME-OFF MESSAGING BULLETINS REPORTS ON NOW **SETTINGS** HELP

Mar 15, 2007 08:39pm Sample Pharmacy Live Chat Support CHAT WITH US LIVE! SIGN-OUT

SETTINGS

Info & Settings My Notifications Employee Permissions **Add/Edit Managers** Make a Payment

Add/Delete & Set Permissions for Multiple Managers
To add a new manager enter their name/email and click "Add New" then click "Edit" next to their name - change their permissions below and click Save Changes.

First Name	Last Name	E-Mail	
Sam	Combs	sample@when2work.com	Edit
John	Doe		Edit
jane	johnson		Edit
Sue	Smith		Add New

Schedules Employees

- Enter a First and Last name and an E-mail if you like
- Click the **Add New** link - The new manager's permissions will appear in the box below

Info & Settings	My Notifications	Employee Permissions	Add/Edit Managers	Make a Payment
Add/Delete & Set Permissions for Multiple Managers To add a new manager enter their name/email and click "Add New" then click "Edit" next to their name - change their permissions below and click Save Changes.				
First Name	Last Name	E-Mail		
Sam	Combs	sample@when2work.com	Edit	
John	Doe		Edit	
Sue	Smith		Edit	
jane	johnson		Edit	
<input type="text"/>	<input type="text"/>	<input type="text"/>	Add New	
Permissions for: <input type="text" value="Sue"/> <input type="text" value="Smith"/> Delete Manager User Name: W2W286 Change Password or ID				
E-Mail: Edit E-Mail Notifications E-MAIL Sign-In Instructions Print Sign-In Instructions			<input type="button" value="Save Changes"/>	
Schedules <input type="checkbox"/> Add Shifts <input type="checkbox"/> Import Shifts <input type="checkbox"/> AutoFill Shifts <input type="checkbox"/> Clear/Unassign or Erase Schedules <input type="checkbox"/> Edit Shifts & Notes <input type="checkbox"/> Save/Name Schedules <input type="checkbox"/> Publish Entire Schedules* <input type="checkbox"/> Unpublish Entire Schedules* <input type="checkbox"/> Add/Edit/Delete Categories		Employees <input type="checkbox"/> Add New Employees <input type="checkbox"/> View Employee Payrates <input type="checkbox"/> Edit/Delete Employees <input type="checkbox"/> Add/Edit/Delete Positions Trades <input type="checkbox"/> Approve/Deny Trades Time Off <input type="checkbox"/> Approve/Deny Time Off Requests Company Settings <input type="checkbox"/> Change Company Settings Notifications <input type="checkbox"/> Can be notified of other managers' actions.		
Select All Clear All				
*Publishing & Unpublishing affect ALL positions - normally only one manager should have permission to perform these functions (only the main manager on the account can Add/Edit Managers)				

- Set the permissions you want for the manager and click the **Save Changes** button

To Edit any Manager's permissions or information or to send Sign-In Instructions

In the Permissions for Multiple Manager window

- Click **Edit** next to the Manager name (their permissions will appear below the list of managers)
- Change the information and/or click the **E-Mail** or **Print Sign-In Instructions**
- Click the **Save Changes** button

Managers can be given permission to:

- Add Shifts
- Import Shifts
- AutoFill Shifts
- Clear/Unassign or Erase Schedules
- Edit Shifts & Notes
- Save/Name Schedules
- Publish Entire Schedules (since all positions are published at once only one manager should have permission to publish)
- Unpublish Entire Schedules (since all positions are unpublished at once only one manager should have permission to unpublish)
- Add/Edit/Delete Categories
- Add New Employees

Manager Sign-In Instructions

Sign-In Instructions with ID and Password can be sent to each Manager. If you have entered an e-mail for the Manager you can send instructions to them by e-mail, if not you can print the instructions for them.

To E-Mail Sign-In Instructions:

From any page

- In the top menu click **SETTINGS** to open the Settings section

WhenToWork.com HOME SCHEDULES EMPLOYEES TRADES TIME-OFF MESSAGING BULLETINS REPORTS ON NOW **SETTINGS** HELP

Mar 15, 2007 09:19pm Sample Pharmacy Live Chat Support CHAT WITH US LIVE! SIGN-OUT

SETTINGS

Info & Settings My Notifications Employee Permissions **Add/Edit Managers** Make a Payment

Add/Delete & Set Permissions for Multiple Managers
To add a new manager enter their name/email and click "Add New" then click "Edit" next to their name - change their permissions below and click Save Changes.

First Name	Last Name	E-Mail	
Sam	Combs	sample@when2work.com	Edit
John	Doe		Edit
Sue	Smith		Edit
jane	johnson		Edit
			Add New

Permissions for: [Delete Manager](#) User Name: TIPAMULA1 [Change Password or ID](#)

E-Mail: sample@when2work.com [Edit E-Mail Notifications](#)

[E-MAIL Sign-In Instructions](#) [Print Sign-In Instructions](#) [Save Changes](#)

Schedules Add Shifts Import Shifts AutoFill Shifts

Employees Add New Employees View Employee Payrates Edit/Delete Employees

- Click the **Add/Edit Managers** tab to open the Managers Permissions page
- Click the **Edit** link next to the Manager's name
- Click the **E-mail Sign-In Instructions** or **Print Instructions** link
- An E-mail is immediately sent to that manager

Related Topics:

- [Managers Who are Also Employees](#)
- [Login Info by E-Mail - Forgot ID/ Password](#)

Managers Who are Also Employees

When you create a new Manager they are given a separate ID and Password to sign in as a manager.

Any manager who is also an employee will then have two different Sign-Ins

1. one ID and Password to sign in as an employee (if they want to propose trades to other employees etc.)
2. a second ID and Password to sign in and perform their permitted manager functions

Related Topics:

- [Login Info by E-Mail - Forgot ID/ Password](#)
- [Receiving E-mails but not Messages](#)

Receiving E-mails but not Messages

If you have added a manager to your account and they also work as an employee they will have two sign-in ID's and passwords. Occasionally employees will message a manager at the manager's employee account instead of the manager account. The Manager will receive a forwarded EMail but not see that message when they sign in as Manager.

Managers who are also employees can periodically sign in using their employee ID to clear out any messages that got sent there by mistake.

Change Your ID or Password

Each WhenToWork user can change their own ID and Password. Managers can change their ID and Password from the **SETTINGS** page.

The main manager also can change any other manager or employee ID and Password.

Sub-Managers can change their own Manager (and Employee) ID and Password. (If their manager permissions allow them to Edit Employees they also can change other employee ID and Passwords when logged in as manager.)

To change your ID and Password:

From any page

- In the top menu click **SETTINGS** to go to the Settings section
- Click the "Change ID or Password" link

The screenshot shows the WhenToWork.com interface. At the top, there is a navigation bar with links: HOME, SCHEDULES, EMPLOYEES, TRADES, TIME-OFF, MESSAGING, BULLETINS, REPORTS, ON NOW, **SETTINGS**, and HELP. Below this, the date and time are Mar 15, 2007, 09:29pm. The user is logged in as 'Sample Pharmacy'. There are buttons for 'Live Chat Support' (CHAT WITH US LIVE) and 'SIGN-OUT'. The main content area has several tabs: **Info & Settings**, My Notifications, Employee Permissions, Add/Edit Managers, and Make a Payment. A 'Save Changes' button is visible. The 'Info & Settings' tab is active, showing 'COMPANY INFORMATION' and 'YOUR INFORMATION'. In the 'YOUR INFORMATION' section, the 'ID & Password' link is highlighted with a red box. A modal window titled 'Change My ID / Password' is open, containing the following fields: Current Sign-In ID, Current Password, NEW Sign-In Id, NEW Password, and Confirm New Password. A red arrow points from the 'Change ID or Password' link to the modal window. At the bottom of the modal, there is a link: **Update User ID / Password**.

- Enter the required information and click the **Update User ID / Password** link
- The next time you sign in you will have to use the new ID and Password

Having trouble changing your ID or Password? Try retrieving your ID/Password information from the sign-in page and then Copy/Paste the information into the change ID/Password window. The use of certain characters may require doing this to get the old ID/Password to be accepted.

Related Topics:

- [Sending Manager Sign-In Instructions](#)
- [Managers Who are Also Employees](#)
- [Receiving E-mails but not Messages](#)