HUMANITY SCHEDULING

A GUIDE TO HUMANITY SCHEDULING FUNCTIONS FOR RETAIL AND WAREHOUSE LEADERS

GOODWILL

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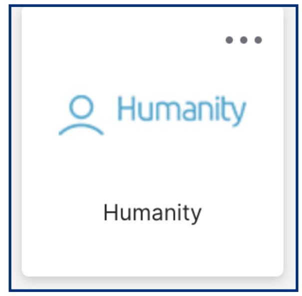
HUMANITY SCHEDULING GUIDE

Note: Click on the title or the page number(s) to navigate to the desired section. Click on the Goodwill logo in the corner of each page to return to the Table of Contents.

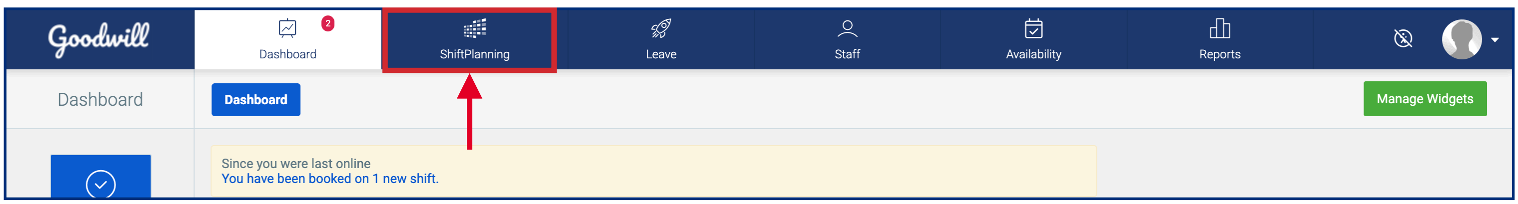
Note: Workday feeds updated employee date, time off data, and leave of absence data to Humanity. Humanity feeds schedule data to Workday. Workday and Humanity "speak" to each other through a regular system sync. It is important to note that although the two systems work in tandem, Workday is the source of truth for anything related to employee data, and Humanity is the source of truth for scheduling data. Furthermore, data synced from Workday to Humanity should not be changed in Humanity, nor should data synced from Humanity to Workday be changed in Workday. For example, employee information should not be updated in Humanity, and schedule updates should not be made through Workday.

1. Navigate to the employee portal at my.goodwillaz.org > Select the **Okta tile** > Select the **Humanity tile**

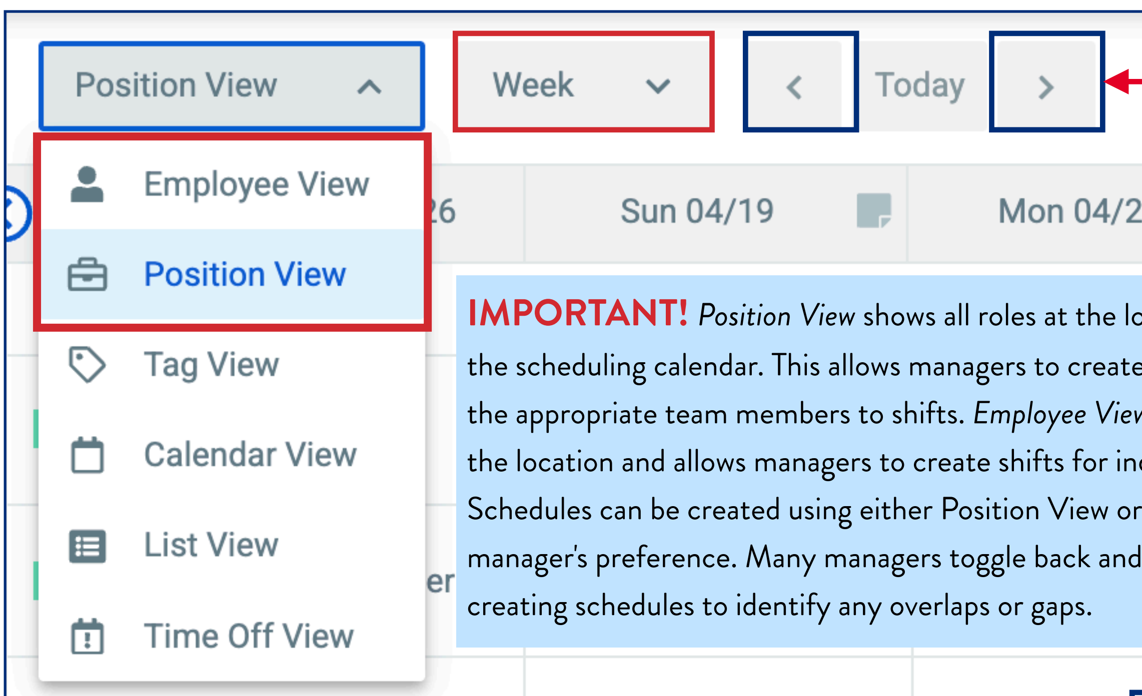


2. Log in using your employee details.

3. Click **Shift Planning** in the blue banner.



4. Select either **Employee View** <u>**OR**</u> **Position View** to access the scheduling calendar



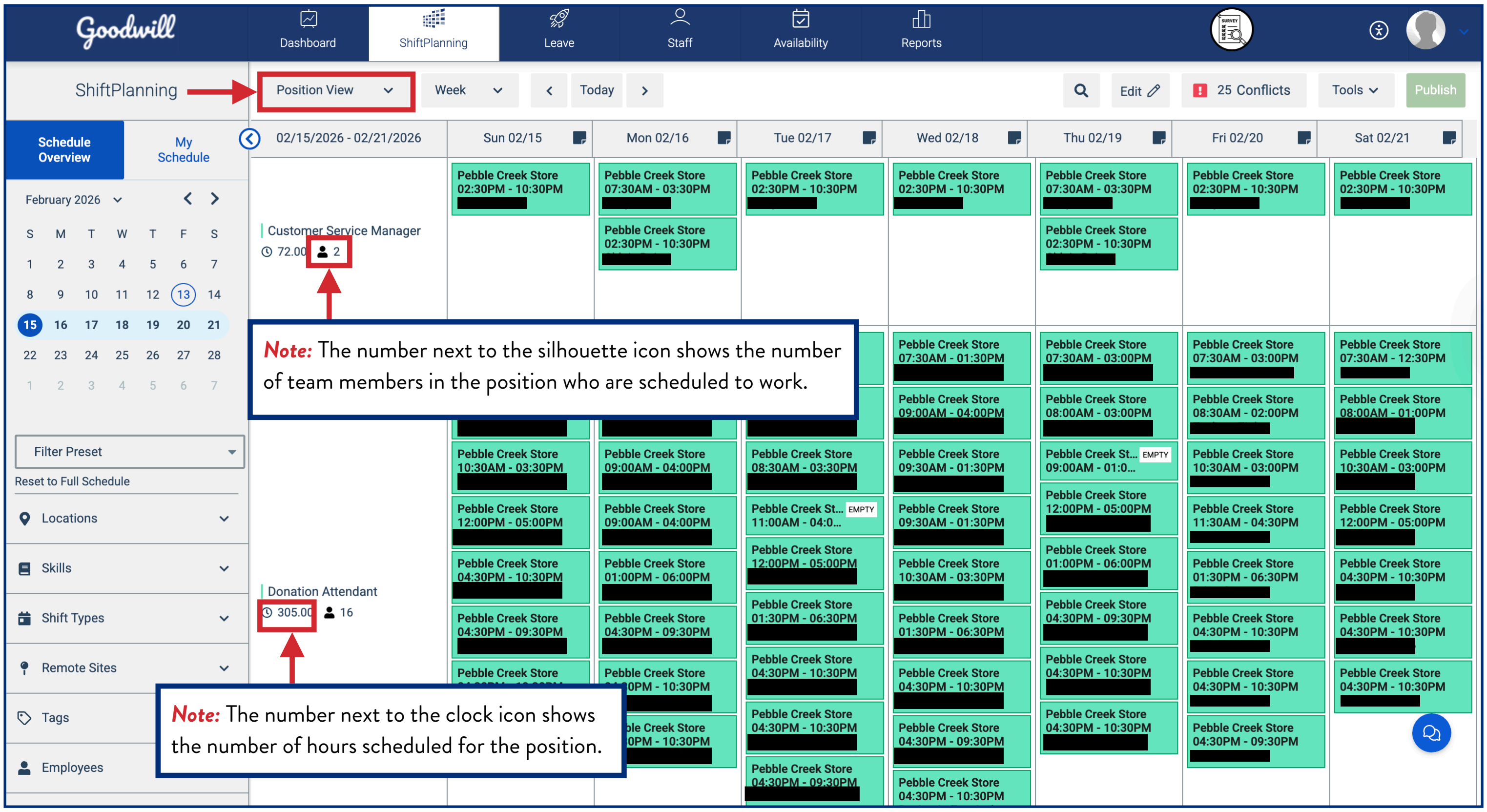
Note: Use the arrows to toggle forward or backward on the scheduling calendar.

IMPORTANT! *Position View* shows all roles at the location in the left column on the scheduling calendar. This allows managers to create shifts per position and assign the appropriate team members to shifts. *Employee View* shows all team members at the location and allows managers to create shifts for individual team members. Schedules can be created using either Position View or Employee View based on the manager's preference. Many managers toggle back and forth between views while creating schedules to identify any overlaps or gaps.

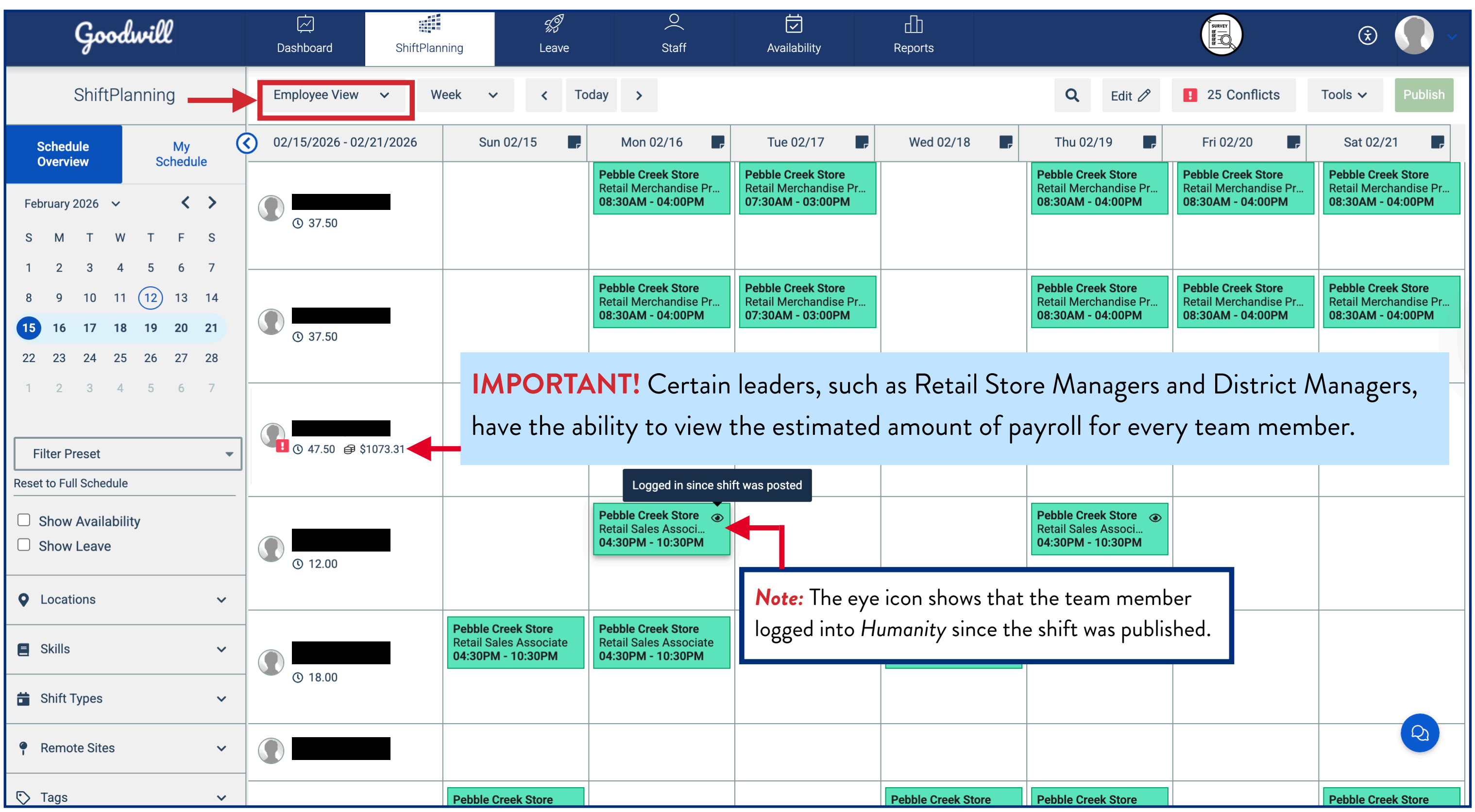
5. Select the desired calendar view (ie, Day, Week, 2 Week, or 4 Week)

Note: It is often easiest to view the scheduling calendar by *Week*.

POSITION VIEW SCHEDULE EXAMPLE

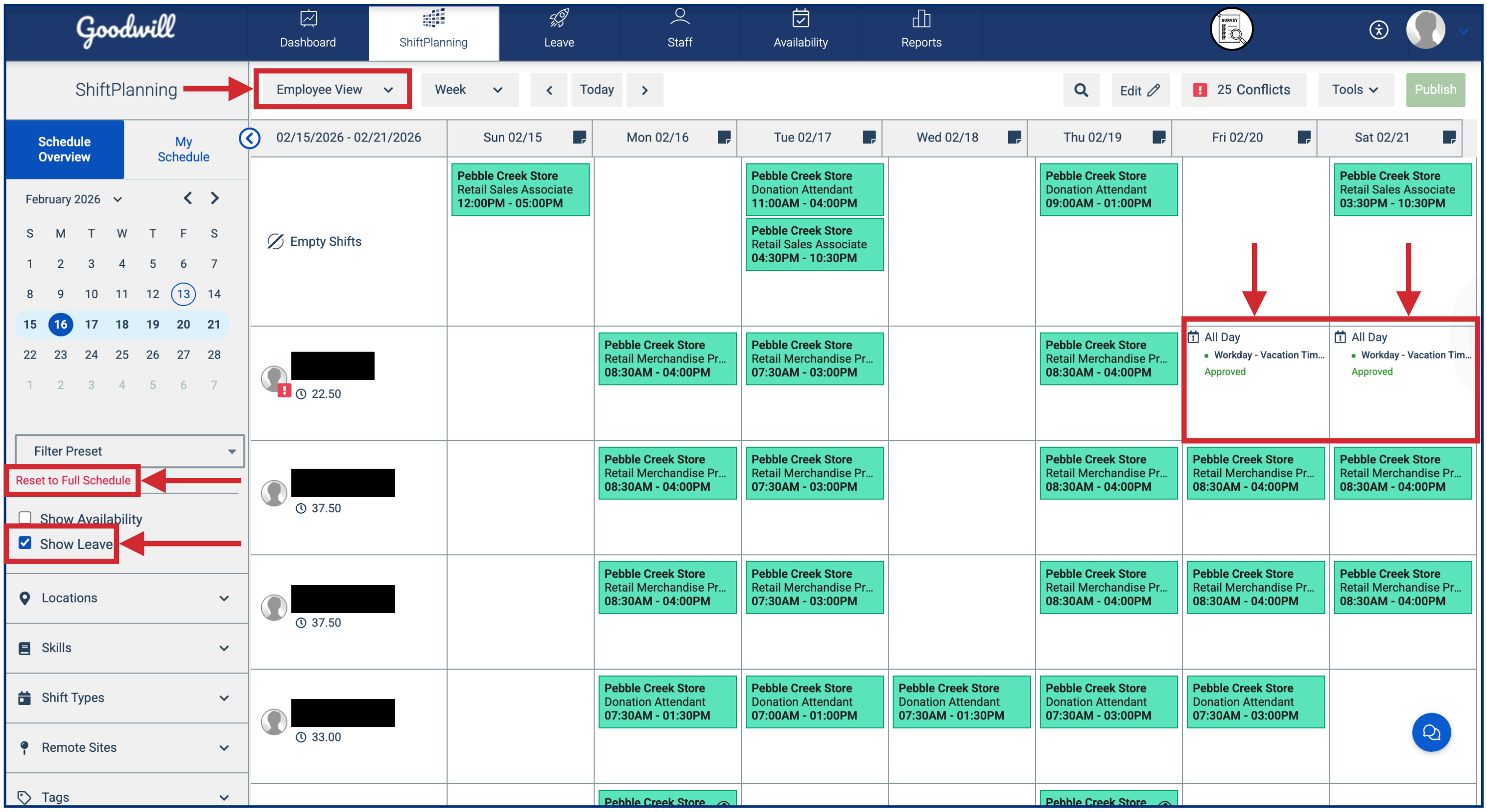


EMPLOYEE VIEW SCHEDULE EXAMPLE



IMPORTANT! All absence/time off requests and approvals are submitted and completed in Workday. Pending Leave of Absence (LOA) requests and all other absence/time off requests (e.g, sick, vacation, unpaid time off, etc.) will **NOT** appear in Humanity unless approved in Workday.

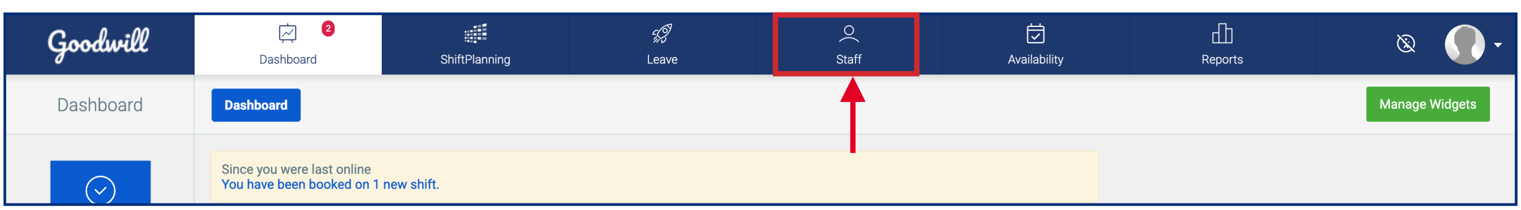
1. To view approved team member LOA and/or time off, Select **Employee View** > Select the **Show Leave** filter.



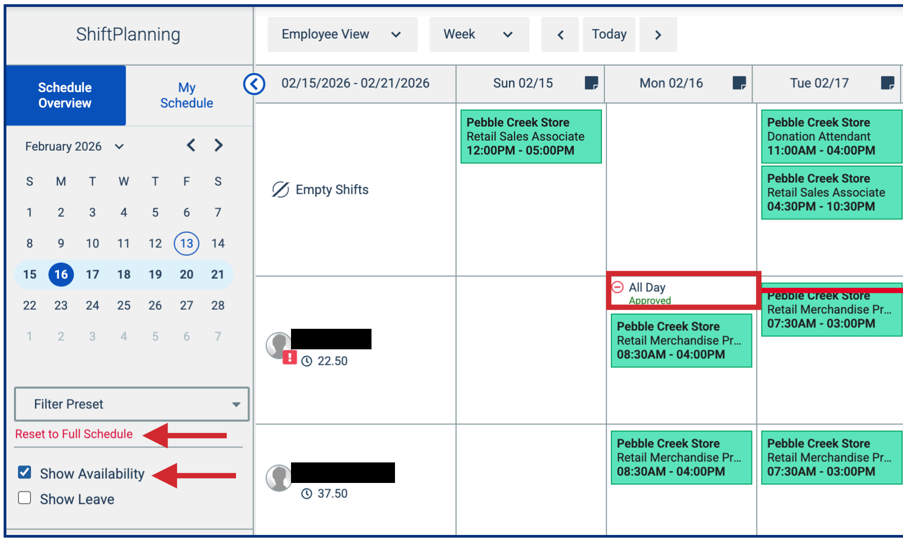
2. Click **Reset to Full Schedule** to remove the *Show Leave* filter.

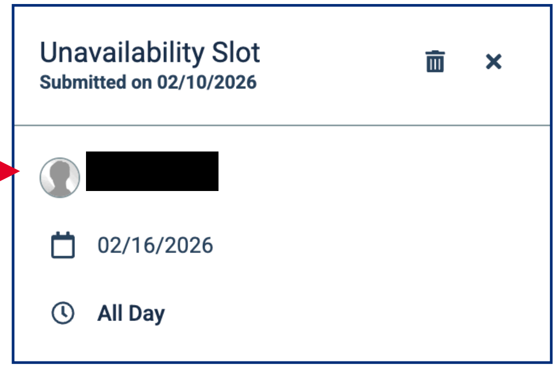
HOW TO VIEW TEAM MEMBER CONTACT INFORMATION:

1. Click the **Staff** option in the blue banner to view your team member's contact information.



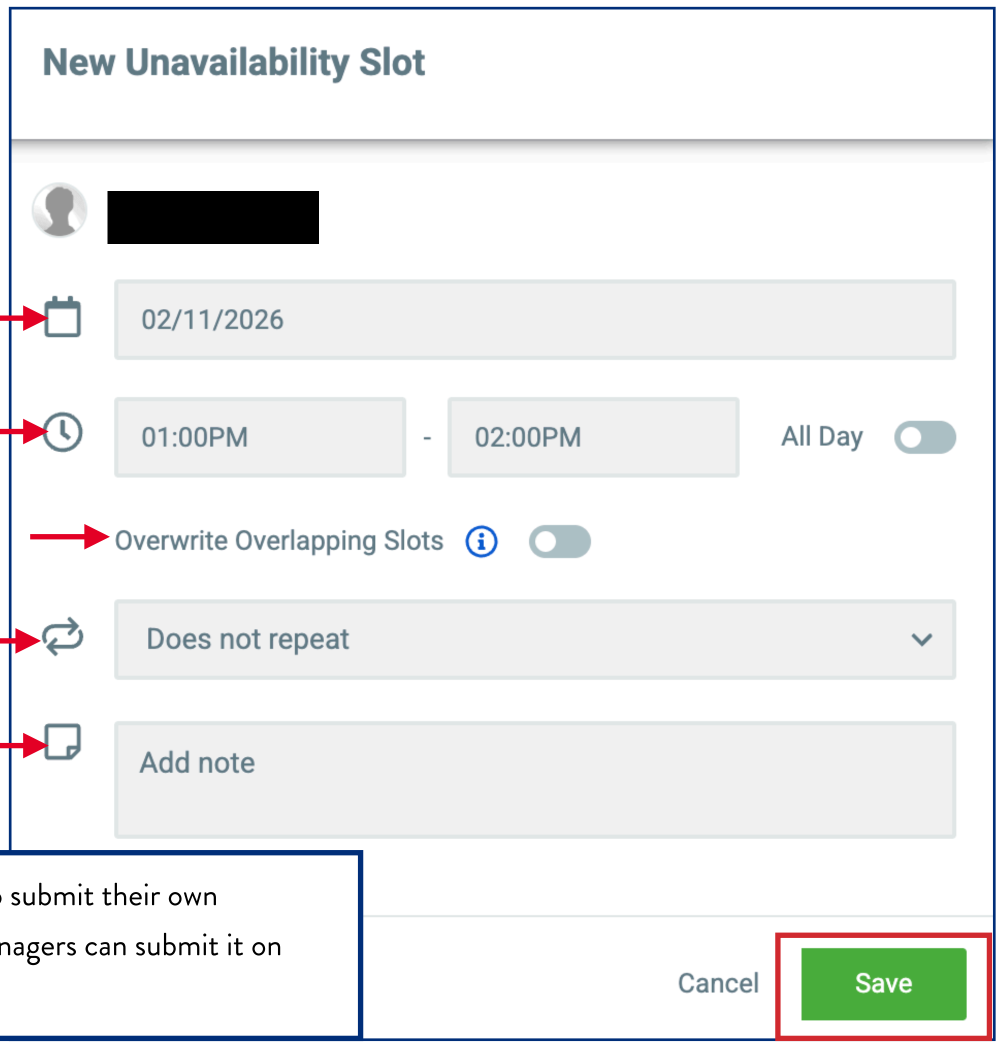
1. To view team member availability, Select **Employee View** > Select the **Show Availability** filter.





2. Click the alert to view details > Click **Reset to Full Schedule** to remove all filters.

3. To enter a team member's availability on their behalf, click **Availability** in the blue banner > locate the appropriate team member > Click the appropriate space in the date column > Enter the availability details > Click **Save**



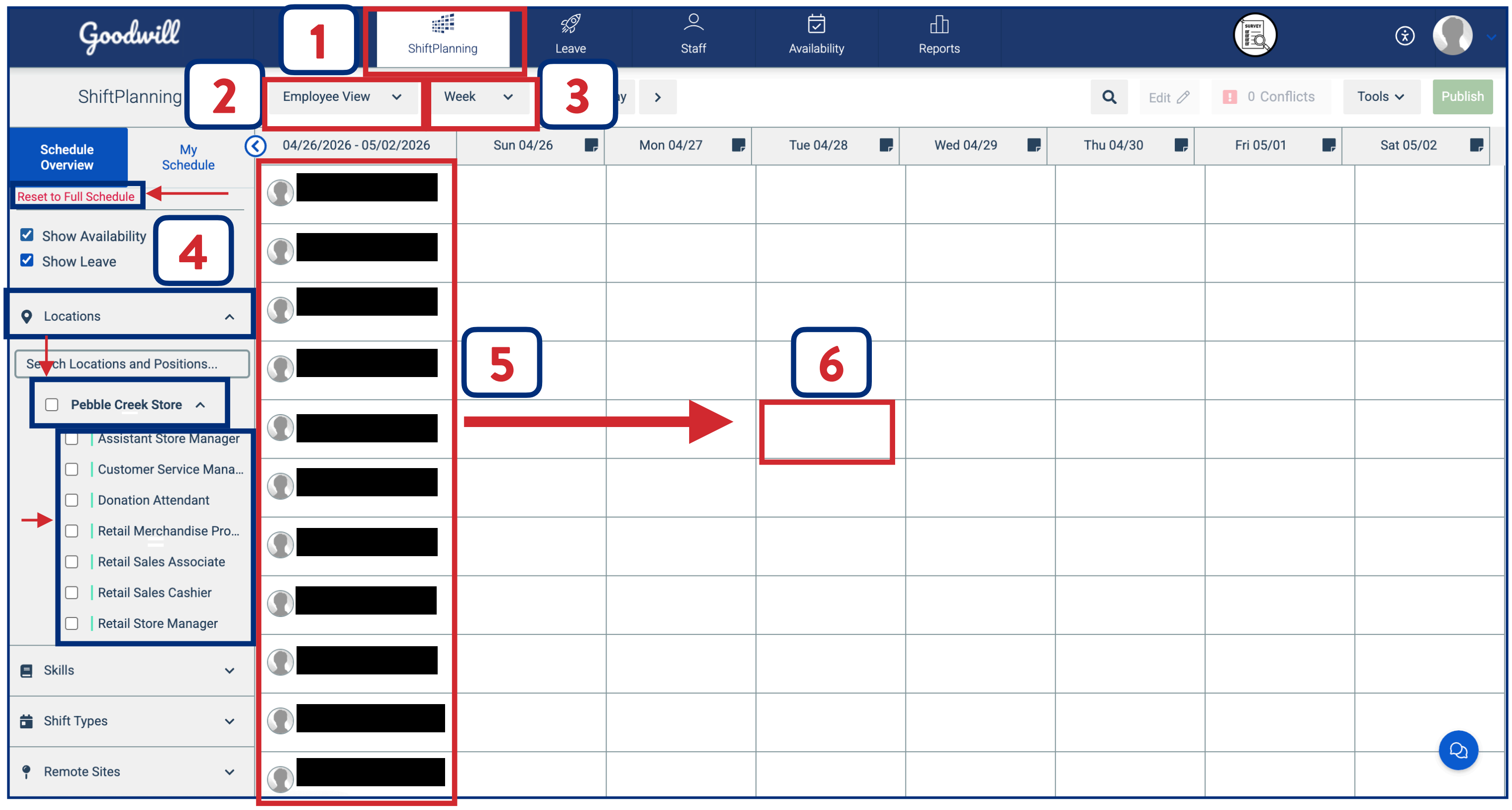
Note: Team Members are encouraged to submit their own availability in the Humanity App, but managers can submit it on their team members' behalf if necessary.

HOW TO CREATE SCHEDULES IN HUMANITY (EMPLOYEE VIEW)

Note: *Employee View* shows all team members at the location and allows managers to create shifts for individual team members. Schedules can be created using either Position View or Employee View based on the manager's preference. Many managers toggle back and forth between views while creating schedules to identify any overlaps or gaps.

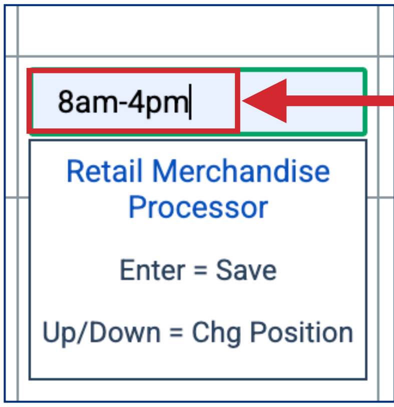
1. Click **Shift Planning** in the blue banner.
2. Select **Employee View.**
3. Select **the desired calendar view** (i.e, Day, Week, 2 Weeks, or 4 Weeks).
4. Select the **Show Availability** and **Show Leave** checkboxes to view any approved LOAs, time off, and availability for team members.

OPTIONAL: To view team members by position, select the Location > Select the desired location > Select the desired role. Click *Reset to full Schedule* to remove all filters.

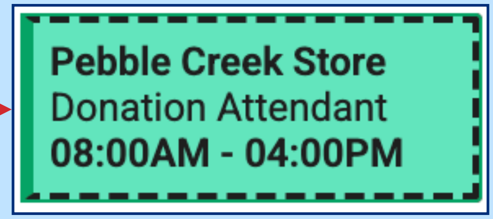


5. Locate the appropriate team member in the left column.
6. Locate the desired day that you would like to schedule a shift for the team member > Click the space in the appropriate date column.

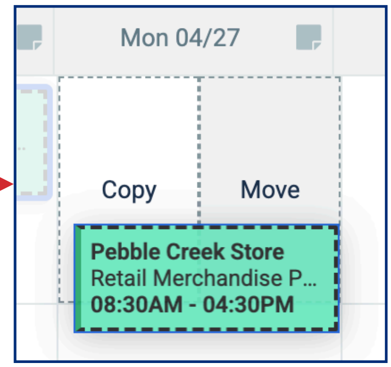
7. Type the **Shift Start** and **End Time** with **AM and PM details** > Click **Enter** on your keyboard.



IMPORTANT: The shift will have a dotted border. A dotted border means that the shift is <u>NOT</u> published and is not visible to the team member(s).



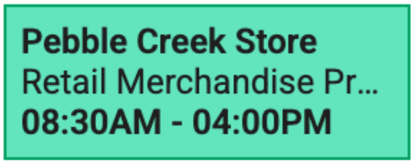
OPTIONAL: To copy or move a single shift, click the shift and drag it to the desired space on the calendar > release over the desired action (i.e., *Copy* or *Move*). This action can be done before assigning a team member to the shift or afterward if you would also like the shift assignment to be moved and/or copied as well.



8. Repeat steps 5-7 as necessary. For options to make creating schedules quicker, review the processes for **creating repeating shifts.**

9. Review the completed schedule and identify and resolve any **conflict alerts** that need to be resolved.

10. Click the green **Publish** button in the upper-right corner of the screen when the schedule is finalized.

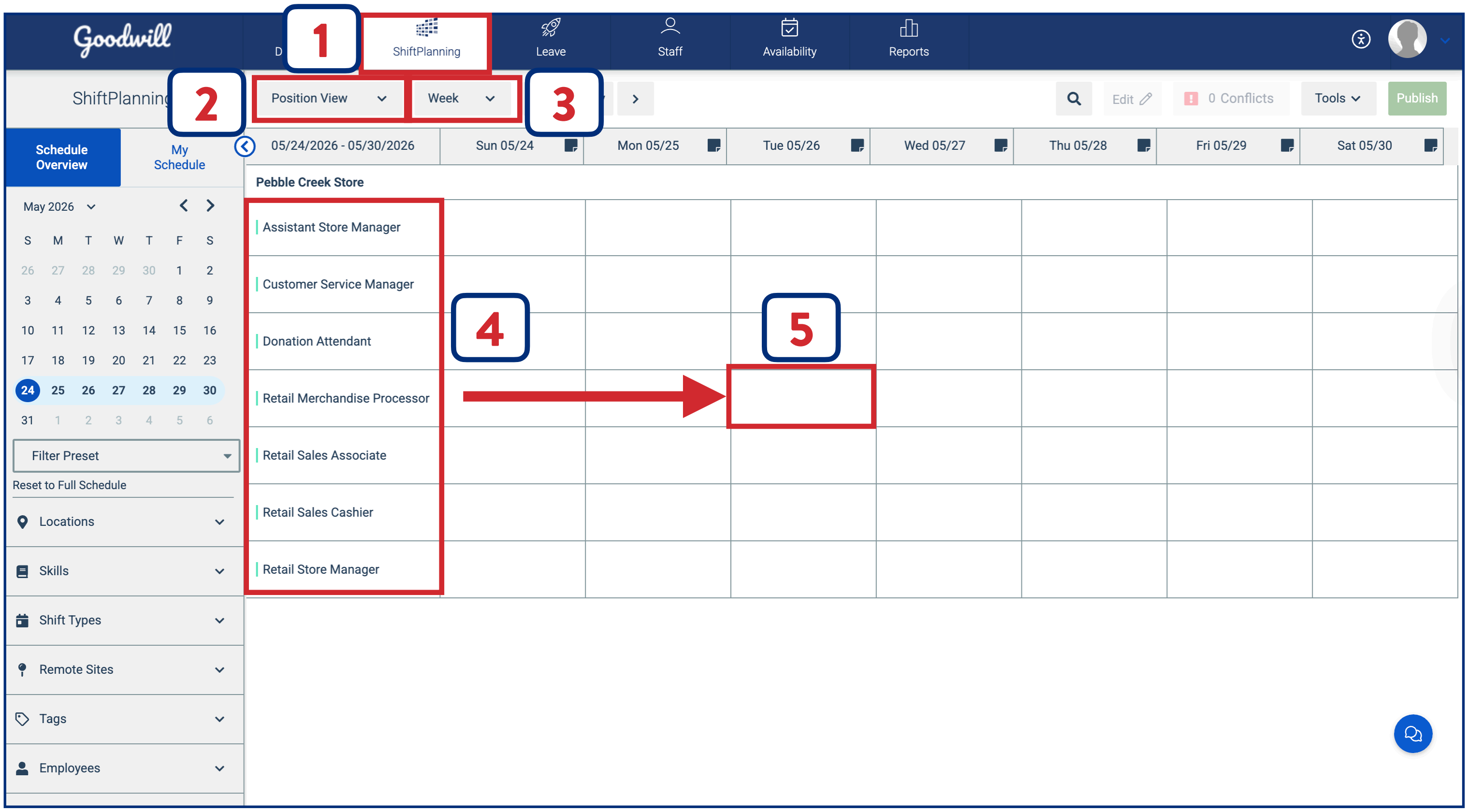


Note: Published shifts will have a solid border. Shifts can be edited, deleted and republished as necessary.

IMPORTANT: Team Members will not be able to view the schedule unless the schedule is published. Schedules should update in Workday within an hour of being published or possibly overnight. Team Members can view published schedules immediately in the Humanity App.

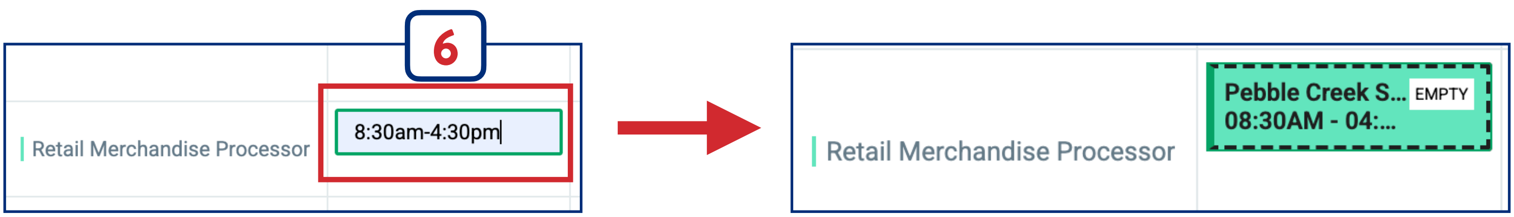
Note: *Position View* shows all roles at the location in the left column. This allows managers to create shifts for each position and assign the appropriate team members to them. Schedules can be created using either *Position View* or *Employee View* based on the manager's preference. Many managers toggle back and forth between views while creating schedules to identify any overlaps or gaps.

1. Click **Shift Planning** in the blue banner.
2. Select **Position View.**
3. Select **the desired calendar view** (i.e, Day, Week, 2 Weeks, or 4 Weeks).
4. Locate the desired position in the left column.

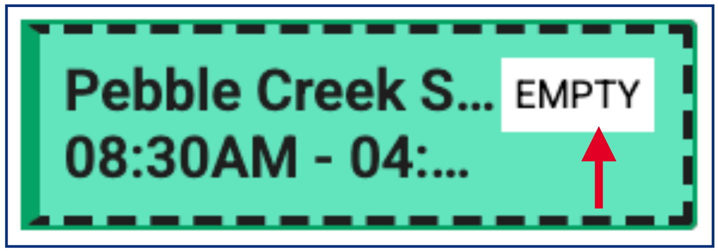


5. Locate the desired day that you would like to schedule a shift for the position > Click the space in the appropriate date column.

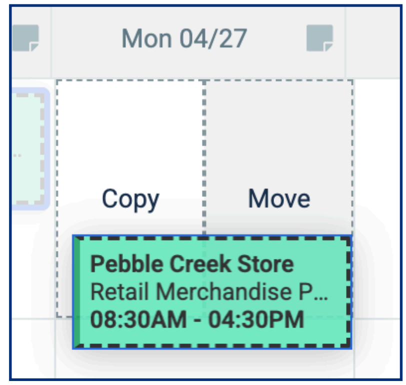
6. Type the **Shift Start** and **End Time** with **AM and PM details** > Click **Enter** on your keyboard.



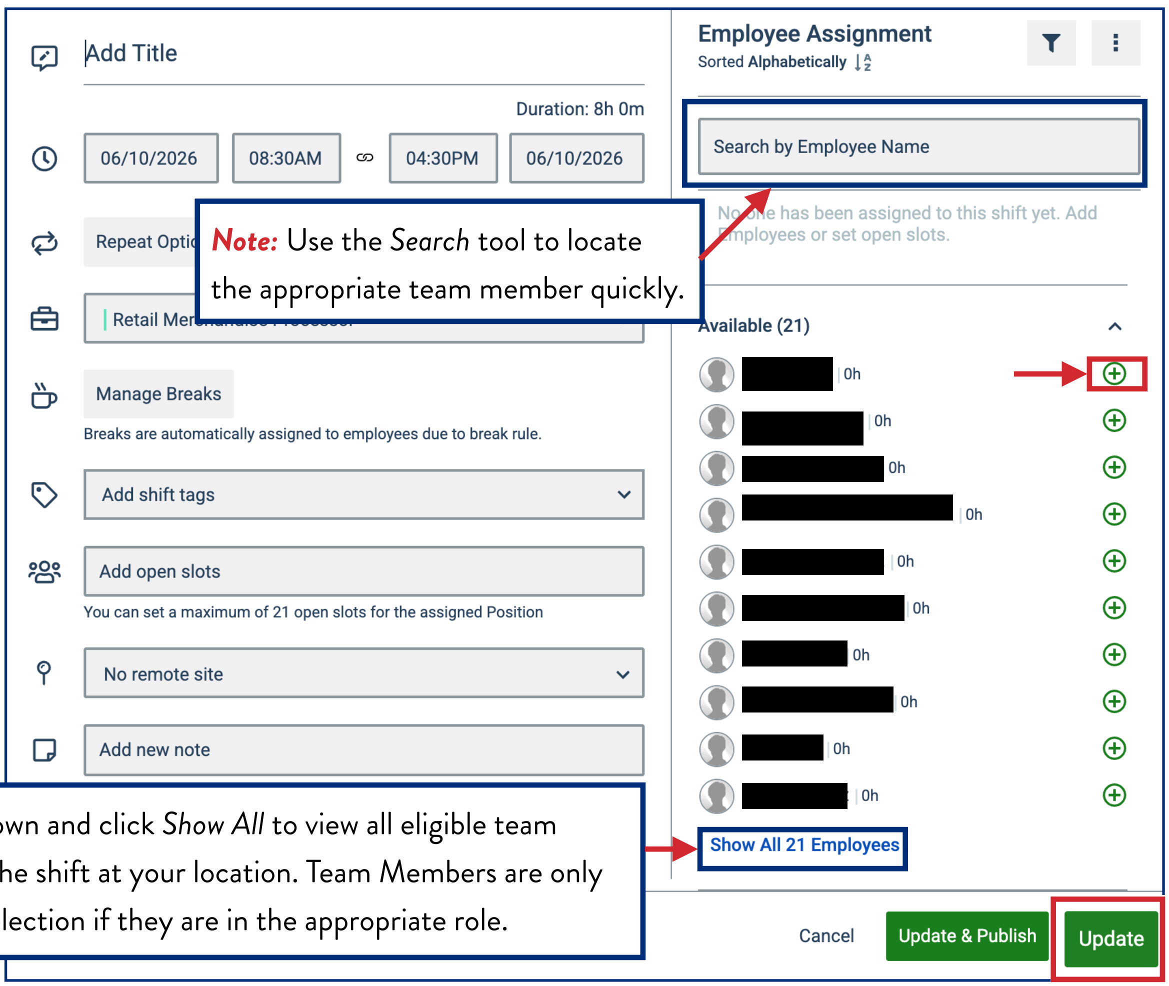
IMPORTANT: The shift will have a dotted border. A dotted border means that the shift is NOT published and is not visible to team members. The shift will also have an *Empty* alert, which means that the shift has NOT been assigned to a team member.



OPTIONAL: To copy or move a single shift, click the shift and drag it to the desired space on the calendar > release over the desired action (i.e., *Copy* or *Move*). This action can be done before assigning a team member to the shift or afterward if you would also like the shift assignment to be moved and/or copied as well.



7. To assign a shift to a team member, **Click the desired shift** > **Click the green plus sign next to the appropriate team member's name** > Click the green **Update** button.

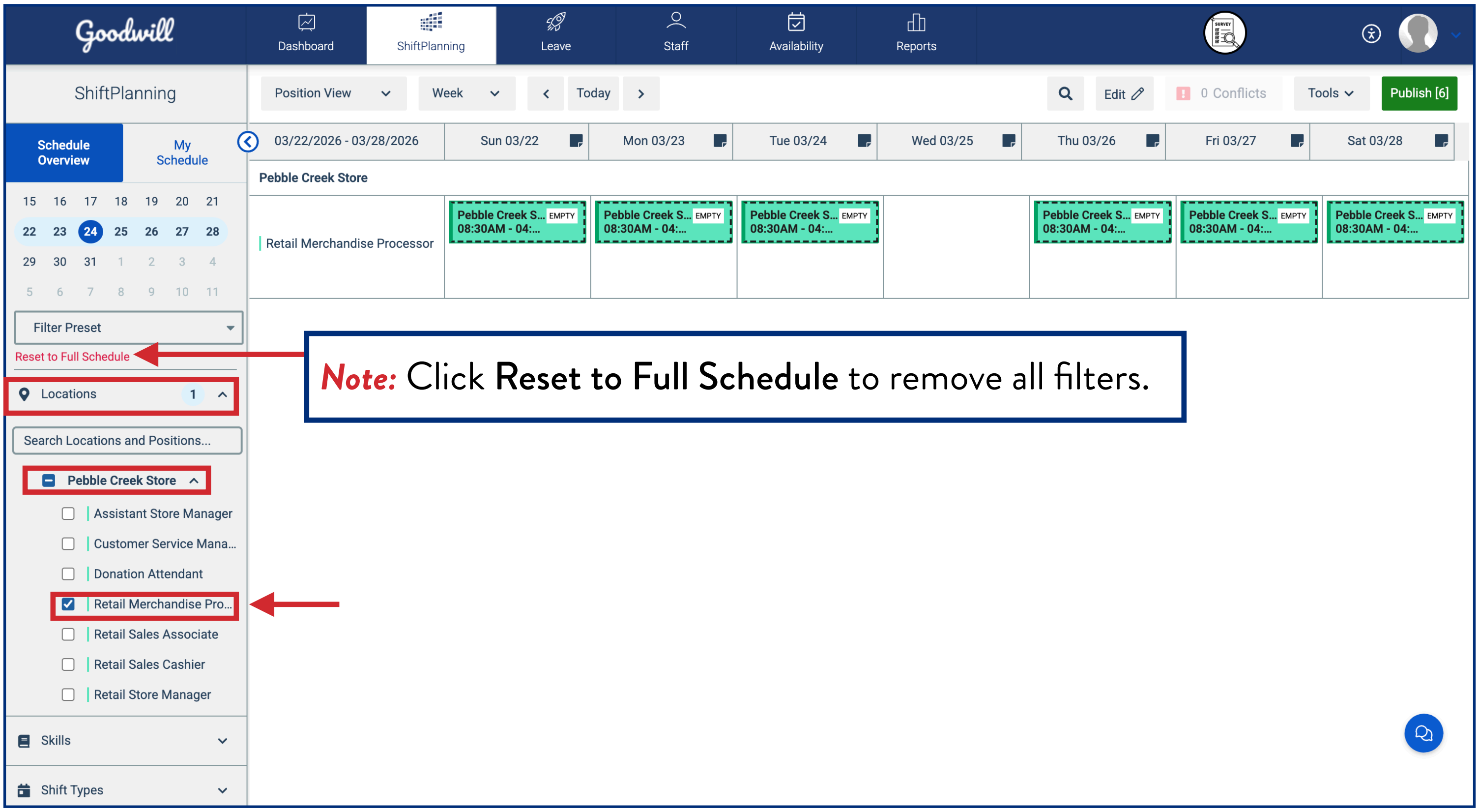


Note: Use the *Search* tool to locate the appropriate team member quickly.

Note: Scroll down and click *Show All* to view all eligible team members for the shift at your location. Team Members are only available for selection if they are in the appropriate role.

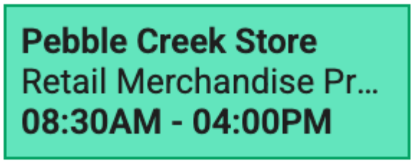
8. Repeat steps 4-7 as necessary. For options to make creating schedules quicker, review the processes for **creating repeating shifts.**

OPTIONAL: To filter your calendar view by specific position(s), Click **Location** > Select the checkbox of your location > Deselect the desired position(s) to remove from your calendar view.



9. Review the completed schedule and identify and resolve any conflict alerts that need to be resolved.

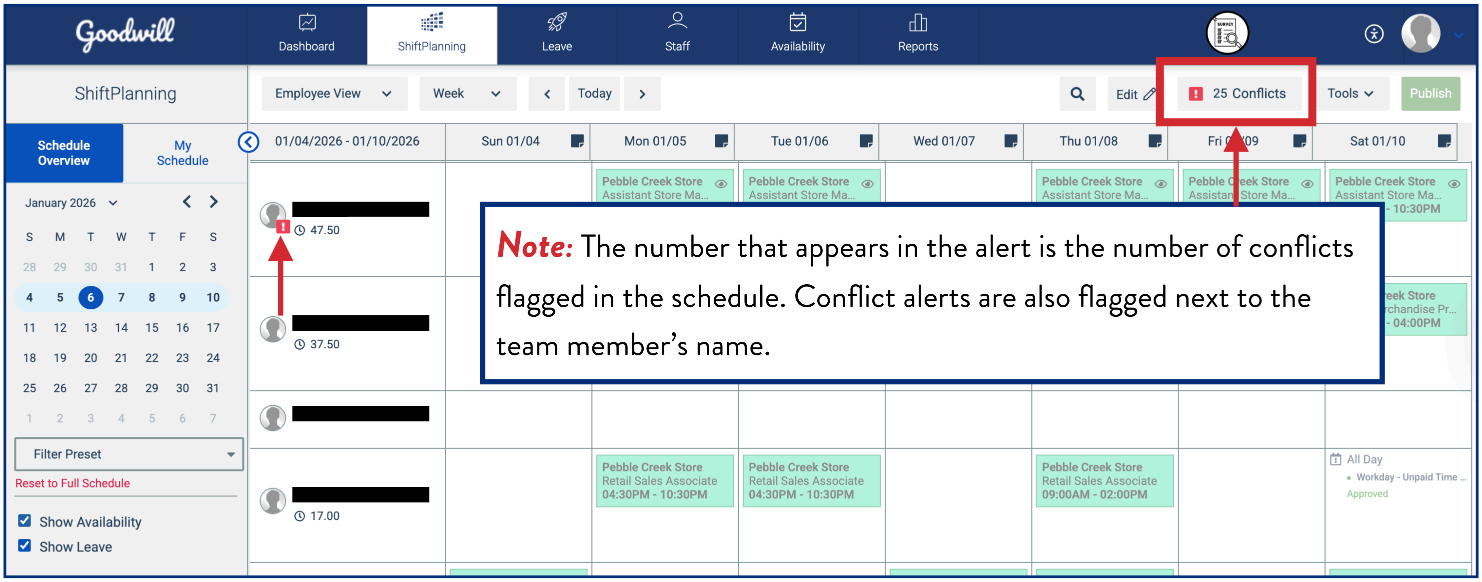
10. Click the green **Publish** button in the upper-right corner of the screen when the schedule is finalized.



Note: Published shifts will have a solid border. Shifts can be edited, deleted and republished as necessary.

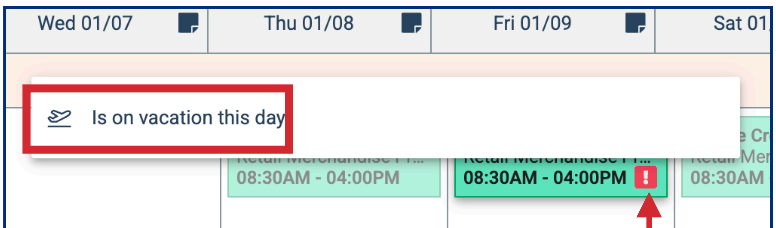
IMPORTANT: Team Members will not be able to view the schedule unless the schedule is published. Schedules should update in Workday within an hour of being published or possibly overnight. Team Members can view published schedules immediately in the Humanity App.

1. Click the **Conflicts** alert in the banner to review all flagged conflicts.



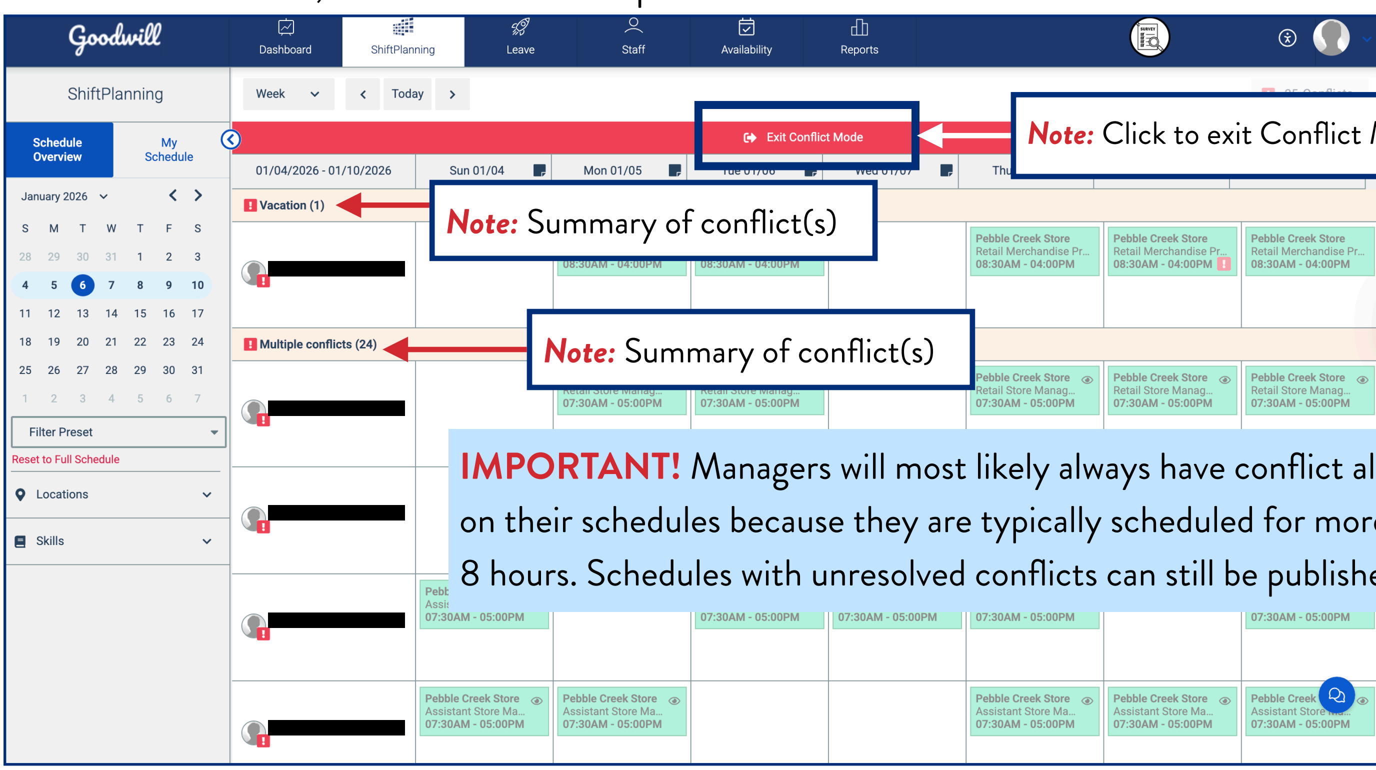
Note: The number that appears in the alert is the number of conflicts flagged in the schedule. Conflict alerts are also flagged next to the team member's name.

2. Hover over the alert on the shift to view more details.



Note: Shifts can be edited to resolve conflicts and schedules will need to be republished.

3. Review Conflicts, Resolve and and Republish schedules as needed.



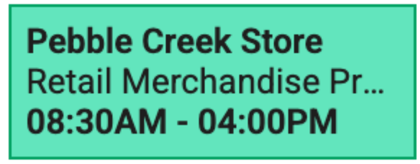
Note: Click to exit Conflict Mode.

Note: Summary of conflict(s)

Note: Summary of conflict(s)

IMPORTANT! Managers will most likely always have conflict alerts on their schedules because they are typically scheduled for more than 8 hours. Schedules with unresolved conflicts can still be published.

1. Click on the desired shift



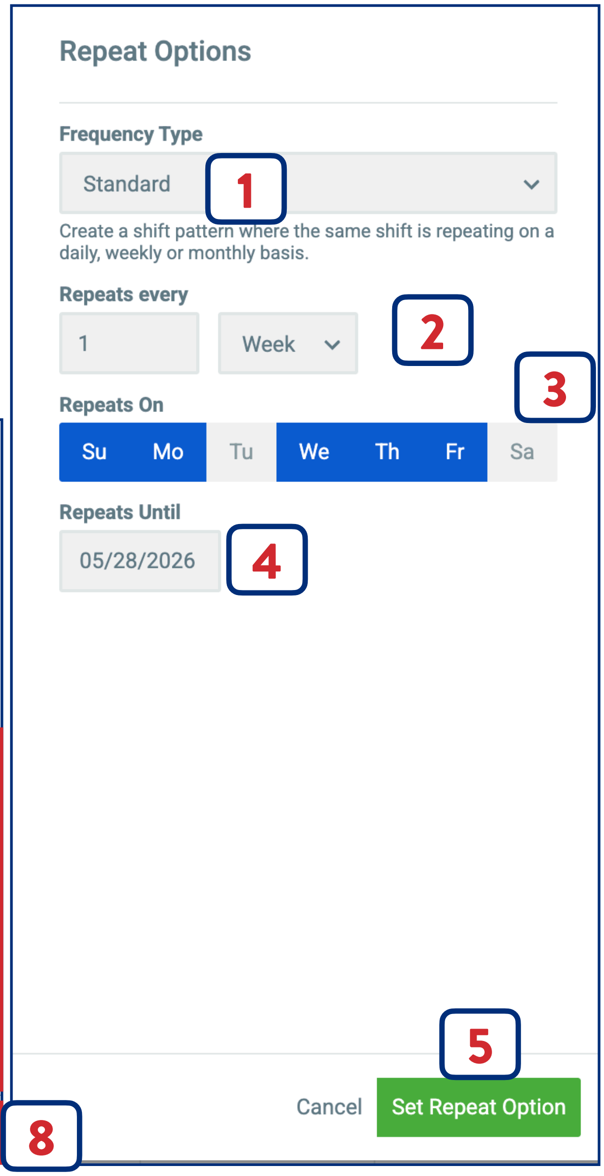
2. Select **Standard**

3. Under *Repeats every*, Select **1** and **Week**

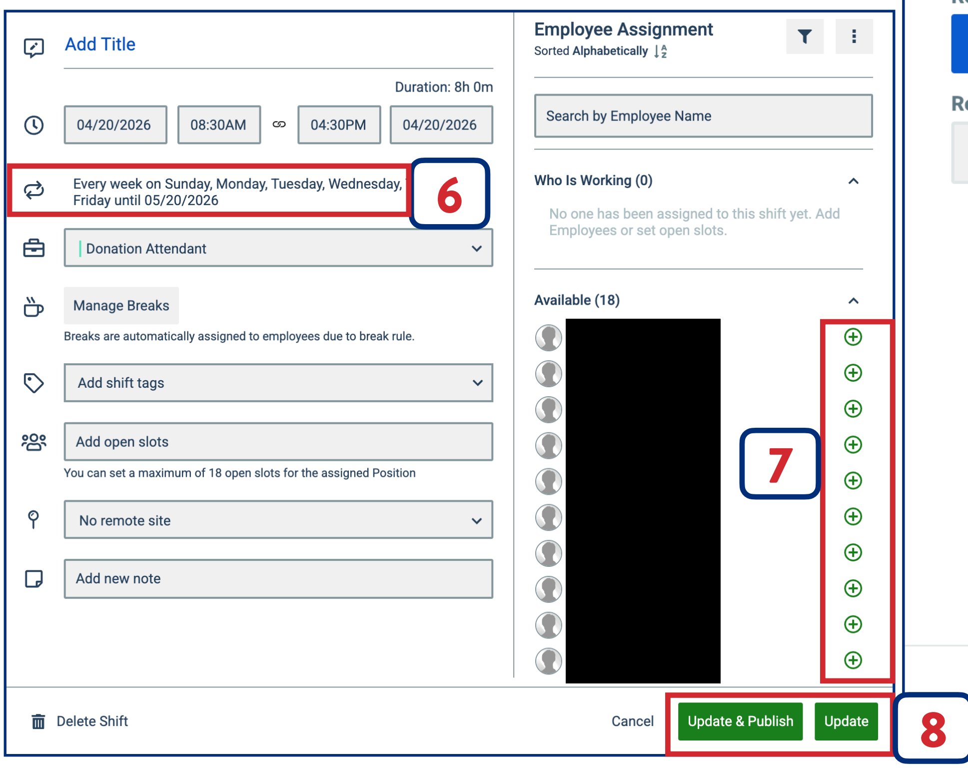
4. Select the desired days of the week

Note: Days of the week do <u>not</u> need to be consecutive.

5. Enter the desired end date > Click **Set Repeat Option**



6. Confirm the shift details

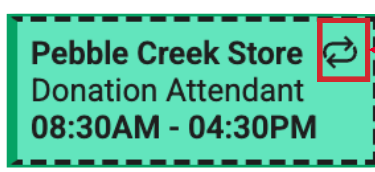


7. Click the green plus sign next to the appropriate team member's name to assign the team member to the shift.

IMPORTANT! If you assign a team member to a repeating shift, they will be assigned to all shifts in the series.

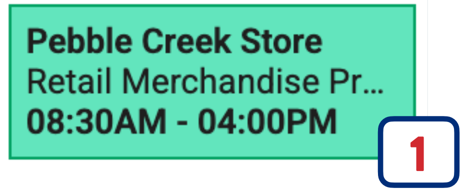
8. Click **Update** **<u>OR</u>** Click **Update & Publish**

9. View the calendar to confirm that the repeating shifts are populated as expected.



Note: Repeating shifts are indicated with the circular arrow icon.

1. Click on the desired shift



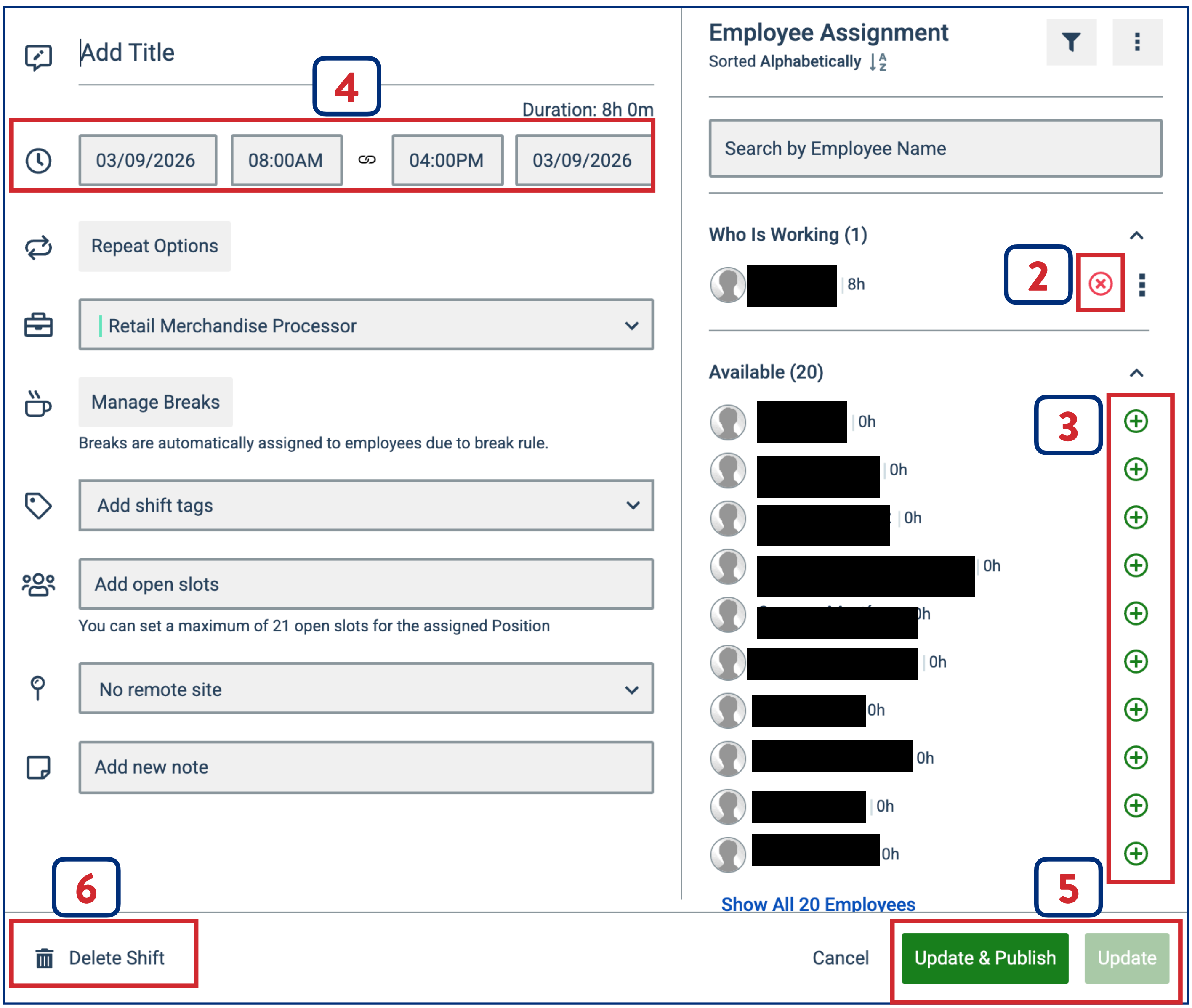
2. Click the red X to remove the team member from the shift assignment.

3. Click the green plus sign next to the appropriate team member's name to assign the team member to the shift.

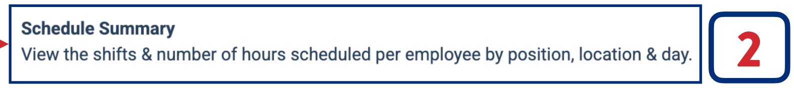
4. Click to select and update the shift start time, end time, or date

5. Click **Update** **<u>OR</u>** Click **Update & Publish/Republish**

6. Click the trash can icon to delete the shift



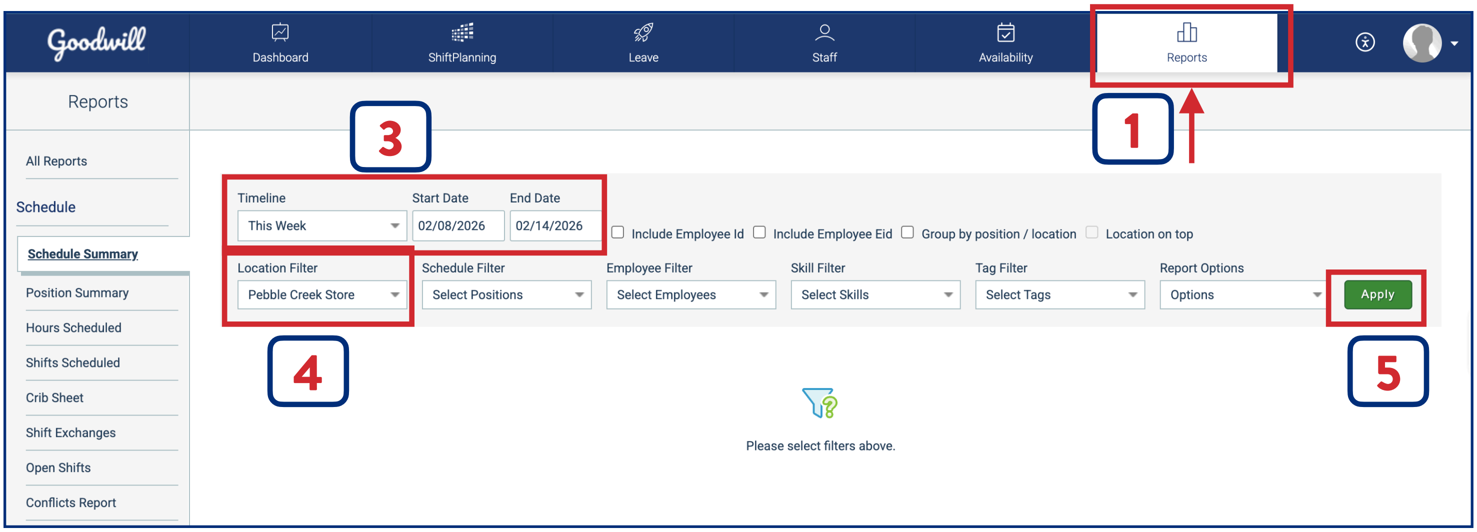
1. Click **Reports** in the blue banner.
2. Click **Schedule Summary**



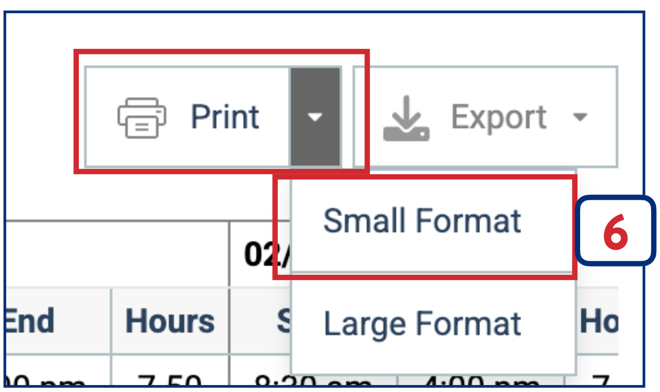
3. Confirm the *Timeline* and the *Start Date* and *End Date;* Click to edit, if necessary.
4. Confirm the **Location.**

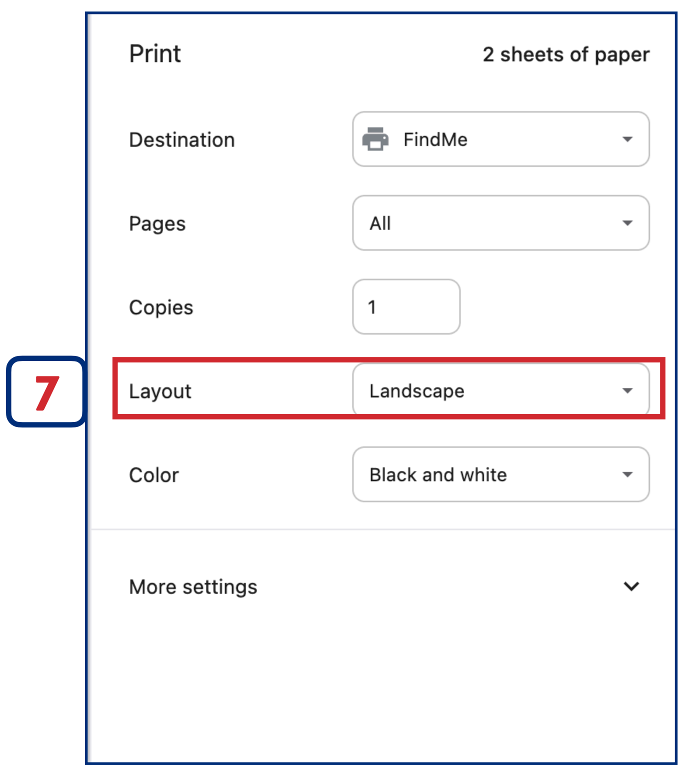
> ***Note:*** Some leaders (e.g., *District Managers*) can select multiple locations. If a leader is assigned to only one location, the appropriate location will automatically default.

5. Click **Apply.**



6. Click the **arrow on the *Print* button > Small Format**





7. Select **Landscape** for layout options > Print

HOW TO PRINT SCHEDULES FOR EACH POSITION

1. Click **Reports** in the blue banner.
2. Click **Schedule Summary**

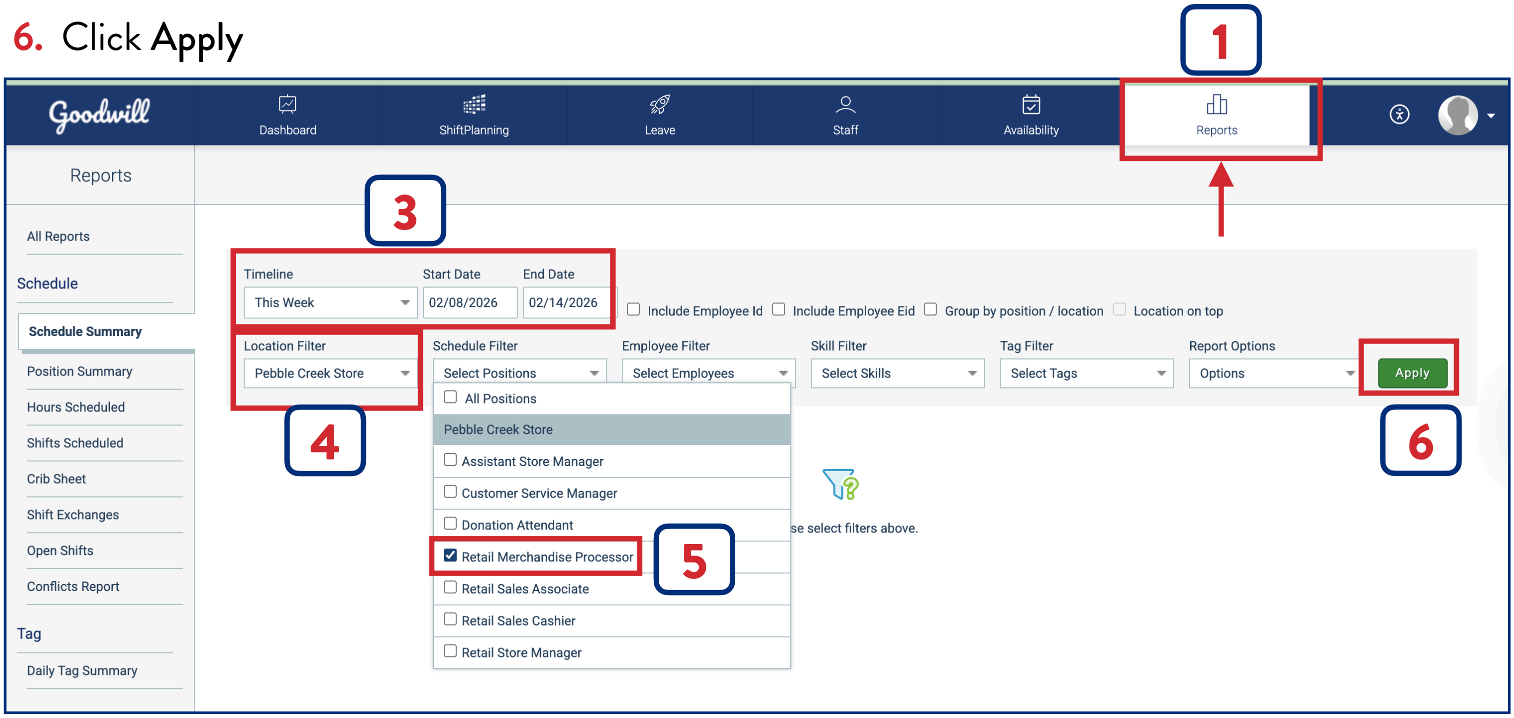
Schedule Summary
View the shifts & number of hours scheduled per employee by position, location & day.

2

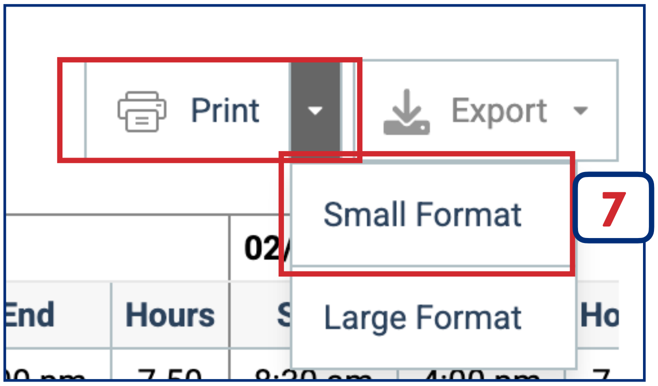
3. Confirm the *Timeline* and the *Start Date* and *End Date;* Click to edit, if necessary.
4. Confirm the **Location.**

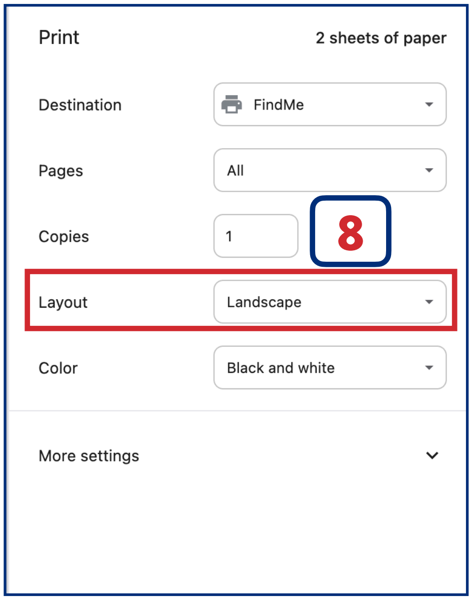
Note: Some leaders (e.g., *District Managers*) can select multiple locations. If a leader is assigned to only one location, the appropriate location will automatically default.

5. Select the desired position(s)
6. Click **Apply**

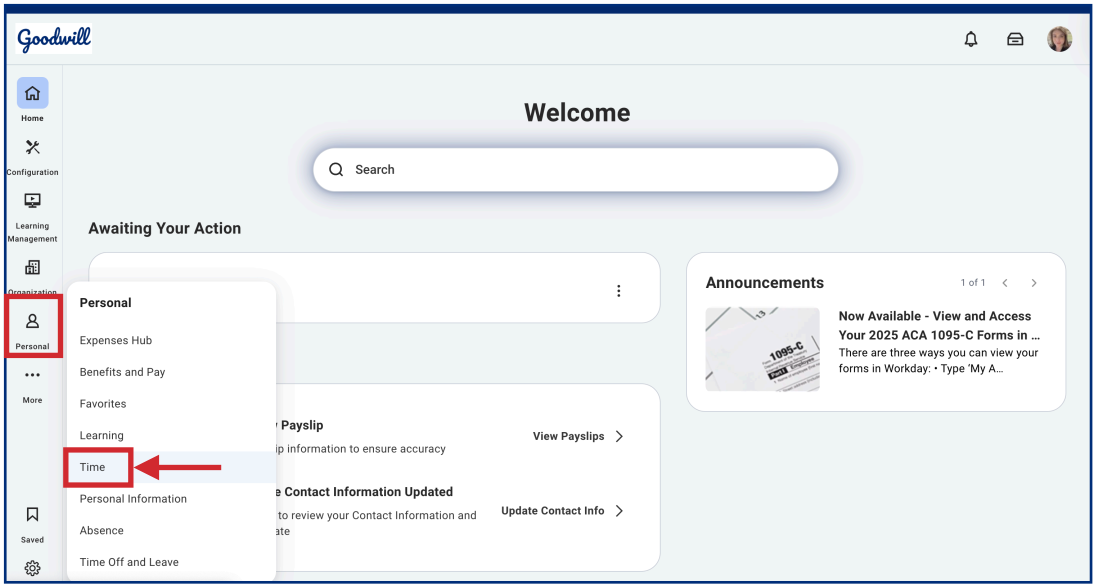


7. Click the **arrow on the *Print* button > Small Format**
8. Select **Landscape** for layout options > Print
9. Repeat steps for each position

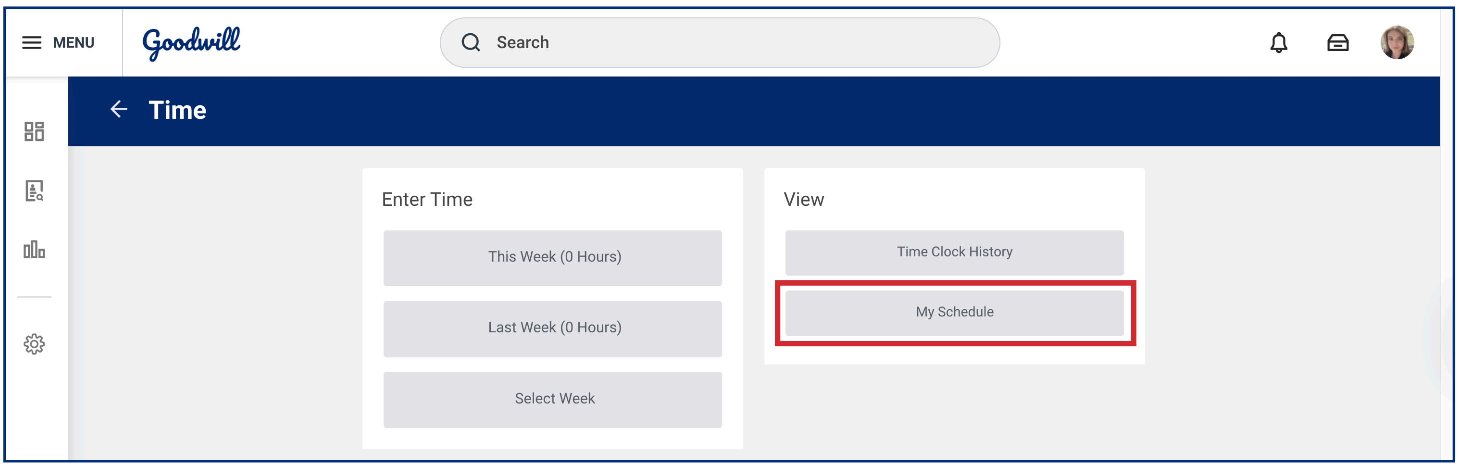




1. Log in to Workday > Hover over the *Personal* icon > Select **Time**



2. Click **My Schedule**



3. View your schedule