# C Humanity Workforce Scheduling Guide

for Managers



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### 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.

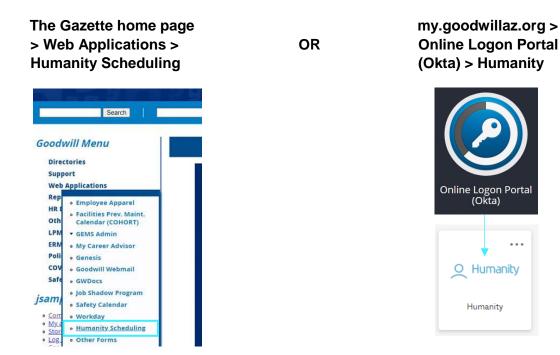
Workday and Humanity "speak" to each other through a regular system sync.

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:



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

### **OKTA Single Sign-on landing:**

	Q Humanity	
	Email/Username	
	Password	Humanity Bot from Humanity
	Log in	Welcome! S What can I help you with today?
>	Log in With Single Sign On	I'm new and want to learn more about Humanity.
	Forgot Password?	I'm a current customer and have a question

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

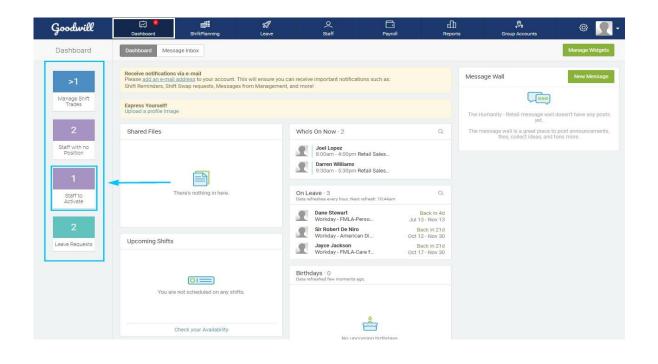
Widgets are the easiest and quickest way to view information about your staff. It is a shortcut to other functions which allow you to perform an action efficiently.

### 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.

Goodwill	Dashboard	ShiftPlanning	<b>S</b> Leave	Q Staff	Payroll		🔊	• 👤 ۵
Actions								Add Employees
>1 Manage Shift Trades	You currently have 3447 There is 1 employee that		r account yet. 🤤 Seno	Activation E-mail Now	Amanually Activate All			
2	Search by Name	Filter by: Lo	cations/Positions *	Skills •		⊞	Fields 👻 🛓 Export	
Staff with no Position	□ Name ▼		Cell Phone	Home Phone	Email 💌		Permission •	Status 💌
1 Staff to Activate	Nelson Reese						Employee	Not Activated
Leave Requests								

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

	Nelson Reese Employee		
	Overview Edit Details Leave Password Permissions Payroli 🗭 Ping		
Employee Det	ails	Upcoming Shifts	View Schedul
Full Name: Username: Mobile:	Nelson Reese 27a6071ea203ba6638eaccc3a6217c0f	_	duled on any upcoming shifts.
Home: Email: Wage: Positions:	\$0.00	Recent Shifts	
Admin Actions	ŝ		't worked any shifts yet
Status:	User account is not activated. Print Activation Instructions · Manually Activate	Statistics	
Activation: Delete:	User Account is Enabled. Disable It <sup>©</sup> Click Here to delete this Employee.	Total Shifts	Total Hours 0.00
Position Assig	priments (0) Q	Late	Absent
15th Ave Si		Karma %	
	Store Manager	Employee Files	
Donation .	Service Manager Attendant Chandise Processor	No files found Upload File	
Retail Sale			



### **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

Goodwill	Dashboard	ShiftPlanning	<b>K</b> Leave	Q Staff	لي Availability	Payroll	H Reports	🔊	۰ 👤 🕸
Activate	Express Yourself! Upload a profile Im	nage		The Goodwill of Central and Northe wall doesn't have any	m Arizona - Test message				
$\longrightarrow$	Upcoming Shift	ts	-	Who's C	0n Now · 0			The message wall is a great place files, collect ideas, and	to post announcements,
		You are not scheduled on	any shifts.		Looks like no	One is at work.			
$\longrightarrow$	Annual Anniver Data refreshed few m			On Leav Data refre	ve · 0 shed few moments ago.				
	No upcoming anniversaries.				No one is o	<b>P</b> n leave today.		0	
Tutorials									U

### **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.



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### MODULES

Goodwill	Dashboard	ShiftPlanning	<b>K</b> Leave	Q Staff	Availability		Reports	<b>,♥</b> Group Accounts	۵ 🖳			
Activate	Express Yourself! Upload a profile in	nage	1	1	1		1	The Goodwill of Central and Northern Arizona - Test messag wall doesn't have any posts yet.				
	Upcoming Shif	fts	-	Who's C	In Now · 0			The message wall is a great place to post announcements, files, collect ideas, and tons more.				
		You are not scheduled on	any shifts.		Looks like no o	2-53 one is at work.						
	Annual Anniver Data refreshed few r			On Leav Data refre	<b>re</b> · 0 shed few moments ago.							
	No upcoming anniversaries.				No one is on	Jeave loday.			0			
Tutorials									9			

### **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.

Dashboard	ShiftPlanning	<b>gg</b> Leave	O Staff	Payroll	H Reports	🔊	• <u> </u>
Employees Loo	cations & Positions Bre	eak Rules					Add Employees
Search by Name	Filter by: Locat	ions/Positions ×	Skills •			🖽 Fields 🔹 🛓 Export	· • • = • = • =
□ Name ▼		Cell Phone	Home Phone	Email 💌		Permission 🔻	Status 🕶
Andrew Colem	nan					Employee	Activated
Casey Brown						Employee	Activated
Darren William	ıs					Manager	Activated
Jessica White	] ←					Employee	Activated
Joel Lopez						Employee	Activated



### **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.

Upcoming Shifts	View Schedul
Oct     4:00pm - 12:00am       19     15th Ave Store - Retail S       Oct     4:00pm - 12:00am       21     15th Ave Store - Retail S       Oct     4:00pm - 12:00am       24     15th Ave Store - Retail S       Recent Shifts	Sales Associate
	The second state of the se
Statistics Total Shifts	Total Hours
Late Karma %	Absent
	Oct       4:00pm - 12:00am         19       15th Ave Store - Retail S         Oct       4:00pm - 12:00am         21       15th Ave Store - Retail S         Oct       4:00pm - 12:00am         24       15th Ave Store - Retail S         Recent Shifts       Image: Statistics         Statistics       Total Shifts         Late       Karma

- 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.

Goodwill	Dashboard	ShiftPlanning	<b>K</b> Leave	Q Staff	Payroll	L] Report	s Group Acc	200
Dashboard	Dashboard Mes	sage Inbox						Admin Profile Settings
>1		s <b>via e-mail</b> Laddress to your account. T It Swap requests, Messages			Message Wall	Availability Support & Tutorials Hide Help Chat		
Manage Shift Trades	Express Yourself! Upload a profile Ima	ge			The Humanity - Retail m	Request a Feature Sign Out Humanity App Version - 9.29.1		
2	Shared Files		3	Q		great place to post announcements, t ideas, and tons more.		
Staff with no Position								
Staff to Activate		There's nothing in here.		Dn Leave · 3 Data refreshes every hour. Next	refresh: 10:44am	Q Back in 4d		
2				Workday - FMLA-P		ul 13 - Nov 13 Back in 21d		
Leave Requests	Upcoming Shifts			Workday - America Jayce Jackson Workday - FMLA-C		ct 12 - Nov 30 Back in 21d ct 17 - Nov 30		
				Birthdays · 0 Data refreshed few moments a	<b>j</b> o.			

2. Go to the notification section. Here you can select how you prefer to be notified and when.

Goodwill	Dashboard	ShiftPlanning	29 Leave	Q Staff	Payroll		🔊	Ø	2
Staff	Employees	Locations & Positions	Break Rules					Add Employees	
II Staff (3447)									
ot Activated (1)		Admin ≓ Manager							
sabled (293)		Overview Edit Deta	alls Leave Password N	lotifications Permission	ns Payroll				
ocations									
7th Ave Store (31)	Notification	Settings							
7th St Store (33)	Humanity car	n notify you via e-mail & sn	ns each time actions take place t	hat involve you.					
15th Ave Store (5)			vell as control whether you are n	otified:					
19th Ave Store (37)		h action before you login t fied when that action happ							
27th Dr RDC (3)									
40th St RDC (4)									
40th St Store (34)	Notificat	lions			E-m	nail SMS	Mobile Push		
43rd Ave Store (32)	Receive	Notifications Via			6	3 (3)	63		
48th St Store (32)	ShiftPlan	anina			E-m	nail SMS	Mobile Push		
		mmy			and the second se	ys 🗸 Always 🗸	Always ~		
61st Ave Store (36)	Upcomin	a Shift Reminder - 60 minu	rtes -						
							Alumor or		
64th St RDC (3)	Upcomin	ng Shift Reminder - 24 hour	s		Alwa	ys 🖌 Always 🗸	Always 🛩		
64th St RDC (3) 67th Ave Store (36)	Upcomin Receive o	ag Shift Reminder - 24 hour daily summary of time she			Alwe Alwe	ys 🖌 Always 🗸 ys 🖌 Always 🗸	Always 🐱		
64th St RDC (3) 67th Ave Store (36) 75th Ave Store (41)	Upcomin Receive o When a n	ng Shift Reminder - 24 hour daily summary of time she new schedule is published	s ets that need to be approved		Alwe Alwe	ys 🖌 Always 🗸			
64th St RDC (3) 67th Ave Store (36) 75th Ave Store (41) 91st Ave Store (30)	Upcomin Receive o When a n	ag Shift Reminder - 24 hour daily summary of time she	s ets that need to be approved		Alwa Alwa	ys 🖌 Always 🗸 ys 🖌 Always 🗸	Always 🐱		
61st Ave Store (36) 64th St RDC (3) 67th Ave Store (36) 75th Ave Store (41) 91st Ave Store (30) 99th Ave Store (32)	Upcomin Receive o When a n When chu	ng Shift Reminder - 24 hour daily summary of time she new schedule is published	s ets that need to be approved		Alwe Alwe Alwe	ys 🗸 Always 🗸 ys V Always V ys V Always V	Always 💙 Always 💙		



### **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.

# **C** Humanity

### **Employee view**

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

Goodwill	년 Dashboard	ShiftPlanning		c 🗍 taff Payroll		<b>,</b> ♥ <b>,</b> Group Accounts	• 👤 🕸
ShiftPlanning	Day Week 2.V	Veek 4 Week	Today >				Publish [17]
» Schedule Search							. 🗟 🗟 🗄
Oct 18, 2020 - Oct 24, 2020	Sun, Oct 18	Mon, Oct 19	Tue, Oct 20	Wed, Oct 21	Thu, Oct 22	Fri, Oct 23	Sat, Oct 24
Andrew Coleman () 24.00	15th Ave Store Retail Sales Associate 8a - 4p		15th Ave Store Retail Sales Associate 8a - 4p		15th Ave Store Retail Sales Associate 8a - 4p		
Casey Brown © 24.00		15th Ave Store Retail Sales Associate 8a - 4p		15th Ave Store Retail Sales Associate 8a - 4p		15th Ave Store Retail Sales Associate 8a - 4p	
Darren Williams () 32.00	15th Ave Store Retail Sales Associat © 4p - 12a		15th Ave Store Retail Sales Associati © 4p - 12a		15th Ave Store Retail Sales Associati © 4p - 12a		15th Ave Store Retail Sales Associate 8a - 4p
Jessica White 32.00		15th Ave Store Retail Sales Associat © 4p - 12a		15th Ave Store Retail Sales Associati & 4p - 12a		15th Ave Store Retail Sales Associati € 4p - 12a	15th Ave Store Retail Sales Associati ⊄ 4p - 12a
Joel Lopez © 24.00			15th Ave Store Retail Sales Associate 8a - 4p	15th Ave Store Retail Sales Associati © 4p - 12a		15th Ave Store Retail Sales Associati ( 4p - 12a	

### **Position view**

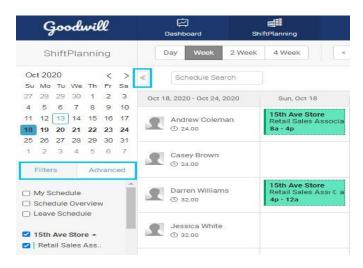
Position view lists your staff positions to the left with their corresponding shifts on the calendar.

Goodwill	反 Dashboard	ShiftPlanning	<b>X9</b> Leave	Q Staff	Payroll		Group Accounts	@ <u> </u>
ShiftPlanning	Day Week 2	2 Week 4 Week	< Today >					Publish [17]
» Schedule Search							☆	
Oct 18, 2020 - Oct 24, 2020	Sun, Oct 18	Mon, Oct 19	Tue, Oct 20	Wed, O	ct 21	Thu, Oct 22	Fri, Oct 23	Sat, Oct 24
15th Ave Store								
	15th Ave Store 8a - 4p Andrew Coleman	15th Ave Store 8a - 4p Casey Brown	15th Ave Store 8a - 4p Joel Lopez	15th Ave S 8a - 4p Casey Brow		15th Ave Store 8a - 4p Andrew Coleman	15th Ave Store 8a - 4p Casey Brown	15th Ave Store 8a - 4p Darren Williams
Retail Sales Associate ③ 136.00	15th Ave Store 4p - 12a Darren Williams	15th Ave Store 4p - 12a Jessica White	C 15th Ave Store 8a - 4p Andrew Coleman	15th Ave S 4p - 12a Jessica Wh	C	15th Ave Store 4p - 12a C Darren Williams	15th Ave Store 4p - 12a © Jessica White	15th Ave Store 4p - 12a C Jessica White
			15th Ave Store 4p - 12a Darren Williams	15th Ave S 4p - 12a Joel Lopez	¢		15th Ave Store 4p - 12a C Joel Lopez	
19th Ave Store								
Assistant Store Manager								
Customer Service Manager								
Donation Attendant								
Retail Merchandise Processor								
Retail Sales Associate								



### 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.

Goodwill	다. Dashboard	ShiftPlanning	<b>2</b> Leave	O Staff	Payroll		🔊	• 🖳 ا
ShiftPlanning	Day Week	2 Week 4 Week	< Today >					Publish [17]
Oct 2020 < > Su Mo Tu We Th Fr Sa	« Schedule Sear	ch						୧ 🖻 🔋 🗉
27 28 29 30 1 2 3	Oct 18, 2020 - Oct 24, 20	020 Sun, Oct 18	Mon, Oct 19	Tue, Oct 20	Wed, Oct 21	Thu, Oct 22	Fri, Oct 23	Sat, Oct 24
4 5 6 7 8 9 10 11 12 13 14 15 16 17	15th Ave Store							
18         19         20         21         22         23         24           25         26         27         28         29         30         31           1         2         3         4         5         6         7		15th Ave Store 8a - 4p Andrew Coleman	15th Ave Store 8a - 4p Casey Brown	15th Ave Store 8a - 4p Joel Lopez	15th Ave Store 8a - 4p Casey Brown	15th Ave Store 8a - 4p Andrew Coleman	15th Ave Store 8a - 4p Casey Brown	15th Ave Store 8a - 4p Darren Williams
Filters Advanced	Retail Sales Associate	15th Ave Store 4p - 12a Darren Williams	15th Ave Store 4p - 12a C Jessica White	15th Ave Store 8a - 4p Andrew Coleman	15th Ave Store 4p - 12a C Jessica White	15th Ave Store 4p - 12a C Darren Williams	15th Ave Store 4p - 12a C Jessica White	15th Ave Store 4p - 12a ℂ Jessica White
My Schedule     Schedule Overview				15th Ave Store 4p - 12a C Darren Williams	15th Ave Store 4p - 12a ⊂ Joel Lopez		15th Ave Store 4p - 12a ⊄ Joel Lopez	
Leave Schedule	40th St Store							
<ul> <li>✓ 15th Ave Store +</li> <li>☐ 19th Ave Store +</li> </ul>	Retail Merchandise Processor							
🗆 27th Dr RDC 👻	Retail Store Manager							
□ 40th St RDC -								
40th St Store *								
Assistant Store      Customer Service								
Donation Attenda								
Retail Merchandi								
Retail Sales Ass								
Retail Sales Cas								
Retail Store Man								
□ 43rd Ave Store +								
🗆 48th St Store 👻								
G1st Ave Store -								
🗆 64th St RDC 🗸								



### 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.'

0	t 20	20				
			We	Th	< Er	
			30			
			7			
			14			
_	a second	-	21			
16.00	1000		28			
			4			
	Filter er Sh		L	Adv	vanc	ed
A	II Shi	fts			2	Ŧ
_	note	Cit				

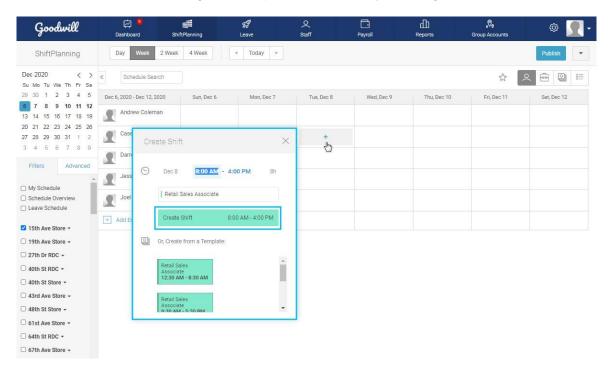
# **C** Humanity

### **Create a Shift**

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

Goodwill	Dashboard	ShiftPlanning	<b>Ø</b> Leave	Q Staff	Payroli		🔊	• 👤 🕸
ShiftPlanning	Day Week 2	Week 4 Week	< Today >					Publish
Dec 2020 < > Su Mo Tu We Th Fr Sa	« Schedule Search			1			☆	୧ 🖻 🚇 🗉
29 30 1 2 3 4 5	Dec 6, 2020 - Dec 12, 2020	Sun, Dec 6	Mon, Dec 7	Tue, Dec 8	Wed, Dec 9	Thu, Dec 10	Fri, Dec 11	Sat, Dec 12
6         7         8         9         10         11         12           13         14         15         16         17         18         19	Andrew Coleman			+				
20 21 22 23 24 25 26 27 28 29 30 31 1 2	Casey Brown			رام) (سا				
3 4 5 6 7 8 9	Darren Williams				_			
Filters Advanced	-							
My Schedule	Jessica White							
Schedule Overview     Leave Schedule	Joel Lopez							
15th Ave Store -	+ Add Employees							
🗆 19th Ave Store 🗸								
🗆 27th Dr RDC 👻								
🗆 40th St RDC 🔹								

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





The shift is created.

Goodwill	Dashboard :	ShiftPlanning	<b>S</b> Leave	Q Staff	Payroll	H Reports	🔊	• 👤 🕸
ShiftPlanning	Day Week 2 We	ek 4 Week	< Today >					Publish [1]
Dec 2020 < > Su Mo Tu We Th Fr Sa	« Schedule Search						☆ ,	♀   ⅲ
29 30 1 2 3 4 5	Dec 6, 2020 - Dec 12, 2020	Sun, Dec 6	Mon, Dec 7	Tue, Dec 8	Wed, Dec 9	Thu, Dec 10	Fri, Dec 11	Sat, Dec 12
6         7         8         9         10         11         12           13         14         15         16         17         18         19	Andrew Coleman							
20         21         22         23         24         25         26           27         28         29         30         31         1         2           3         4         5         6         7         8         9	Casey Brown			15th Ave Store Retail Sales Associ 8a - 4p				
Filters Advanced	Darren Williams							
My Schedule Schedule Overview	Jessica White							
Leave Schedule	Joel Lopez							
<ul> <li>15th Ave Store +</li> <li>19th Ave Store +</li> </ul>	+ Add Employees							

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.

Goodwill	Dashboard S	hiftPlanning	<b>S</b> Leave	Q Staff	Payroll		Rroup Accounts	• 👤 🕸
ShiftPlanning	Day Week 2 Wee	k 4 Week	< Today >					Publish [1]
Dec 2020 < > Su Mo Tu We Th Fr Sa	« Schedule Search						☆ ,	
29 30 1 2 3 4 5	Dec 6, 2020 - Dec 12, 2020	Sun, Dec 6	Mon, Dec 7	Tue, Dec 8	Wed, Dec 9	Thu, Dec 10	Fri, Dec 11	Sat, Dec 12
6         7         8         9         10         11         12           13         14         15         16         17         18         19	Andrew Coleman							
20         21         22         23         24         25         26           27         28         29         30         31         1         2           3         4         5         6         7         8         9	Casey Brown © 8.00		,	15th Ave Store Retail Sales Associa 8a - 4p				
Filters Advanced	Darren Williams							
My Schedule     Schedule Overview	Jessica White							
Leave Schedule	Joel Lopez							
<ul> <li>✓ 15th Ave Store ▼</li> <li>□ 19th Ave Store ▼</li> </ul>	+ Add Employees							



Click on the shift to open the Shift Edit Window.

Goodwill	Dashboard	ShiftPlanning	<b>s</b> Leave	Q Staff	Payroll		Sroup Accounts	۰ <u> ا</u>
ShiftPlanning	Day Week 2 We	ek 4 Week	< Today >					Publish [1]
Dec 2020 < > Su Mo Tu We Th Fr Sa	K Schedule Search						☆	<
29 30 1 2 3 4 5	Dec 6, 2020 - Dec 12, 2020	Sun, Dec 6	Mon, Dec 7	Tue, D	ec 8 Wed, De	c 9 Thu, Dec 1	0 Fri, Dec 11	Sat, Dec 12
6         7         8         9         10         11         12           13         14         15         16         17         18         19           20         21         22         23         24         25         26	Andrew Coleman	Retail Sales	Associate Click he	ere to add title		:		
27         28         29         30         31         1         2           3         4         5         6         7         8         9	Casey Brown © 8.00	🗂 Date	Dec 8, 2020 - De	ec 8, 2020	Search			
Filters Advanced	Darren Williams	🛇 Time	8:00 AM CO 4:00 PM	M 8h	Who's Working Casey Brown (8)			
My Schedule Schedule Overview	Jessica White	2 Repeat C	ptions	et Open Slots	□ Jessica White □ Darren Williams			
Leave Schedule	Joel Lopez	Breaks are au	N tomatically assigned to e	Manage Breaks	Andrew Coleman     Joel Lopez			
15th Ave Store •	+ Add Employees	to break rule.						
<ul> <li>□ 19th Ave Store +</li> <li>□ 27th Dr RDC +</li> </ul>		No Remo	ote Site Set					
□ 40th St RDC -		Notes						
40th St Store +				li				
□ 43rd Ave Store -		A politicati	1. obih		Cancel	Save & Close		
🗆 48th St Store 👻		🗎 Delete th	iis Shiit		Caricei	Save & Cluse		
G1st Ave Store -								

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



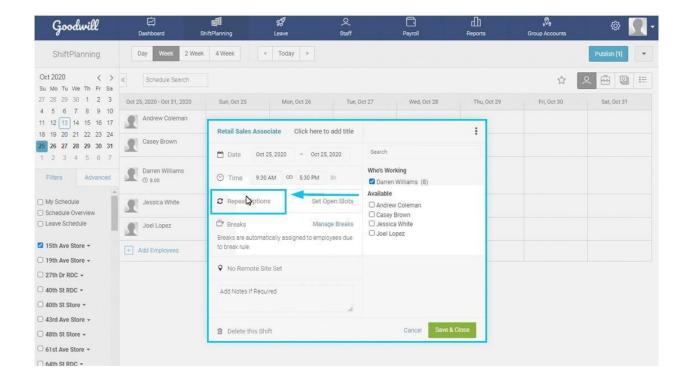
### Repeat Shifts (With/Without employees)

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'.



Retail Sales Associate Click here to add title	Repeat Shift
🛗 Date Oct 25, 2020 - Oct 25, 2020	Mon - Fri 🗸
O Time         9:30 AM         OD         5:30 PM         8h           C Repeat Options         Set Open Slots	Until: Nov 7, 2020
Breaks     Manage Breaks       Breaks are automatically assigned to employees due to break rule.          • No Remote Site Set        Add Notes If Required	Options: O Shift Time Only With Employees
4	Cancel Set to Repeat!

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

Goodwill	Dashboard	<b>∭</b> ShiftPlanning	<b>and</b> Leave	Q Staff	Payroll	ती Reports	Sroup Accounts	• 👤 🕸
ShiftPlanning	Day Week 2 Wee	k 4 Week <	Today >				1 Conflict	Publish [6]
Oct 2020 < > Su Mo Tu We Th Fr Sa	« Schedule Search						☆ 🔉	. 🙆 🕲 😑
27 28 29 30 1 2 3	Oct 25, 2020 - Oct 31, 2020	Sun, Oct 25	Mon, Oct 26	Tue, Oct 27	Wed, Oct 28	Thu, Oct 29	Fri, Oct 30	Sat, Oct 31
4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24	Andrew Coleman							
18         19         20         21         22         23         24           25         26         27         28         29         30         31	Casey Brown							
1 2 3 4 5 6 7 Filters Advanced	Darren Williams	15th Ave Store Retail Sales Associa 9:30a - 5:30p						
My Schedule Schedule Overview	Jessica White							
Leave Schedule	Joel Lopez		C					
<ul> <li>I 5th Ave Store ▼</li> <li>19th Ave Store ▼</li> </ul>	+ Add Employees							



### 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'.

Goodwill	년 Dashboard	ShiftPlanning	gg Leave	Q Staff	Payroll	山 Reports	<b>"♥</b> Group Accounts	• 📃 🐵
ShiftPlanning	Day Week 2 We	ek 4 Week	< Today >				1 Conflict	Publish [7]
Oct 2020 < > Su Mo Tu We Th Fr Sa	C Schedule Search						\$	. 🙆 😫 🖂
27 28 29 30 1 2 3	Oct 25, 2020 - Oct 31, 2020	Sun, Oct 25	Mon, Oct 26	Tue, Oct 2	7 Wed, Oct 28	Thu, Oct 29	Fri, Oct 30	Sat, Oct 31
4       5       6       7       8       9       10         11       12       13       14       15       16       17         18       19       20       21       22       23       24         25       26       27       28       29       30       31	Andrew Coleman ③ 8.00	Retail Sales		e to add title	Repeat Shift			
1 2 3 4 5 6 7	Casey Brown	🗂 Date	Oct 25, 2020 - Oct	25, 2020	Tue - Sat	~		
Filters Advanced	Darren Williams ① 48.00	<ul><li>Time</li><li>Repeat O</li></ul>	8:00 AM CO 4:00 PM		ntii: Nov 7, 2020	ve Store tales Associa \$:30p	15th Ave Store Retail Sales Associa 9:30a - 5:30p	
Schedule Overview     Leave Schedule	Jessica White	📅 Breaks	Ma	inage Breaks				
I5th Ave Store +	Joel Lopez	Breaks are aut to break rule.	tomatically assigned to en		ptions:			
<ul> <li>19th Ave Store +</li> <li>27th Dr RDC +</li> </ul>	+ Add Employees	♀ No Remo	ite Site Set	Description	Shift Time Only With Employees			
🗆 40th St RDC 👻		Notes						
40th St Store +				11				
43rd Ave Store +     48th St Store +					Cancel Set to R	lepeat!		
G 61st Ave Store +								

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

Goodwill	Dashboard	ShiftPlanning	gg Leave	Q Staff	Payroll		🔊	@ 🤦 -
ShiftPlanning	Day Week 2 We	ek 4 Week <	Today >				1 Conflict	Publish [12]
Oct 2020 < > Su Mo Tu We Th Fr Sa	« Schedule Search						<u>م</u>	
27 28 29 30 1 2 3	Oct 25, 2020 - Oct 31, 2020	Sun, Oct 25	Mon, Oct 26	Tue, Oct 27	Wed, Oct 28	Thu, Oct 29	Fri, Oct 30	Sat, Oct 31
4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24	Ø Empty Shifts			15th Ave Store Retail Sales Associa 8a - 4p	15th Ave Store Retail Sales Associa 8a - 4p			
25         26         27         28         29         30         31           1         2         3         4         5         6         7           Filters         Advanced	Andrew Coleman © 8.00	15th Ave Store Retail Sales Associa 8a - 4p						
My Schedule	Casey Brown							
Schedule Overview     Leave Schedule	Darren Williams © 48.00	15th Ave Store Retail Sales Associa 9:30a - 5:30p						
<ul> <li>☑ 15th Ave Store -</li> <li>□ 19th Ave Store -</li> </ul>	Jessica White							
<ul> <li>27th Dr RDC -</li> <li>40th St RDC -</li> </ul>	Joel Lopez							
- 40th St Store -	+ Add 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.

🗂 Date	Dec 8, 202	20 - Dec	8, 2020	Select Frequency	×
🛇 Time	8:00 AM	යා 4:00 PM	8h	Select Frequency  Every 'n' Day/Week	
C Repeat	Options	Se	t Open Slots	'n' On, 'n' Off Custom Cycle	_
Breaks Breaks are a to break rule	15	Ma assigned to en	anage Breaks nployees due	Daily Weekly Monthly (same date) Mon - Thu Mon - Fri	
No Ren	note Site Se	t		Mon - Sat Tue - Sat Sat - Sun	
Notes			7	Mon, Wed, Fri Tues, Thur Fri - Tues	

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.* 



Retail Sales Associate C	lick here to add title	Repeat Shift	
🗂 Date Nov 15, 2020	- Nov 15, 2020	SSOOSOSOSS	Cancel
© Time 8:00 AM 00	4:00 PM 8h	S = Shift, O = Day OFF	_
2 Repeat Options	Set Open Slots	Until: Dec 26, 2020	
Breaks Breaks are automatically assign to break rule.	Manage Breaks ed to employees due		
No Remote Site Set		Options: O Shift Time Only With Employees	
Notes	11		b
		Cancel	Set to Repeat!

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.

Goodwill	더 Dashboard S	hiftPlanning	gg Leave	Q Staff	Payroll Reports	Group Accounts	• 👤 🐵
ShiftPlanning	Day Week 2 Week	4 Week	< Today 3	•			Publish [16]
Nov 2020 <>	« Schedule Search						
1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21	Nov 15, 2020 - Dec 12, 2020	Sun Mon Tue We Nov Nov Nov No 15 16 17 18	v Nov Nov N	ov Nov Nov Nov Nov Nov	V Fri Sat Nov Nov Nov Dec Dec D 27 28 29 30 1 2 3	Dec Dec Dec Dec Dec	Tue Wed Thu Fri Sat Dec Dec Dec Dec Dec 8 9 10 11 12
22         23         24         25         26         27         28           29         30         1         2         3         4         5	Andrew Coleman						
6 7 8 9 10 11 12. Filters Advanced	Casey Brown ① 128.00	15 15 Re Re 8a 8a 4p 4p	15 11 Re Ri 8a 8i 4p 4j	5 15 15 15 15 e Re Re Re Re a 8a 8a 8a 8a 8a p 4p 4p 4p 4p	Rei Rei R 8a 8a 8	15 15 15 15 Re: Re: Re: 8a 8a 8a 8a 4p 4p 4p 4p	15 15 Ret Ret 8a 8a 4p 4p
My Schedule Schedule Overview	Darren Williams						
Leave Schedule	Jessica White		China Chi	)			
<ul> <li>15th Ave Store •</li> <li>19th Ave Store •</li> </ul>	Joel Lopez						
🗆 27th Dr RDC 🕶							



## 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.

- 回 1 28 Q Staff db .0. Goodwill **@**} Dashbo Leave Payroll Reports Group Acco Day Week 2 Week 4 Week ShiftPlanning < Today > Oct 2020 < > « 2 Schedule Search 10 Su Mo Tu We Th Fr Sa 27 28 29 30 1 2 3 Oct 18, 2020 - Oct 24, 2020 Sun, Oct 18 Mon, Oct 19 Tue, Oct 20 Wed, Oct 21 Thu, Oct 22 Fri, Oct 23 Sat, Oct 24 4 5 6 7 8 9 10 15th Ave Store Retail Sales As 15th Ave Store Retail Sales Ass 5th Ave Store letail Sales Assoc 11 12 13 14 15 16 17 Andrew Coleman es Asso 18 19 20 21 22 23 24 8a - 4p 8a - 4p 8a - 4p 25 26 27 28 29 30 31 15th Ave Store Retail Sales Asso 8a - 4p 1 2 3 4 5 6 7 15th Ave Store 5th Ave Store Casey Brown Retail Sales Ass etail Sales Asso 8a - 4p 8a - 4p Filters Advanced Retail Sales Ass C 4p - 12a 15th Ave Store Retail Sales Ass C 4p - 12a 15th Ave Store Retail Sales Assi © 4p - 12a 15th Ave St Darren Williams () 32.00 My Schedule Ba - 4p Schedule Overview C Leave Schedule 5th Ave Store etail Sales Ass C 5th Ave Store th Ave Store tail Sales Assi C Sth Ave Store Jessica White Z 15th Ave Store + 4p - 12a 4p - 12a 4p - 12a 4p - 12a Retail Sales Ass.. 15th Ave Store Retail Sales Asso 4p - 12a ith Ave Store 5th Ave Store 19th Ave Store -Joel Lopez ③ 24.00 tetail Sales Assi C Retail Sales Ass 8a - 4p 4p - 12a 27th Dr RDC -□ 40th St RDC -+ Add Employees 🗆 40th St Store 🕶 43rd Ave Store -A8th St Store + 🗆 61st Ave Store 🝷 G 64th St RDC -🗆 67th Ave Store 🗸 75th Ave Store -□ 7th Ave Store -🗆 7th St Store 🕶 91st Ave Store -99th Ave Store -
- 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'.

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ublish Schedule	×
Publish shifts in the current time Oct 18, 2020 - Oct 24, 2020	eline
Publish: 17 Republish: 0 Conflicts: 0	
Notification Options	
<ul> <li>Don't notify Employees</li> <li>Send Notifications to Employees</li> <li>Send Notifications to Employees</li> </ul>	
Include custom message in Notificat	tion:
	/i
	Publishing shifts

• Displayed shifts in the selected timelines are published.

# **C** Humanity

Goodwill	Dashboard	ShiftPlanning	gg Leave	Q Staff	Payroll		Sroup Accounts	@ <u> -</u>
ShiftPlanning	Day Week 2 We	ek 4 Week <	Today >					Publish
Oct 2020 < > Su Mo Tu We Th Fr Sa	« Schedule Search		17 sl	nifts published.	-		- 1	
27 28 29 30 1 2 3	Oct 18, 2020 - Oct 24, 2020	Sun, Oct 18	Mon, Oct 19	Tue, Oct 20	Wed, Oct 21	Thu, Oct 22	Fri, Oct 23	Sat, Oct 24
4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24	Andrew Coleman © 24.00	15th Ave Store Retail Sales Associa 8a - 4p		15th Ave Store Retail Sales Associa 8a - 4p		15th Ave Store Retail Sales Associa 8a - 4p		
25 26 27 28 29 30 31 1 2 3 4 5 6 7 Filters Advanced	Casey Brown		15th Ave Store Retail Sales Associa 8a - 4p		15th Ave Store Retail Sales Associa 8a - 4p		15th Ave Store Retail Sales Associa 8a - 4p	
My Schedule Schedule Overview	Darren Williams ③ 32.00	15th Ave Store Retail Sales Ass C a 4p - 12a		15th Ave Store Retail Sales Ass C a 4p - 12a		15th Ave Store Retail Sales Assi C a 4p - 12a		15th Ave Store Retail Sales Associa 8a - 4p
Leave Schedule     15th Ave Store •     Retail Sales Ass.	Jessica White		15th Ave Store Retail Sales Ass C a 4p - 12a		15th Ave Store Retail Sales Assi C a 4p - 12a		15th Ave Store Retail Sales Assi C a 4p - 12a	15th Ave Store Retail Sales Assi C a 4p - 12a
<ul> <li>19th Ave Store -</li> <li>27th Dr RDC -</li> </ul>	Joel Lopez ① 24.00			15th Ave Store Retail Sales Associa 8a - 4p	15th Ave Store Retail Sales Assi € a 4p - 12a		15th Ave Store Retail Sales Assi ( a 4p - 12a	
□ 40th St RDC + □ 40th St Store +	+ Add Employees							

### **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'.

Goodwill	Dashboard	ShiftPlanning	gg Leave	Q Staff	Payroll		Sroup Accounts	• 👤 🕸
ShiftPlanning	Day Week 2 We	ek 4 Week	Today >					Publish [1]
Oct 2020 < > Su Mo Tu We Th Fr Sa	« Schedule Search						\$ P	
27 28 29 30 1 2 3	Oct 18, 2020 - Oct 24, 2020	Sun, Oct 18	Mon, Oct 19	Tue, Oct 20	Wed, Oct 21	Thu, Oct 22	Fri, Oct 23	Sat, Oct 24
4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31	Andrew Coleman © 24,00	15th Ave Store Retail Sales Associa 8a - 4p	Needs to be Republished	15th Ave Store Petail Sales Associa 8a - 4p		15th Ave Store Retail Sales Associa 8a - 4p		
1 2 3 4 5 6 7 Fitters Advanced	Casey Brown © 22.00		15th Ave Store Tail Sales Associa - 2p +		15th Ave Store Retail Sales Associa 8a - 4p		15th Ave Store Retail Sales Associa 8a - 4p	
My Schedule	Darren Williams ③ 32.00	15th Ave Store Retail Sales Ass C a 4p - 12a		15th Ave Store Retail Sales Ass C a 4p - 12a		15th Ave Store Retail Sales Assi C a 4p - 12a		15th Ave Store Retail Sales Associa 8a - 4p
<ul> <li>☑ 15th Ave Store ▲</li> <li>☑ Retail Sales Ass</li> </ul>	Jessica White		15th Ave Store Retail Sales Ass C a 4p - 12a		15th Ave Store Retail Sales Assi ( a 4p - 12a			15th Ave Store Retail Sales Assr C a 4p - 12a
□ 19th Ave Store + □ 27th Dr RDC +	Joel Lopez ① 24.00			15th Ave Store Retail Sales Associa 8a - 4p	15th Ave Store Retail Sales Assi C a 4p - 12a		15th Ave Store Retail Sales Assi C a 4p - 12a	
□ 40th St RDC + □ 40th St Store +	+ Add Employees							



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

	fts in the curr 10 - Oct 24, 20		e
Publish: 0 Republish: 1 Conflicts: 0			
Notification	n Options		
Send No	ify Employees tifications to En tifications to En	nployees nployees & I	/anagers
Include cust	om message in	Notification	6
			1

### Shift is re-published.

Goodwill	Dashboard :	shiftPlanning	gg Leave	O Staff	Payroll		Group Accounts	• 👤 🕸
ShiftPlanning	Day Week 2 Wee	k 4 Week <	Today >					Publish
Oct 2020 < > Su Mo Tu We Th Fr Sa	« Schedule Search	]	1 sh	ift republished.	-	_	· 🕁 🔎	
27 28 29 30 1 2 3	Oct 18, 2020 - Oct 24, 2020	Sun, Oct 18	Mon, Oct 19	Tue, Oct 20	Wed, Oct 21	Thu, Oct 22	Fri, Oct 23	Sat, Oct 24
4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31	Andrew Coleman © 24.00	15th Ave Store Retail Sales Associa 8a - 4p		15th Ave Store Retail Sales Associa 8a - 4p		15th Ave Store Retail Sales Associa 8a - 4p		
1 2 3 4 5 6 7 Filters Advanced	Casey Brown © 22.00		15th Ave Store Retail Sales Associa 8a - 2p		15th Ave Store Retail Sales Associa 8a - 4p		15th Ave Store Retail Sales Associa 8a - 4p	
My Schedule	Darren Williams © 32.00	15th Ave Store Retail Sales Ass € a 4p - 12a		15th Ave Store Retail Sales Ass C a 4p - 12a		15th Ave Store Retail Sales Assi C a 4p - 12a		15th Ave Store Retail Sales Associa 8a - 4p
Leave Schedule  15th Ave Store •  Retail Sales Ass.	Jessica White © 24.00		15th Ave Store Retail Sales Ass C a 4p - 12a		15th Ave Store Retail Sales Assi © a 4p - 12a			15th Ave Store Retail Sales Assi € a 4p - 12a
□ 19th Ave Store + □ 27th Dr RDC +	Joel Lopez © 24.00			15th Ave Store Retail Sales Associa 8a - 4p	15th Ave Store Retail Sales Assi C a 4p - 12a		15th Ave Store Retail Sales Assr C a 4p - 12a	
40th St RDC +	+ Add Employees							

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### 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.

Goodwill	Dashboard	ShiftPlanning	ත්ති Leave	O Staff	Payroll	Reports	<b>"♡</b> ₀ Group Accounts	• 👤 ه
ShiftPlanning	Day Week 2 Wee	ek 4 Week <	Today >					Publish
Nov 2020 < > Su Mo Tu We Th Fr Sa	« Schedule Search						☆	. 🖻 🗐 🗄
1 2 3 4 5 6 7	Nov 29, 2020 - Dec 5, 2020	Sun, Nov 29	Mon, Nov 30	Tue, Dec 1	Wed, Dec 2	Thu, Dec 3	Fri, Dec 4	Sat, Dec 5
8 9 10 11 12 13 14 15 16 17 18 19 20 21	Andrew Coleman							
22 23 24 25 26 27 28 29 30 1 2 3 4 5	Casey Brown							
6 7 8 9 10 11 12 - Filters Advanced	Darren Williams							
-	Jessica White							
My Schedule Schedule Overview Leave Schedule	Joel Lopez							
☑ 15th Ave Store ▼	+ Add Employees							
19th Ave Store -								
🗆 27th Dr RDC 👻								
🗆 40th St RDC 👻								
🗆 40th St Store 🝷								
🗆 43rd Ave Store 👻								
🗆 48th St Store 👻								
🗆 61st Ave Store 👻								
🗆 64th St RDC 🕶								
· · · · · · · · · · · · · · · · · · ·								



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

Goodwill	Dashboard	ShiftPlanning	12 Leave	Q Staff	Payroll	C]] Reports	<b>,0</b> Group Accounts	• 👤 ا
ShiftPlanning	Day Week 2 Wee	ek 4 Week	< Today >					Publish
Nov 2020 < > Su Mo Tu We Th Fr Sa	Schedule Search							Print & Save
1 2 3 4 5 6 7	Nov 29, 2020 - Dec 5, 2020	Sun, Nov 29	Mon, Nov 30	Tue, Dec 1	Wed, Dec 2	Thu, Dec 3	Fri, Dec 4	Copy Schedule
8 9 10 11 12 13 14 15 16 17 18 19 20 21	Andrew Coleman							👬 Import Schedule
22 23 24 25 26 27 28 29 30 1 2 3 4 5	Casey Brown							O Schedule Sync
6 7 8 9 10 11 12	Darren Williams							• Clear Schedule
Filters Advanced								🖾 Enable Ghost Shifts 🗸
My Schedule	Jessica White							③ Show Budget Mode
Schedule Overview Leave Schedule	Joel Lopez							Show Old Shift Creation
✓ 15th Ave Store ▼	+ Add Employees							
□ 19th Ave Store -								
🗆 27th Dr RDC 🗕								
🗆 40th St RDC 🕶								
□ 40th St Store +								
🗆 43rd Ave Store 👻								
🗆 48th St Store 👻								
🗆 61st Ave Store 👻								
G 64th St RDC -								

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

Goodwill	Dashboard	ShiftPlanning	<b>ع</b> ی Leave	Q Staff	Payroll		🔊	۵ 🤦
ShiftPlanning	Day Week 2 We	eek 4 Week <	Today >					Publish
Nov 2020 < > Su Mo Tu We Th Fr Sa	<						습	♀  ◙ ⅲ
1 2 3 4 5 6 7	Nov 29, 2020 - Dec 5, 2020	Sun, Nov 29	Mon, Nov 30	Tue, Dec 1	Wed, Dec 2	Thu, Dec 3	Fri, Dec 4	Sat, Dec 5
8 9 10 11 12 13 14 15 16 17 18 19 20 21	Andrew Coleman							
12     23     24     25     26     27     28       19     30     1     2     3     4     5	Casey Brown							
6 7 8 9 10 11 12	Darren Williams							
Filters Advanced	Jessica White							
My Schedule Schedule Overview Leave Schedule	Joel Lopez							
I 15th Ave Store •	+ Add Employees							
19th Ave Store 🗸								
27th Dr RDC 👻								
40th St RDC +								
🗋 40th St Store 👻								
☐ 43rd Ave Store -	Z							
🗌 48th St Store 👻								
🗆 61st Ave Store 👻	Daily va. Weekly Budget							
G4th St RDC +	week: hrs \$	hrs \$	hrs \$	hrs S	hrs S	hrs \$	hrs S	hrs S



### 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.

Goodwill	년 Dashboard	ShiftPlanning	<b>S</b> Leave	O Staff	Payroll		😡 Group Accounts	@ <u> </u> -
ShiftPlanning	Day Week 2 Wee	k 4 Week <	Today >					Publish [4]
Nov 2020 < > Su Mo Tu We Th Fr Sa	« Schedule Search							
1 2 3 4 5 6 7	Nov 29, 2020 - Dec 5, 2020	Sun, Nov 29	Mon, Nov 30	Tue, Dec 1	Wed, Dec 2	Thu, Dec 3	Fri, Dec 4	Sat, Dec 5
8 9 10 11 12 13 14 15 16 17 18 19 20 21	Andrew Coleman							
22         23         24         25         26         27         28           29         30         1         2         3         4         5           6         7         8         9         10         11         12	Casey Brown ③ 32.00 🖽 \$1280	15th Ave Store Retail Sales Associate 8a - 4p		15th Ave Store Retail Sales Associate 8a - 4p	15th Ave Store Retail Sales Associate 8a - 4p	15th Ave Store Retail Sales Associate 8a - 4p	9	
Filters Advanced	Darren Williams ③ 32.00	15th Ave Store Retail Sales Associate 8a - 4p		15th Ave Store Retail Sales Associate 8a - 4p	15th Ave Store Retail Sales Associate 8a - 4p	15th Ave Store Retail Sales Associate 8a - 4p	9	
Schedule Overview Leave Schedule	Jessica White 3 32.00	15th Ave Store Retail Sales Associate 8a - 4p		15th Ave Store Retail Sales Associate 8a - 4p	15th Ave Store Retail Sales Associate 8a - 4p	15th Ave Store Retail Sales Associate 8a - 4p	2	
I 15th Ave Store ▼ 19th Ave Store ▼	Joel Lopez							
27th Dr RDC +	+ Add Employees							
□ 40th St RDC ▼								
□ 43rd Ave Store -	Zar Chester Strategic Strategics	6 () 24 n/o				③ 24 / 20 120		
□ 48th St Store +	# 1280.00 / 2000 64 9 Daily vs. Weekly Budget		⊙ / 100 <b>0</b> %	③ 24 / 100 24 %	© 24/100 24%		% () / 100 0	% () / 100 0%
□ 61st Ave Store -	owny re. Heenry buuger		🧀 🧀 / 2000 🛛 0 %	A 320 / 2000 16 %	A 320 / 2000 16 %	Ø 320 / 2000 16	% 📣 / 2000 0	% 🖉 / 2000 0%
🗆 64th St RDC 👻	week: 100hrs 2000	hrs \$	hrs S	hrs \$	hrs \$	20 hrs 0 \$	hrs S	hrs \$

### **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.

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Goodwill	더 Dashboard	ShiftPlanning		💋 Leave			) Staff				Payroll			Repo			Gr	No Dup Acc			] 4	Ô	•
ShiftPlanning	Day Week 2 We	ek 4 Week	< To	oday >																	Publis	h [1]	٠
Dec 2020 < > Su Mo Tu We Th Fr Sa	« Schedule Search																		☆	<u>,</u>		0	E
29 30 1 2 3 4 5	Tue, Dec 1, 2020	12 1	2 3	4	5	6	7	8	9	10	11	12	1	2	3	4	5	б	7	8	9	10	11
6 7 8 9 10 11 12 13 14 15 16 17 18 19	Andrew Coleman	410									. 651	. 196											PM
20     21     22     23     24     25     26       27     28     29     30     31     1     2	Casey Brown								Ret	ail Sales	Associ	ate 8:00a	am - 4:00	Opm									
3 4 5 6 7 8 9	Darren Williams								Ret	ail Sales	Associ	ate 8:00a	am - 4:00	Opm									
Filters Advanced	Jessica White								Ret	ail Sales	Associ	ate 8:00a	am - 4:00	Dpm									
My Schedule	Joel Lopez																						
Schedule Overview Leave Schedule	+ Add Employees																						
15th Ave Store •																							
🗆 19th Ave Store 🕶																							
🗆 27th Dr RDC 👻																							
□ 40th St RDC +																							
🗆 40th St Store 👻																							
□ 43rd Ave Store -																							
🗆 48th St Store 👻	02	4							ä	0	0				-								
🗆 61st Ave Store 🕶	¢ 3.	20						3	3	3	3	3	3	3	3								
🗆 64th St RDC 🕶		hrs \$																					

### 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.



Goodwill	Dashboard	ShiftPlanni	ing	Leave		오 ‱#	Payrol		d) Reports		Neccounts								S 1
Reports																			
I Reports	Budget Between: Nov 29,	2020 - Dec 5	5, 2020																
istom Reports		10																	
edule	Timeline	* 10	w 29, 2020	tec 5, 2020															
edule Summary	All Locations	*	Apply																
ition Summary																	enter n	P Save as CS	
ition Summary Cost																	Print Report	[] Save as CS	/ [] Save as >
rs Scheduled		Nov 29, 2	020		Nov 30, 21	020		Dec 1, 202	20		Dec 2, 203	10		Dec 3, 203	20		Dec 4, 20	20	
get	Locations	Actual	Percentage	Difference	Actual	Percentage	Difference	Actual	Percentage	Difference	Actual	Percentage	Difference	Actual	Percentage	Difference	Actual	Percentage	Difference
Peak Hours		Budget	recentage	Difference	Budget	reconage	Uniterence	Budget	recentage	Difference	Budget	recentage	University	Budget	recentage	omerence	Budget	recentage	Dimension
ts Scheduled		24.00 / 0.00 h						24.00 / 0.00 h			24.00 / 0.00 h			24.00 / 0.00 h					
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n Shifts		24.00 /						24.00 /			24.00 /			24.00 / 20.00					
oyee	15th Ave Store	0.00 h 320.00	n/a	-24.00 h	n/a	n/a	n/a	0.00 h 320.00	n/a	-24.00 h	0.00 h 320.00	n/a	-24.00 h	h	120.00 %	-4.00 n	n/a	n/a	n/a
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iversary																			
ations	Retail Sales	24.00 / 0.00 h	n/a	-24.00 h				24.00 / 0.00 h	n/a	-24.00 h	24.00 / 0.00 h	n/a	-24.00 h	24.00 / 0.00 h	n/a	-24.00 h			
ition Summary	Associate	320.00 / 0.00	n/a	-320.00 \$	n/a	n/a	n/a	320.00 / 0.00	n/a	-320.00 \$	320.00 / 0.00	n/a	-320.00 \$	320.00 / 0.00	n/a	-320.00 \$	n/a	n/a	n/a
vallability		2						s			s			\$					
rly Availability																			
is Expiration																			

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

	is Week	*	06/25/2019	07/01/2019	
I Remote Sites  All Locations  Apply					



### **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.

Goodwill	Dashboard	ShiftPlanning	<b>g</b> Leave	O Staff	Payroll		Group Accounts	• 👤 🕸				
Reports												
All Reports	Schedule Summary		per employee by position,	location & day								
Custom Reports												
Schedule	Position Summary View the number of hours scheduled by position and grouped by location.											
Schedule Summary	Hours Scheduled											
Position Summary	View the number of	View the number of hours scheduled for employees during a certain time period.										
Position Summary Cost	Budget View budget agains	st scheduled shifts for eac	h location during a certair	time period								
Hours Scheduled	field budget agains		in location daming a certain	time period.								
Budget	Shifts Scheduled View the Shifts scheduled for employees during a certain time period.											
Daily Peak Hours	Shift Exchanges											
Shifts Scheduled		shift trades, and pick-ups	during a certain time peri	od by employee								
Crib Sheet	Open Shifts											
Shift Exchanges		open shifts. Useful for see	ing where you still have er	npty slots.								
Open Shifts	Availability											
Employee	View the availability	of employees during a ce	ertain time period.									
Attendance	Unavailability View the unavailabi	lity of employees during a	certain time period.									
Anniversary			unterstation constan PUT (1997)									
Vacations	Hourly Availability View the number of	available employees even	ry hour in a day.									
Vacation Summary	Crib Sheet											
Availability		ib-sheet for any given day	. Useful for keeping track	of breaks/hours offline.								
Unavailability	Attendance Statisti	cs										



### **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

Goodwill	Dashboard	ShiftPlanning	<b>S</b> Leave	Q Staff	Payroll		🔊	- 🖳 🕸
Reports								
All Reports								
Custom Reports	This Week	<ul> <li>Nov 8, 2020</li> </ul>	0 Nov 14, 2020	O Include Employe	e Id 🗆 Include Employee	Eid		
Schedule	All Locations	<ul> <li>Select Pos</li> </ul>	sitions 💌 S	elect Employees	Select Skills	▼ Options	- Apply	
Schedule Summary								
Position Summary								
Position Summary Cost					V8			
Hours Scheduled				Please se	lect filters above.			
Budget								
Daily Peak Hours								
Shifts Scheduled							₹2	
Crib Sheet								
Shift Exchanges								
Open Shifts								

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