Humanity

Workforce Scheduling Guide

for Managers

Humanity

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Humanity

WELCOME

Welcome to Humanity, an online scheduling platform that optimizes employee scheduling and time off management in conjunction with WorkDay.

- 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.
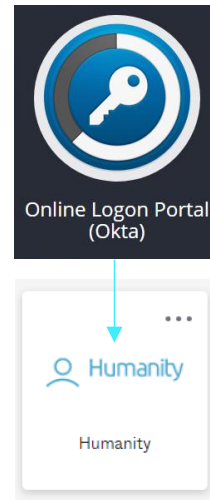
LOGGING ON

Let's get started by accessing and logging into Humanity. Humanity can be accessed from either:

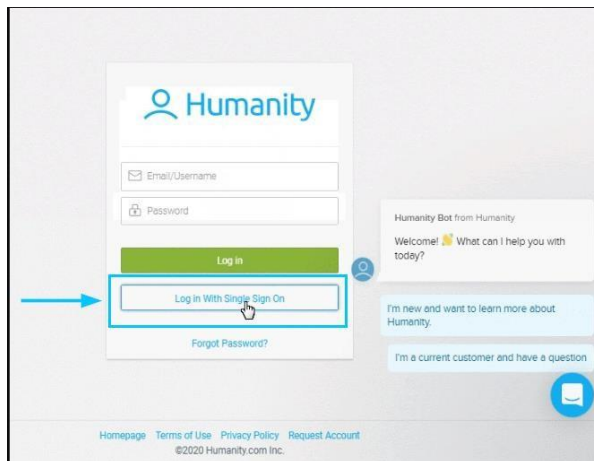**The Gazette home page > Web Applications > Humanity Scheduling**   OR   **my.goodwillaz.org > Online Logon Portal (Okta) > Humanity**

You can log into Humanity through your OKTA Single Sign-On.

OKTA Single Sign-on landing:

Google Chrome is recommended for the best performance. Although Humanity can be accessed using other browsers, users may experience lesser performance and/or usage issues.

DASHBOARD

After logging in, you'll be brought to the Humanity homepage, which is referred to as the Dashboard. Let's get familiar with the Dashboard and the Widgets and Action Items within it.

Widgets
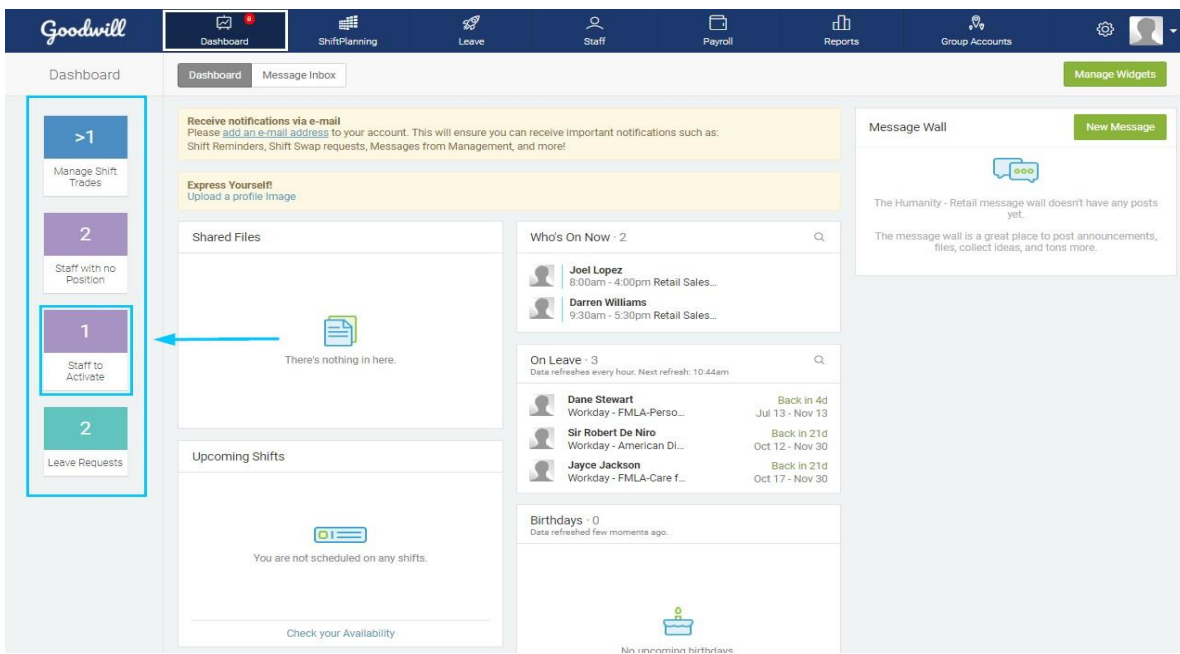
Widgets are the easiest and quickest way to view information about your staff. It is a shortcut to other functions which allow you to perform an action efficiently.

Action Items column

The action panel brings up the notifications for all any Humanity tasks that need resolution. In the graphic below, our Action Items tell us that we have more than one shift trade, two staff members with no position assigned, one staff member to activate, and two leave requests that need our attention.

Let's see how to use widgets and action items to activate and add a position to our new employee Nelson Reese.

1. Click the "Staff to Activate" widget to go directly to the task as shown in the following Image.

2. Activate employee Nelson Reese by complete the pending request.

3. Complete Nelson Reese's activation by assigning his position.
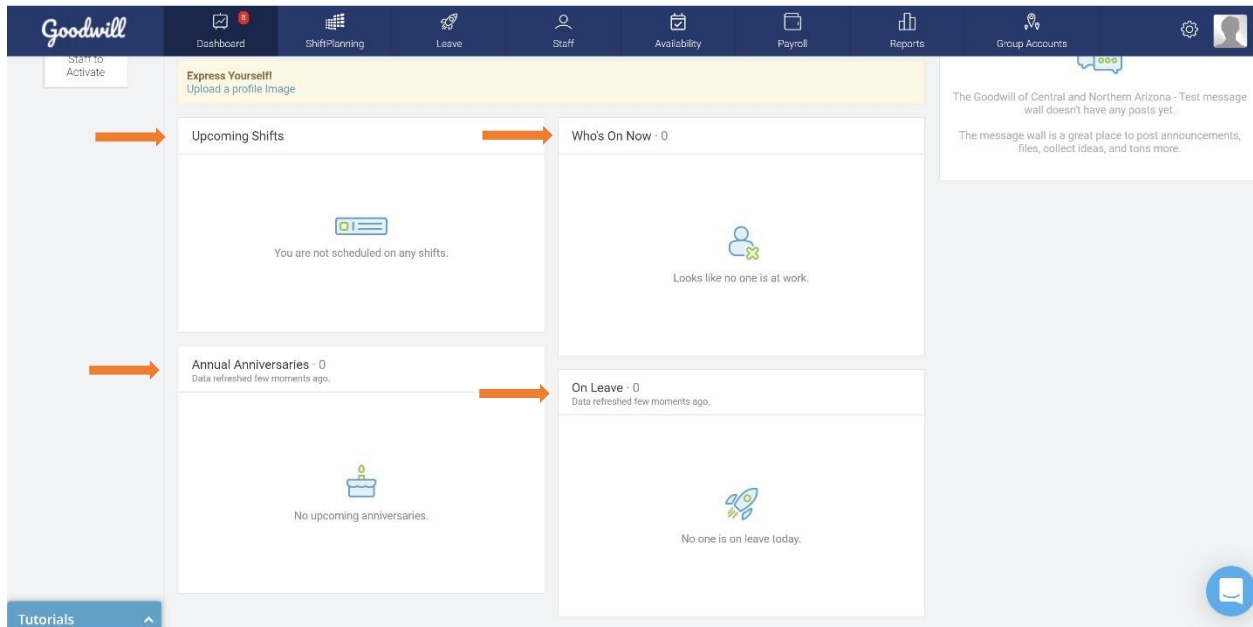
DASHBOARD NAVIGATION

The Dashboard provides you with an overview of all activities associated with your account, including updates and a list of pending actions waiting for your review. Let's review each of the widgets within this view.

WIDGETS

Upcoming Shifts

This widget allows you to view your own upcoming schedule, if applicable.

Annual Anniversaries

This widget displays any team member work anniversaries for the next 7 days.

Who's On Now

This widget will show you:

1. Information about the shift, position, and time when a user clocked in.
2. Position colors for each of your employees.
3. Detail information about employee break ('coffee cup' icon).
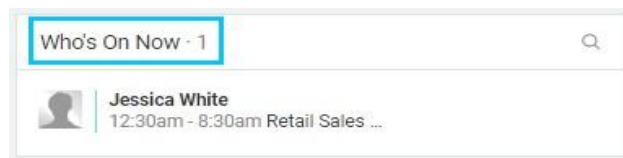
On Leave

This widget offers information about current team member leaves. You can also view how many employees are on leave.

1. Employee name and leave type are displayed.
2. Leaves dates and return dates: Partial leave - countdown in hours and minutes.
3. Daily leave countdown: counts down leave in days until it reaches 1 day, then continues in hours and minutes.

Humanity
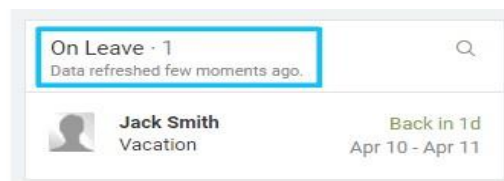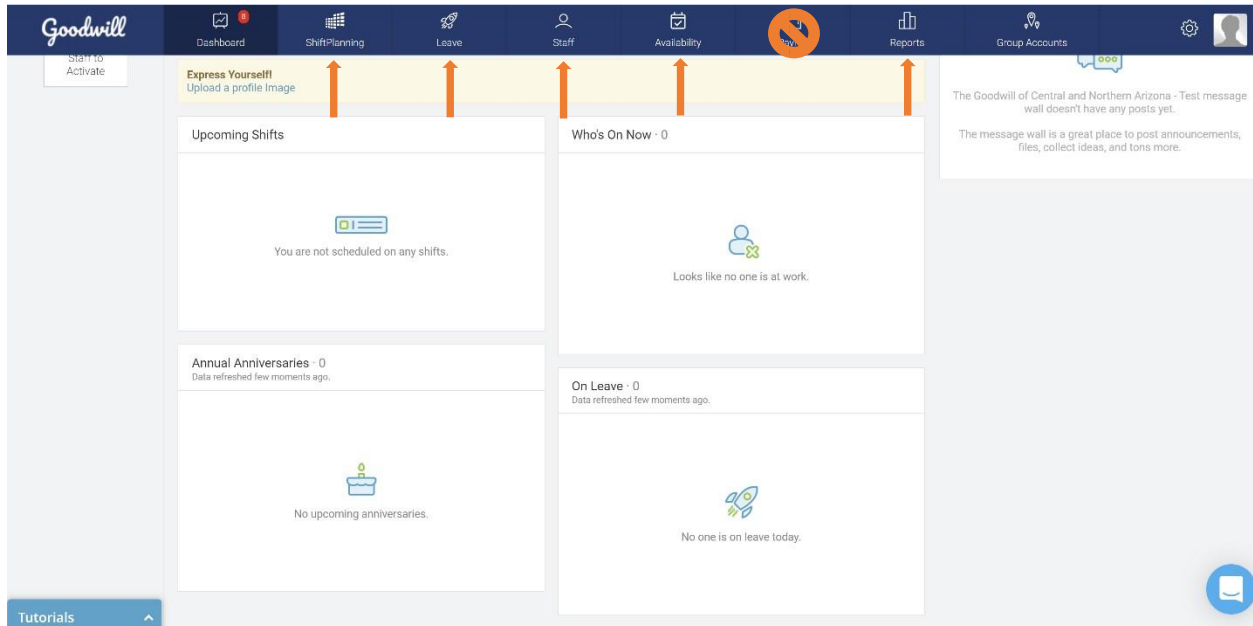
MODULES

Shift Planning Module

The 'ShiftPlanning' module is a central hub where you can create or manage your staff schedules. Whether you have a single location or multiple, ShiftPlanning has robust views that make it easy to visualize and plan your staffing needs.

Leave Module

The Leave module shows all approved time off, for you as well as your team members, at a glance.

Staff Module

The Staff module gives you visibility to details about your individual team members, provided through Workday.

Availability Module

The Availability module allows you to see each of your team member's ability to be scheduled at a glance. The availability data you see is submitted by the team member, approved by you, and then published - giving you control and visibility to plan schedules.

Payroll Module

The Payroll tab is a ghost function for Goodwill's purposes; it comes programmed into the Humanity interface and cannot be disabled, but for our purposes, it's not used. Our Payroll functions will be managed through Workday, so please ignore the Payroll tab and its functions.
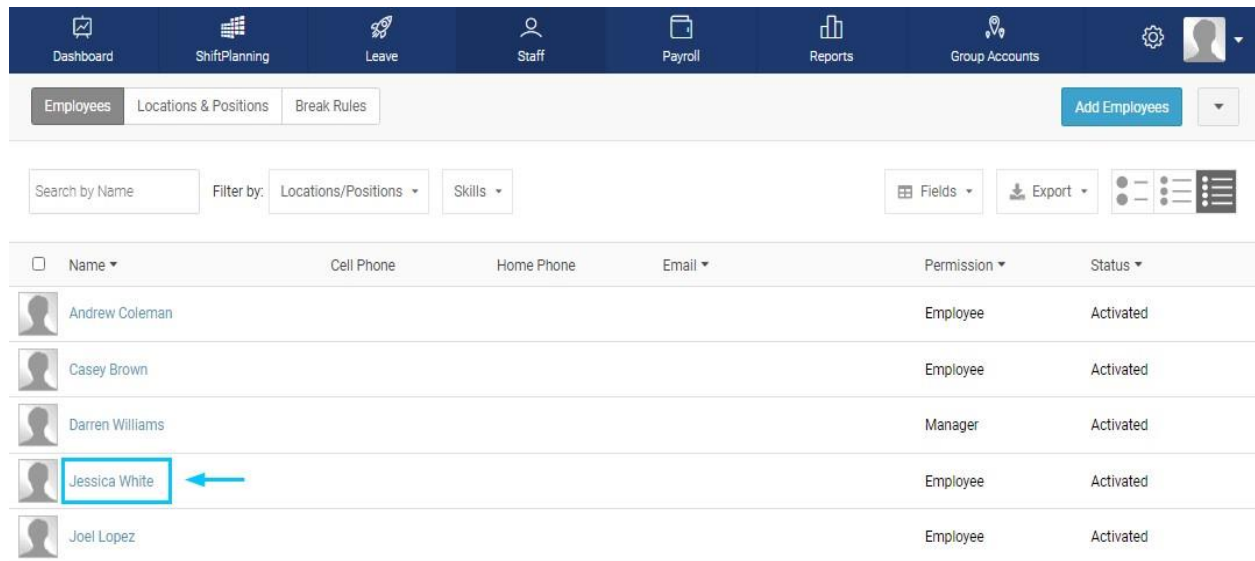
Reports Module

The 'Reports' tab quantifies your workforce scheduling as data. It has various report types which make it easy to produce information that helps drive business decisions. Manager functions allow you to create 'Custom Reports' as well.

STAFF MODULE: TASKS

A staff member's profile shows different tabs that you can use to customize their personal and professional details. The visibility of the tabs varies according to the permission level given by the Manager in Humanity.

You can access a staff member's profile by going to the Staff module > Employees.
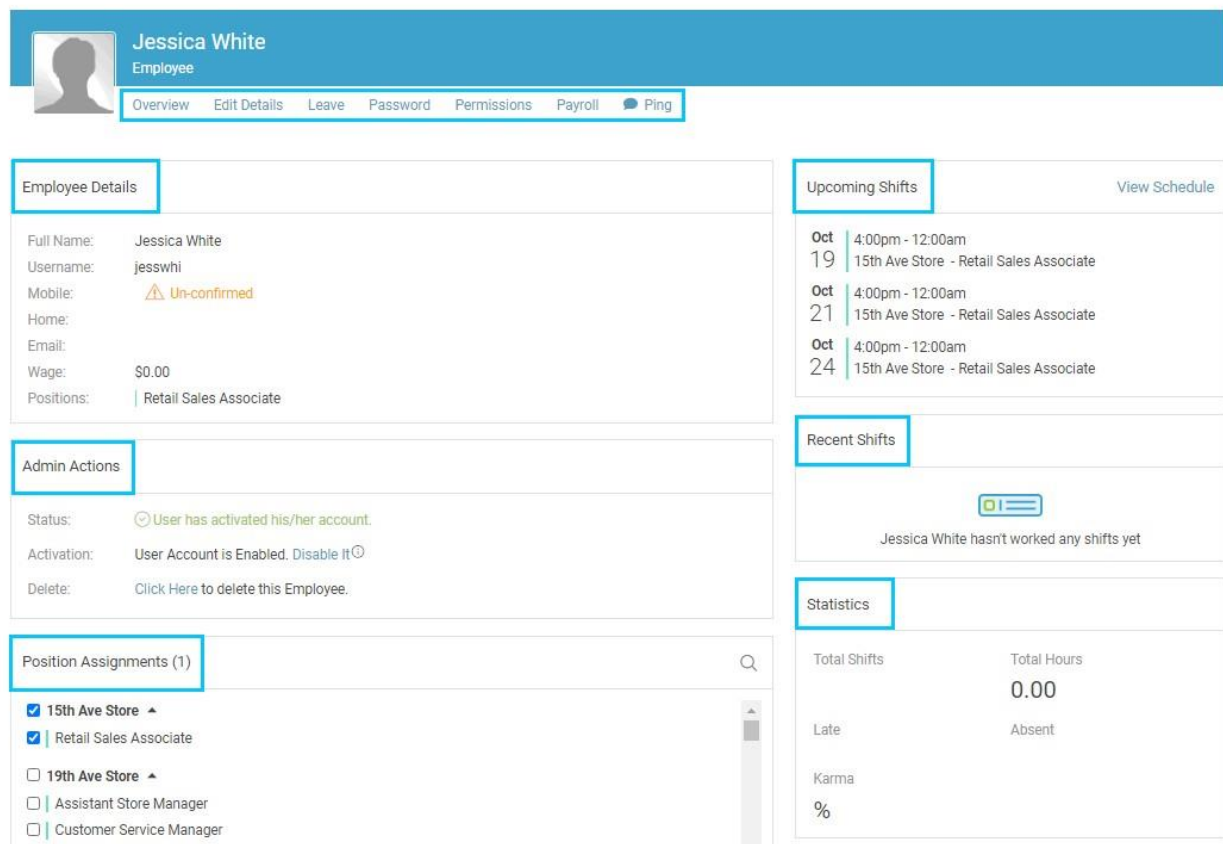
Profile overview

Profile **Overview** works as an access point to employee details. It contains different sections with information on employees' personal information, assignments, and schedules.

"Overview" is visible to Manager, Supervisor, and Scheduler permission levels; however, the amount of information varies according to the permission level.

- Password section can be used to set up a password for individual users.
- Permission section is available to manager/admin access only. (Permission level is assigned to the staff member based on business and operational requirements.)

Notifications

Each user has the option to customize or restrict settings for receiving notifications under his/her profile which will overwrite the global settings. Let's practice managing notifications.

1. Go to your profile from the top-right corner.
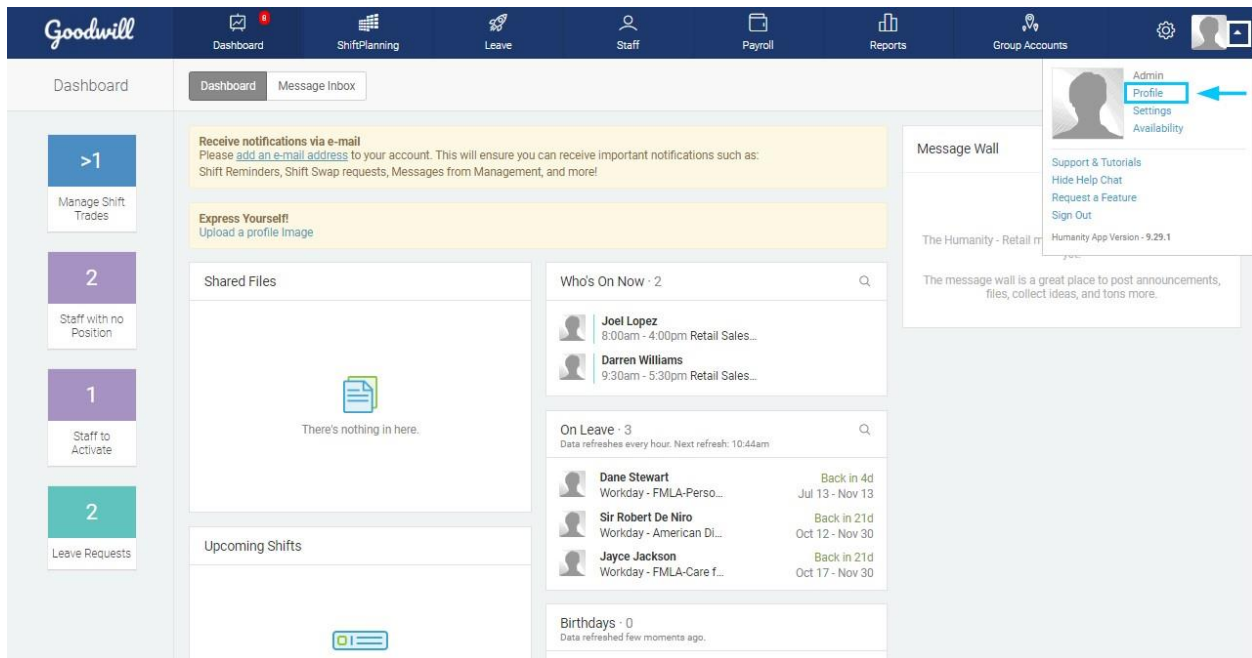
2. Go to the notification section. Here you can select how you prefer to be notified and when.
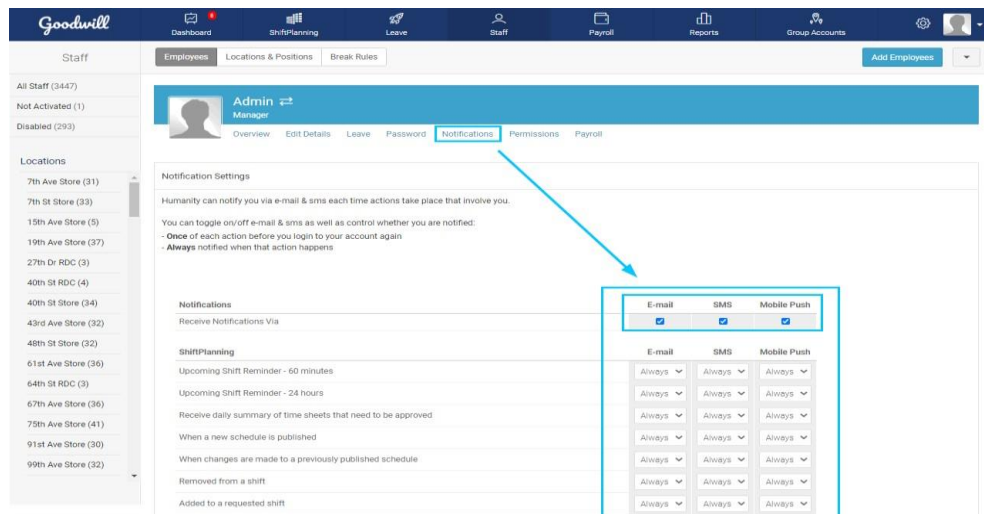
SHIFTPLANNING MODULE: TASKS

Overview

Whether you have a single location or multiple locations to manage, ShiftPlanning has robust views that make scheduling simple and efficient. The 'ShiftPlanning' tab is a central hub where you can create or manage staff schedules.
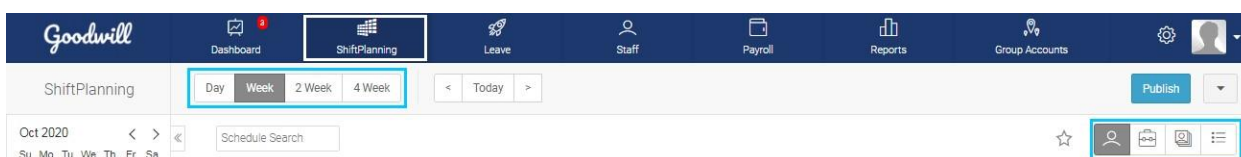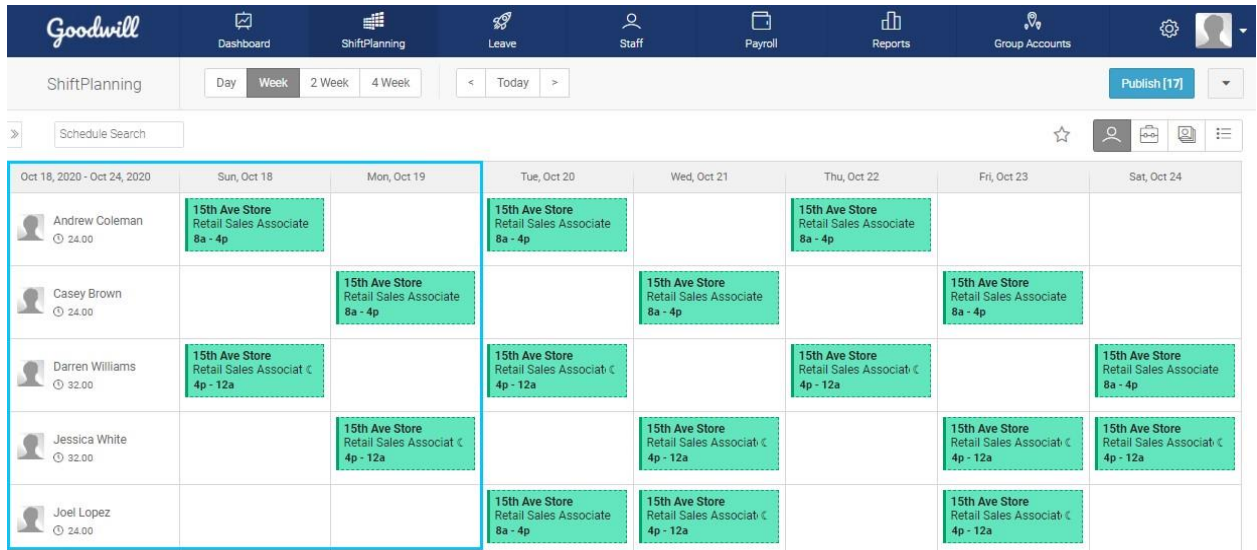
Timeline

ShiftPlanning tab will open up in the "**week**" view as a default, but you can select your preferred view from the top right side of the schedule.

*Timeline options are equally available to managers/supervisors and schedulers.

Employee view

Employee view lists your **staff names** to the left with their corresponding shifts on the calendar.

Position view

Position view lists your **staff positions** to the left with their corresponding shifts on the calendar.

Filter

On the left side of the ShiftPlanning tab, you will be able to view the filter panel.

Locations/Position

You may also select the Primary location's position and Additional Locations to filter down the schedule by an individual or multiple locations and positions. Once a position/location is selected, the schedule will only show data for that position/location.

Advanced Filters/Reset Advanced Filters

After selecting the 'Advanced' tab, you can filter the view further by selecting 'Shift Type,' 'Remote Sites,' 'Skills,' or 'Employees.'

Create a Shift

A shift can be created by going to the required calendar cell > Click '**+**' to add a shift.

Or click to access the existing shift templates or manually entering the required shift times.

The shift is created.

You may select 'Employee View' or 'Position View'. You can choose your preferred 'Basic View' under which you want to create the schedule.

> *Managers/supervisors are able to manage and create schedules for all of the staff members and locations/positions. However, a scheduler can create and manage schedules for positions that are assigned to him only.

Edit shifts

If you have created a custom shift, or if you need to adjust a shift you've added using a shift template or scheduling template, you can modify the shift's details in various ways.

Click on the shift to open the Shift Edit Window.

The following shift parameters can be edited:

- Position
- Title
- Date
- Time
- Set Open Slots
- Number of Slots
- Shift Notes
- Employee Assignment
- Coffee Icon
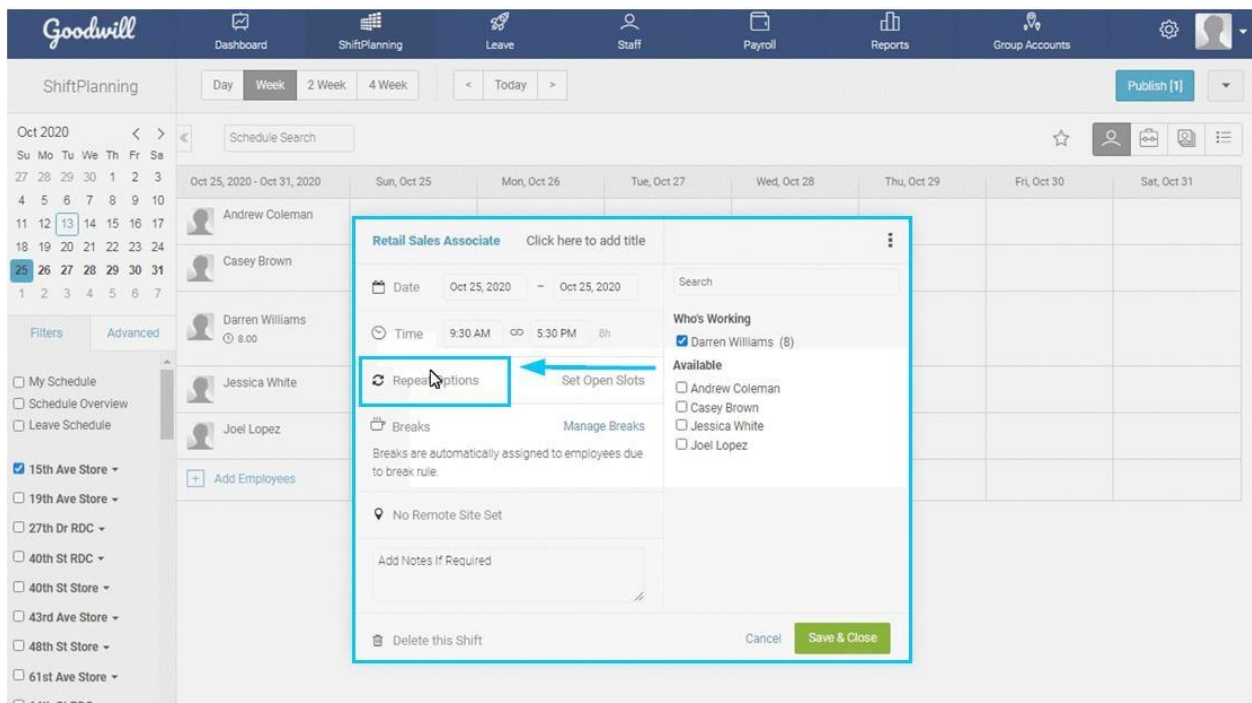- Task Assignment
- Skill Assignment

Repeat Shifts (With/Without employees)

Humanity offers the options to set up recurring shifts, which greatly speeds up the scheduling process. Although it is optional, you can create a recurring shift and have them repeated as long as you like.

With Employees

The shift will be set to recur in the future with the staff assignment of the current shift.

● Click on the shift that you are looking to repeat to open the Shift Edit Window > Click on the Repeat options.

● Select the required shift repeat frequency i.e. Mon-Fri.
● Select the Until date that defines how long the shift repeats.
● Select 'With Employees' option.
● Click on 'Set to Repeat'.

- 'Save & Close' to repeat the shift.
- Once the window will be closed, repeating shifts will be visible across the schedule.

Without Employees

A shift can be set to recur in the future without specific employee information. To set up a recurrence without employees, select 'Shift Time Only'.

The shifts will be repeated as an empty shift without employees.

Custom cycles (SSOOSSO)

Custom Cycle enables you to create a unique schedule for the extended timelines. A unique schedule series can be created by putting in Shifts as '**S**' and off days as '**O**'. Let's practice creating a custom cycle.

1. Click on the first shift you have created to open the Shift Edit Window > Select 'Custom Cycle' from the 'Repeat Options' list.

2. Create a unique cycle of shift repeat as per the requirement. *Custom Cycle can be customized by creating a unique series where letter 'S' will reflect days your employee(s) should be scheduled for and the letter 'O' reflects the days your employee(s) should not be scheduled for.*

3. 'Save & Close' the changes to repeat the shifts. Go to the '2 Week' or '4 Week' view to view the shifts laid out according to the custom cycle you have created.

Review/Resolve Scheduling Conflicts (brief explanation on what conflicts do and how to resolve)

A *Conflict* is a notification that appears when you create a shift/schedule that is not aligned with the parameters of the account settings. Conflicts details can be accessed by clicking on the conflict button, and they can be resolved by making required changes in the respective shift.

Publish Schedule

Once a schedule is complete, it can be published to go live and be visible to others. As part of publishing, there are selections about notifications that can be customized to meet your needs.

- Go to the 'Publish' button in the top-right corner.

- The 'Publish Schedule' window shows the total number of the shifts you are going to publish.
- Select the appropriate 'Notification Options'.
- Click on 'Publishing Shifts'.

- Displayed shifts in the selected timelines are published.
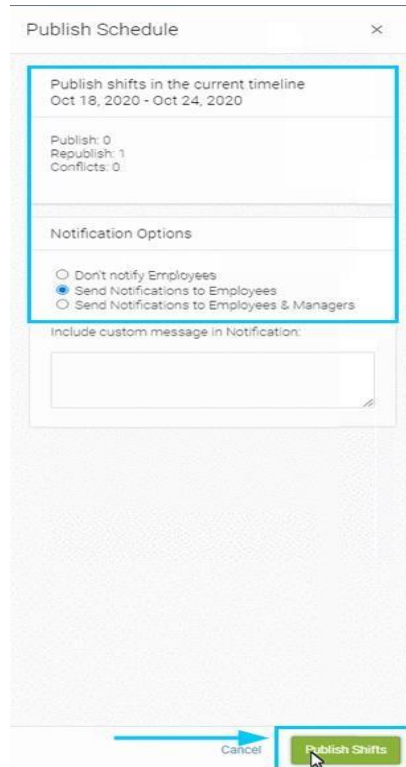
Re-publish Schedule

Once a schedule is published, is may need updating or changing. The Re-publish feature is only to notify staff via email of the changes to a previously published schedule. Let's practice republishing a schedule.

If you hover your mouse over the shift where the changes are made after the schedule publish, it shows 'Needs to be Republished'.

When you click the 'Publish' button, it will show the details for the affected shift change.

Shift is re-published.

SHIFTPLANNING MODULE: BUDGET MODE

Humanity's in-line 'Budget' mode helps you to keep labor expenses under control while scheduling your staff in a daily, weekly, or month view. It also allows transparency and better planning. Additionally, this tool helps monitor expenses in relation to the maximum hours scheduled. Let's practice Budget Mode.

View and Edit Budget Mode

Under 'Shiftplanning' > Select 'Schedule Overview' or the location/position from the left-hand side filter panel.

Click 'Show Budget Mode' from the schedule action drop-down available in the top-right corner.

Click the 'Pencil' icon to insert or edit budget details.

Notes:

- ✓ You can type add daily and weekly hours along with budget data.
- ✓ You can click the pencil icon again to show/hide the budget values.
- ✓ Red-colored values mean you are over budget.
- ✓ Green values mean you are within budget.

Representation of Budget Mode Data

1.) Representation of Budget Mode Data in a Day View

- • In the 'Day' view, you'll see 'Actual' hours or how many employees are scheduled by the hour. You'll also see whether you're under or overstaffed in those hours, represented by a dollar value.
- • To the left, you have your total daily 'Actual' hours scheduled over your set 'Budget' hours and the dollar value.
- • The 'Cost' multiplies the 'Scheduled Hours' by hourly pay and shows the total.

2.) Representation of Budget Mode Data in a Week View

- In the 'Week' view, the 'Budget' window appears at the bottom of the page where you can see your set 'Budget' hour totals (clock icon) against your 'Actual' hours: how much you have on the schedule for the week or each day.

3.) Budget Report

- 'Budget Report' gives you a complete view of your budgeting and represents your 'Actual' Scheduled Hours/Income against your set 'Budget' Hours/Income by 'Location'.
- If you are under budget the 'Difference' will be show green; if you're over budget it will show red.

You may click on 'Save as CSV' or 'Save as XLSX' to extract the report as well.
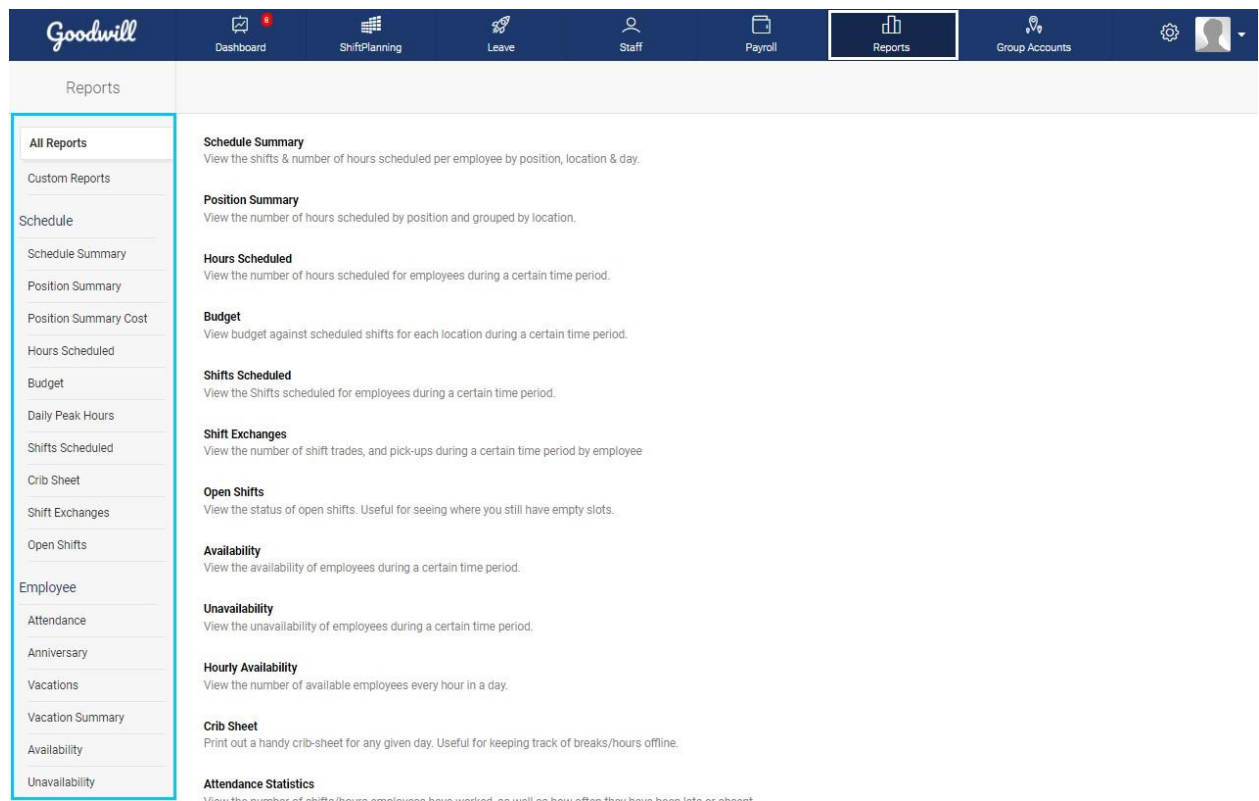
REPORTS

Overview

Humanity's automation of scheduling allows for unprecedented access to data. The 'Reports' tab is a central hub where that data can be spooled, in your preferred format, to make the best decisions for your business. Let's take a deeper look into what reports and data are available.

Menu Options

The Reports module comes with pre-set report options to pull data on Payroll, Scheduling, Employee Attendance, Anniversary, Skills, Availability and Leaves.

Review Reports – Schedule and Employee

'All Reports - Schedule' is a tab that gives a brief description of reports related to scheduling and budgeting that are available in Humanity:

1. **Schedule Summary Report:**
   The 'Schedule Summary' is a report that will list all the shifts scheduled and hours per day with both start and end times of the shift from the ShiftPlanning. The report can be easily grouped by 'Location' or other filters set in the application and also includes totals for the key metrics.

2. **Position Summary Report:**
   With 'Position Summary' report, you can view the number of hours scheduled, by 'Position' and group by 'Location'.

3. **Position Summary Cost Report:**
   The 'Position Summary Cost Report' shows you the total daily cost by the 'Position' grouped by the 'Location'. The report can be used side-by-side with Position Summary report in order to compare the Hours scheduled VS Cost per position.

4. **Hours Scheduled Report:**
   Hours Scheduled report gives the total hours scheduled per employee for a selected timeline.

5. **Budget:**
   The 'Budget Report' represents the 'Actual' Scheduled Hours/Income against the set 'Budget' Hours/Income by 'Location' for your employees.
   Note: If you are under budget the 'Difference' will be shown in 'Green' and if you're over budget it will be shown in 'Red'.

6. **Daily Peak Hours:**
   The 'Daily Peak Hours' is a report that will show the maximum daily hours scheduled per 'Position' or by 'Skills'.

7. **Shifts Scheduled:**
   The 'Shifts Scheduled' report can be used to keep track of hours that employees are scheduled to work on the schedule along with the positions' details.

8. **Shifts Confirmed:**
   The 'Shifts Confirmed' Report is used to keep track of hours that have been 'Approved' through the 'Shift Approval' feature and not through the 'Time Clock.'

9. Crib Sheet:
The 'Crib Sheet' report can be handy when pulling the scheduled shifts with detailed information e.g. shift notes and titles etc.; It is useful for keeping track of breaks/hours offline.

10. Shift Exchanges:
Under this report, you can pull up the details for the shift exchanges done by your staff using the 'Shift Trade' build-in feature of the app. The report can be easily grouped by 'Location' or other filters set in the application and also includes totals for the key metrics.

11. Open Shifts:
This report provides you with a list of all the open shifts listed by date and the names of the 'Employee' that have filled the open shifts.
Note: The 'Slots' refers to the number of open shifts that have been filled, as a fraction of the total number of available open shifts.

'All Reports - Employee' is a tab that gives a brief description of reports related to employee availability and attendance that are available in Humanity:

1. Vacations:
'Vacation' report views the number of days employees have given for vacation, or how many were rejected/left outstanding. It also shows the number of vacations your staff has requested and is then categorized as approved, declined and the ones still needing approval.

2. Vacation Summary:
The 'Vacation Summary' report gives you a comprehensive overview of the vacation requests made by the staff.
Note: The is an extensive version of the vacation report which shows approved/declined the requests when the request was submitted, and the remaining vacation days, etc.

3. Availability:
'Availability' report views the availability of employees during a certain period.
Here you can view your employees' availability by day during a certain date range. The 'Total' shows hours/percentage for which someone is available during the selected date range.

4. Unavailability:
'Unavailability' report views the unavailability of employees during a certain period.
Here you can view your employees' unavailability by day during a certain date range. The 'Total' shows hours/percentage for which someone is not unavailable during the selected date range.

5. Hourly Availability:
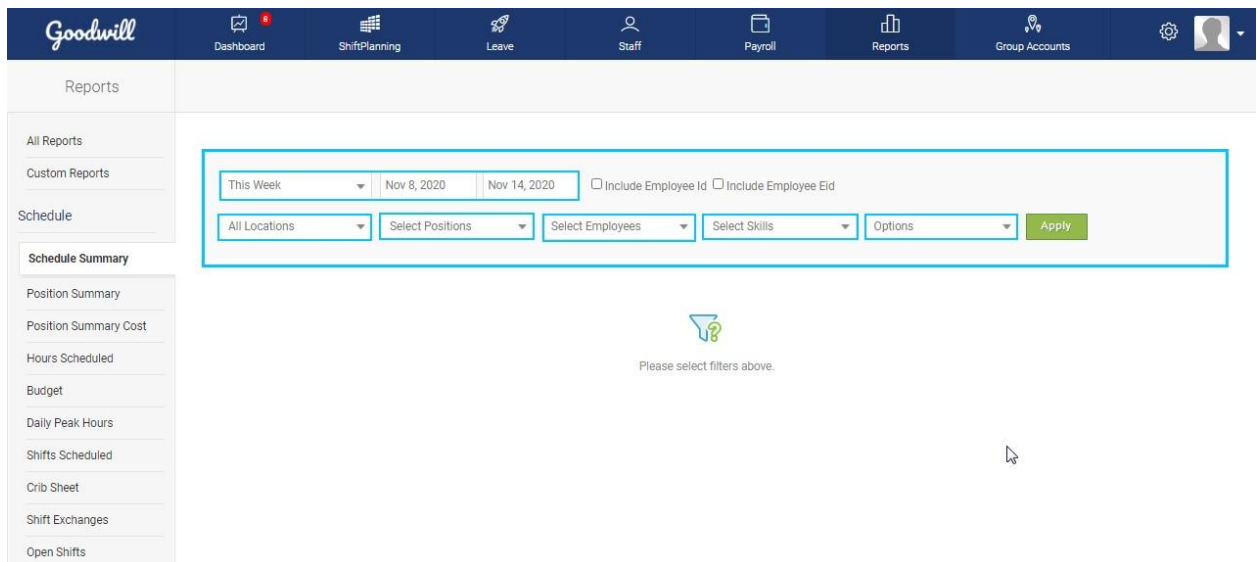*'Hourly Availability' report view the availability of the number of employees available in per hour in a day.*

6. Skills Expiration:
'*Skills Expiration' report views the skills expiration date added next to the skills assigned to the staff.*

Filters

Multiple filters are available to help customize and spool data related to Humanity functions. These filters include:

- Dates/Timelines
- Locations
- Positions
- Employees

If you have any further queries, please don't hesitate to reach out to us at support@humanity.com.