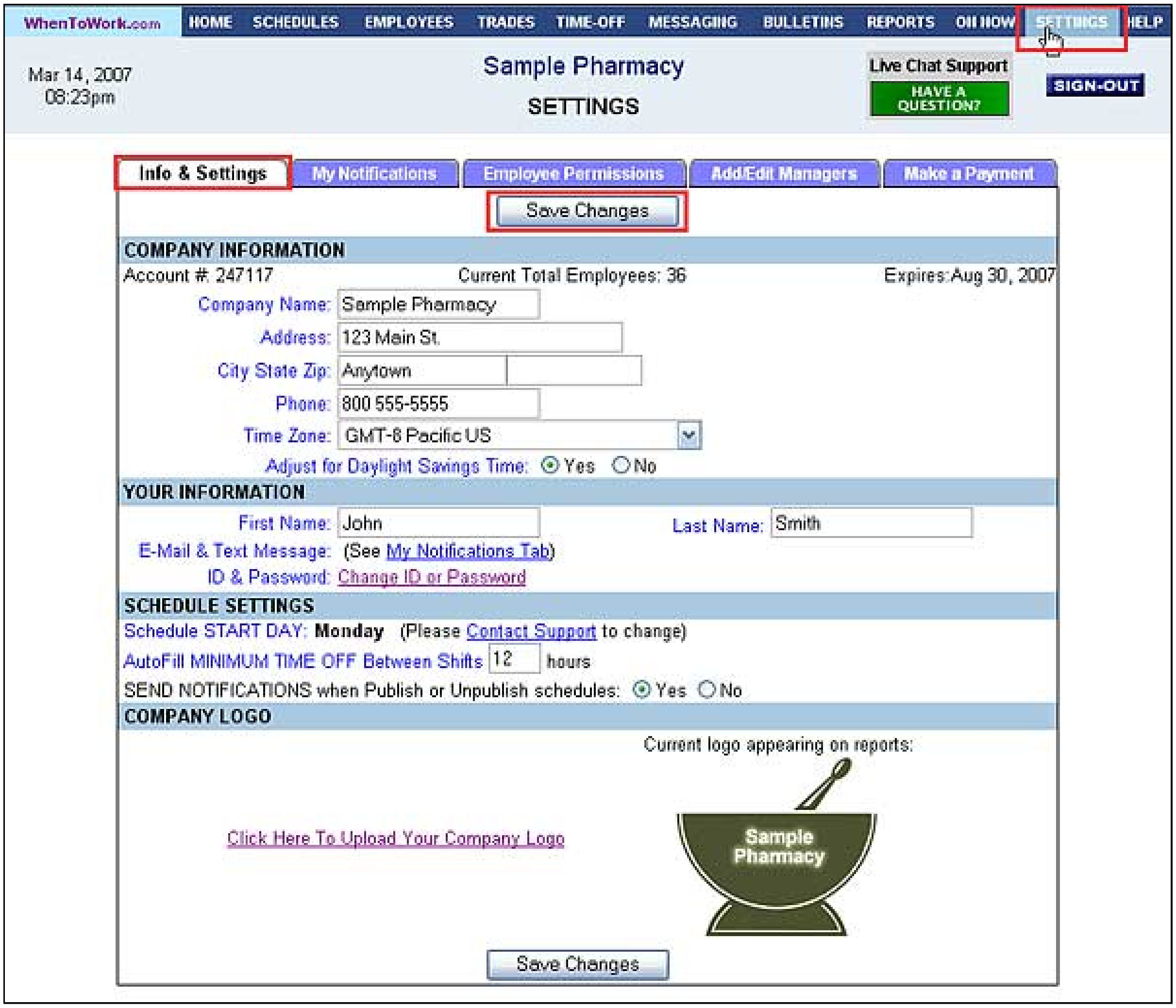
Managers -

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 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SEND NOTIFICATIONS when schedules are published or unpublished: Setting to Yes means that employees are automatically e-mailed their schedules when a week is published and receive a "schedule retraction" e-mail if a week is UNpublished.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 got 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.

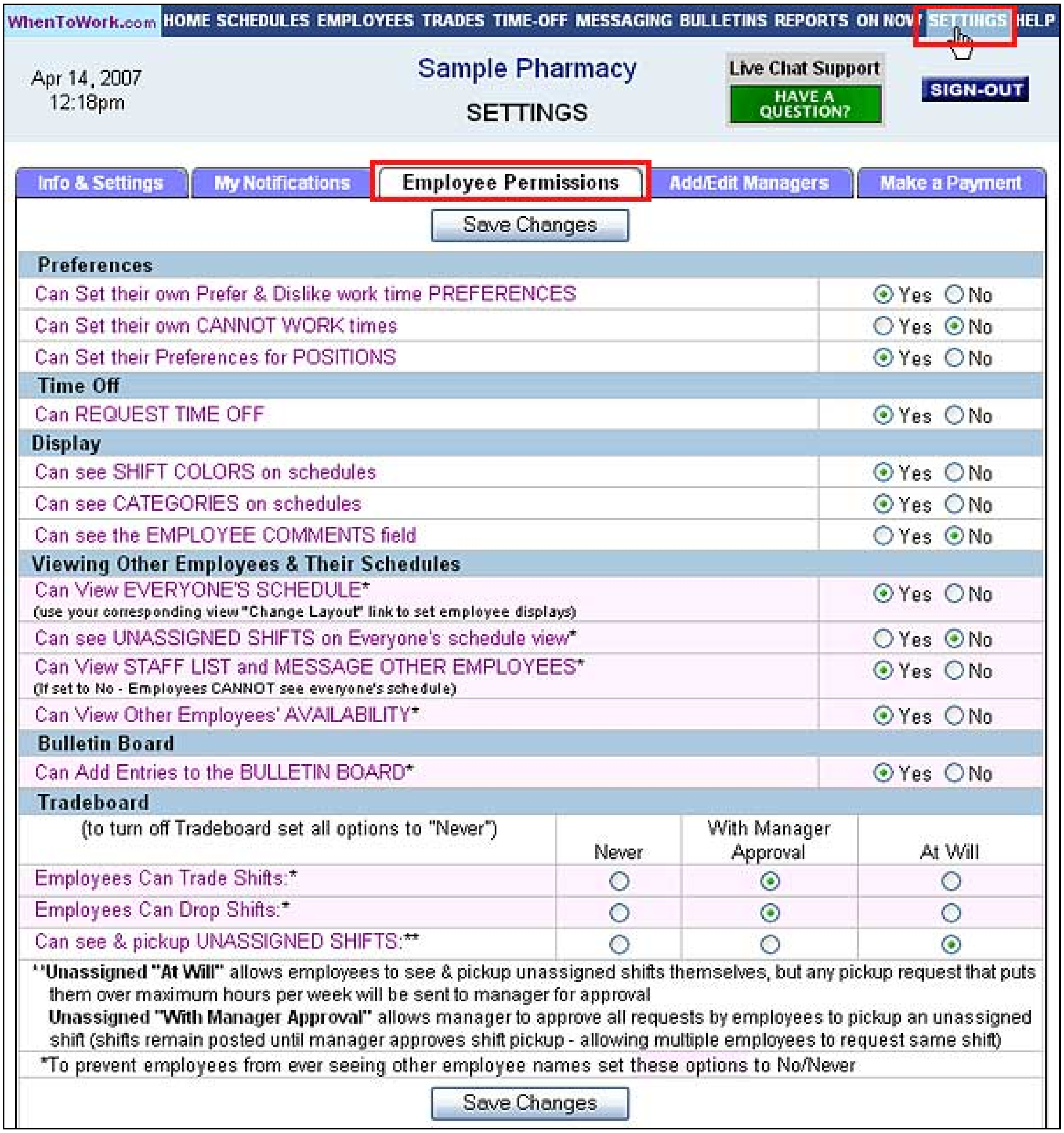
Related Topics:

- 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.



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

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.

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.

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.

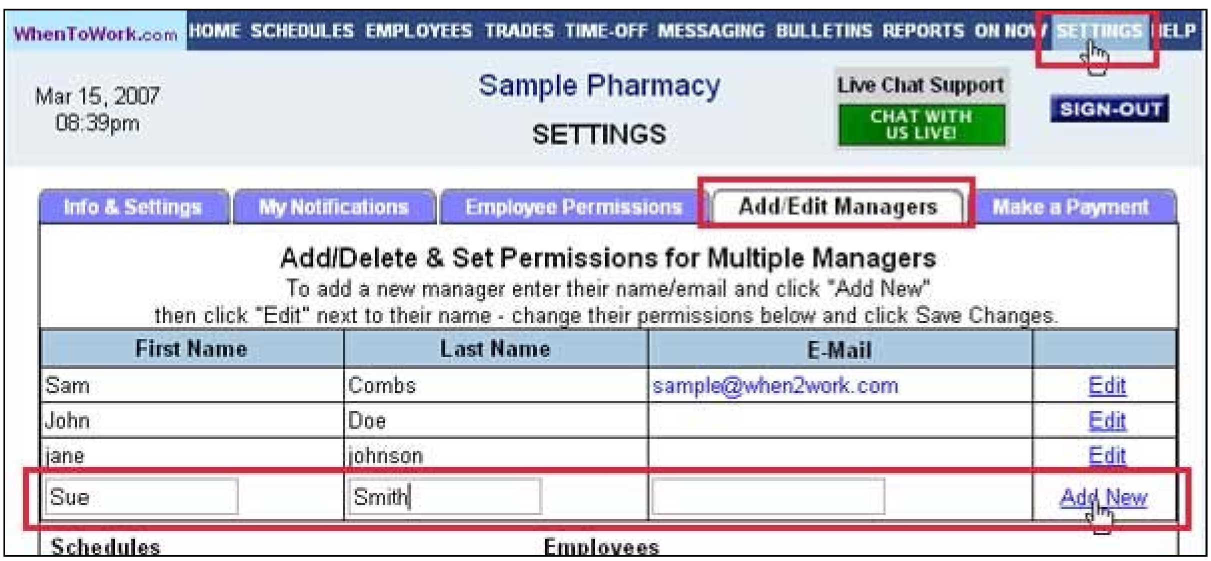
You can also create a "manager" account for a third party who needs to have access to viewing the work schedule. You can set all permissions to unchecked so that they cannot perform any scheduling functions, but can still log in to view the most up-to-date schedule information using the manager interface.

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.

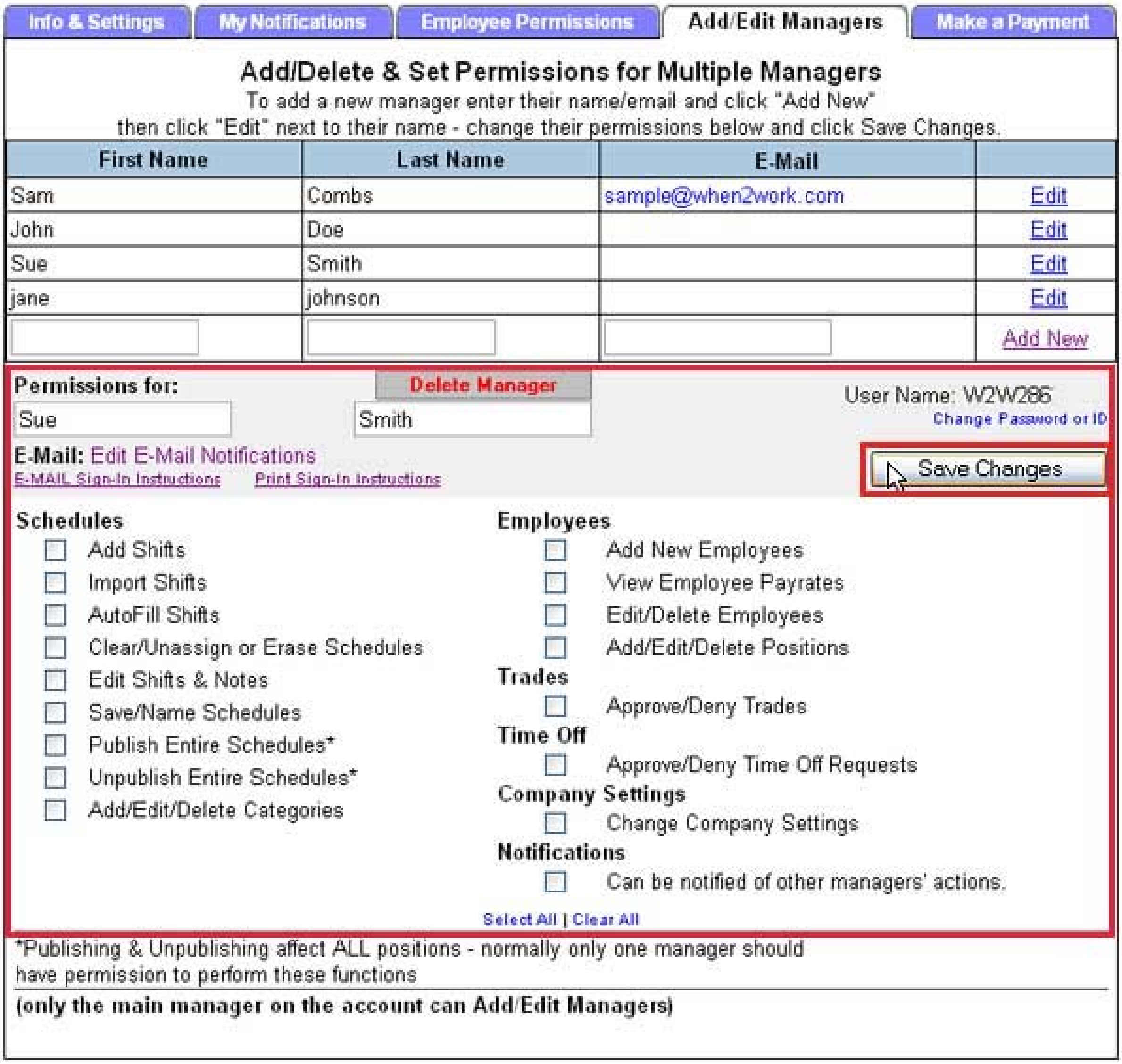
To add a new Manager

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



- 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



- 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

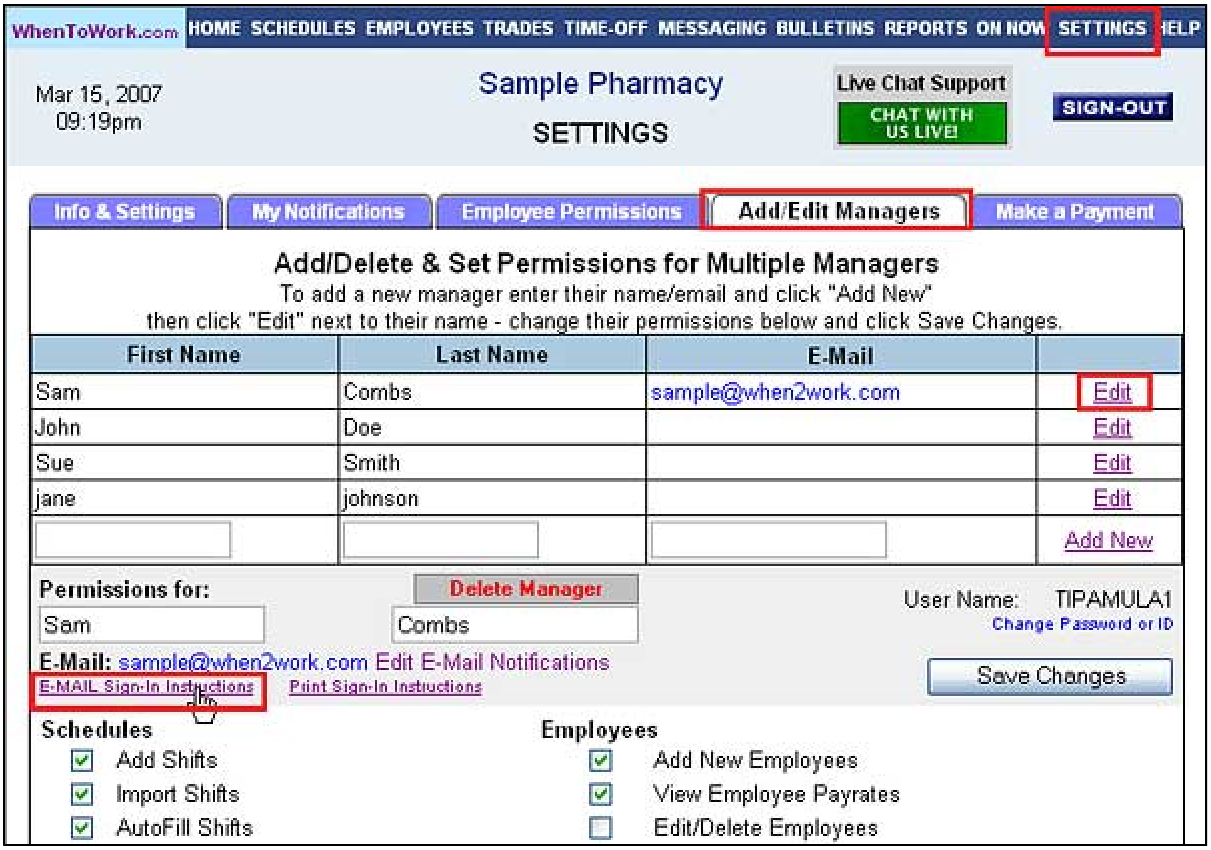
Manager Sign-In Instructions

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



- 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.

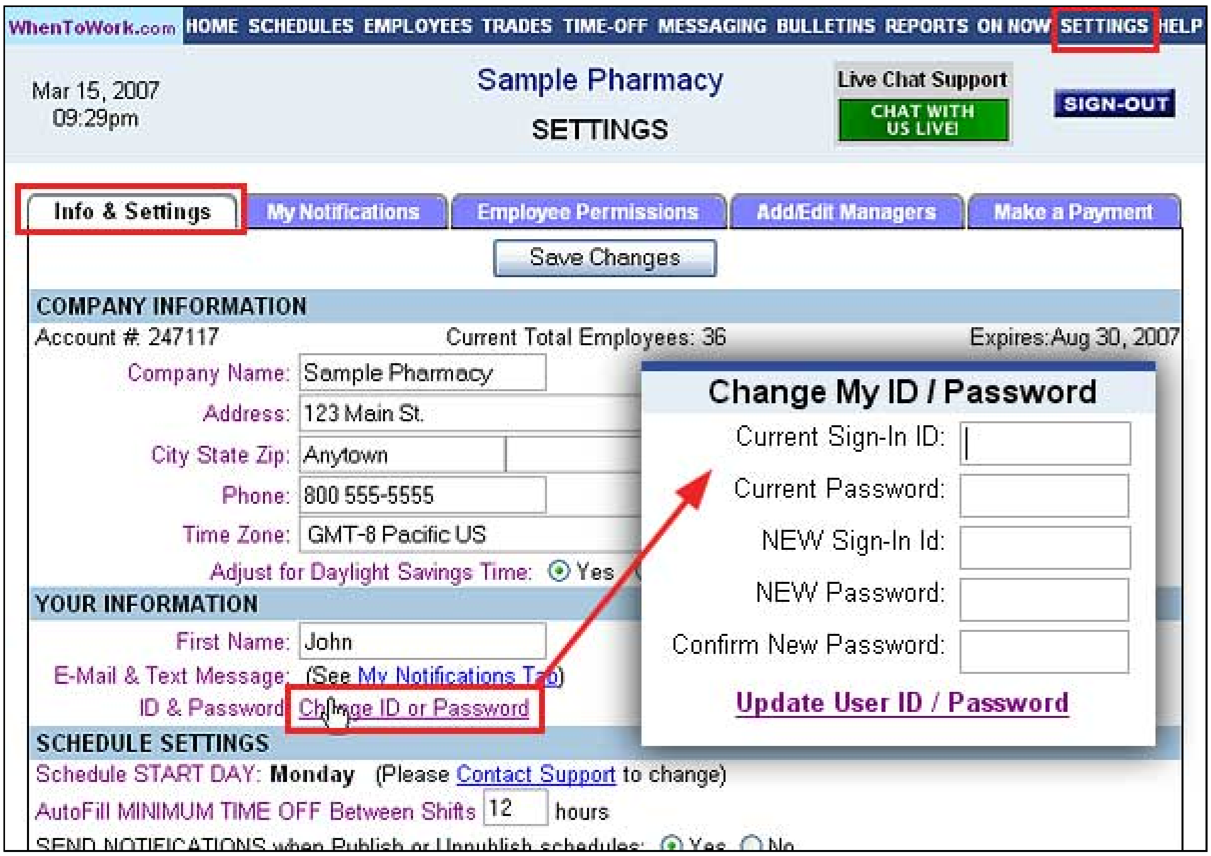
The main manager also can change any other manager or employee ID and Password.

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



- 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