

Employee Information -----

Add New Employees

You can add new employees at any time. All that is required for each employee is a name and what Positions they can work.



To Add Employees:

From any page:

- On the top menu click **EMPLOYEES** to go to the Employee List page
- Click **Add New Employee** to open the Add Employee window
- Fill out the new employees info (The only required information is a first or last name and what Positions that employee can work) Note: Adding employee E-mail address will set up automatic schedule and message forwarding
- Click **Add this Employee**
- The window will remain up for you to enter another new employee
- Click **Close Window** when you are finished adding employees

Note other items such as work time preferences and email and text message notifications can be set up after adding the employee using the [Edit Employee](#) window

Add A New Employee

First Name: Last Name:

Positions: [Add New Position](#) | [Select All](#) | [Clear All](#)

<input type="checkbox"/> Hospital-Cashier	<input type="checkbox"/> Hospital-Pharm. Assistant	<input type="checkbox"/> Hospital-Pharmacist
<input type="checkbox"/> Store-Cashier	<input type="checkbox"/> Store-Cosmetics	<input type="checkbox"/> Store-Floater
<input type="checkbox"/> Store-Floor	<input type="checkbox"/> Store-Giftware-Front	<input type="checkbox"/> Store-Pharm. Assistant
<input type="checkbox"/> Store-Pharmacist	<input type="checkbox"/> Store-Post Office	<input type="checkbox"/> Store-Receiving

Add This Employee

The entries below are not required.

Auto-Fill setting for this employee

Option 1 (Default): **Maximum** Hours/Week Days/Week
 Hours/Day Shifts/Day

Option 2 (by Seniority): [Hire Date](#)

Option 3 (by Scheduling Group): [Scheduling Group](#)

E-Mail:

Pay Rate:

Phone:

2nd Phone:

Cell:

Employee #:

Address:

Address 2:

City, State, Zip:

Comments:

Add This Employee

Employees can sign in to their account and add some of their own details such as:

- Phone Numbers
- E-Mail and Text Message Addresses and what notifications are sent, which should be their "reply to" address if their messages are forwarded to another employee or manager's email
- Address
- [Work Time Preferences](#) (which you can choose to ignore when AutoFilling or you can turn off this ability to add like and dislike times on the [SETTINGS>Employee Permissions](#) page)
- [Positions Preferences](#) (if you allow employees to set them)
- Employees can also stop e-mail forwarding and notifications

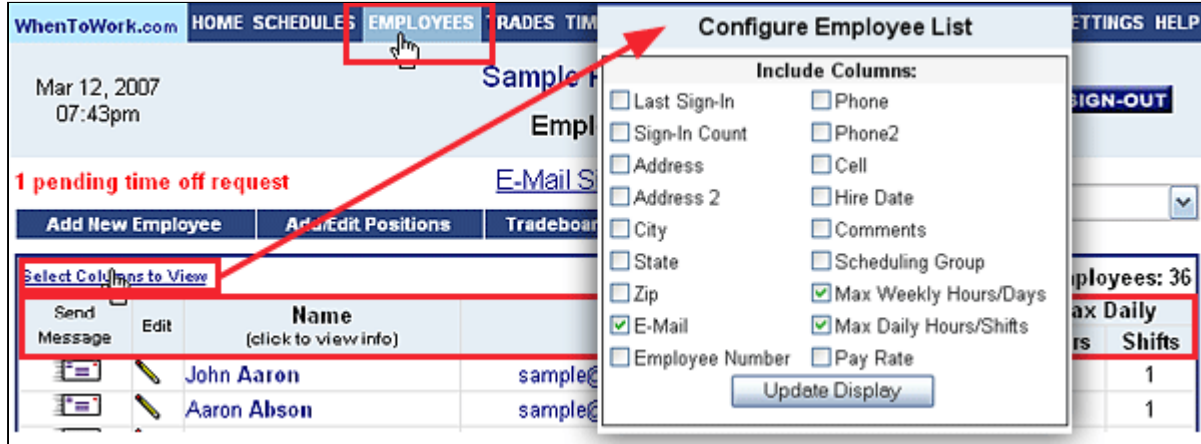
Related Topics:

- [Editing Employee Details](#)
- [Should I Let Employees Sign In?](#)
- [Making Changes \(after Publishing\)](#)
- [Each Employee has a sign-in ID](#)
- [Sending Employees Sign In Instructions](#)
- [Optional Tradeboard](#)
- [Enter E-Mails for Automatic Forwarding](#)


List of Employees


An "at a glance" list of employees is always available. This list can be set to show any or all of the following information:

- Last Sign-In
- Sign-In Count
- Address
- City
- State
- Zip
- E-Mail
- Employee Number
- Phone
- Phone 2
- Cell
- Hire Date
- Comments
- Scheduling Group
- Max Weekly Hours/Days
- Max Daily Hours/Shifts
- Pay Rate (single payrate)



The Employee list also has two columns with icons:

 Edit the employee - click the pencil icon next to the employee to go directly to that Employee's edit employee page.

 Send a Message to Employee - click the envelope icon next to the employee to send that employee a WhenToWork message

The Employee list can be filtered like the Schedule Views to only show the Employees in one Position or Group of Positions.

To view employees who can work a Position or Position Group:

From any page:

- In the top menu click **EMPLOYEES** to go to the Employee List page
- In the Positions dropdown choose the **Position name**
- All employees set to be able to work this position will be listed

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

Apr 14, 2007 09:02am Sample Pharmacy Employees Live Chat Support CHAT WITH US LIVE SIGN-OUT

1 pending time off request E-Mail Sign-In Instructions Display: All Positions

Add New Employee Add/Edit Positions Tradeboard Print Export

Select Columns to View

Send Message	Edit	Name (click to view info)	E-Mail*	Max Hours
		John Aaron	sample@when2work.com	50
		Aaron Abson	sample@when2work.com	30
		Dean Almanson	sample@when2work.com	50
		Ron Arno	sample@when2work.com	40
		Amy Cabillo		40
		Caron Chamos	sample@when2work.com	20
		June Clemson	sample@when2work.com	40
		Richard Compton	sample@when2work.com	50
		Lauren Danson	sample@when2work.com	20

Display: All Positions
 All Positions
 Add / Edit Positions
 Select / Group Positions
 -Hospital
 -Store
 Cashiers both locations
 Pharm both locations
 Hospital-Cashier
 Hospital-Pharm. Assistant
 Hospital-Pharmacist
 Store-Cashier
 Store-Cosmetics
 Store-Floater
 Store-Floor

Related Topics:

- Adding New Employees
- Enter E-Mails for Automatic Forwarding
- Viewing Employee Details
- Editing Employee Details
- Finding an Employee's ID & Password

View Employee Details

Employee details are always one click away. Clicking on an employee name anywhere in the system brings up the View Employee Details page. These tabbed pages show all the employee information, their week and monthly individual work schedule, their work time preferences and time-off. The work schedule/preferences section includes navigation so that you can move back or forward by a week or month.

To edit any of the employee information Managers with permission can use the [Edit this Employee](#) link in the top right of View Employee Details pages.


John Aaron Next ▶

[E-MAIL Sign-In Instructions](#)

Information

Schedules - Preferences

Time Off

Name: John Aaron  [EDIT This Employee](#)

Phone: 555-2239

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

Positions: Hospital-Cashier	Hospital-Pharm. Assistant	Store-Cashier
Store-Cosmetics	Store-Floater	Store-Floor
Store-Giftware-Front	Store-Post Office	Store-Receiving

Hire Date: 4/21/2004

Pay Rate: 8.00

Scheduling Group: 1

Max AutoFilled: 50 Hrs/Week	7 Days/Week
14 Hrs/Day	1 Shifts/Day

Employee #: 12300


Address: 1123 Main Street

City, State, Zip: Uptown, CA

Last Sign-In: 09/17/06 01:31 pm

Comments

up for promotion

 [EDIT This Employee](#)

John Aaron Next ▶

[E-MAIL Sign-In Instructions](#)

Information | **Schedules - Preferences** | **Time Off**

[View MONTHLY Schedule](#) - [Recent Shift Change Notifications](#) [EDIT This Employee](#)

◀ Week of Jun 4, 2007

Mon - Jun-4	Tue - Jun-5	Wed - Jun-6	Thu - Jun-7	Fri - Jun-8	Sat - Jun-9	Sun - Jun-10
1:30am - 5:15pm Store-Cashier Lunch at 12	5pm - 9pm Store-Post Office	9am - 12pm Hospital-Cashier	9:30am - 5:30pm Store-Receiving	12pm - 6pm Hospital-Cashier		

Working **29.0** hours

[Click to E-MAIL Schedule](#) | [Click to PRINT Schedule](#)

Work Time Preferences

Time >	12a	1	2	3	4	5	6a	7	8	9	10	11	Noon	1	2	3	4	5	6p	7	8	9	10	11
Mon Jun-4																								
Tue Jun-5																								
Wed Jun-6																								
Thu Jun-7																								
Fri Jun-8																								
Sat Jun-9																								
Sun Jun-10																								

Date has specific preferences: prefers, dislikes, cannot work and no preference

[EDIT This Employee](#)

John Aaron Next ▶

[E-MAIL Sign-In Instructions](#)

Information | **Schedules - Preferences** | **Time Off**

[ADD/Delete Time Off](#)

Edit	Start Date	End Date / Times	Status	Requested	Last Modified	Comment
	Jun 10, 2007	Jun 10, 2007	Approved	01/21/06 10:15am	01/21/06 10:15am	
	Jun 9, 2007	Jun 9, 2007	Approved	01/21/06 10:19am	01/21/06 10:19am	family reunion
	Mar 17, 2006	Mar 21, 2006	Approved	09/12/05 04:24pm	09/12/05 04:24pm	

[EDIT This Employee](#)

Related Topics:

- [Editing Employee Details](#)
- [Finding an Employee's ID & Password](#)

View / Print Individual Monthly Schedules

Employees can log in and view their own schedules online - this ensures the employee is always viewing their most current schedule. In some cases you may want to print a monthly schedule for one employee. This can be done from that employee's Employee Details window.

Also note that you can print individual WEEKLY schedules for all employees an one time from the By Employee Schedule View using the Change Layout Link to choose that print option.

To print an Individual Employee's Monthly Schedule:

From any page:

- Click **EMPLOYEES** in the top menu to go to the Employee List (1.)
- Click the **Employee name** to open the Employee Details window. (2.)
- Click the **Schedules-Preferences** tab (3.)
- Click the **View MONTHLY Schedule** link in the upper left (4.)

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. A red box labeled '1.' highlights the 'EMPLOYEES' link. Below the navigation bar, the date is Dec 19, 2006, 06:13pm, and the company name is Sample Pharmacy. The main heading is 'Employees'. There is a notification for '1 pending time off request' and a link for 'E-Mail Sign-In Instructions'. Below this, there is a section for 'John Aaron' with a 'Next' button. A red box labeled '2.' highlights the 'John Aaron' name in a list of employees. To the right of the name is a 'Schedules - Preferences' tab, highlighted with a red box labeled '3.'. Below the tab is a 'View MONTHLY Schedule' link, highlighted with a red box labeled '4.'. The main content area shows a weekly schedule for the week of Jun 4, 2007. The schedule is as follows:

Mon - Jun-4	Tue - Jun-5	Wed - Jun-6	Thu - Jun-7	Fri - Jun-8	Sat - Jun-9	Sun
	5pm - 9pm Store-Post Office	9am - 12pm Hospital- Cashier	9:30am - 5:30pm Store- Receiving	12pm - 6pm Hospital- Cashier		

At the bottom of the schedule, it says 'Working 21.0 hours' and there is a 'Click to print s' link.

- You can use the "Click to Print Schedule" link at the bottom of that window for a printer friendly version of that display.

[Information](#) | [Schedules - Preferences](#) | [Time Off](#)

[View WEEKLY Schedule & Preferences](#)  [EDIT This Employee](#)

◀ June 2007  ▶

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
					1	2
					Hospital-Cashier 12pm - 6pm	
3	4	5	6	7	8	9
Hospital-Cashier 12pm - 6pm - LP		Store-Post Office 5pm - 9pm - NIGHT	Hospital-Cashier 9am - 12pm	Store-Receiving 9:30am - 5:30pm	Hospital-Cashier 12pm - 6pm	
10	11	12	13	14	15	16
					Hospital-Cashier 12pm - 6pm	
17	18	19	20	21	22	23
Store-Cosmetics 11am - 5pm - LP	Store-Cashier 9:35am - 5:30pm	Store-Post Office 5pm - 9pm - NIGHT				
24	25	26	27	28	29	30
Hospital-Cashier 12pm - 6pm - LP						

[Click to print schedule](#)

Related Topics:

- [Why Use Shift Categories?](#)
- [Adding New Category Definitions](#)
- [Existing Shifts - Assigning Categories](#)
- [Adding New Shifts is Easy Using Shift Categories](#)
- [Using Categories to Selectively AutoFill*](#)
- [Coloring Individual or Groups of Shifts](#)
- [Setting a Category Default Shift Color](#)

Edit Employee Details

Employee Details can be edited from the Edit Employee window (accessed from either the Employee List (using the pencil icon) page or from the Employee Details window using the "Edit this Employee Link").

To edit Employee Details:

From any page:

- Click the Employee name to bring up the Employee Details window
- Click the **Edit this Employee** link in the upper right to open the Edit Employee page
- Make the changes
- Click **Save**

Sample Pharmacy
Unpublished Schedule

John Aaron

Information Schedules - Preferences Time Off

Name: John Aaron

Phone: 555-2239

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

Positions: Hospital-Cashier Hospital-Pharm. Assistant Store-Cashier
Store-Cosmetics Store-Floater Store-Floor
Store-Giftware-Front Store-Post Office Store-Receiving

Hire Date: 4/21/2004

Pay Rate: 8.00

Scheduling Group: 1

Max AutoFilled: 50 Hrs/Week 7 Days/Week
14 Hrs/Day 1 Shifts/Day

Employee #: 12300
Address: 1123 Main Street
City, State, Zip: Uptown, CA
Last Sign-In: 09/17/06 01:31 pm

Comments
up for promotion

[E-MAIL Sign-In Instructions](#)

[EDIT This Employee](#)

John Aaron

Aaron Abson

OR from any page:

- On the top menu choose **EMPLOYEES** to go to the Employee List page

mar 14, 2007 01:43pm

Sample Pharmacy
Unpublished Schedule

CHAT WITH US LIVE SIGN-OUT

John Aaron Next

Schedule View: By t

1 time off request

Add Shifts In

E-MAIL Sign-In Instructions


Change Layout

(Unassigned Shifts)

John Aaron

Aaron Abson

Information Schedules - Preferences Time Off

Name: John Aaron  [EDIT This Employee](#)

Phone: 555-2239

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

Positions: Hospital-Cashier Hospital-Pharm. Assistant Store-Cashier
Store-Cosmetics Store-Floater Store-Floor
Store-Giftware-Front Store-Post Office Store-Receiving

Hire Date: 4/21/2004

Pay Rate: 8.00

Scheduling Group: 1

Max AutoFilled: 50 Hrs/Week 7 Days/Week
14 Hrs/Day 1 Shifts/Day


Employee #: 12300

Address: 1123 Main Street

City, State, Zip: Uptown, CA

Last Sign-In: 09/17/06 01:31 pm

Comments
up for promotion

- Click the pencil icon  next to the employee's name
- Make the changes
- Click **Save**

EDIT John Aaron [Next](#)

[View Employee](#) Sign-In ID: **WZWSAMPMP** [E-MAIL Sign-In Instructions](#)
[Change Password or ID](#) [Print Sign-In Instructions](#)

First Name: John Last Name: Aaron

Positions: [Add New Position](#) | [Select All](#) | [Clear All](#) [Rank Employee for Positions \(Skills Rating\)](#)

<input checked="" type="checkbox"/> Hospital-Cashier	<input checked="" type="checkbox"/> Hospital-Pharm. Assistant	<input checked="" type="checkbox"/> Store-Cashier
<input checked="" type="checkbox"/> Store-Cosmetics	<input checked="" type="checkbox"/> Store-Floater	<input checked="" type="checkbox"/> Store-Floor
<input checked="" type="checkbox"/> Store-Giftware-Front	<input checked="" type="checkbox"/> Store-Post Office	<input checked="" type="checkbox"/> Store-Receiving
<input type="checkbox"/> Hospital-Pharmacist	<input type="checkbox"/> Store-Pharm. Assistant	<input type="checkbox"/> Store-Pharmacist

The entries below are not required.

SAVE **SAVE & NEXT**

Auto-Fill settings for this employee

Maximum: 50	Hours/Week: 7	Days/Week:
Hours/Day: 14	Hours/Day: 1	Shifts/Day:

Hire Date: 4/21/2004 First: Priority Group:

E-Mail: [EDIT E-Mail Notifications](#) [sample@when2work.com](#) [E-MAIL Sign-In Instructions](#)

Pay Rate: 8.0 per hour

Phone: 555-2239 2nd Phn:

Cell:

Employee #: 12300

Address: 1123 Main Street

Address 2:

City, State, Zip: Uptown CA

Comment:
up for promotion

[DELETE This Employee](#) **SAVE** **SAVE & NEXT**

Work Time Preferences **Position Preferences**

[Set SPECIFIC DATE Preferences](#) [Set REPEATING WEEKLY Preferences](#) [Edit Position Preferences \(Skills Rating\)](#)

[View current preferences](#)

Time Off Requests John Aaron

Requested Time Off	Start Date	End Date / Times	Status	Comments
Delete Entry	Jun-10	Jun-10		
Delete Entry	Jun-9	Jun-9		family reunion
Delete Entry	Mar-17	Mar-21		

[Add New Time Off](#)

Related Topics:

- Should I Let Employees Sign In?
- Each Employee has a sign-in ID
- Sending Employees Sign In Instructions

Find / Change an Employee's ID & Password

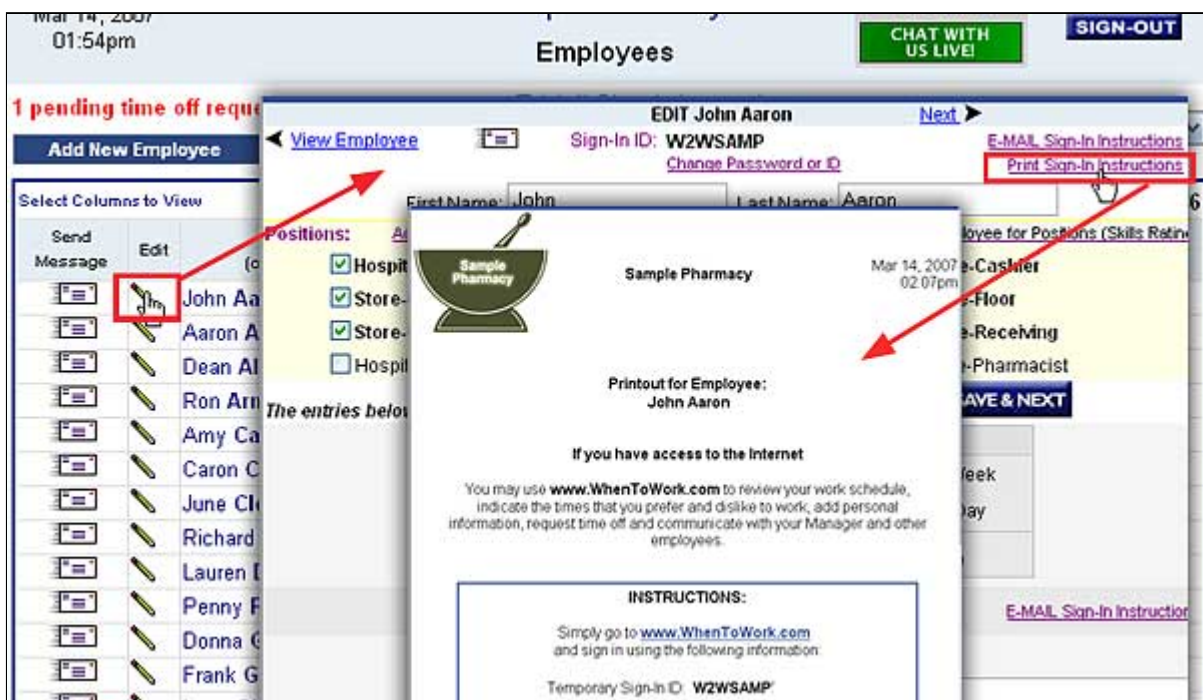
Each employee has a unique sign-in ID and Password. When the employee is first added they are assigned a temporary ID and password that begins with W2W. When they first sign in they are prompted to a new ID and password in the welcome wizard.

Employee ID's can be found on each employee's Edit Employee window at the top under their name and can be changed using the "Change ID and Password" link below that ID. Their current Password can be viewed on the Print Sign-In Instructions page. If you change an employee's ID to something other than the temporary W2W ID they will not see the "welcome wizard" when they first sign in.

To view an employee's current sign-in ID and Password

From any page

- In the top menu click **EMPLOYEES** to go to the Employee List page
- Click the **pencil icon** next to the employee's name to open the Edit Employee window



- Click the **Print Sign-In Instructions** link
- Your printer dialog will come up - to view the page click **Cancel** in the print dialog window
- Scroll down to find the ID and password
- Close the window when you are done (or to print **Right-Click >Print**)

To change an employee's Sign-In and Password

From any page

- In the top menu click **EMPLOYEES** to go to the Employee List page
- Click the **pencil icon** next to the employee's name to open the Edit Employee window
- Click the **Change Password or ID** link below their Sign-In ID to open the Change User's ID & Password window
- Enter the new Sign-In ID and Password and type the Password again to confirm
- Click the **Save** link

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

Apr 14, 2007 09:12am Sample Pharmacy Live Chat Support CHAT WITH US LIVE! SIGN-OUT

Employees

1 pending time off req

EDIT John Aaron Next

View Employee Sign-In ID: W2WSAMPEMP Change Password or ID E-MAIL Sign-In Instruc Print Sign-In Instruc

First Name: John Last Name: Aaron

Change User's ID / Password John Aaron

Current Sign-In ID: W2WSAMPEMP

NEW Sign-In ID: W2WSAMPEMP

NEW Password:

Confirm New Password:

Save

Positions: Store-Cashier Store-Floor Store-Receiving Store-Pharmacist

Rank Employee for Positions (Skill):

SAVE & NEXT

Days/Week: Shifts/Day:

Related Topics:

- Should I Let Employees Sign In?
- Each Employee has a sign-in ID
- Sending Employees Sign In Instructions

Stop an Employee From Having Access

You can stop an employee from having access to WhenToWork at any time.

Two things are required from their **Edit Employee** window:

- 1) change their ID and Password
- 2) remove their e-mail addresses (you can move their e-mail address to the Comments field) which prevents them from retrieving their new ID and Password using the "Forget your ID and Password" link on the Sign-In page

The screenshot shows the 'Edit Employee' window for John Aaron. The window is titled 'Employees' and has a 'SIGN-OUT' button in the top right. A red box highlights the 'Change Password or ID' link in the 'Sign-In ID' field. Another red box highlights the 'Delete Address' button in the 'Notifications via E-mail or Text Message' table.

E-MAIL Address	Notifications		
sample@when2work.com	Forward W2W Messages	Tradeboard Entry	Select / ADD Notifications
	Shift Traded/Picked Up	Trade/Pickup Requested	
	Bulletin Board Entry	Schedule Published	
	Schedule UnPublished	Published Shift Changed	Delete Address
	Trade Approved/Denied	Time Off Approved/Denied	
	Time Off Created	Urgent Text Alerts	

Delete or Deactivate an Employee

Deleting: Employees can be deleted using the "Delete This Employee" button in the Edit Employee window.

When an employee is deleted they will no longer be listed on the Employee List page and any past shifts that they were assigned to will show their name with the word "Deleted" after it.

If you have shifts in the future that were already assigned to the employee they are automatically unassigned from those shifts.

The screenshot shows the 'WhenToWork.com' interface for 'Sample Pharmacy'. The 'EMPLOYEES' tab is selected. A list of employees is visible on the left, with 'John Aaron' highlighted. A red arrow points from the 'Edit' button for John Aaron to the 'EDIT John Aaron' window. In this window, the 'DELETE This Employee' button at the bottom is highlighted in red. The window also shows fields for employee information, positions, and contact details.

When you delete an employee they are no longer included in your Total Employee count for billing purposes.

Information about a deleted employee's shifts can be found using the Search Shifts function on any Schedule View.

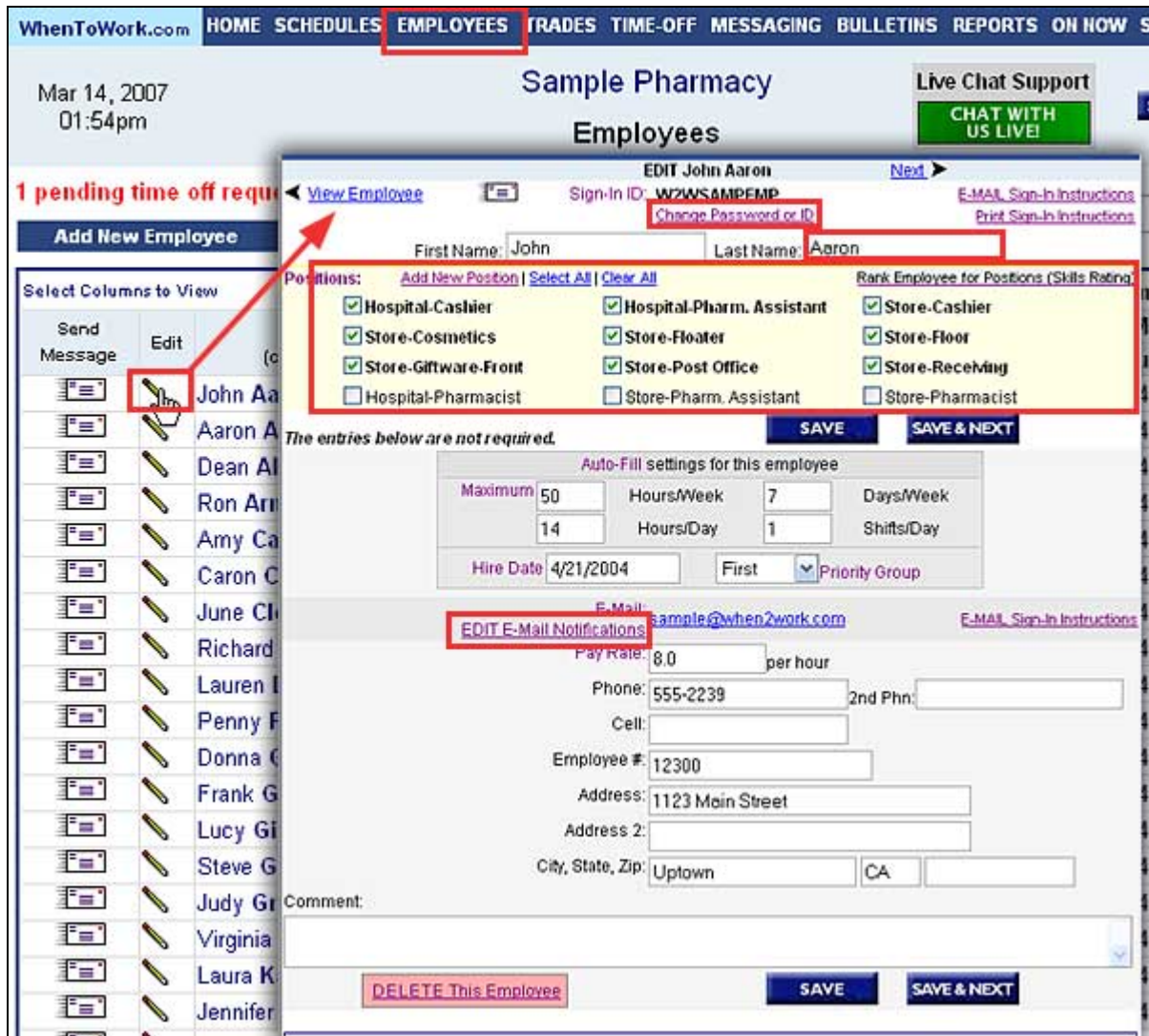
Deactivate an Employee:

If you want to retain an employee in your account (to access their information later or to have the ability

reactivate them later) but you want to set them as inactive:

In the **Edit Employee** window:

- Change their ID and or password so they cannot log in
- Enter a Z in front of the employee last name so that they are sorted to the bottom of the list and are out of the way in the Employee list page.
- Uncheck all Positions for the employee (so they will never be AutoFilled or listed as a possible replacement in the Shift Change window)
- Click Edit E-Mail Notifications and delete their e-mail addresses (you can move them to the comments field) so that they will not be able to retrieve their ID or password from the Sign-In page



Related Topics:

- Searching for Shifts
- Delete or Deactivate an Employee