Shift Tool Manual

WorkDo Tool Guide

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I Advanced Tools

WorkDo has many tools on the Do page of different levels within the workplace. This means workplaces, groups, and buddies all have a specific Do button and set of tools to use. Below is Table I-1) which shows which tools are available at which level.

Tools such as HR, Leave, Expenses, and Approvals are set to activate once you create a workplace while other tools such as Payroll, Attendance, Leave, Leave Pro, Overtime, Expenses, and Approvals (depending on HR) need to be activated manually according to the needs of your company. This means the HR tool needs to stay activated for the other tools to function.

▼ Table I-1. WorkDo Tools

Tool	Workplace	Group	Buddy	Dependency
HR	●	x	x	
Payroll	●	x	x	HR
Attendance	●	x	x	HR
Check In	●	x	x	HR
Leave	●	x	x	HR
Leave Pro	●	x	x	HR
Shifts	●	x	x	HR required for clock in/out
Overtime	●	x	x	HR
Timesheet	●	x	x	HR
Expenses	●	x	x	HR
Approvals	●	x	x	HR
Conf. Rm	●	x	x	

Tool	Workplace	Group	Buddy	Dependency
CRM	●	x	x	
Cashbook	●	●	●	
Phonebook	●	●	●	
We Buy	●	●	x	
IOU	●	●	x	

Ⅱ Shift: Easy Shift Scheduling

The Shift tool is essential to those who work in the service industry that relies on shift scheduling. With Shift, employees can easily stay on top of their schedules. The Shift tool grants managers and employees the freedom to quickly assign shifts to achieve the perfect work-life balance without sacrificing team productivity.

Here are the three advantages of Shift.

- **Real-Time Shift Management**
  Managers can verify the employee shifts and their schedules in real-time. The comment section is available for employees to information between shifts.
- **Attendance Management**
  When both Shift and Attendance tools are enabled, employees can clock in/out for shifts, making staff attendance easier to manage.
- **Use Shift as a Duty Roster**
  Bet you didn't know Shift can double as a duty roster, did you? Well, you can use the shift schedule to assign rotating employees of specific tasks.

Simply put, Workdo's Shift tool is your best friend and real-time resource management if you rely on a shift schedule to get things rolling.

If the employees happen to use WorkDo's Attendance tool to clock in/out, some settings in the HR tool are required for managers to sign off on late appeals, as shown in the table below.

▼ Table II-1. Shift-HR Dependencies

Setting	Dependency
*System Settings	Sets whether newly onboard employees are required to clock in/out.
*Departments	Sets department managers who will sign off on employee post clock requests and appeals.
*Shift Schedules	Set the shift schedules and clock in/out times.
*Employee Profiles	Only accounts that are bound to the workplace can use the Shift tool to calculate employee workhours.
Shift Manager Assignment	Shift managers will sign off on shift employees' post clock requests and appeals.

III Set Up

In this section, we will guide you on how to use the Shift tool. The web interface is more comprehensive than the app interface, but you can choose your preferred device to set up Shift. This guide will only be focused on the web interface.
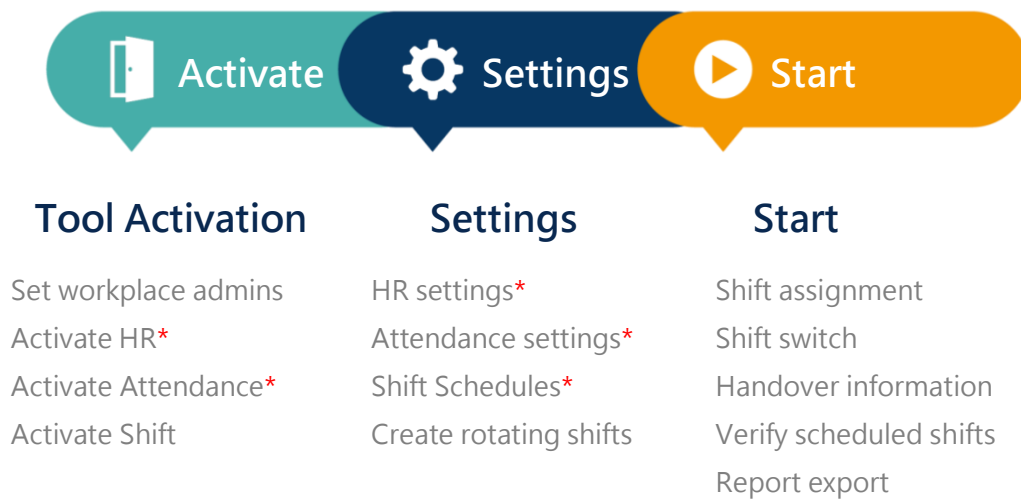
The process includes 3 stages: tool activation, settings, and start as shown below. But before you embark, you might want to think about whether you need to use the Attendance tool in conjunction with employees to clock in/out on shift, or just the Shift tool itself.

- **Use the Attendance tool to clock in/out on shifts.**

When you need to use WorkDo to clock in/out on shifts, you must use the Attendance tool and the HR tool in conjunction. The Attendance tool is for employees to clock in/out, while the HR tool sets the shift schedules and managers who sign off on employees' shift-related requests and appeals.

- **Use the Shift tool only.**

If you only use the three main functions in the Shift tool, which are Shift Calendar, Duty Rosters, and Shift Report (Please refer to STEP 2-b~ STEP 2-h).

Activate	Settings	Start
Tool Activation	**Settings**	**Start**
Set workplace admins	HR settings*	Shift assignment
Activate HR*	Attendance settings*	Shift switch
Activate Attendance*	Shift Schedules*	Handover information
Activate Shift	Create rotating shifts	Verify scheduled shifts
		Report export

▲ Image III-1. Setup Process

🔔 **The red asterisks mark the settings you need to set when you need to use the Attendance tool for employees to clock in/out on shifts.**

STEP 1. Tool Activation

To ensure information is compartmentalized among all members in the workplace, WorkDo was designed to have workplace admins and tool admins. (Table Step 1-1) Workplace admins include an owner and multiple admins who can adjust workplace settings and are usually management and IT employees. Tool admins manage the data others see per tool.

▼ Table STEP 1-1. Admin Authorities

Authority	Workplace Owner	Workplace Admin	Tool Admin
Delete workplace	●	x	x
Change workplace ownership	●	x	x
Maintain workplace settings	●	●	x
Activate advanced tools	●	●	x
Change tool roles	●	●	x
Maintain tool settings	x	x	●
Maintain advanced tool data and records	x	x	●

a.Confirm/Assign Workplace Admins

As you can see from Table Step 1-1, workplace admins are assigned by the owner or other admins. If you are a workplace admin, you can skip this portion and go to step 1-b, Set Up Tool Roles, and if you need to be a workplace admin, please have one of the admins assign you the role. You can find out whether you are a workplace admin by following the steps below.

b.Set Up Tool Roles

WorkDo's advanced tools require some workplace members to take the management role to operate smoothly. Please read the description of each tool role carefully when assigning tool roles to each member.

Tool Role	Authority	Description
No Role	The Shift tool is not available to these employees.	b. Could be used for interns or part-time employees.
Employee	View their shifts and deliver handover information.	c. The default tool role for all employees.
Manager	The highest access level and manages all shift schedules, shifts, and records.	d. The workplace owner inherits the HR Staff tool role by default upon tool activation.

Manage Tool Roles

1. Ask the workplace admins to go to the Workplace page.
2. Click the Workplace Settings.
3. Click the Tool Box and the Advanced tab is available for you to activate, deactivate and manage tools.
4. Make sure Shift is activated, then click Manage.
5. Click Manage All Member Roles.
6. Use the search bar quickly locate the members for role changes.
7. Click the drop down menu and edit members' roles, repeat until all roles have been assigned correctly.

STEP 2. Start

The Shift tool is the best way for you to effectively manage employees' shift schedules to achieve a healthy work-life balance for everyone truly.

Once you have activated the tool, shift manager(s) can start creating shift schedules and rotational employees, it's that simple!
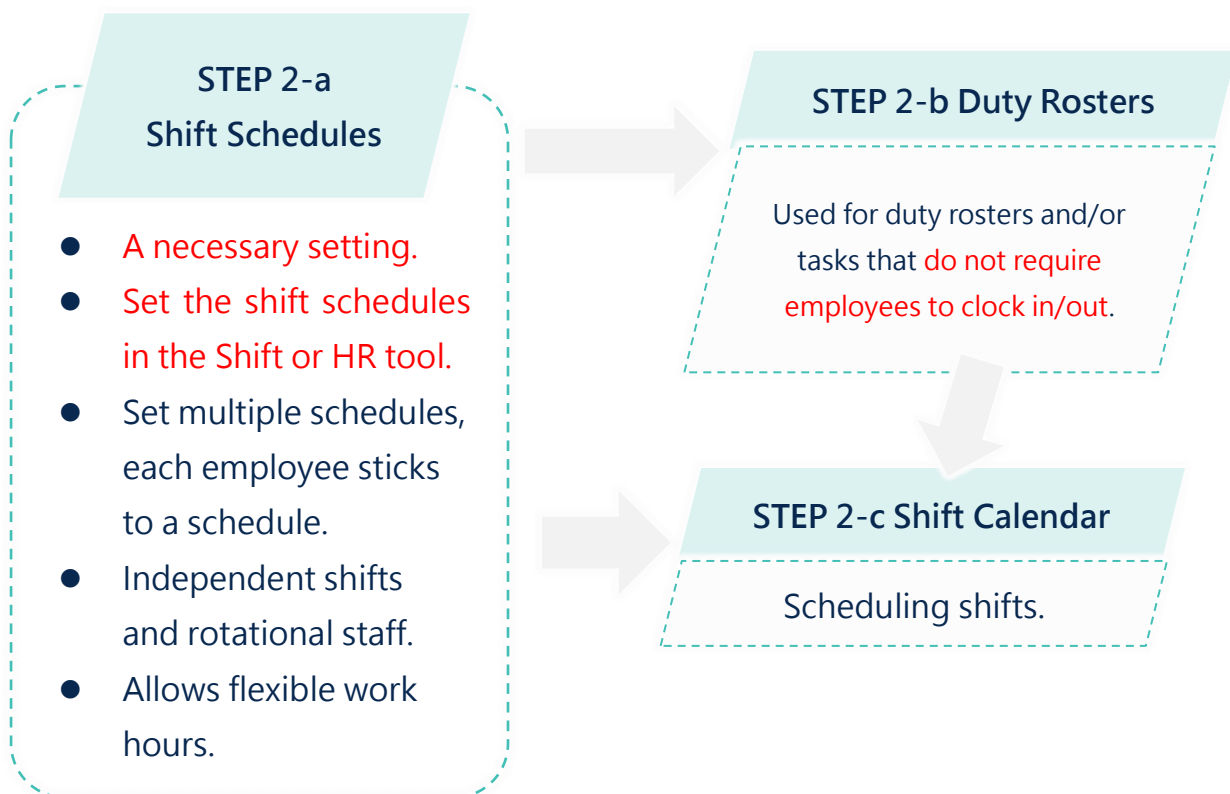
a. Set Shift Schedules

As mentioned previously, the HR and the Attendance tool must be active if the employees are required to clock in/out on their shifts. Please see below for the information on the necessary settings.

- Please set your tool role to Manager as shown in STEP 1-b Set Up Tool Roles.
- Please refer to the HR and the Attendance tool manual for relevant settings.

Managing multiple shift schedules allows you to create shifts for departments, branch stores, and rotational employees. This is why creating shift schedules is the first step in using Shift.

Please follow the steps below in setting up the Shift Schedules, Shift Tables, and then Shift Calendar for managing multiple departments, branch stores, or rotational employees. Otherwise, you may skip to Step 2-c and start scheduling employee shifts.

STEP 2-a
Shift Schedules

- A necessary setting.
- Set the shift schedules in the Shift or HR tool.
- Set multiple schedules, each employee sticks to a schedule.
- Independent shifts and rotational staff.
- Allows flexible work hours.

STEP 2-b Duty Rosters

Used for duty rosters and/or tasks that do not require employees to clock in/out.

STEP 2-c Shift Calendar

Scheduling shifts.

Set Shift Schedules

1. Enter the Shift Schedules.
   - Click Workplace > Do > Shift > Shift Schedules as the tool admin.
2. Click +Create and complete the necessary fields (* Must be filled).
   - Shift Schedule Name.
   - Shift Schedule Description.
   - Members: Click +Create to select rotational employees.
     - ➲ Employee: The source of the employee list is based on the Employee Profiles in the HR tool.
     - ➲ Effective Date: Set a date when the specified employee starts to follow this work schedule.
   - Shifts: Set rotational shifts and times.
3. Click Save to complete.
4. Repeat Steps 2 to 3 to create other schedules.

b. Set Duty Rosters

When you already have an existing clock in/out system and do not need to use the Attendance tool in tandem with the Shift tool, then the Duty Rosters function is sufficient to get the job done.

Create Duty Rosters

1. Click the Shift tool as the tool admin.
2. Click the Duty Rosters option.
3. Click +Create and fill out the fields (* Must be filled).
   - Duty Roster Name.
   - Duty Roster Description.
   - Employees: Select rotational employees for the duty roster.
   - Shifts: Click +Add Shift to add shifts to the duty roster.
4. Click Save to finish.

c. Assign Shifts

You may schedule and edit rotational employees' shifts as the tool admin. Simply select the appropriate schedule or duty roster and assign the rotational employees to their shifts, easy-peasy!

Assign Shifts

1. Click the Shift tool and select Shift Calendar as the tool admin.
2. Select the schedule or duty roster from the drop-down menu, then the rotational employee.
3. Click Edit Schedule.
4. Select a time frame and it will be highlighted in blue.
   - Single-Day: Click on a date.
   - Time Frame: Select two dates on the calendar within a two-month period.
5. Choose available employees for the shifts on the right panel.
6. Repeat this step until you have scheduled employees for their shifts.
7. Click Save to finish shift scheduling.

Each shift schedule may contain multiple shifts with their identification colors on the shift calendar.

- View specified employee's shift schedule.
  - ➲ Colored Dots: Scheduled shifts.
  - ➲ Number of Dots: Number of shifts.
- View All Members' shift schedules.
  - ➲ Blue Dot: There are unscheduled shift(s) on that day.
  - ➲ Blue Ellipse: At least one or more employees are scheduled for each shift.

d. Shift Change

Available to the Shift tool Manager, they can change and swap shifts for the employees with a few clicks of the button.

Shift Change

1. Enter Shift Calendar as the tool admin.
2. Select the schedule or duty roster from the drop-down menu, then the rotational employee.
3. Pick a date and the shifts will be displayed on the right panel.
4. Select a shift.
5. Select the on-duty employees for the shift.
6. Click Save to update the change.

e. Send Notifications

As the Shift tool Manager, you are bound to swap and update shifts a few times, but once the schedule is set, you may send a notification to inform the staff to review their shift schedule of the final changes.

You can use the default message or input your message when sending notifications to your shift staff, the process is straightforward.

1. Enter the Shift Schedules or Duty Rosters option.
   - Shift Schedules: Workplace > Do > Shift > Shift Schedules > Select a schedule from the drop-down menu.
   - Duty Rosters: Workplace > Do > Shift > Duty Rosters > Select a roster from the drop-down menu.
2. Click the Notify button.
3. Enter a message then click Send to notify the staff.

f. View Shift Schedule

The shift calendar offers everyone a detailed view of their schedule so they can prioritize their time and show up to work as scheduled.

View Schedule

1. Enter the Shift Calendar.
   - Notification Center: Click on a Shift notification to automatically enter the Shift Calendar.
   - Click Workplace> Do > Shift > Shift Calendar.
2. Select a shift schedule or duty roster.
3. Select an employee.
4. Select a date to view the shifts.
   - Click arrow buttons to switch between months.
5. Shift Identification Markers.
   - No markers: No scheduled shifts.
   - Markers: Please refer to Assign Shifts section for details.

g. Leave Handover Messages

The shift staff can leave handover messages when changing shifts to avoid information loss and miscommunication.

Leave Messages

1. Enter the Shift Calendar.
2. Select a shift schedule or duty roster.
3. Click on a date then a shift.
4. Use the comment box to leave messages, send photos, or files.

h. Report Export

As the Shift tool Manager, you may export detailed shift reports for review.

Export Shift Reports

1. Enter the Schedule Report option.
2. Use the filters to narrow down your report range.
3. Select a file format to export the report.
   - Export CSV: Download an editable Excel format report.
   - Export PDF: Download a non-editable PDF format report.