



User Manual

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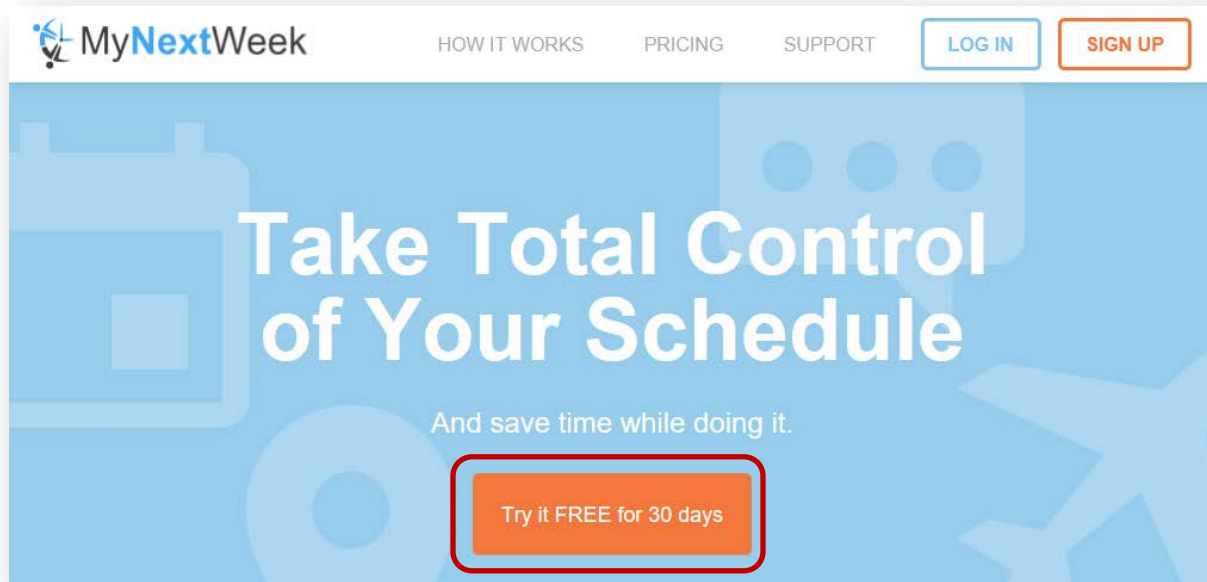
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Sign Up

From the home page, click on "Try It For Free" or "Sign Up".



Enter your email address and create a password. Confirm your password and respond to the captcha then click "**Create Account**".

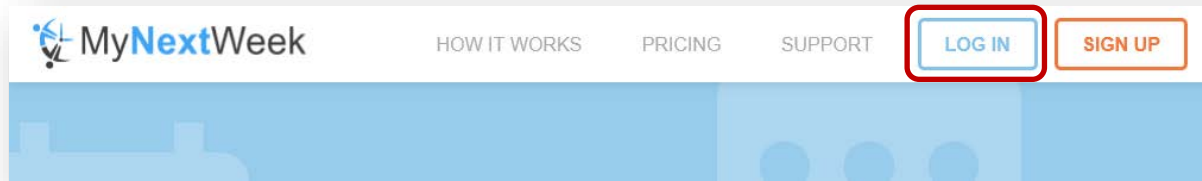
The screenshot shows the MyNextWeek sign-up form. At the top, there is a navigation bar with the MyNextWeek logo and a "Sign In" link. Below the navigation bar, there are two tabs: "Sign in" and "Create new account". The "Create new account" tab is selected. The form contains three input fields: "Email Address *" with the value "jack@myrestaurant.com", "Password *" with masked characters, and "Confirm Password *" with masked characters. Below the input fields, there is a checkbox labeled "I'm not a robot" and a reCAPTCHA logo. At the bottom of the form, there is a blue button labeled "Create Account" which is highlighted with a red rectangular border.

At this point, you can [create a new organization](#).

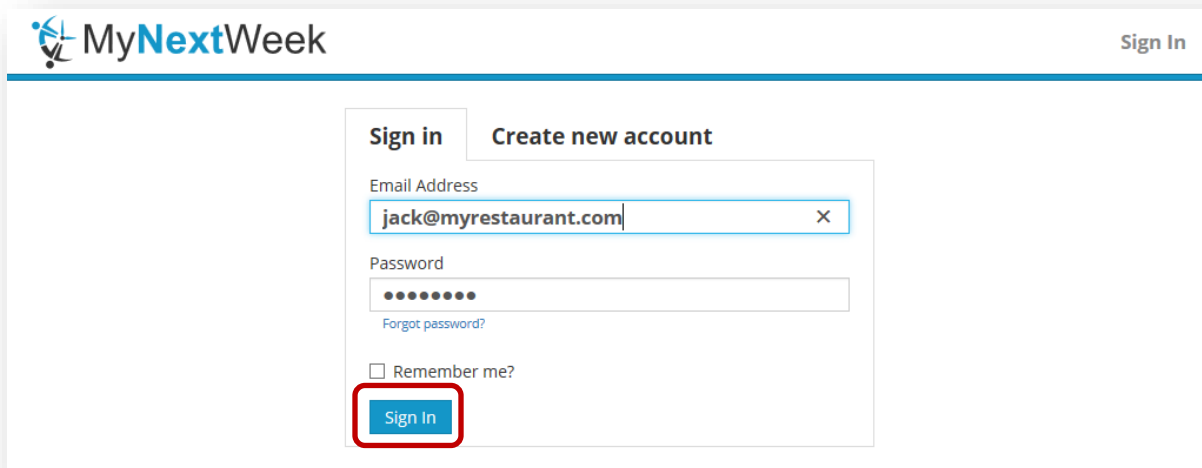
Note: If your organization already has an account, you can [join your existing organization](#) using the confirmation number you received in your invitation email.

Sign In

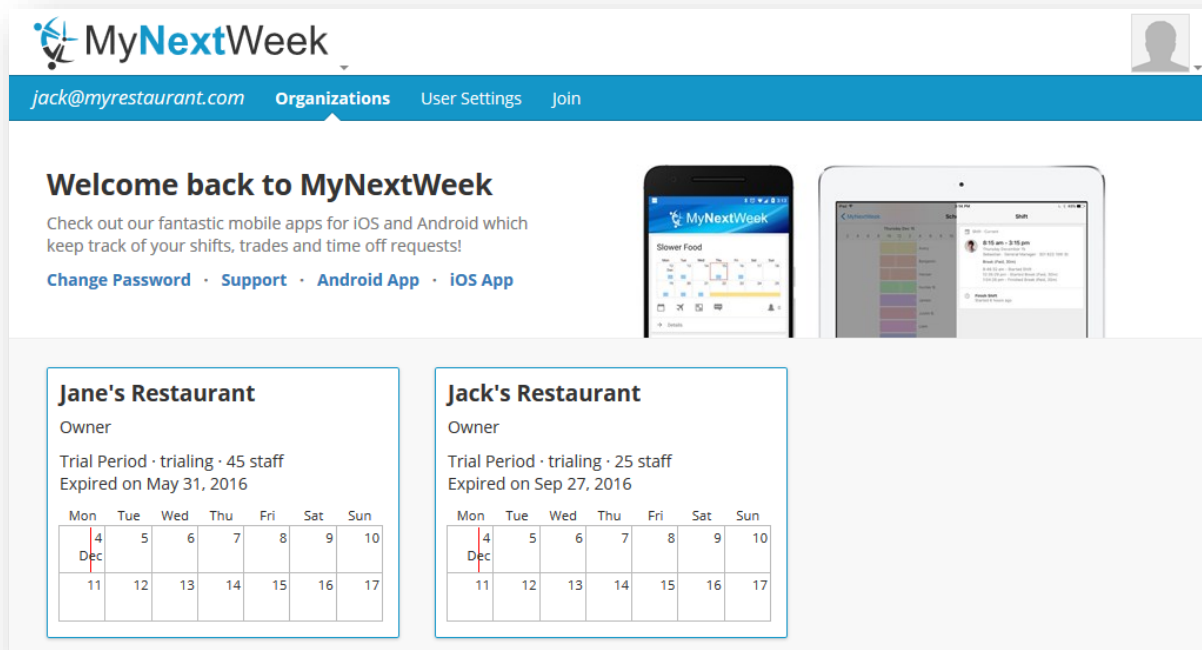
From the home page, click on **"Log In"**.



When the sign-in page opens, enter your email address and password, then click **"Sign In"**. Email invitations also direct staff members to this page.

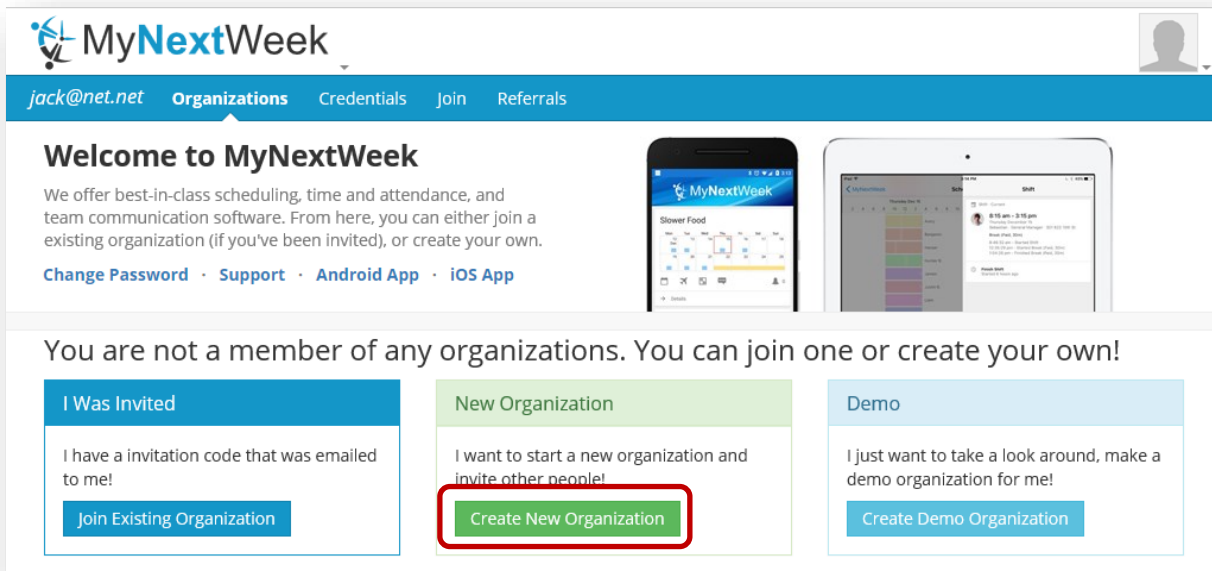


Click on the card for the organization (most users will only have one organization).



Create a New Organization

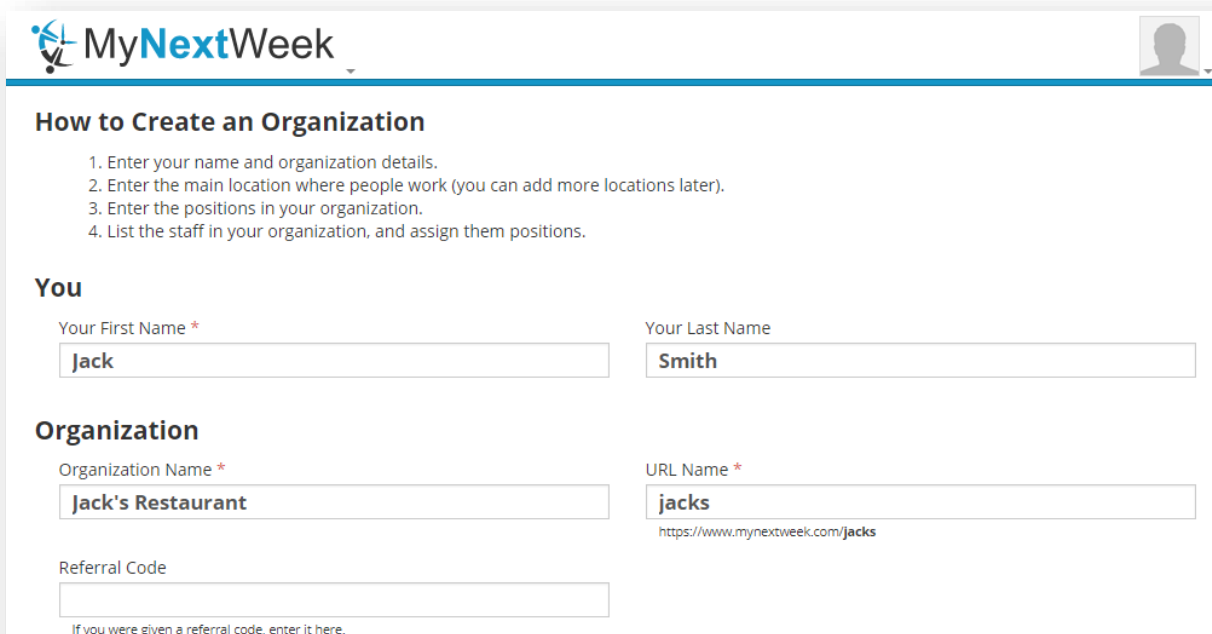
Once you log in for the first time, you have the option to join an existing organization or create a new organization. Click on the **"Create New Organization"** button to create an organization.



The screenshot shows the MyNextWeek login page. The user is logged in as 'jack@net.net'. The page has a blue header with the MyNextWeek logo and navigation links: Organizations, Credentials, Join, and Referrals. Below the header, there is a 'Welcome to MyNextWeek' section with a description of the software and links for 'Change Password', 'Support', 'Android App', and 'iOS App'. To the right of the text are images of the app on a smartphone and a tablet. Below this, a message states: 'You are not a member of any organizations. You can join one or create your own!'. There are three main options: 'I Was Invited' (with a 'Join Existing Organization' button), 'New Organization' (with a 'Create New Organization' button highlighted by a red box), and 'Demo' (with a 'Create Demo Organization' button).

Enter your first and last names, the name of your organization, and a short **URL Name**. The URL unique name is the name that designates your organization within **MyNextWeek.com**.

Note: The URL name must be 16 characters or less. It cannot contain spaces or special characters, however it may contain numbers.



The screenshot shows the 'How to Create an Organization' form. It includes a list of steps: 1. Enter your name and organization details. 2. Enter the main location where people work (you can add more locations later). 3. Enter the positions in your organization. 4. List the staff in your organization, and assign them positions. Below the steps, there are two sections: 'You' and 'Organization'. The 'You' section has fields for 'Your First Name' (filled with 'Jack') and 'Your Last Name' (filled with 'Smith'). The 'Organization' section has fields for 'Organization Name' (filled with 'Jack's Restaurant'), 'URL Name' (filled with 'jacks'), and 'Referral Code' (empty). Below the 'Referral Code' field, there is a note: 'If you were given a referral code, enter it here.' The URL 'https://www.mynextweek.com/jacks' is displayed below the 'URL Name' field.

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In the **"Address Search"** box, start typing the address for your main location. The autocomplete will show locations that match your entry; click on the correct address to automatically fill in the rest of the information. Typically, the time zone will be set automatically based on your entered location. Alternatively, you may manually enter your address information. If you wish, press the **"Check Location on Map"** button to display the map location.

Enter the phone number for your main office.

Add positions for your business. If you wish, you can select a pre-defined business template to automatically create typical positions for common business types.

Add your staff. Optionally, you can press **"Add Demo Staff"** to generate random staff members for testing after the positions have been created.

Press the  button to add additional items, or press a  button to remove an item. When finished, press the **"Create Organization"** button to create your organization.

Main Location

Address Search
123 5th Avenue North, Nashville, TN, United States

Street Address *
123 5th Ave N

City
Nashville

State/Province
TN

Country
United States

Phone
555-555-5555

Time Zone
(-06:00) America/Chicago

Check Location on Map

Positions

Positions describe the qualifications required for shifts. Organizations require at least one position.

Predefined Business Template
Blank

 Position Name

 Manager

 Add Position

Staff

Staff can take any shift with a position they're qualified for. Staff without any positions will be unable to fill shifts.

 Name

 Positions

Jack Smith

x Manager

 Add Staff Member

Add Demo Staff

Create Organization

Join an Organization

Once you log in for the first time, you have the option to join an existing organization or create a new organization.

To join an existing organization, create a new account and press **"Join Existing Organization."** Alternatively, you can log in with the link from your invitation email.

Enter the user code provided in your email, then click on the **"Join Organization"** button to join the organization.

MyNextWeek

jack@net.net Organizations Credentials **Join** Referrals

Join Organization

You should have received an email like this:

From: MyNextWeek
To: You
Subject: Invitation from [redacted] to [redacted]

[redacted] invited you to setup your [redacted] account on MyNextWeek!

You're a click away from being able to set your work availability, see your upcoming schedule, and much more!

[Join Acme Inc.](#)

If, for some reason the above link doesn't work, you can use the following invitation code: [redacted] < Paste this below

You can paste that code into this page:
<https://www.mynextweek.com/user/join>

Copy the code from the email and paste it in this box.

Code *

[Join Organization](#)

Help Videos

After creating a new organization, the help video menu will be displayed. These videos will walk you through performing basic and advanced tasks in MyNextWeek. To close the help videos, click the red  icon in the upper right corner. These videos can be accessed at any time from the schedule editor using the question mark icon .



Getting Started

Home Staff Schedules Settings

MyNextWeek

...

Introduction

Welcome to the course on creating schedules with MyNextWeek.

0:00 / 0:42

Title	Length
Introduction	0:45
Schedule Editor Basics	5:28
Positions	2:20
Availability	3:12
Schedule Editor Advanced	10:37

Keyboard Shortcuts

Cut	Ctrl-X
Copy	Ctrl-C
Paste	Ctrl-V
Undo	Ctrl-Z
Redo	Ctrl-Y
Select All	Ctrl-A
Delete	Del

[Back to the Editor!](#)

Set My Initial Availability (Work Schedule Preferences)

Once you log in, you will be prompted to set your availability. The following options can be set on for each time block on the availability screen:

-  **Prefer to work** (The algorithm will attempt to assign shifts during these periods.)
-  **No preference**
-  **Prefer not to work** (The algorithm will try to avoid assigning shifts during these periods.)
-  **Cannot work** (The algorithm will never assign shifts during these periods.)

Note: Managers can still create shifts manually during "Cannot work" periods.

Jack's Restaurant



Hello John Smith!

Welcome to MyNextWeek!

First things first: in order to make the best schedules possible, we need to know your availability. Below, you'll see a grid that represents a work week. As demonstrated in the instructions below you're able to set when you can't work, as well as color the time you *can* work with your preferences (Prefer to work, Prefer not to work, or No preference).

	12a	1	2	3	4	5	6	7	8	9	10	11	12p	1	2	3	4	5	6	7	8	9	10
Mon	Red	Red	Red	Red	Red	Red	Red	Orange	Orange	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green
Tue	Red	Red	Red	Red	Red	Red	Red	Orange	Orange	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green
Wed	Red	Red	Red	Red	Red	Red	Red	Orange	Orange	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green
Thu	Red	Red	Red	Red	Red	Red	Red	Orange	Orange	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green
Fri	Red	Red	Red	Red	Red	Red	Red	Orange	Orange	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green
Sat	Red	Red	Red	Red	Red	Red	Red	Orange	Orange	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green
Sun	Red	Red	Red	Red	Red	Red	Red	Orange	Orange	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green

 Prefer to work

 No preference

 Prefer not to work

 Cannot work

Hide Instructions

Set your availability now:

	12a	1	2	3	4	5	6	7	8	9	10	11	12p	1	2	3	4	5	6	7	8	9	10	11
Mon	Green	Red	Red	Red	Red	Red	Orange	Orange	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green
Tue	Green	Red	Red	Red	Red	Red	Orange	Orange	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green
Wed	Green	Red	Red	Red	Red	Red	Orange	Orange	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green
Thu	Green	Red	Red	Red	Red	Red	Orange	Orange	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green
Fri	Green	Red	Red	Red	Red	Red	Orange	Orange	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green
Sat	Green	Red	Red	Red	Red	Red	Orange	Orange	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green
Sun	Green	Red	Red	Red	Red	Red	Orange	Orange	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green

 Prefer to work

 No preference

 Prefer not to work

 Cannot work

Set My Availability!

Set your work preferences as shown in the demo animation, then press the "Set My Availability!" button to save your changes.

Note: Your availability can be changed later.

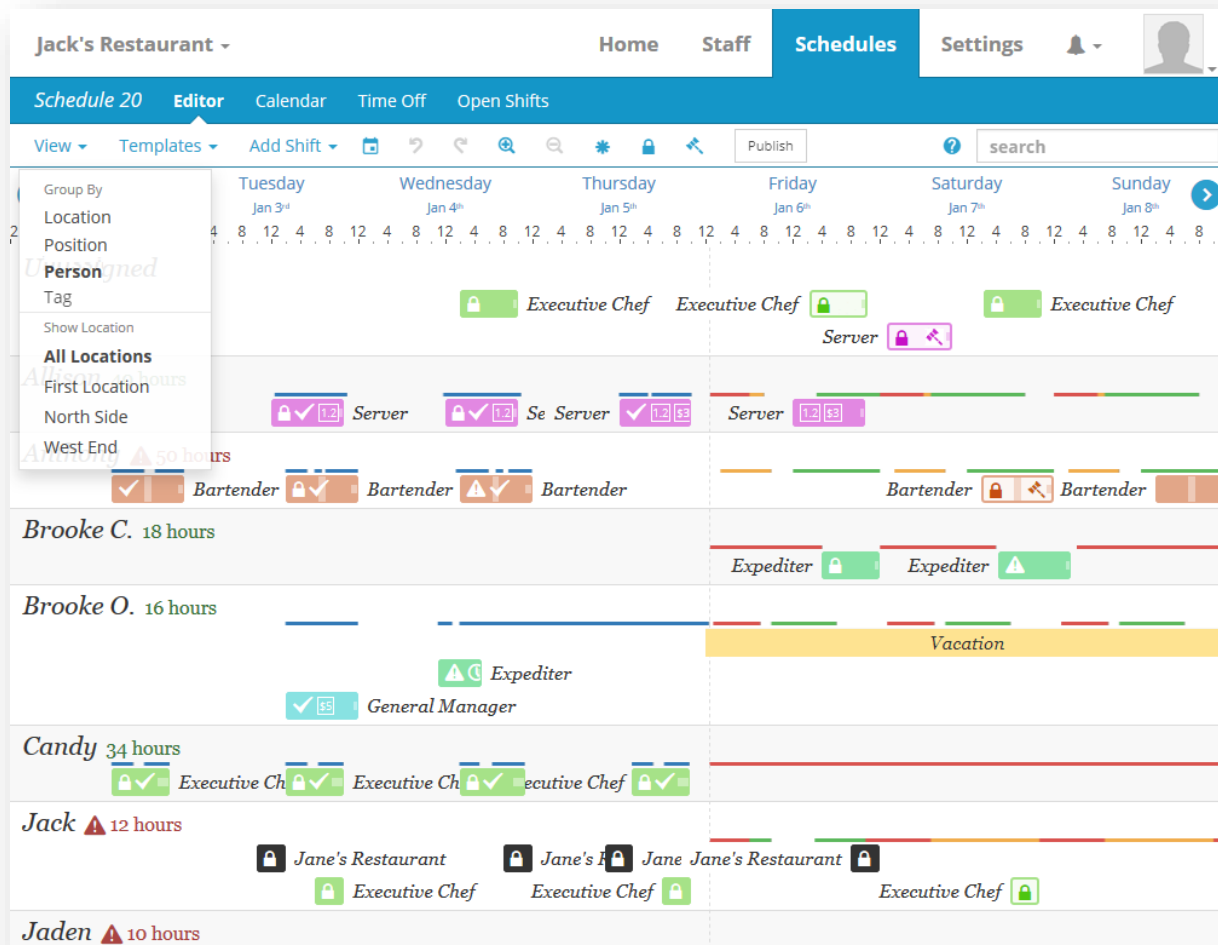
Schedule Editor Overview

The schedule editor is used to rapidly create and fill new schedules. To open the schedule editor, click on the **"Schedules"** tab, click on the **"Editor"** submenu tab.

Under the **"View"** submenu, you can group by location, by position, by person, or by tag. By default, the schedule is grouped by position.

Future time ranges show the staff member's [availability](#) (red/yellow/green lines), while past time ranges show the actual clock-in and clock-out times (blue lines). If a user forgets to clock out, the manager can click on the shift then fix the times on the **"Pay"** tab.

The total hours for each staff member is shown after the staff member's name. If a staff member is under or over their hours for the week, a red conflict symbol (⚠️) will appear.



Color-coding is used to give more information in the schedule editor, as follows:

- Unassigned shifts are colored grey.
- Selected shifts have darker colors.
- **"Schedule Synergy"** shifts from external organizations are colored black. These shifts cannot be edited.
- Approved vacation time is shown as yellow bars.

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Shift "**charms**" are a compact way of giving information about a shift in the schedule editor. The meanings of some typical charms are explained below:

-  A number **without** a currency sign indicates a shift **multiplier**.
-  A number **with** a currency sign indicates a shift **bonus**.
-  An open lock indicates a published, **unlocked** shift.
-  A closed lock indicates a published, **locked** shift.
-  A vertical, light line indicates a **scheduled break**.
-  A line at the end of the shift indicates an **unscheduled break**.
-  A caution symbol indicates a rules **conflict** (overlapping shifts, over hours, staff member cannot work, etc.) for the shift.
-  A clock indicates that the staff member has checked in and not yet completed the shift.
-  A checkmark indicates that the staff member has checked in and completed the shift.
-  An outlined shift indicates that the shift is open for bids with **no bids**.
-  A gavel indicates that the shift is open for bids with **one or more bids**.

To show or hide the shift charms, go to the "**View**" submenu and click "**Show Shift Charms**" or "**Hide Shift Charms**".

"**Forward**" (➡) and "**Back**" (⬅) buttons allow you to navigate forwards and backwards in time through the schedules.

"**Undo**" (↶) and "**Redo**" (↷) buttons allow you to undo and redo changes in the schedule editor.

Press the "**Select All**" (✳) to select all of the shifts on the visible timeline.

Use the "**Zoom In**" (⌕) and "**Zoom Out**" (⌕) buttons to change the scale of the visible timeline. The largest allowable timescale is one week. The smallest allowable timescale is one day.

Press the "**Conflict**" (⚠) button to cycle through the conflicting shift(s) in the schedule editor. Click on a shift with this symbol to see more information about the conflict.

Press the "**Bid**" (💎) button to cycle through the shift(s) with one or more bids in the schedule editor. Click on a shift with this symbol to see more information about the bids.

Press the "**Rules**" (🔗) button to create new [custom business rules](#) for the organization. This feature is disabled by default and can be enabled via the "[Settings](#)" page for the organization.

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Mouse over a staff member's name and the gear icon (⚙️) will appear next to the staff member's name. Click on the gear icon to open the position and location details popup for the staff member. From this page, you can edit the staff member's positions and locations. Press **"Save"** to save your changes, or **"Cancel"** to discard your changes.

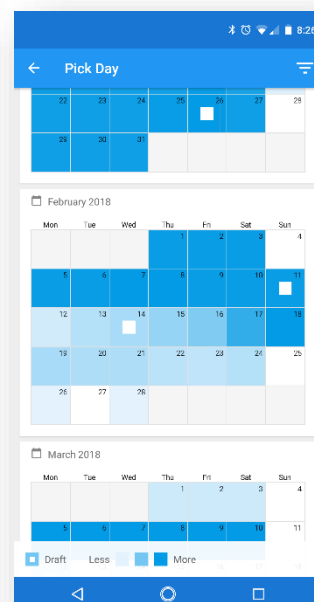
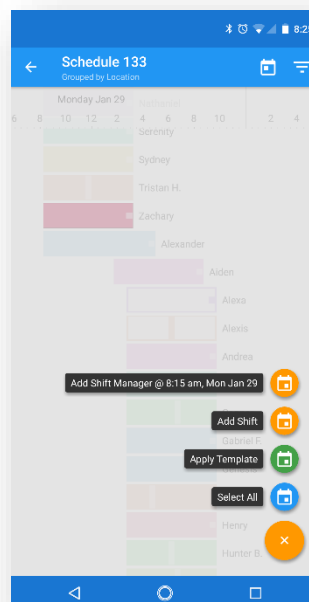
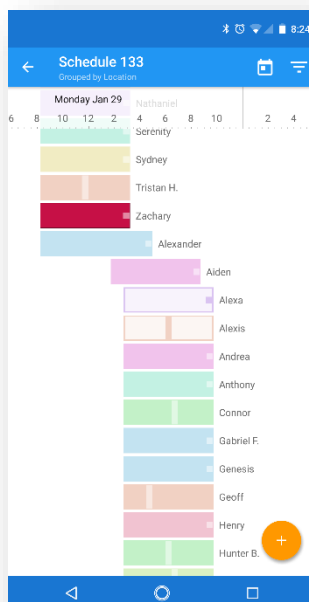
Edit Positions/Locations: Anthony Edington

This allows you to edit qualifications without going to the [main grid](#).

Position	Eligible	Affinity
Bartender	☒	2/10
Dishwasher	☐	
Executive Chef	☐	
Expediter	☒	5/10
General Manager	☒	3/10
Server	☐	
Sous Chef	☒	5/10

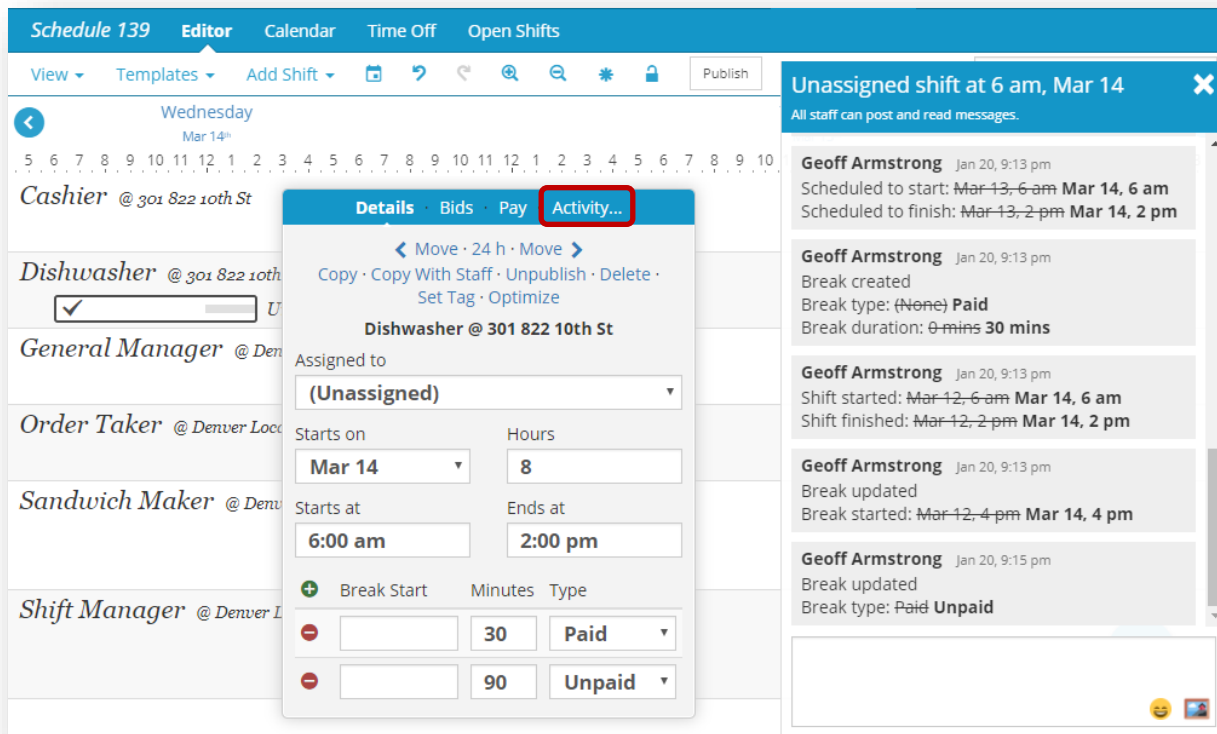
Location	Eligible	Affinity
First Location	☒	10/10
North Side	☒	5/10
West End	☒	1/10

From the manager dashboard, the schedule icon (📅) displays the mobile version of the schedule editor. On the schedule editor, an action button (⊕) displays more options to edit the schedule, and a filter button (🔍) lets you filter the items shown (for example, by location). Finally, the shift heatmap button (📊) shows the relative number of shifts per day. Click a specific day on the shift heatmap to display the schedule for that day.

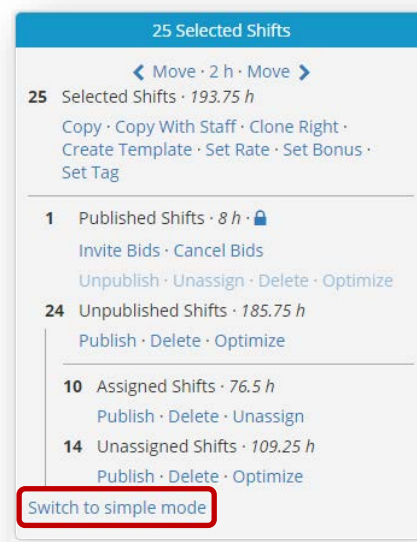
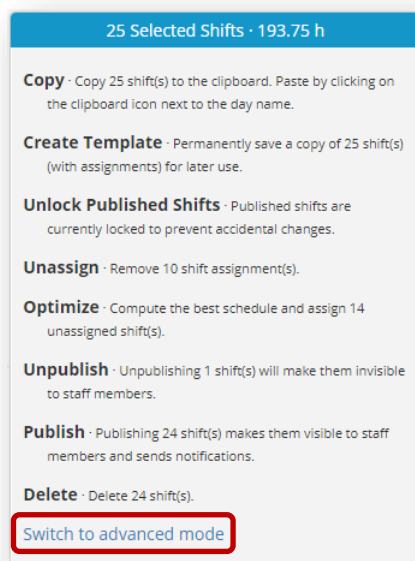


Schedule Editor Action Menus

When a single shift is selected, the action menu shows shift details, including start times and breaks, bids, and pay details. Press **"Activity..."** on the action menu to view bring up the audit history; this will display any changes previously made to the shift in the right-hand panel.



When multiple shifts are selected, the action menu may be toggled between simple mode (below left) and advanced mode (below right). Actions that are not currently possible will be hidden (simple mode) or greyed out (advanced mode).



Create a Schedule / Add Shifts

Before creating a schedule, you must first [create positions](#), [create staff members](#), and [set positions for staff members](#). If you have multiple locations, you must set the [locations](#) for your staff members. To create the schedule, add shifts in the schedule editor to create the schedule.

Press **"Add Shift"** to bring up the shift panel. Select a position, date, start time, and end time. Total hours for the shift will be automatically calculated. Press **"Add"** button to add the shift to the schedule editor.

Alternatively, you can draw a shift directly in the schedule editor using your mouse or stylus.

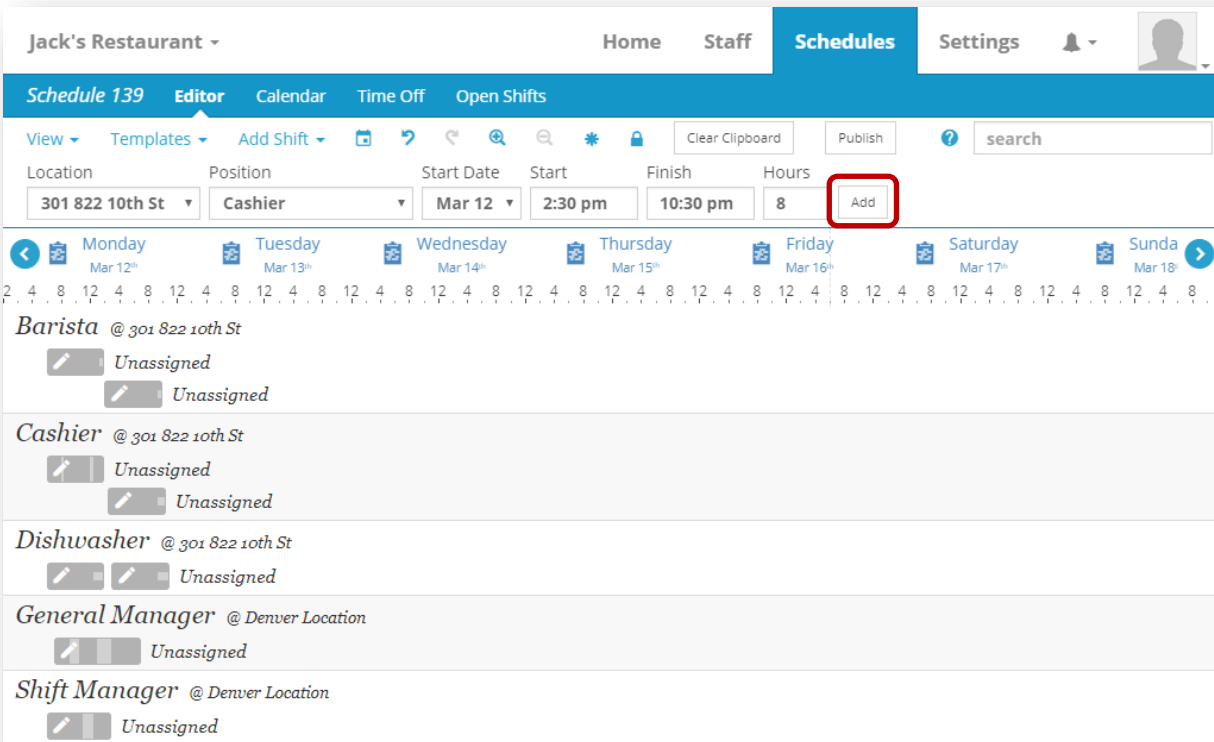
Note: When you enter a finish time, the end time will automatically recalculate. Conversely, when you enter an end time, the finish time will automatically recalculate. Maximum shift lengths can be changed on the ["Settings"](#) tab.

If you make a mistake, you can undo your action with the **"Undo"** button . There are multiple levels of undo and redo.

At this point, you can [edit a shift](#), [add breaks](#), [create a split shift](#), or [copy shifts](#) to other days.

Once the schedule is complete, you can [assign shifts](#) then [publish the schedule](#).

Optionally, you may also [create a template](#) from the current schedule.



Jack's Restaurant ▾ Home Staff Schedules Settings

Schedule 139 Editor Calendar Time Off Open Shifts

View ▾ Templates ▾ Add Shift ▾       Clear Clipboard Publish  search

Location Position Start Date Start Finish Hours **Add**

301 822 10th St ▾ Cashier ▾ Mar 12 ▾ 2:30 pm 10:30 pm 8

Monday Mar 12th Tuesday Mar 13th Wednesday Mar 14th Thursday Mar 15th Friday Mar 16th Saturday Mar 17th Sunday Mar 18th

Barista @ 301 822 10th St

 Unassigned  Unassigned

Cashier @ 301 822 10th St

 Unassigned  Unassigned

Dishwasher @ 301 822 10th St

  Unassigned

General Manager @ Denver Location

 Unassigned

Shift Manager @ Denver Location

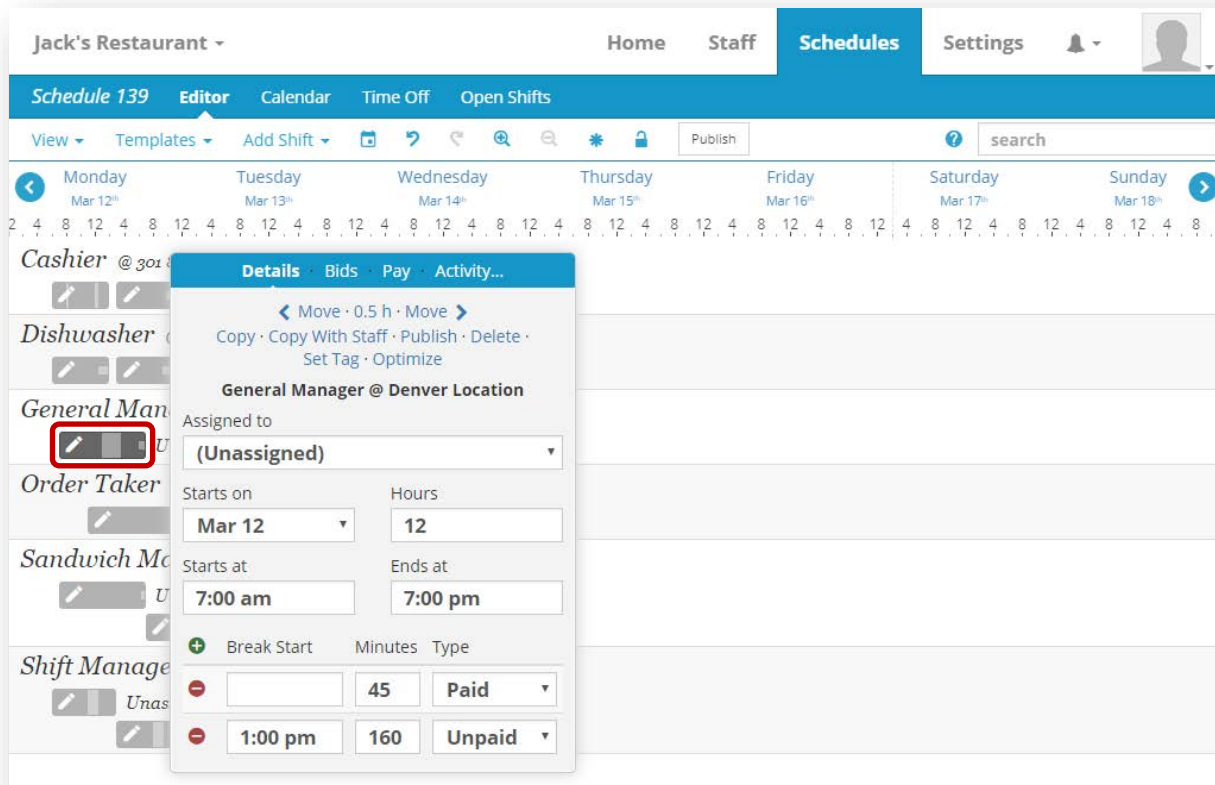
 Unassigned

Edit a Shift or Add Breaks (Including Split Shifts)

To edit a shift, click on the shift in the schedule editor. This will open an action menu that lets you assign the shift, change the shift start and end times, and add breaks.

Multiple breaks can be added to a single shift. Breaks with a specified start time will show up as a vertical band ■ of the specified duration at the specified time. Breaks with a flexible (undefined) start time will show up as a dash — of the specified duration at the end of the shift.

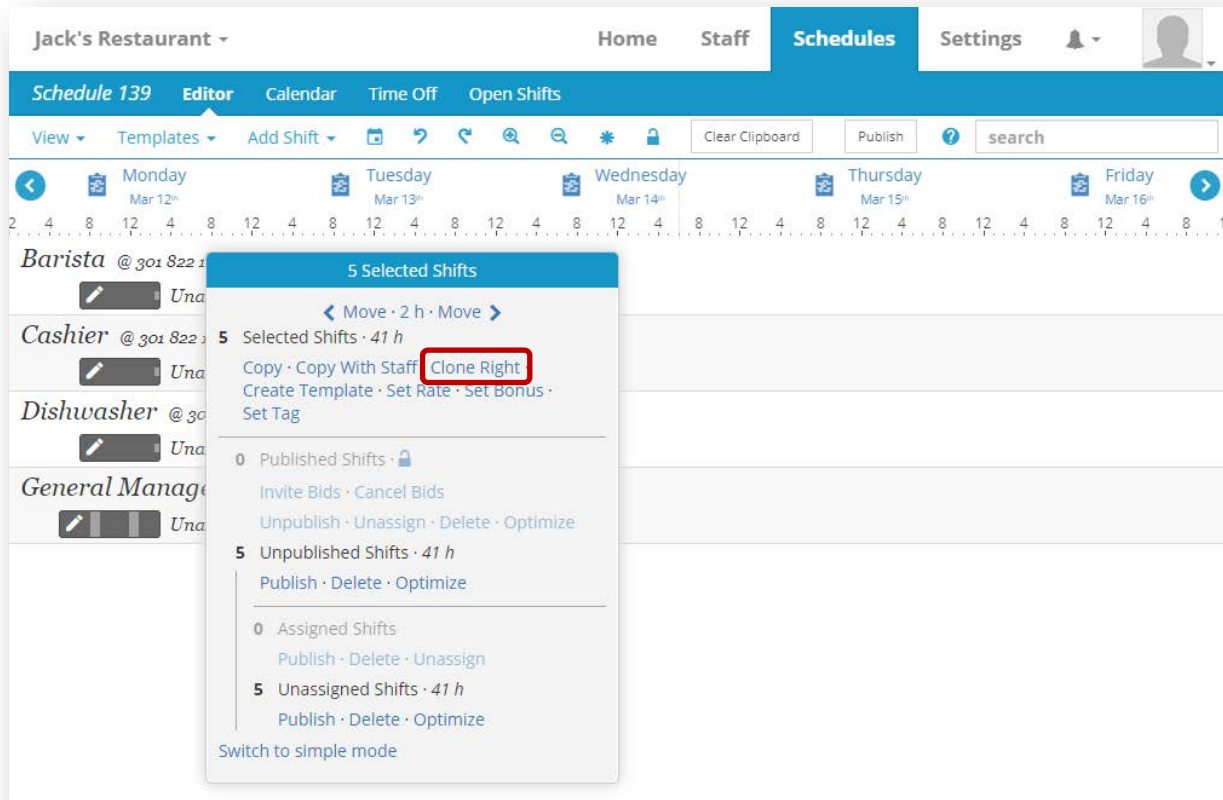
Each break will have a specified type (e.g. paid break, unpaid break, split shift, or other custom break type).



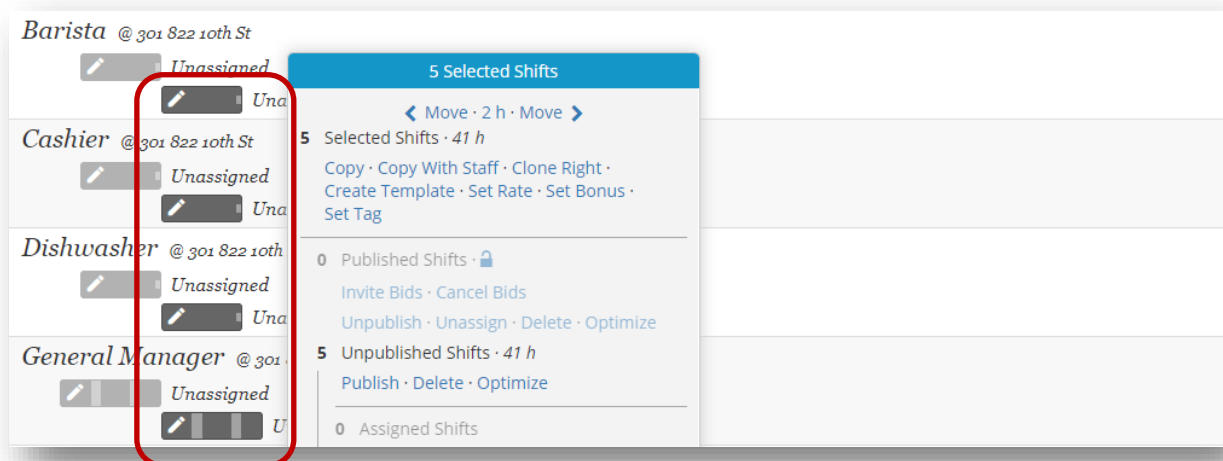
Note: The default break types are paid, unpaid, and split shift, however custom break types may be added via the organization's ["Settings"](#) tab.

Clone Right a Set of Shifts

Cloning shifts is useful when you have an early shift and a late shift in the same day. Select the shifts you wish to clone. Click **"Clone Right"** on the action menu.



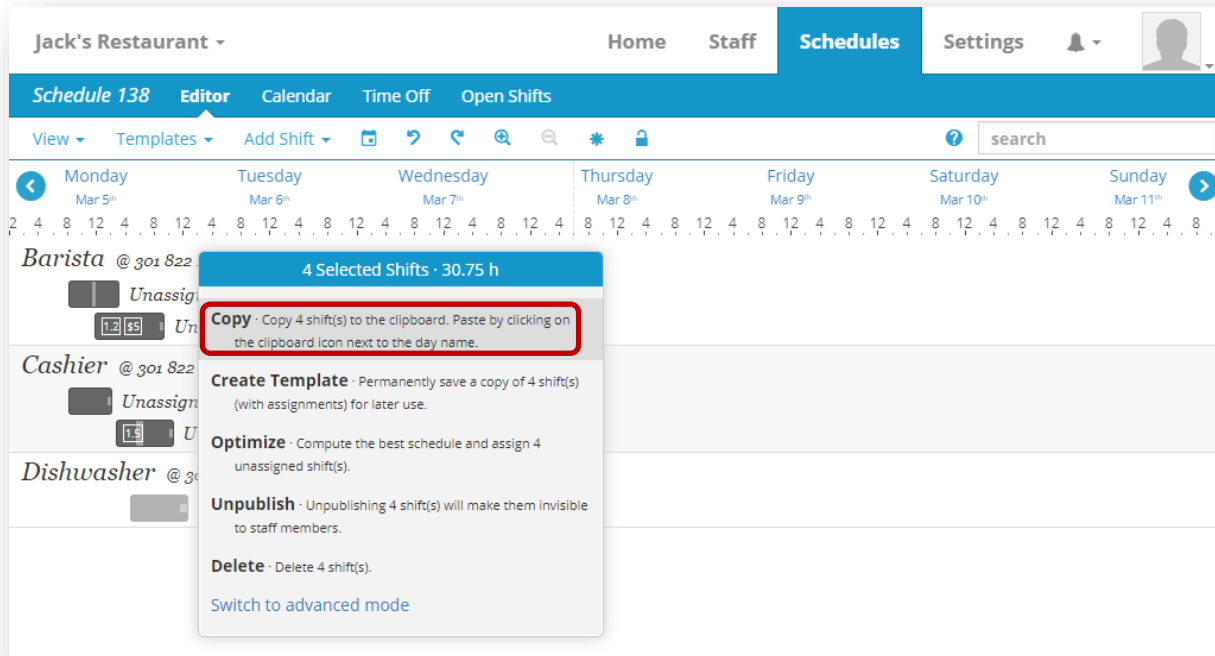
This will generate a new identical shift directly to the right of each shift in the original selection (see below).



Copy a Set of Shifts

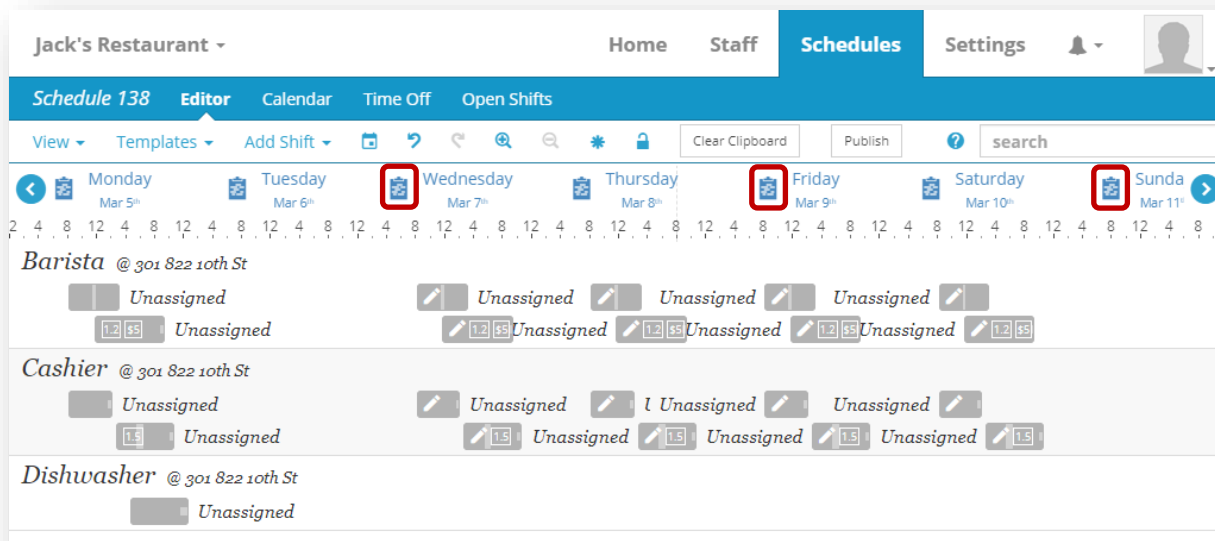
To copy a set of shifts to a different day (or duplicate the shifts on the same day), click-and-drag to select the shifts you wish to copy. Alternatively, you can click on a day name (e.g. Monday, Tuesday, Wednesday, etc.) at the top of the screen to select all shifts that start on that day.

Once the shifts are selected, select **"Copy"** from the action menu, or use the **CTRL-C** shortcut. This copies the selected shifts to the clipboard.



Press the clipboard symbol (📋) to paste the copied shifts on a given day. The shifts will be pasted with same times as the original set of shifts. Press the **"Clear Clipboard"** button to clear the clipboard.

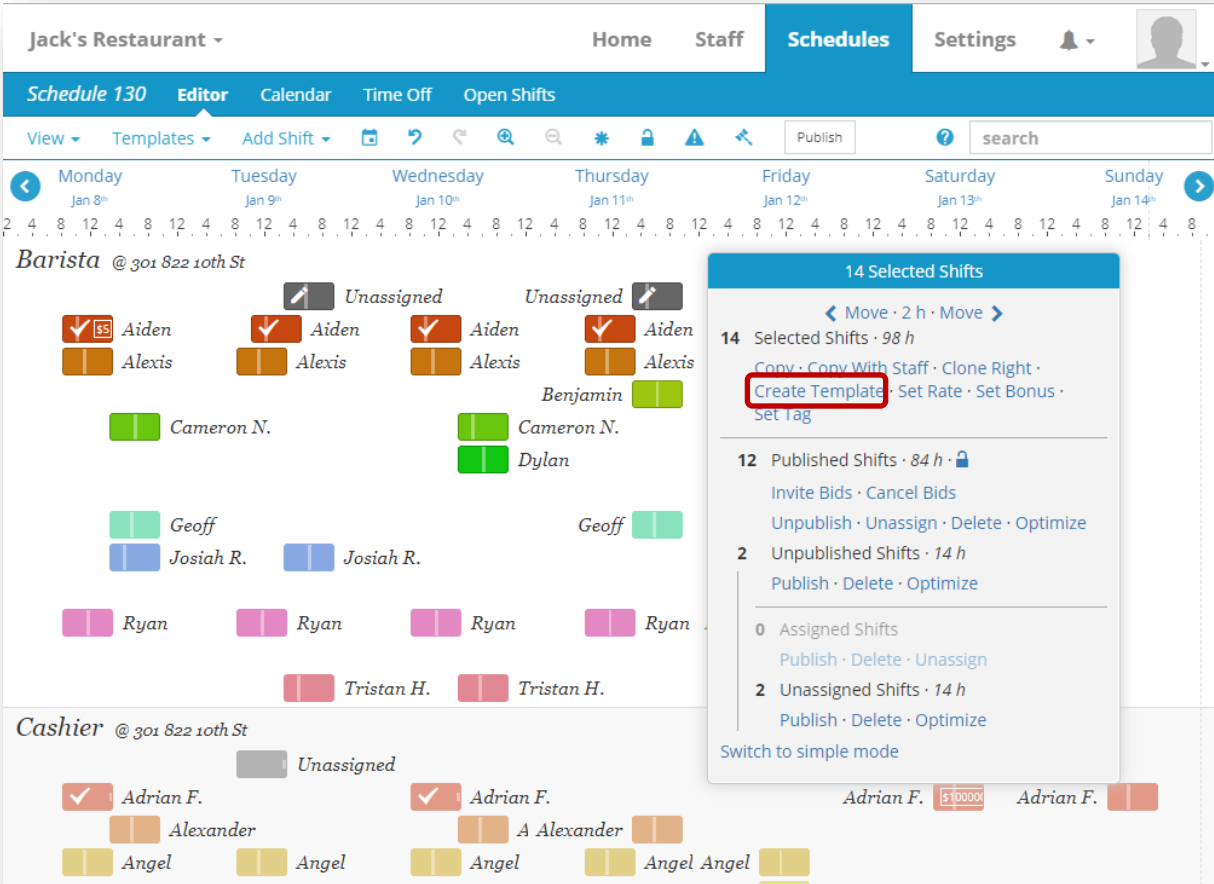
You may also navigate to another week using the **"Forward"** (➡) and **"Back"** (⬅) buttons then paste the shifts on a different week.



Create a Schedule Template

Click  to select all of the currently displayed shifts, or scroll across the specific shifts that you want to select in the schedule editor. In the action menu, pick **"Create Template"** to save the currently selected shifts to a template (with assigned staff members). Enter the name of the template, then press the **"OK"** button.

This template can then be used to automatically create shifts in subsequent weeks.



The screenshot shows the 'Schedules' editor for 'Jack's Restaurant'. The top navigation bar includes 'Home', 'Staff', 'Schedules', and 'Settings'. The main area displays a weekly calendar for January 8th to 14th. Staff members are listed on the left, including Barista and Cashier. A context menu is open over the calendar, showing options for the selected shifts. The 'Create Template' option is highlighted with a red box.

Jack's Restaurant ▾ Home Staff Schedules Settings

Schedule 130 Editor Calendar Time Off Open Shifts

View ▾ Templates ▾ Add Shift ▾ Publish search

Monday Jan 8th Tuesday Jan 9th Wednesday Jan 10th Thursday Jan 11th Friday Jan 12th Saturday Jan 13th Sunday Jan 14th

Barista @ 301 822 10th St

Unassigned Unassigned

Aiden Alexis Cameron N. Geoff Josiah R. Ryan Tristan H.

Cashier @ 301 822 10th St

Unassigned

Adrian F. Alexander Angel A Alexander Angel Angel

14 Selected Shifts

Move · 2 h · Move

14 Selected Shifts · 98 h

Copy · Copy With Staff · Clone Right · Create Template · Set Rate · Set Bonus · Set Tag

12 Published Shifts · 84 h · Lock

Invite Bids · Cancel Bids

Unpublish · Unassign · Delete · Optimize

2 Unpublished Shifts · 14 h

Publish · Delete · Optimize

0 Assigned Shifts

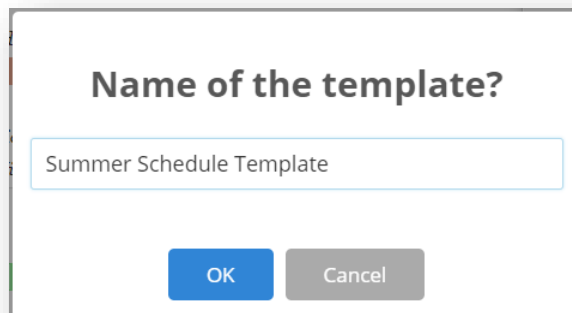
Publish · Delete · Unassign

2 Unassigned Shifts · 14 h

Publish · Delete · Optimize

Switch to simple mode

Enter a name for the template, then click **"OK"**.



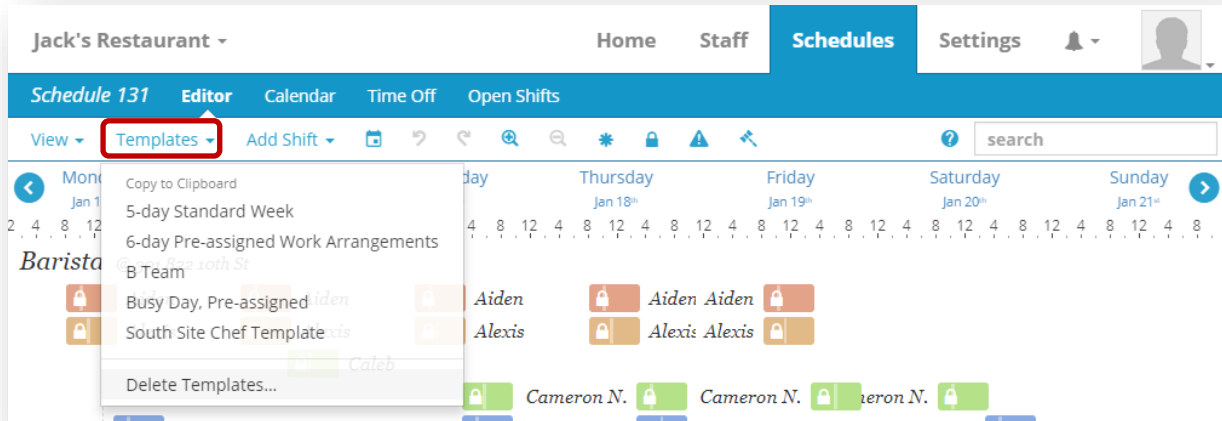
Name of the template?

Summer Schedule Template

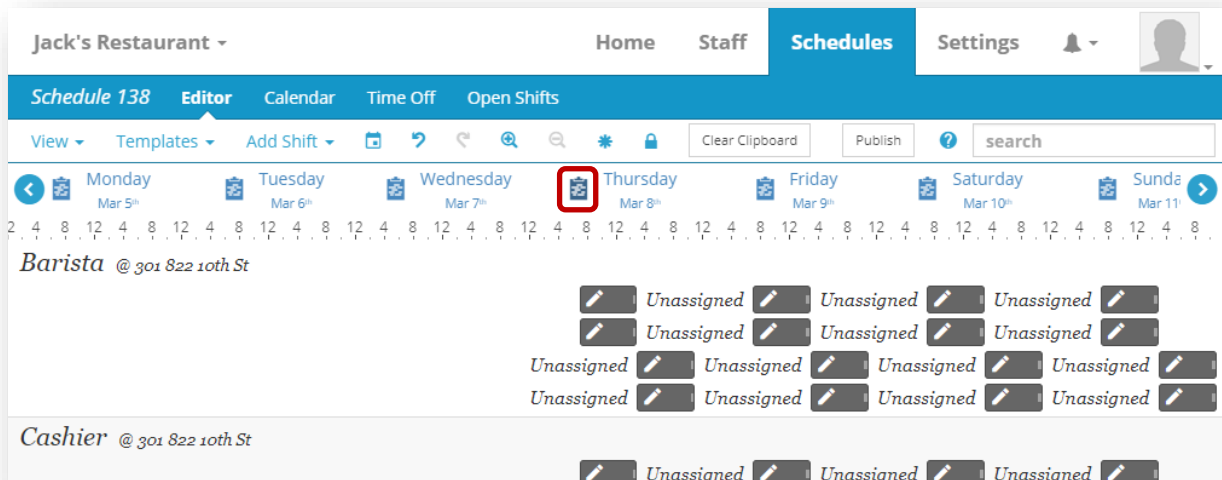
OK Cancel

Use a Schedule Template

In the schedule editor, click on the **"Templates"** submenu item and select the template you wish to copy to the clipboard.

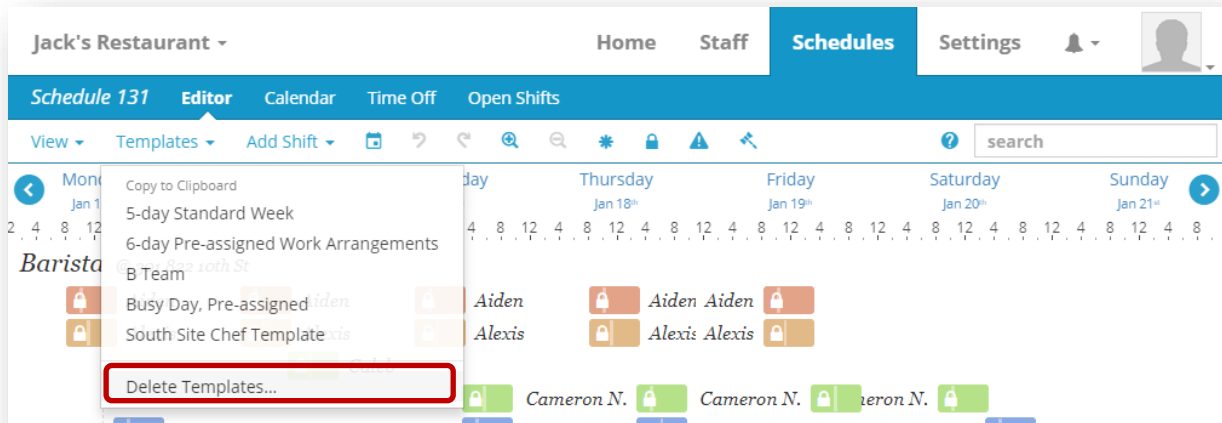


Click on the day in the schedule editor where you wish to paste the start of the template. In the example below, the schedule was placed by pressing paste (⌘) on Thursday. Any additional days from the pasted template will carry over to the next week, even though it is not currently visible on the screen. Press the **"Clear Clipboard"** button to clear the template from the clipboard.

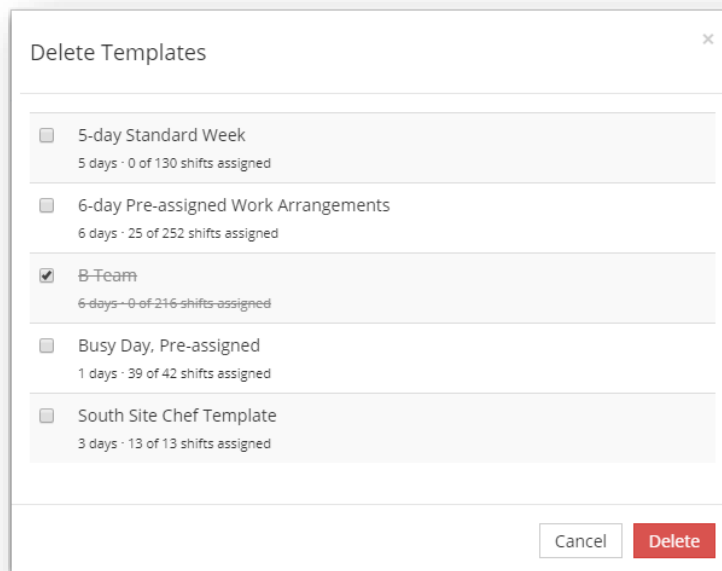


Delete a Schedule Template

In the schedule editor, click on the **"Templates"** submenu item then click on **"Delete Templates..."** at the bottom of the menu.



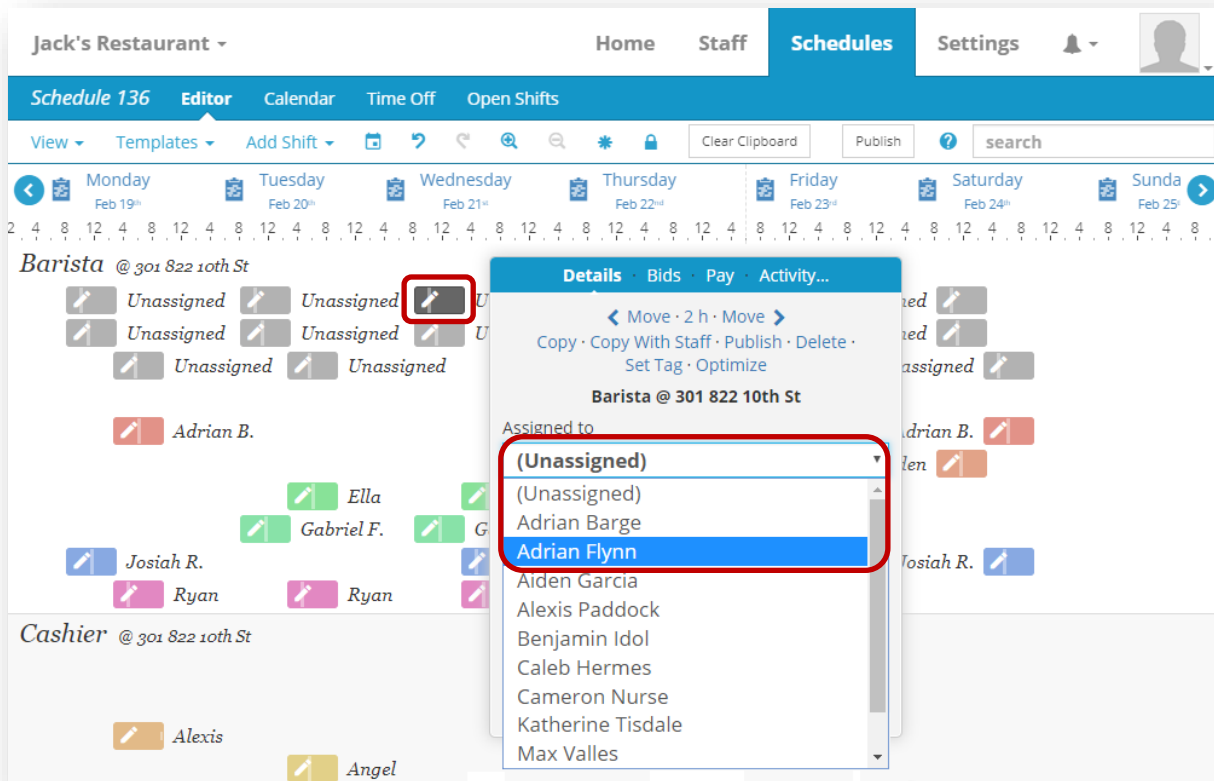
Select the template(s) which you wish to delete. Press **"Delete"** to permanently delete the selected template(s).



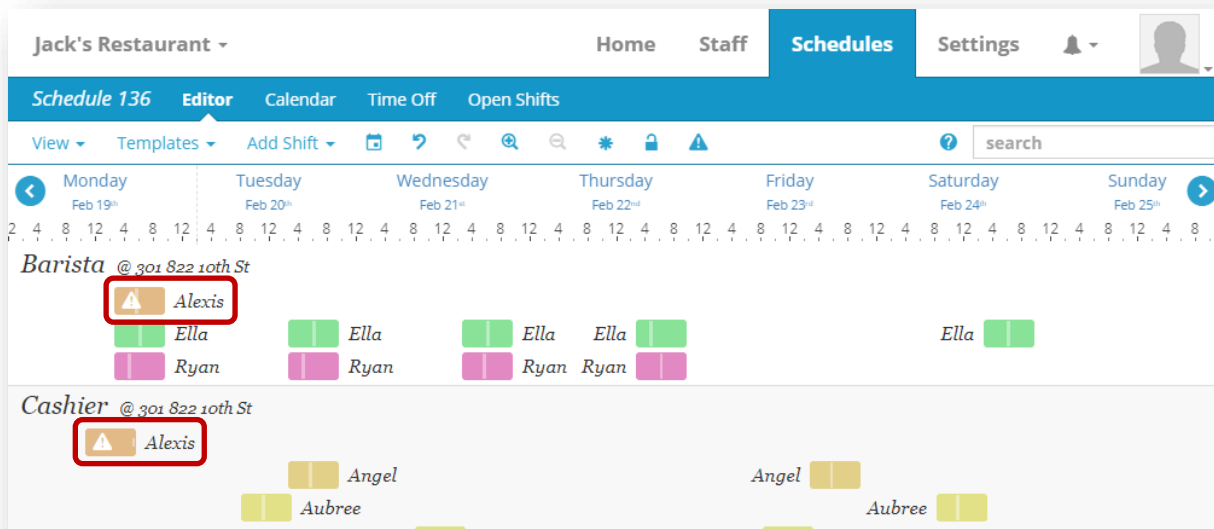
Caution: This action cannot be undone.

Assign Shifts Manually

To assign a shift manually, open the [schedule editor](#). Click on the shift to be assigned; this will open the details menu for the shift. Click the **"Assigned to"** dropdown and select the name of the person to whom you wish to assign the shift. Only staff members with the correct position and the correct location for the selected shift will appear in the list.



When a shift conflict occurs (e.g. overlapping shifts, over the maximum hours for the day, over the maximum hours for the week), the **"Conflict"** (⚠️) button will appear on the main toolbar and the conflict charm icon (⚠️) will appear on the affected shift(s).

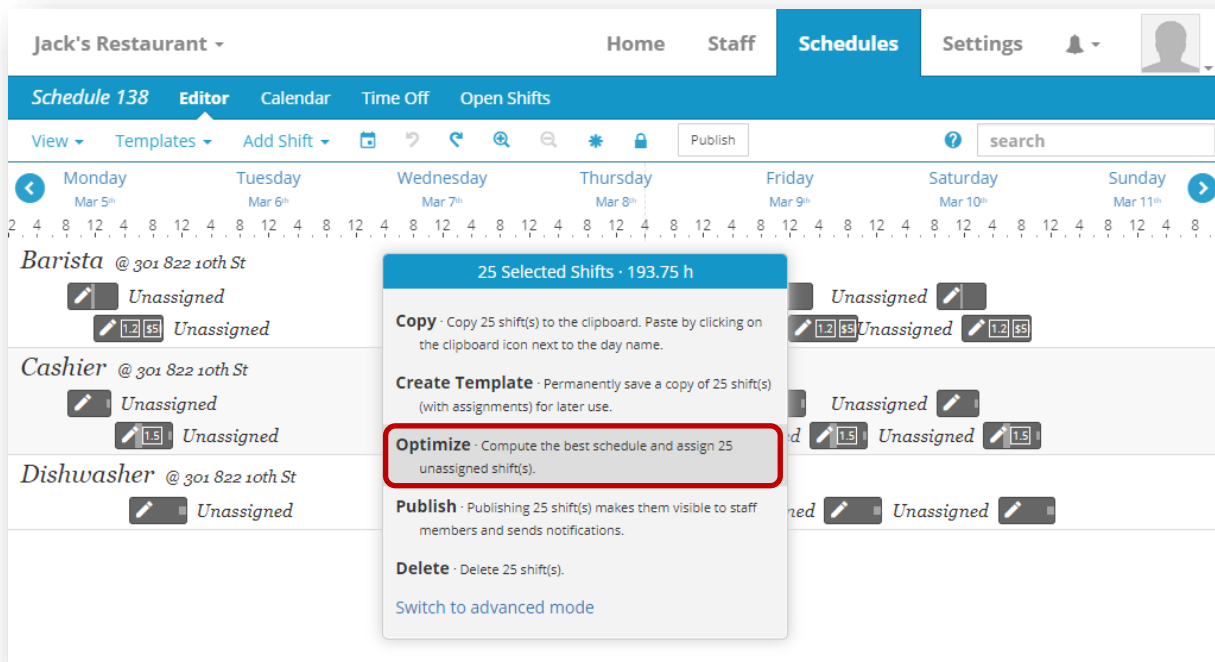


Assign Shifts Automatically (Optimize Schedule)

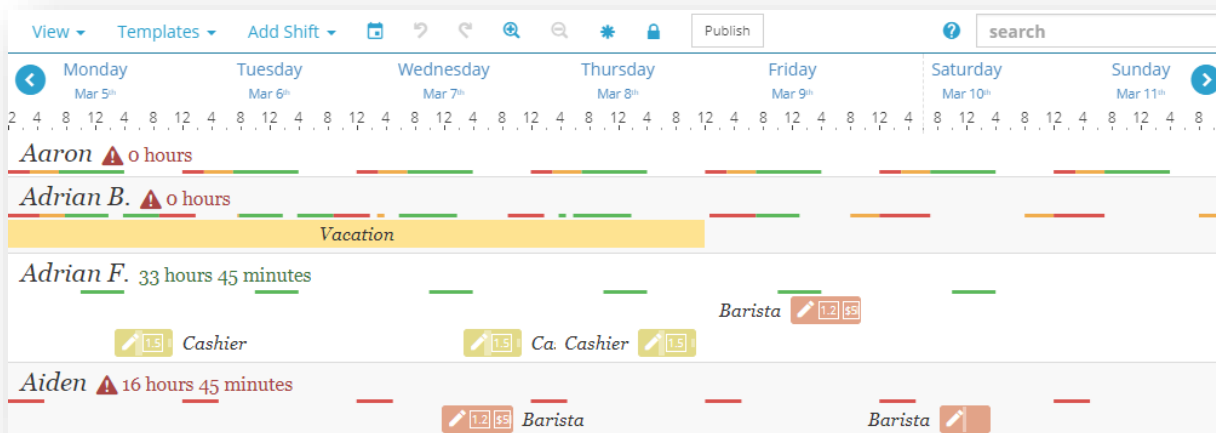
Click and drag inside the [schedule editor](#) window to select one or more shifts. The action menu will appear for the selected shifts. Click on "**Optimize**" to automatically assign the selected, unassigned shifts based on **MyNextWeek.com's** optimization algorithm.

When using the **advanced mode** action menu, you can choose to assign all of the selected **unpublished** shifts (including reassigning shifts that have already been assigned) or choose to assign only the selected **unassigned** shifts.

Note: If selected shifts remain unassigned after optimized, it indicates that there are no staff members who can fill the shift according to their positions, availability, and maximum working hours per week.



When viewing the schedule **by person** (as shown below), the reasoning behind the automated assignments will become clear. Staff availability (thin red/yellow/green lines), vacations (thick yellow bar), and maximum/minimum hours requirements are shown in this view. This view will visually show why a staff member is not available for shifts at a given time.

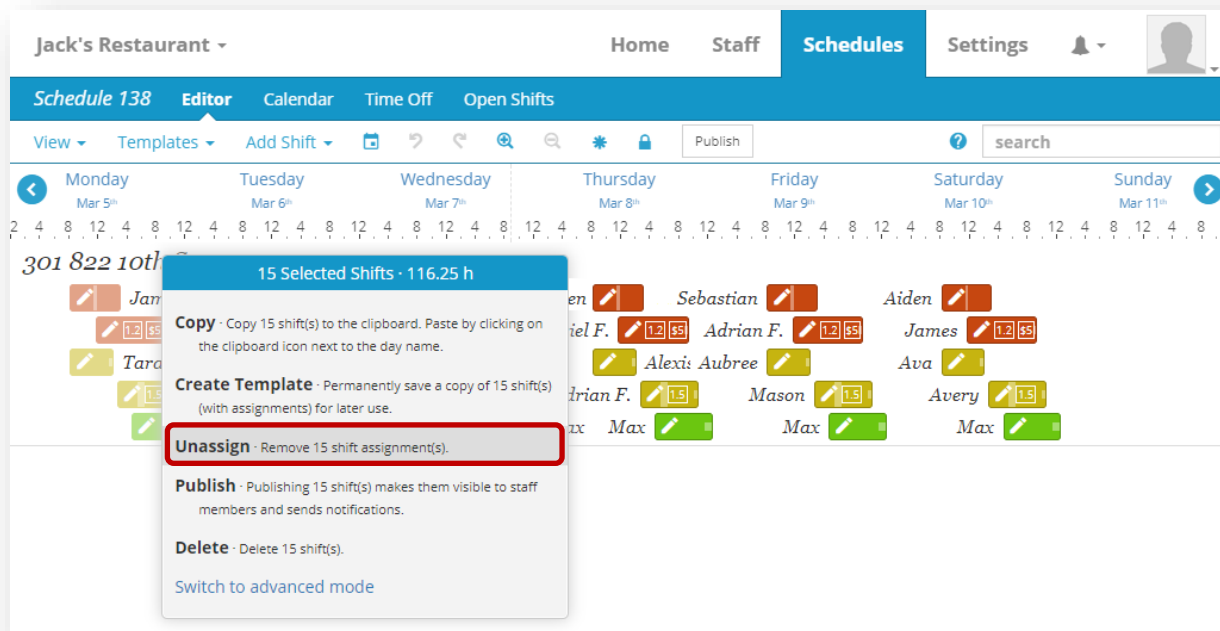


Unassign Shifts

Click and drag inside the [schedule editor](#) window to select one or more shifts.

The action menu will appear for the selected shifts. Click on **"Unassign"** to automatically unassign the selected shifts.

When using the **advanced mode** action menu, you can choose to unassign **all** of the selected shifts or choose to unassign only the selected **published** shifts.



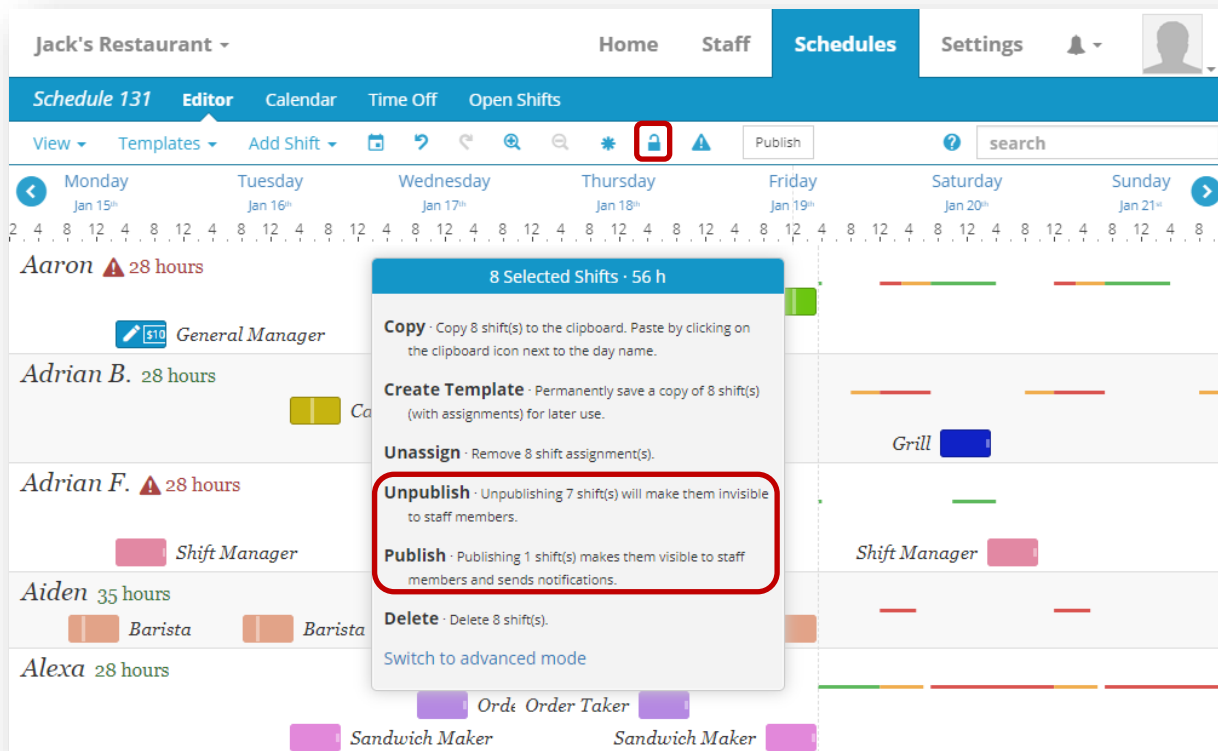
Publish / Unpublish Shifts

Notes:

- Once shifts are published, they are automatically locked (🔒) and they become visible to the staff. The staff are notified of their new schedules and their calendars will be updated (if they have previously synched their calendars using iCalendar).
- Any changes to a published schedule will cause notifications to be sent to the affected staff members.
- To edit locked shifts, you must unlock the shifts using the lock icon (🔓).
- We recommend that you unpublish shifts before making changes; otherwise notifications will go out to affected staff members each time you make a change to a shift. Once your changes are complete, you can again publish and lock the shifts.

Click and drag inside the [schedule editor](#) window to select one or more shifts (or use CTRL-A or press * to select all shifts for the current week).

The action menu will appear for the selected shifts. Click one of the "Publish" options to publish the selected shifts of the specified type (e.g., all unpublished, assigned, or unassigned).



Edit Shift Pay (Special Rate Multiplier, Shift Bonus)

Click on any shift inside the editor to bring up the action menu. Click on the "Pay" tab.

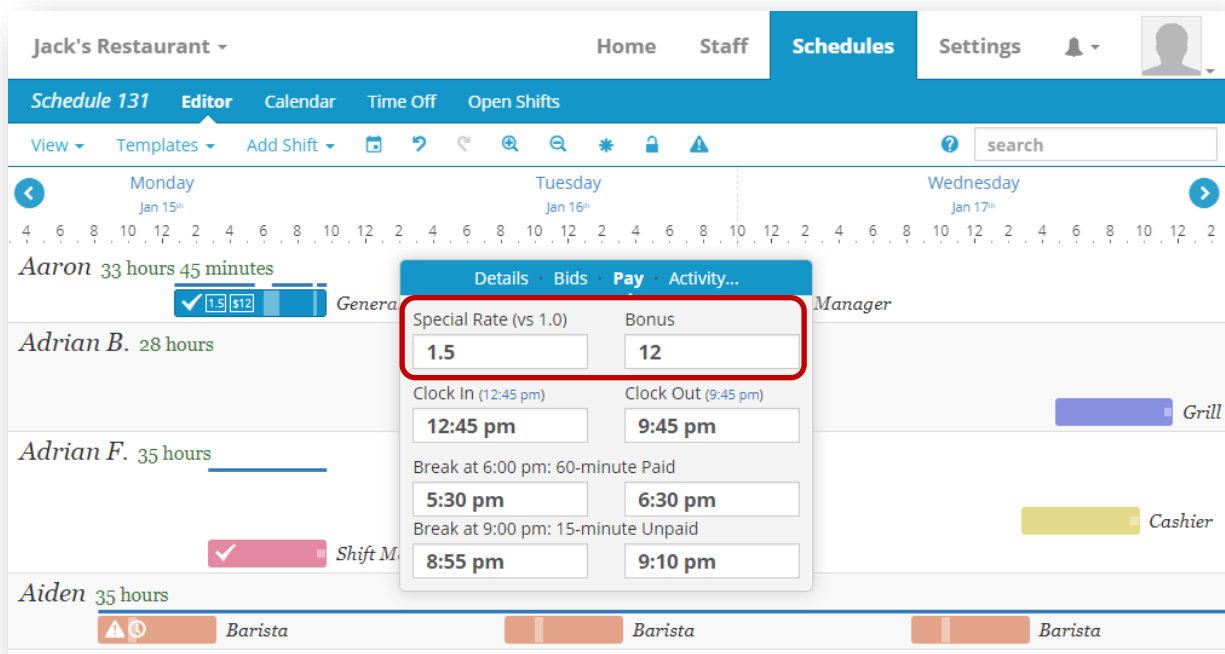
On the "Pay" tab, you can set a flat bonus rates and special rates.

For instance, a holiday shift could be increased to pay time and a half (1.5 times the regular rate in the example below).

A shift could also have a flat bonus (\$12 in the example below). A bonus or commission is useful for staff that perform specific tasks on a shift. For example, each shift could be a time slot for a product delivery, specific service, or product installation. Bonuses can also be used to compensate staff for less desirable shifts (for instance, night shifts).

Special rate multipliers and bonuses are displayed as charms on the affected shift(s) in the schedule editor.

Special rate multipliers do **not** affect the shift bonus. The shift bonus is added **after** the special rate multiplier is applied.



Edit Shift Clock In or Clock Out Times

Sometimes, a staff member might forget to clock in or clock out for a shift, or clock in at the wrong time. In these cases, the manager can manually edit the shift clock in and clock out times.

To change a clock in or clock out time, first select the shift in the schedule editor. Click on the **"Pay"** tab, then enter new values for the clock in and/or clock out times. Click on the displayed default time ([blue text](#)) to use the default shift start or end time.

When a staff member checks in to a shift, a clock (🕒) will appear on the shift. When a staff member clocks out of the shift, a checkmark (✓) will appear on the shift. If a staff member forgets to check out, a caution symbol (⚠️) will appear on the shift and the blue line will extend past the end of the shift.

Note: Press **"Activity..."** on the action menu to view any changes previously made to the shift, including any changes to the clock in and clock out times.

The screenshot shows the 'Jack's Restaurant' scheduling interface. The top navigation bar includes 'Home', 'Staff', 'Schedules', and 'Settings'. The 'Schedules' tab is active, showing 'Schedule 131' in 'Editor' mode. The interface displays a calendar view for Monday (Jan 15th), Tuesday (Jan 16th), and Wednesday (Jan 17th). A staff member named Aaron is assigned a shift on Monday, with a total of 33 hours and 45 minutes. A modal window is open for editing the 'Pay' tab for Aaron's shift. The modal contains the following information:

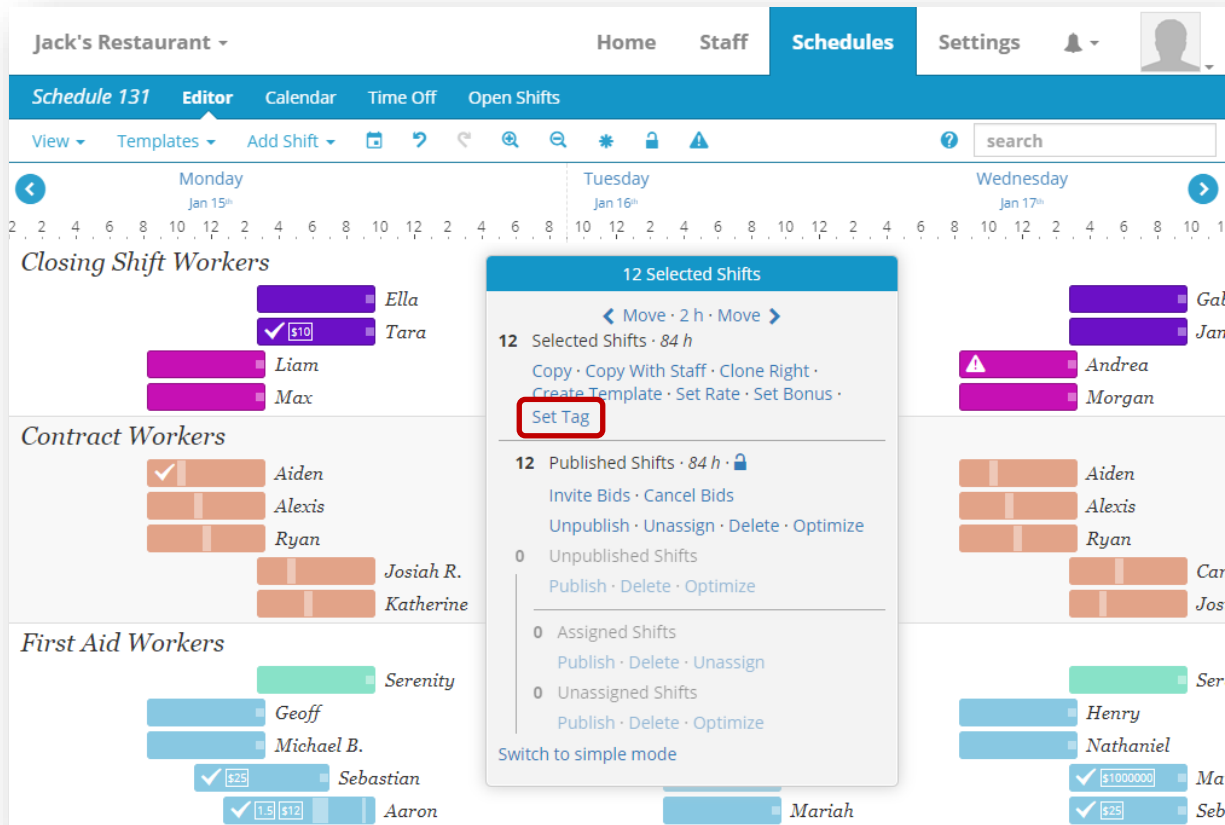
Details · Bids · Pay · Activity...	
Special Rate (vs 1.0)	Bonus
1.5	12
Clock In (12:45 pm)	Clock Out (9:45 pm)
12:45 pm	9:45 pm
Break at 6:00 pm: 60-minute Paid	
5:30 pm	6:30 pm
Break at 9:00 pm: 15-minute Unpaid	
8:55 pm	9:10 pm

The modal window is highlighted with a red border. The background shows other staff members: Adrian B. (28 hours), Adrian F. (35 hours), and Aiden (35 hours). The bottom of the interface shows the roles of the staff members: Barista, Barista, and Barista.

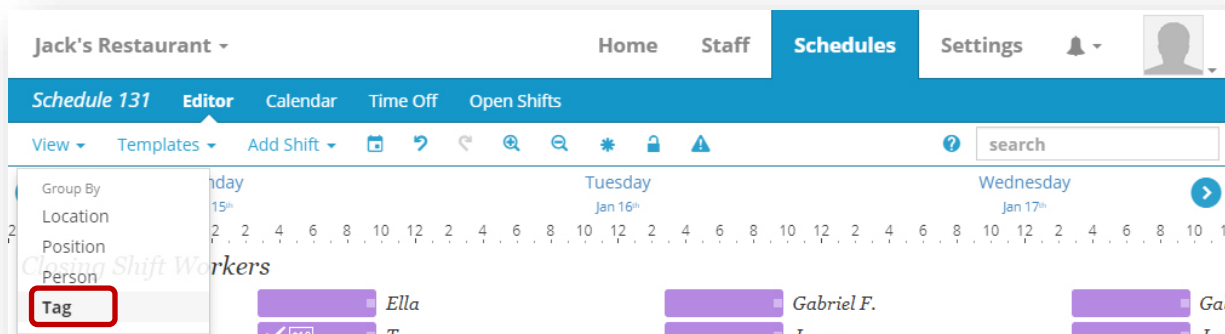
Apply a Tag to Shifts

Tags are a way to group shifts for display and reporting purposes. To apply a shift tag, select one or more editable shifts in the schedule editor. If more than one shift is selected, ensure that the action menu is set to **"Advanced Mode"** so that the additional menu items appear. Click on **"Set Tag"** then enter a tag for the selected shifts.

Note: Each shift can only have one tag at a time. To clear the tag, clear the text box when setting the tag.



Tags can be used to sort shifts in the [schedule editor](#). To sort by tag, click on the **"View"** dropdown menu then group by **"Tag"**.

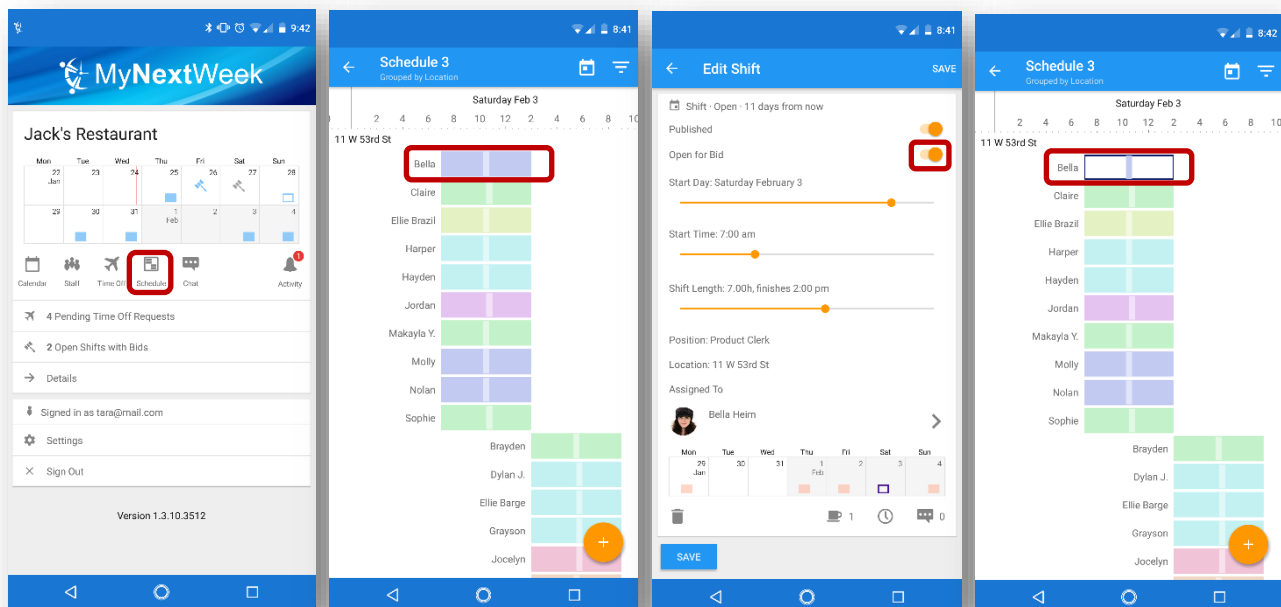


Open a Shift for Bids

When a shift is open for bids, any qualified staff member can bid on a shift or a portion of the shift. When bids are received, a manager can select one or more bids as the "winner".

- A shift must be published before it can be opened for bidding.
- A staff member can put any of their own assigned shifts up for bid via the web app or the phone app by opening the shift and selecting **"Give Away Shift"**.
- A manager can put an unassigned or an assigned shift up for bid.
-  An open shift with **no bids** is indicated by a grey, outlined, hollow shift.
-  An open shift with **one or more bids** will also have a gavel.

On the mobile application, a manager can put a shift up for bids. To do so, first open the organization schedule. Next, click on the shift you wish to put up for bids. Move the "Open for Bid" toggle to open the shift for bids. The shift will change to a purple outline on the mini calendar and on the main schedule.

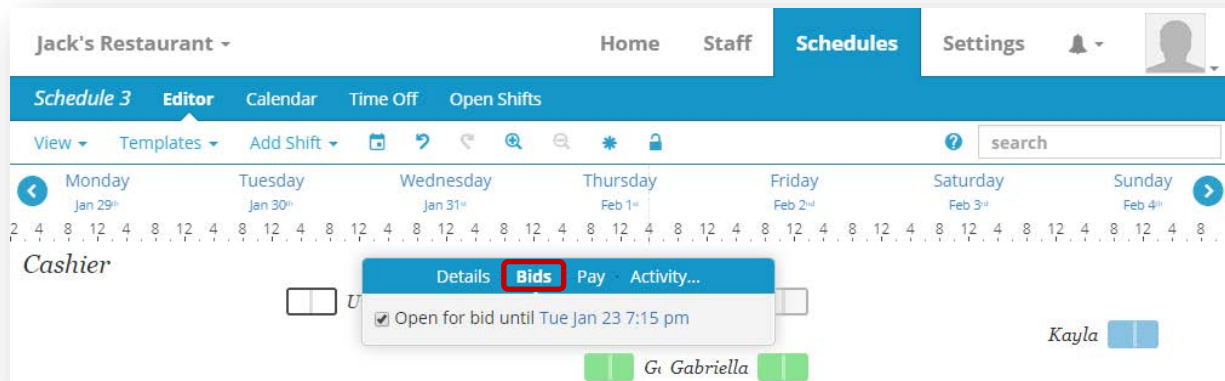


On the mobile application, a user can [put a shift up for bid](#) by selecting a shift then clicking **"Give Away Shift"**.

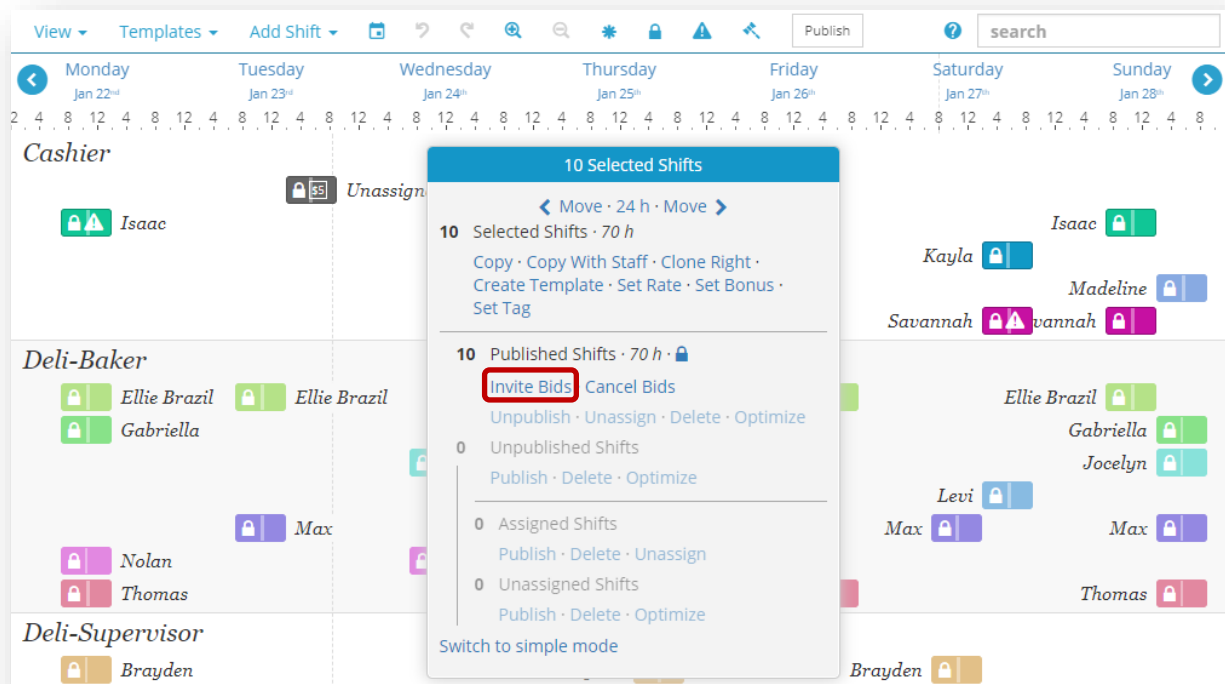
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To open a single shift for bids on the web application, select the shift to open the action menu, then click the **"Bids"** tab. Click the checkbox and (optionally) modify the deadline (e.g. the number of hours prior to the shift start time after which bids will not be allowed).



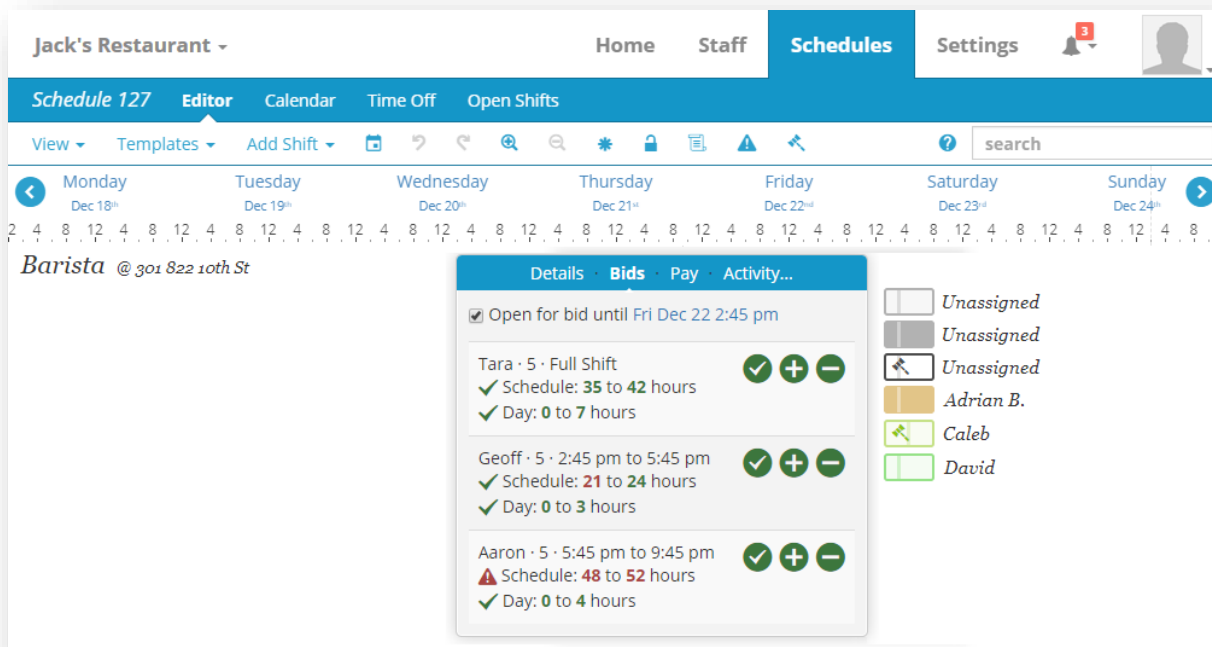
Managers may also select multiple published shifts and **"Invite Bids"** to open all of these shifts for bidding at once. This will apply the default deadline to each affected shift (where possible).



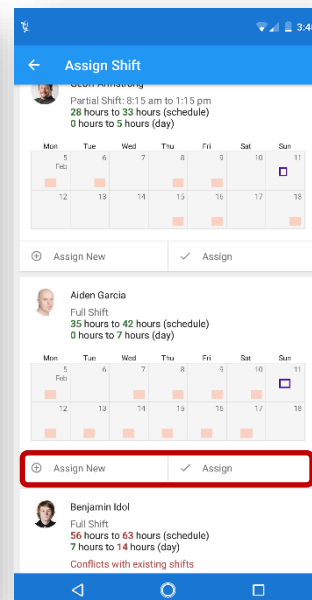
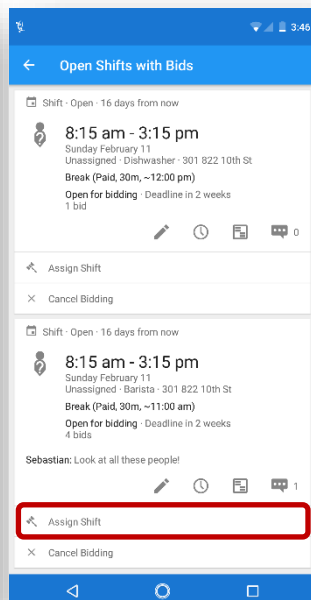
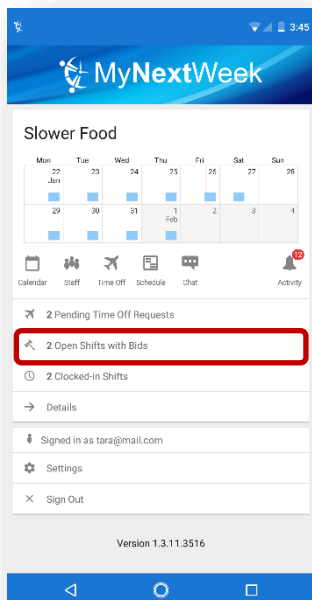
Select Successful Bidder(s) for a Shift

In the web app, press the **"Bid"** (🗳️) button to cycle through the open shift(s) with one or more bids in the schedule editor. Alternatively, you may click directly on a shift to open the action menu.

Click the checkmark (✅) to assign the full or partial shift to the staff member. Click the plus sign (+) to assign a new shift with the specified parameters (the original shift will remain up for bid). Click the minus sign (➖) to remove a bid from the shift.

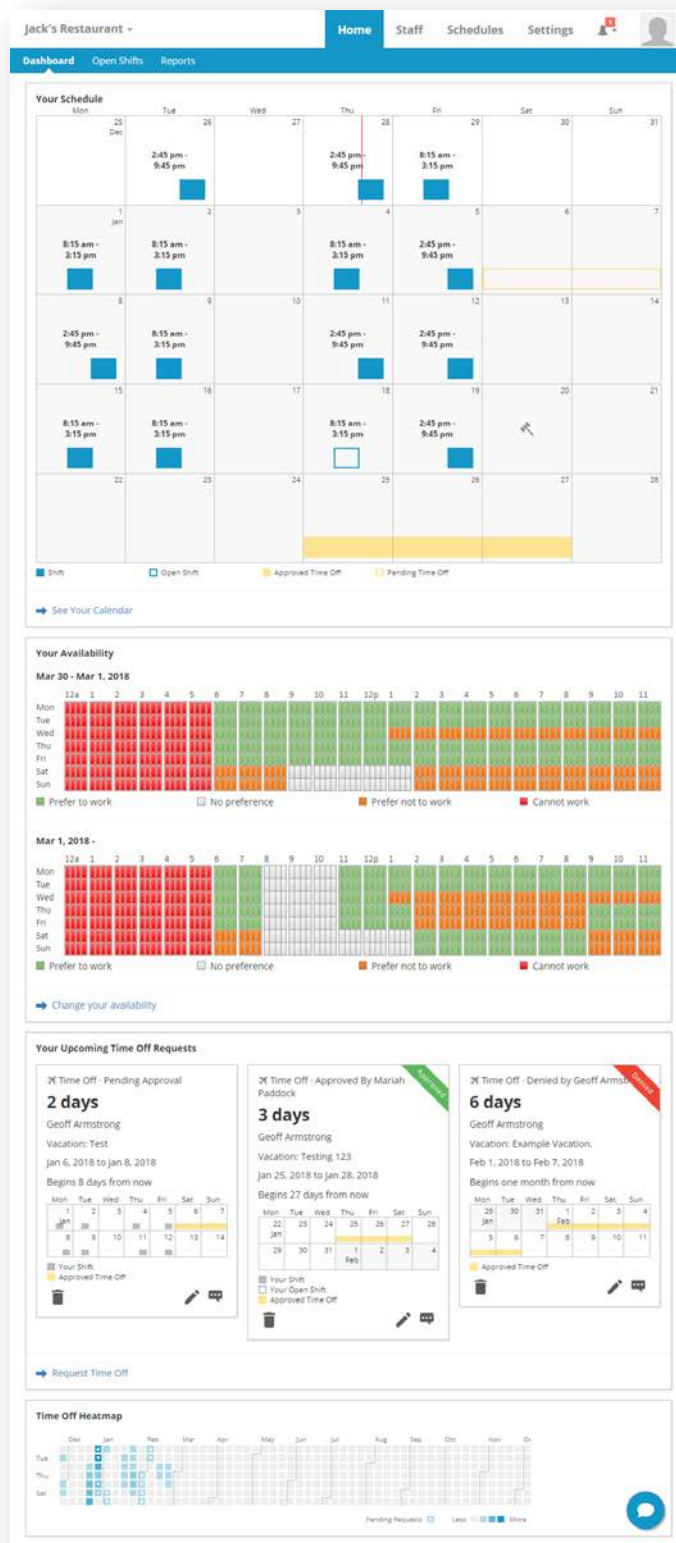


In the phone app, the manager can click to view open shifts with bids. Click on any of the open shifts to assign the shift. Select a staff member and tap **"Assign"** to assign the shift. Alternatively, **"Assign New"** will create a new copy of the shift and assign that shift to the staff member.



Dashboard

The dashboard (Home Tab) shows your schedule, availability, time off requests, and potential open shifts.



A red number (2) beside the notification bell indicates that you have new notifications. Click on the bell to view the notifications.

Your schedule shows:

-  your scheduled shifts
-  your shifts (open for bidding)
-  days with available shifts (click on the gavel to view available shifts)
-  your approved time off
-  your pending time off

Your availability shows your preferred times to work on a weekly basis.

Your upcoming time off requests (pending, approved, and denied) are shown. *This section will include time off requests for other staff members if you are a manager or a location manager.*

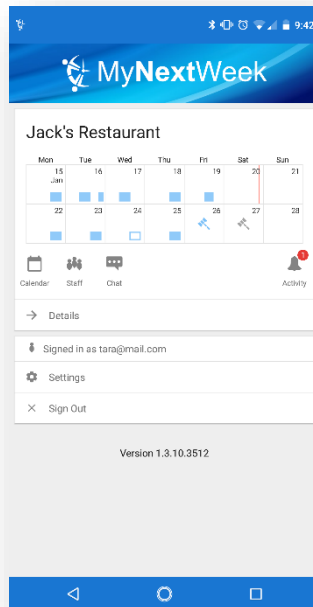
The **time off heatmap** shows time off requests for your organization.

 Click on the chat icon to see your available chat channels. On some screens, the chat icon will also display an audit history for the items on the page.

Continued on next page...

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The mobile app dashboard has similar functionality. A typical employee screen is shown below.



The top of the page shows your two-week mini calendar, where:

- a red vertical line indicates the current date and time
- a solid blue rectangle indicates your shift
- a blue outline indicates one of your shifts that is up for bids
- a solid yellow rectangle indicates your approved time off
- a yellow outline indicates a pending time off request
- a grey gavel (🔨) indicates days with available shifts
- a blue gavel (🔨) indicates days with an active bid on a shift

The calendar icon (📅) displays up your full calendar.

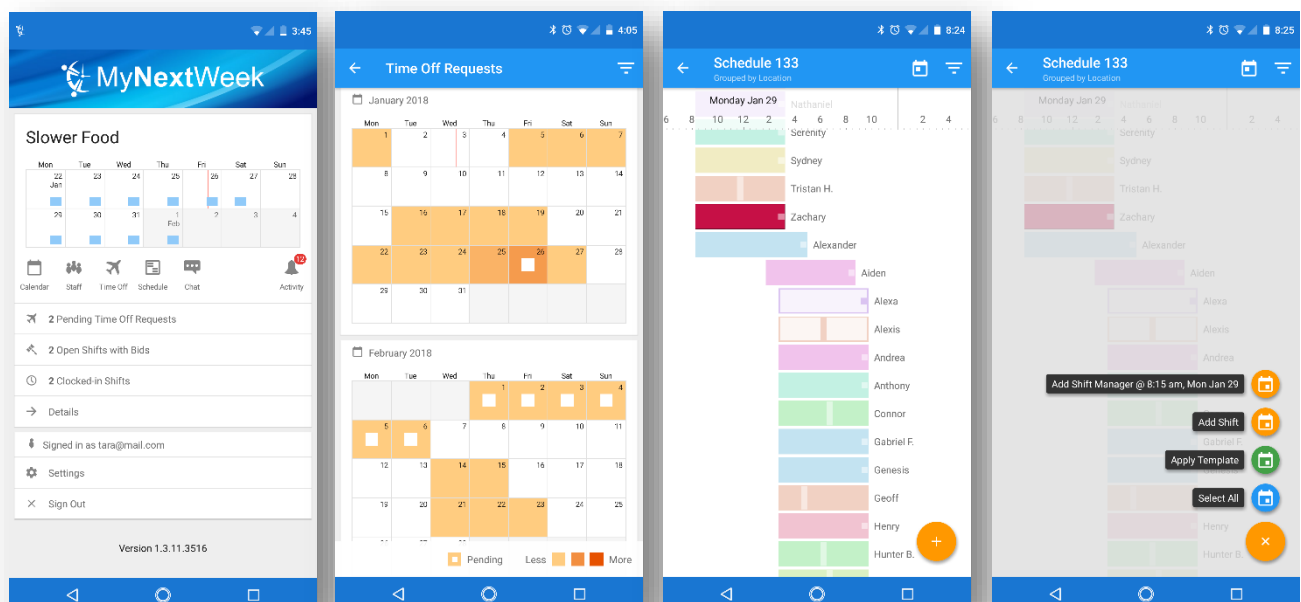
The staff icon (👥) displays staff schedules for this week.

The chat icon (💬) displays your chat channels.

A red number beside the notification bell (🔔) indicates that you have new activity. Click on the bell to view the notifications.

Click on the settings icon (⚙️) to change the lead times for your shift notifications.

A typical manager screen is shown below (*left*). In addition to the items shown on the employee screen, you can also approve pending time off requests, approve bids on shifts, or clock out users who forget to clock out. The time off icon (✈️) displays the time off heat map (*center left*). The schedule icon (📅) displays the mobile version of the schedule editor (*center right*). On the schedule editor, an action button (⊕) displays more options to edit the schedule (*right*), and a filter button (🔍) lets you filter the items shown (for example, by location). Finally, the shift heatmap button (📊) shows the relative number of shifts per day, similar to the time off heatmap.



Edit Organization Settings

Click on the **"Settings"** tab, then click on the **"General"** submenu tab. From this page, you may edit various organization-wide settings, such as chat channels, shift and break requirements, break types, break rules, shift bid settings, and time off categories. You may also set the default working preferences for new staff.

Note: "Minimum Time Between Shifts" and "Preferred Time Between Shifts" will be overridden by the values on the staff member's [rate card](#), if applicable.

To add a new item, press the "add" (+) button. To remove an item, press the corresponding "remove" (−) button.

Jack's Restaurant ▾

HomeStaffSchedules**Settings**

14

GeneralLocationsPositionsThemeRate CardsInvoices

Main Settings

Organization Name *

Jack's Restaurant

URL Name *

jacksrest

<https://www.mynextweek.com/jacksrest>

Scheduling Considerations

Time Zone

(-05:00) America/New_York ▾

Schedules Start On

Monday ▾

Minimum Shift Length (hours) *

3

Maximum Shift Length (hours) *

10

Minimum Time Between Shifts (hours)

8

Preferred Time Between Shifts (hours)

10

Availability Change Lead Time (days)

1 ▾

How far in advance workers may make availability changes.

☒ Apply Shift Rules to External Shifts

Consider external "Schedule Synergy" shifts when determining maximum hours per day, minimum time between shifts, etc.

☒ Enable Custom Rules

Enable custom rules in the schedule editor.

Clock In/Out Features

☒ Enable Clock-in/out on Kiosks

☒ Enable Clock-in/out on Mobile

Clock In Early Window

60 ▾

Minutes earlier than the shift start time where clocking in is permitted.

Clock Out Late Window

90 ▾

Automatically clock out clocked-in shifts after this amount of time.

☐ Calculate Employee Pay

Enable shift pay calculations based on Employee Compensation data.

Break Types

+ Break Type	Paid Break	Clock In/Out Required
− Paid	☒	☒
− Unpaid	☐	☒
− Split	☐	☒

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Break Rules

+	Min Shift Length (minutes)	Max Shift Length (minutes)	Type	Duration (minutes)
-	300		Paid	30

Open Shifts

Open Shift Life Time (hours)
48
Maximum time that new bids are accepted on open shifts. This affects default bid deadlines.

Open Shift Lead Time (hours)
24
How close to the start of the shift is bidding permitted? This affects default bid deadlines.

Time Off Categories

+	Name	Description	Notice (Days)	Approval Deadline (Days)
-	Vacation	Vacation days	14	10
-	Bereavement	Time off due to the death of a fam	0	
-	Medical	Doctor appointments, etc	7	

Channels

+	Name	Description	Default Access
-	General	Communication with all employees.	☒
-	Manager	Managers only.	☐
-	Kitchen Team	All of the kitchen staff.	☒

Defaults for New Staff

Minimum Work Per Week (hours)
15

Preferred Work Per Week (hours)
35

Maximum Work Per Week (hours)
45

Maximum Work Per Day (hours)
10

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

☒ Prefer to work ☐ No preference ☒ Prefer not to work ☐ Cannot work

Save

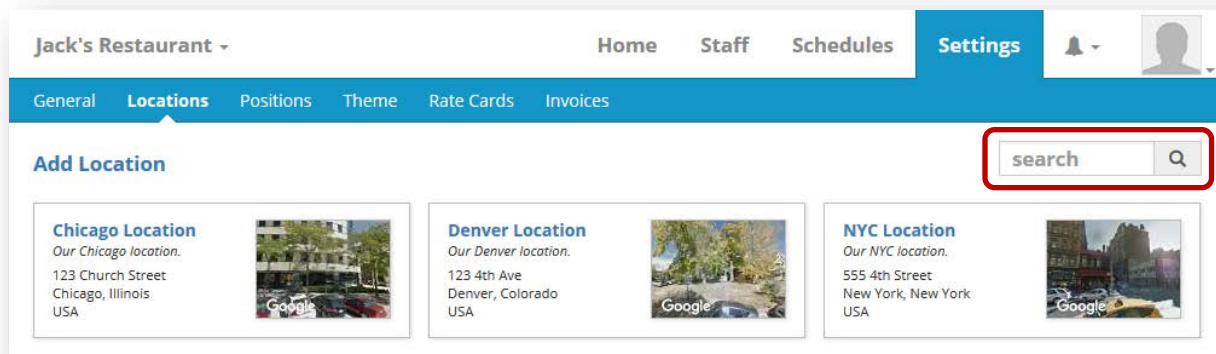
Note: For the time off categories, the approval deadline is the minim lead time

Press the **"Save"** button to save your changes.

Find a Location

Click on the **"Settings"** tab then select the **"Locations"** submenu tab. Click the **search bar** and begin to type the name of the location. The search bar will filter the information as you type.

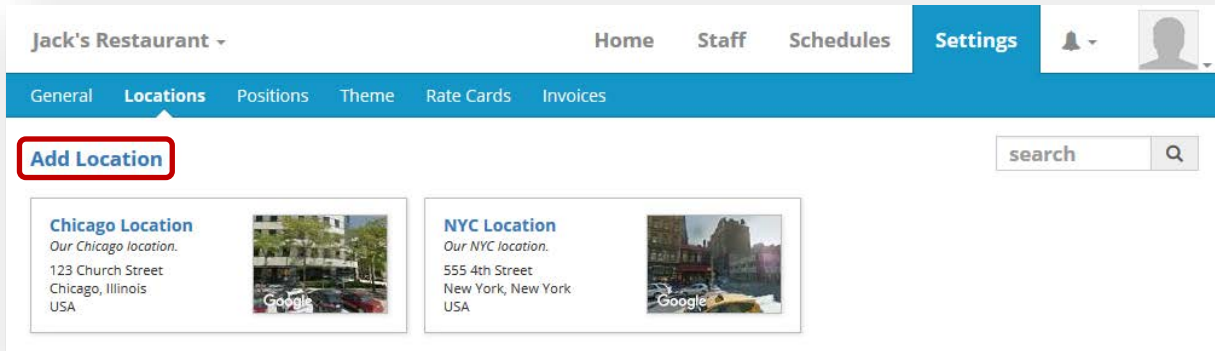
Click on the title of a location to view additional details.



Create a New Location

Note: An organization has a main location (configured when the organization account is created), but it can also have additional locations. Each shift will be associated with a single location. By default, this is the main location. Once additional locations are added, the location can be specified when a new shift is created in the shift editor.

Click on the **"Settings"** tab then select the **"Locations"** submenu tab. Click on the **"Add Location"** link.



Enter the location name and (optionally) a description of the location.

The screenshot shows the 'New Location' form. The 'Location Name' field is labeled 'Location Name *' and contains the text 'Denver Location'. The 'Location Description' field is labeled 'Location Description' and contains the text 'Our Denver location.'. A red box highlights the 'Create' button at the bottom left of the form.

Press the **"Create"** button and the [location details](#) page for the newly created location will open.

Edit Location Details

Click on the **"Settings"** tab then select the **"Locations"** submenu tab. [Search](#) to find the position you wish to edit, then click on the position's name to bring up the **"Details"** tab for the location.

After changing the location details, press the **"Save"** button to save your changes.

After entering the address, click on **"Pin Address Location"** to pin the location on the map. Choose **"Include StreetView Picture"** to include the picture for the location (if available). **"Pin Map Center"** places the pin in the center of the currently displayed map. **"Re-center"** changes the view so that the map is centered on the pin. **"Clear"** removes the pin from the map.

Note: If the pin doesn't show up in the correct location, you can manually move it to the correct spot on the map. If the StreetView picture doesn't show the right building, move the pin around on the building until the picture displays the desired view. StreetView is not available in all areas.

Jack's Restaurant ▾

HomeStaffSchedulesSettings

🔔👤

GeneralLocationsPositionsThemeRate CardsInvoices

Location Name *

Denver Location

Phone

555-555-1234

#Hashtag

denver

Location Description

Our Denver location.

Address

123 Main Street

City

Denver

Region

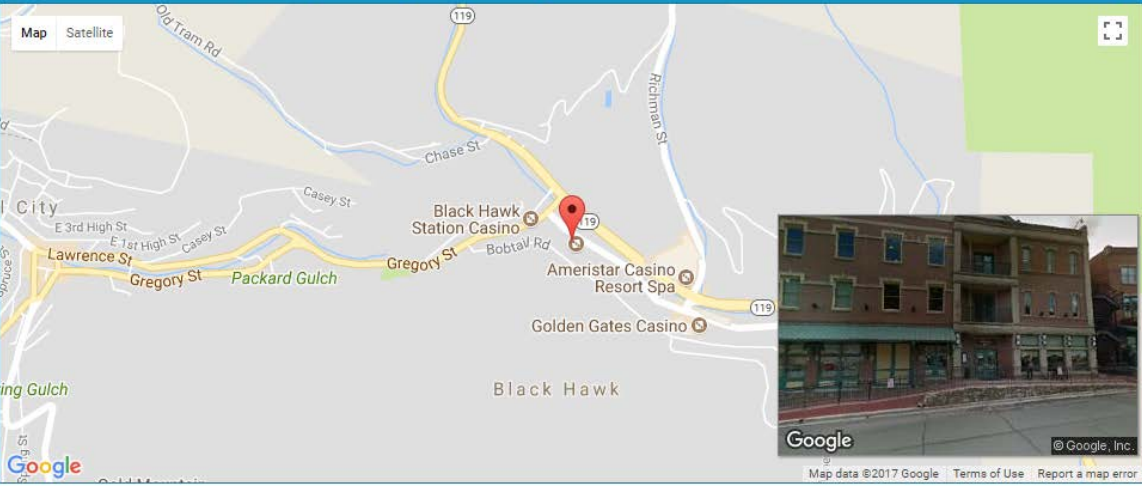
Colorado

Country

USA

📍 Pin Address Location📍 Pin Map Center⌕ Re-center🗑 Clear

MapSatellite



Google

Map data ©2017 Google | Terms of Use | Report a map error

☒ Include StreetView Picture

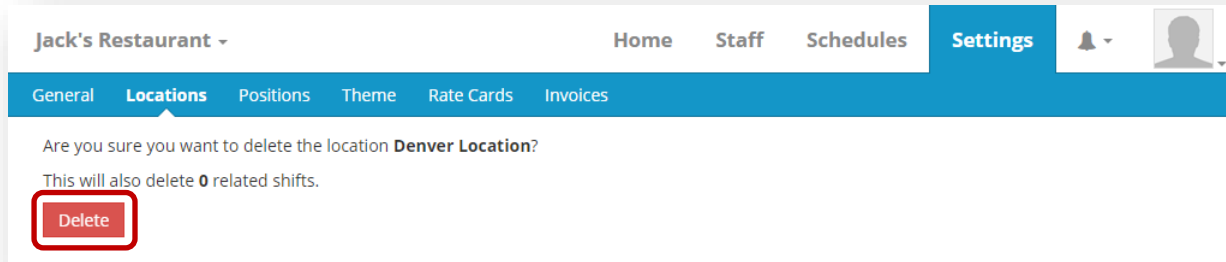
Save

Delete

Delete a Location

Click on the **"Settings"** tab then select the **"Locations"** submenu tab. [Search](#) to find the location you wish to delete, then click on the location's name to open the **"Details"** tab for that location.

Press the **"Delete"** button to delete the location. When prompted, press the **"Delete"** button to confirm.

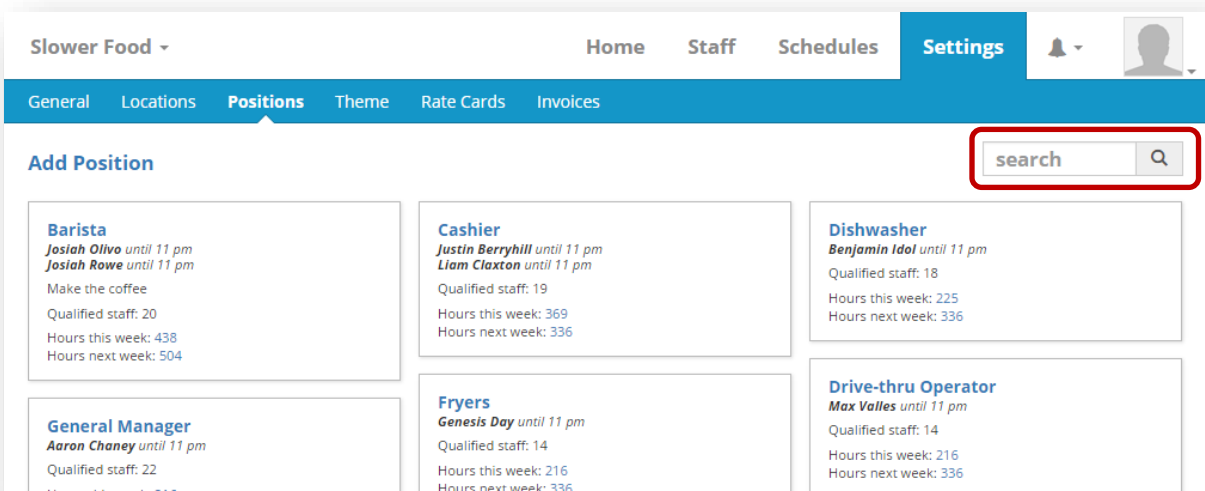


Caution: Deleting a location will also delete any current or historical shift data associated with this location. This action cannot be undone.

Find a Position

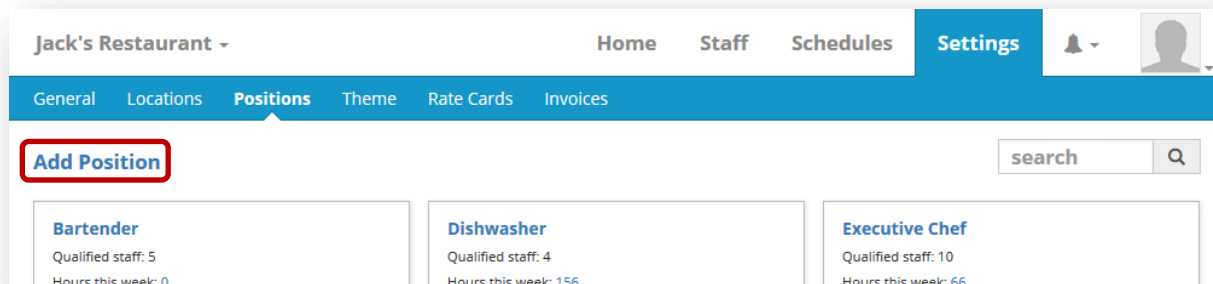
Click on the **"Settings"** tab then select the **"Positions"** submenu tab. Click the **search bar** and begin to type the name of the position. The search bar will filter the information as you type.

Click on the title of a position to view additional details.



Create a New Position

Click on the **"Settings"** tab then select the **"Positions"** submenu tab. Click on the **"Add Position"** link.



Enter the position name and (optionally) a description of the position.

A screenshot of the 'New Position' form in the web application. The header and submenu are the same as the previous screenshot. The form has a title 'New Position'. It contains two input fields: 'Position Name' with the value 'Mixologist' and 'Position Description' with the value 'This technical expert mixes flavor elements and beverages to make yummy drinks.' At the bottom left of the form is a blue button labeled 'Create' with a red border.

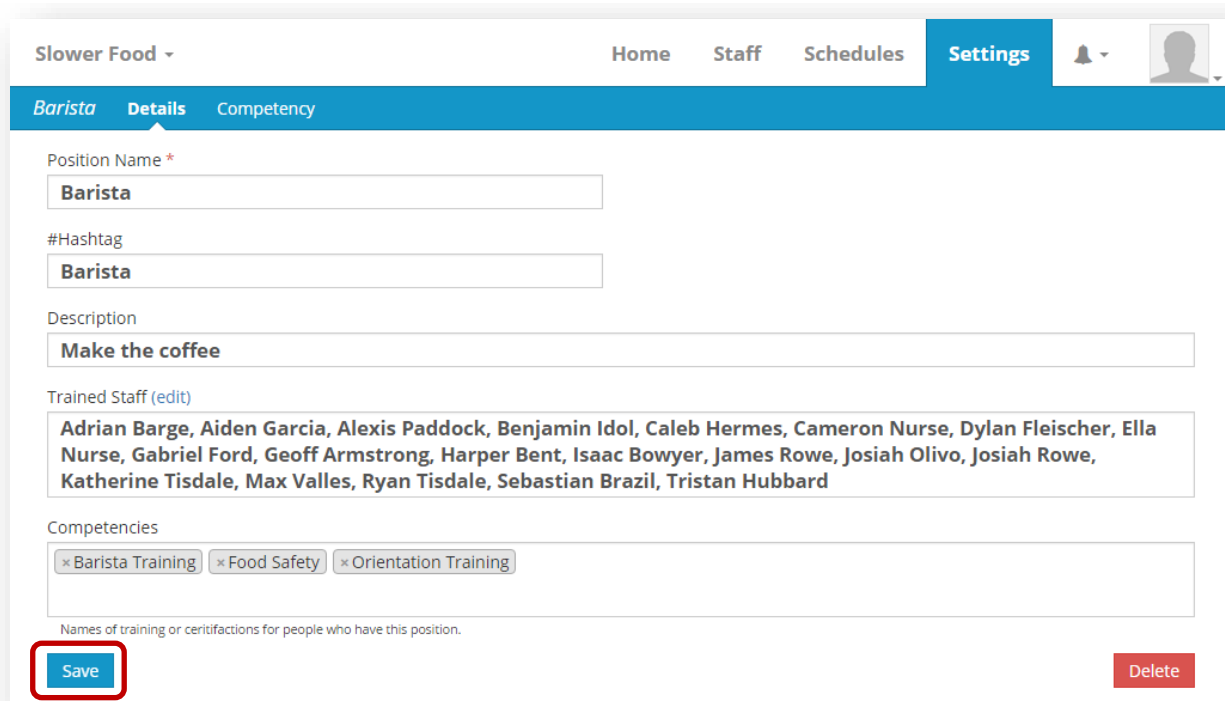
Press the **"Create"** button and the [position details](#) page will open for the newly created position will open.

Edit Position Details

Click on the **"Settings"** tab then select the **"Positions"** submenu tab. [Search](#) to find the position you wish to edit, then click on the position's name to bring up the **"Details"** tab for the position.

To add required competencies for the position, click in the **"Competencies"** box and start to type the name of the competency. Existing competencies that match your text string will appear, or press **"Enter"** to create a new competency with the entered text string.

After changing the position details, press the **"Save"** button to save your changes.



The screenshot shows a web application interface for editing position details. At the top, there is a navigation bar with the following elements: a dropdown menu labeled 'Slower Food', and tabs for 'Home', 'Staff', 'Schedules', and 'Settings' (which is currently selected). To the right of the 'Settings' tab are a notification bell icon and a user profile icon. Below the navigation bar, there is a sub-navigation bar with three tabs: 'Barista', 'Details' (which is selected), and 'Competency'. The main content area is titled 'Position Name *' and contains a text input field with the value 'Barista'. Below this is a '#Hashtag' section with a text input field containing 'Barista'. The 'Description' section has a text input field with the value 'Make the coffee'. The 'Trained Staff (edit)' section displays a list of names: Adrian Barge, Aiden Garcia, Alexis Paddock, Benjamin Idol, Caleb Hermes, Cameron Nurse, Dylan Fleischer, Ella Nurse, Gabriel Ford, Geoff Armstrong, Harper Bent, Isaac Bowyer, James Rowe, Josiah Olivo, Josiah Rowe, Katherine Tisdale, Max Valles, Ryan Tisdale, Sebastian Brazil, and Tristan Hubbard. The 'Competencies' section shows three tags: 'x Barista Training', 'x Food Safety', and 'x Orientation Training'. At the bottom of the form, there is a note: 'Names of training or certifications for people who have this position.' Below this note are two buttons: a blue 'Save' button (highlighted with a red rectangle) and a red 'Delete' button.

To designate staff that are assigned to each position, save your changes then click on the **"(edit)"** link to open the [qualifications page](#).

Continued on next page...

...continued from previous page.

When the qualifications page opens, the current position will be highlighted in green by default. Click on the checkboxes to edit the staff for the position then press the **"Save # Changes"** button to save your changes.

Note: You can click on row and column titles to highlight the rows and columns; this makes editing easier. A red flag (🚩) on the cell indicates that the staff member **does not** have the required competencies for the assigned position. A green (🟢) flag indicates that the staff member **does** have the required competencies for the unassigned position.

When you are finished editing, click on the **"Save # Changes"** button to save your changes.

Slower Food ▾

Home

Staff

Schedules

Settings



List

Grid

Qualifications

Time Off

Edit

Eligible ▾

Save 0 Changes

	Locations		Positions											Channels	
	301 822 10th St	Location B	Barista	Cashier	Dishwasher	Drive-thru Operator	Fryers	General Manager	Grill	Order Taker	Sandwich Maker	Shift Manager	General	Manager	
Aaron Chaney	✓	✓	✓	✓			✓						✓		
Adrian Barge	✓	✓	✓	✓			✓	✓	✓		✓		✓	✓	
Adrian Flynn	✓		✓									✓	✓		
Aiden Garcia	✓		✓							✓			✓		
Alexa Hubbard	✓	✓	✓						✓	✓			✓		

Edit Position Competencies

Click on the **"Settings"** tab then select the **"Positions"** submenu tab. [Search](#) to find the position you wish to edit, then click on the position to bring up the **"Details"** tab for the selected position. Click on the **"Competency"** tab to show competencies for the position.

The dropdown box contains the competencies required for this position. Select a competency from the dropdown box to show status of the competency for all staff members with the selected position.

When a staff member has obtained a competency, check the box to the left of the staff member. Enter the competency expiry date, or leave the expiry blank if the competency never expires. Expired competencies are indicated by a red warning symbol (⚠).

Staff Member	Expires
☒ Adrian Barge	
☐ Cameron Heim	
☒ Julian Chaney	Sep 08, 2017
☒ Luis Garcia	⚠ Mar 06, 2017
☒ Morgan Bates	⚠ May 10, 2017

[Save](#)

Delete a Position

Click on the **"Settings"** tab then select the **"Positions"** submenu tab. [Search](#) to find the position you wish to delete, then click on the position's name to open the **"Details"** tab for that position.

Press the **"Delete"** button to delete the position. When prompted, press the **"Delete"** button to confirm.

Delete position **Mixologist**? It is currently held by 3 workers.
This will also delete 3 shifts from the system, 2 of which are in the future.

[Delete](#)



Caution: Deleting a position will also delete any current or historical shift data associated with this position. This action cannot be undone.

Customize the Theme and Logo

Click on the **"Settings"** tab, then click on the **"Theme"** submenu tab. To add a logo, click on the **"Upload a file"** button to upload your logos. Mobile logos should be square.

Note: Portable Network Graphics (.png) format is recommended for logos.

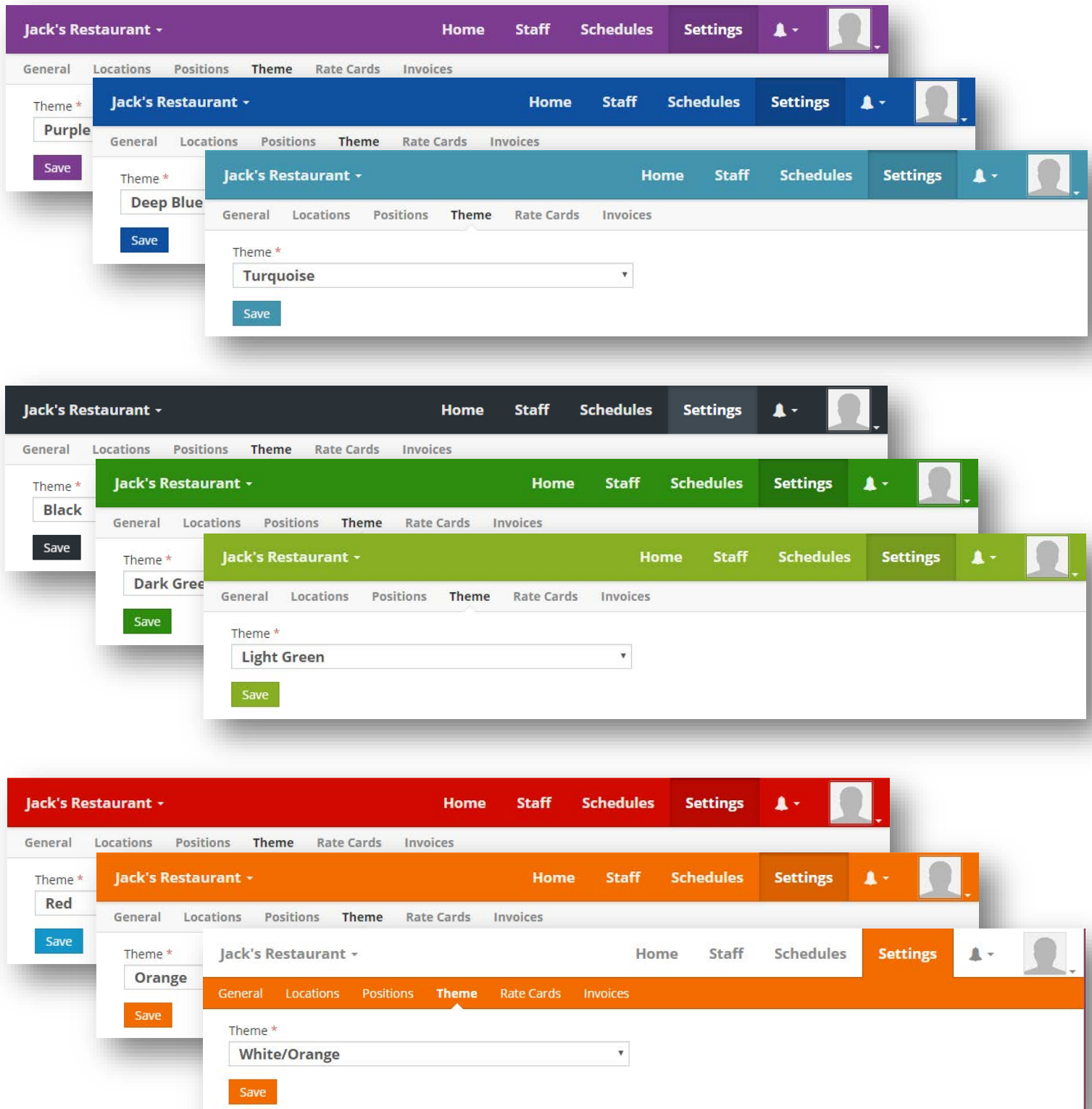
Choose a color theme that is compatible with your logo from the drop down **"Theme"** menu. In addition to the solid-color menu backgrounds, there are several color combinations that pair a white menu background with an accent color. In the example below, the white color theme is shown with a graphic as the logo.

Click **"Save"** to save and apply your changes.

Note: Click on the logo for more options (e.g. crop or delete).

The screenshot displays the 'Settings' page for 'Vanilla Girl Cupcake Shop'. The top navigation bar includes 'Home', 'Staff', 'Schedules', and 'Settings'. Below this, a submenu shows 'General', 'Locations', 'Positions', 'Theme' (selected), 'Rate Cards', and 'Invoices'. The 'Theme' section features a dropdown menu set to 'White' and a 'Save' button. The 'Web Site Header' section shows the shop's logo and name, with an 'Upload a file' button. The 'Mobile Banner Logo Image' section shows a smaller version of the logo with an 'Upload a file' button. The 'Mobile Banner Background Image' section shows a light blue background with an 'Upload a file' button. To the right, a smartphone mockup displays the mobile app interface, which includes a 'Slower Food' header, the shop's logo, and a list of current activity, staff, and schedules.

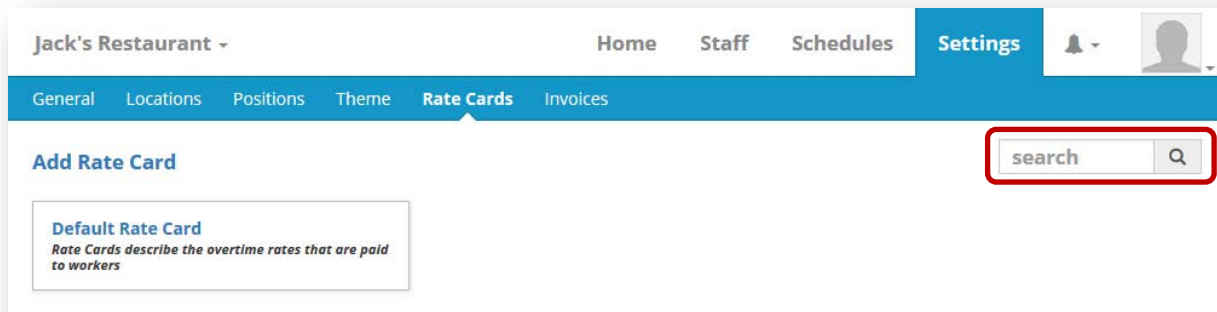
The examples below show various themes with the default text.



Find a Rate Card

Click on the **"Settings"** tab then select the **"Rate Cards"** submenu tab. Click the **search bar** and begin to type the name of the rate card. The search bar will filter the information as you type.

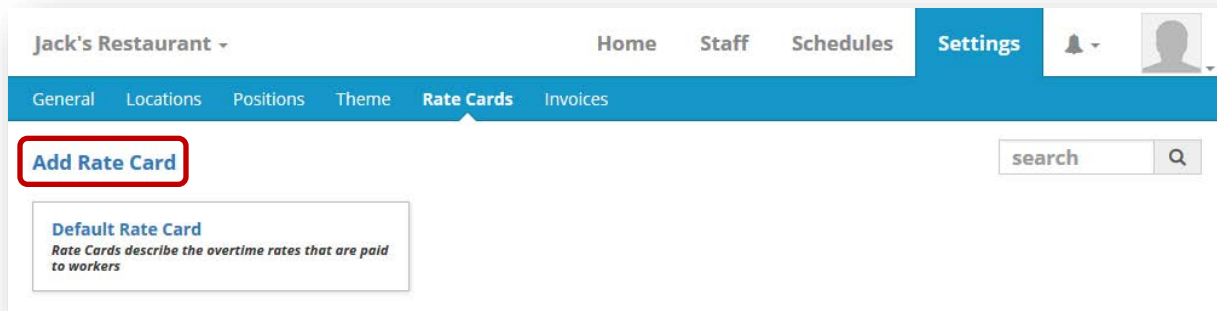
Click on the title of a rate card to view additional details.



The screenshot shows the 'Rate Cards' page under the 'Settings' tab. The 'search' bar is highlighted with a red box. The page title is 'Add Rate Card'. Below the search bar, there is a 'Default Rate Card' section with the text: 'Rate Cards describe the overtime rates that are paid to workers'.

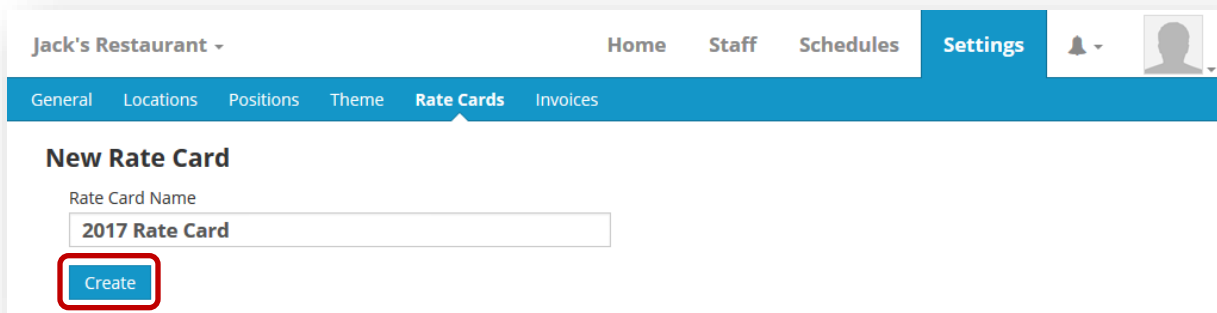
Create a New Rate Card

Click on the **"Settings"** tab then select the **"Rate Cards"** submenu tab. Click on the **"Add Rate Card"** link.



The screenshot shows the 'Rate Cards' page under the 'Settings' tab. The 'Add Rate Card' link is highlighted with a red box. The page title is 'Add Rate Card'. Below the link, there is a 'Default Rate Card' section with the text: 'Rate Cards describe the overtime rates that are paid to workers'.

Enter a name for the new rate card.



The screenshot shows the 'New Rate Card' form. The 'Create' button is highlighted with a red box. The form has a title 'New Rate Card' and a label 'Rate Card Name'. The text '2017 Rate Card' is entered in the input field.

Press the **"Create"** button and the [rate card details](#) page for the newly created rate card will open.

Edit Rate Card Details

Rate cards describe the overtime rates as well as required time gaps. Click on the **"Settings"** tab then select the **"Rate Cards"** submenu tab. [Search](#) to find the rate card you wish to edit, then click on the rate card's name to bring up the **"Details"** tab for the rate card. Different rate cards can be applied to each [compensation period](#) for each staff member.

Specific hours and days can have different multipliers. To edit multiple hourly multipliers at the same time, click and drag to highlight multiple values, then enter the new multiplier in the text box. Rates can either stack (e.g. add together) or not stack (e.g. the higher of the two rates is used).

Minimum times between shifts and preferred time between shifts are used by the schedule editor when automatically assigning shifts; these will also appear as warnings in the schedule editor when violated. The minimum continuous free time per schedule will attempt to ensure that staff members have the specified amount of continuous time off each schedule

After changing the rate card details, press the "Save" button to save your changes. Once the rate card is created, this rate card can be applied to specific staff members.

Jack's Restaurant ▾

HomeStaffSchedulesSettings

GeneralLocationsPositionsThemeRate CardsInvoices

Name

Default Rate Card

Description

Rate Cards describe the overtime rates that are paid to workers

Daily Overtime Starts After (hours)

8

After working this much in a day, the overtime multiplier is applied to additional hours.

Weekly Overtime Starts After (hours)

40

After working this much in a week, the overtime multiplier is applied to additional hours.

Overtime Multiplier

1.25

☐ Stacking Rates

If set, when a worker has exceeded their daily or weekly regular hours and is working a during a special hourly period, the overtime rates stack.

Minimum Time Between Shifts (hours)

8

If set, the schedule editor will try really hard to keep this much time between shifts.

Preferred Time Between Shifts (hours)

12

If set, the schedule editor will try to keep this much time between shifts.

Min Continuous Free Time Per Schedule (hours)

48

Check schedules to make sure they have at least one gap between shifts that's this long.

Hours Per Workday

7.5

How many hours are in a standard work day?

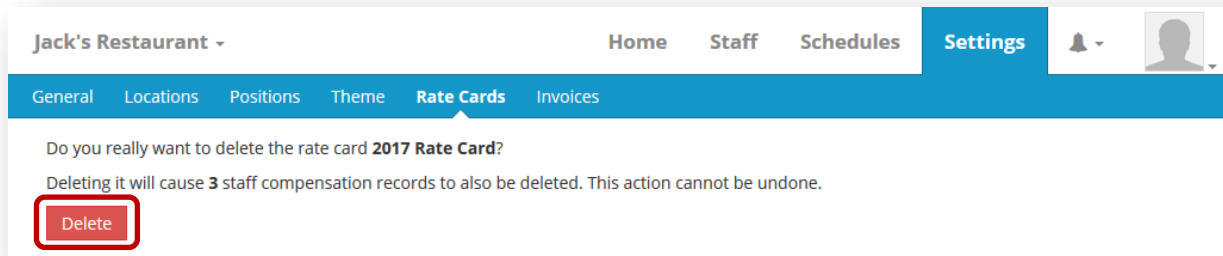
Hour	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
0:00	1.00	1.00	1.00	1.00	1.00	1.00	1.00
1:00	1.00	1.20	3.00	1.00	1.00	1.00	1.00
2:00	1.00	4.00	1.00	1.5	1.00	1.00	1.00
3:00	1.00	1.00	1.00	1.00	1.00	1.00	1.00
4:00	1.00	1.00	1.00	1.00	1.00	1.00	1.00
⋮							
22:00	1.00	1.00	1.00	1.00	1.00	1.00	1.00
23:00	1.00	1.00	1.00	1.00	1.00	1.00	1.00

SaveDelete

Delete a Rate Card

Click on the **"Settings"** tab then select the **"Rate Cards"** submenu tab. [Search](#) to find the rate card you wish to delete, then click on the rate card's name to open the **"Details"** tab for that rate card.

Press the **"Delete"** button to delete the rate card. When prompted, press the **"Delete"** button to confirm.



Caution: Deleting a rate card will also delete any current or historical data associated with this rate card. This action cannot be undone.

Generate a Payroll Report

Click on the **"Home"** tab, then click on the **"Reports"** submenu tab.

Enter the range of schedules you wish to include in the report (i.e. first schedule number to last schedule number). Both of the listed schedules and all schedules between will be included in the report. Report data is effective-dated and is based on the specified [compensation](#) periods as well as the [shift multipliers and bonuses](#).

Choose any desired settings, such as:

- Specific Location or All Locations
- Include Unpublished Shifts
- Full-Time-Equivalent (FTE) Hours per Day
- Sheets to Include (Staff Hours Summary, Staff Compensation Staff Planned Hours, Staff Actual Hours, Staff Hours Delta, Shift List, Planned FTE per Day, Actual FTE per Day)
- Time Off Requests

Click on the **"Run"** button to generate the report. The reports are exported in a Microsoft Excel compatible format (*.xlsx).

Jack's Restaurant ▾

Home Staff Schedules Settings ▾

Dashboard Open Shifts Reports

Report Parameters

First Schedule
Schedule 17: Dec 12, 2016 - Dec 18, 2016 ▾

Last Schedule
Schedule 20: Jan 2 - Jan 8 ▾

Location Filter
All Locations ▾

☐ Include Unpublished Shifts
Unpublished shifts are normally not included in reports.

FTE in Hours per Day
8 ▾
How many hours per day do you calculate as 1 FTE? (e.g. 7.5)

Sheets to Include

☒ Staff Hours Summary Staff hours breakdown (planned & actual).	☒ Staff Compensation Staff compensation breakdown (planned & actual).
☐ Staff Planned Hours Planned Staff hours per day.	☐ Staff Actual Hours Actual Staff hours per day.
☐ Staff Hours Delta The difference between the planned hours minus the actual hours worked.	☐ Shift List A list of all the shifts in this time period, useful for autofiltering.
☐ Planned FTE per Day Planned FTE per Day (Grouped by Position)	☐ Actual FTE per Day Actual FTE per Day (Grouped by Position)
☐ Time Off List List time off requests in this time period.	

Run

Continued on next page...

...continued from previous page.

A sample payroll report is shown below. Planned hours are shown in grey text. Actual hours are shown in dark blue, bold text.

		Schedule 192														Schedule 193			
		Planned	Actual	Oct 31		Nov 1		Nov 2		Nov 3		Nov 4		Nov 5		Nov 6	Planned	Actual	N
Adam Hermes	Total Hours	0.00	0.00	0.00		0.00		0.00		0.00		0.00		0.00		0.00	0.00	0.00	
	Regular Hours	0.00	0.00														0.00	0.00	
	Special Hours	0.00	0.00														0.00	0.00	
	Overtime Hours	0.00	0.00														0.00	0.00	
Adam Idol	Total Hours	32.00	32.20	8.00	8.00	8.00	8.20	8.00	7.87	0.00	0.00	8.00	8.13	0.00	0.00	0.00	40.00	32.72	
	Regular Hours	32.00	32.03	8.00	8.00	8.00	8.10	8.00	7.87			8.00	8.07				40.00	32.55	
	Special Hours	0.00	0.00														0.00	0.00	
	Overtime Hours	0.00	0.17				0.10						0.07				0.00	0.17	
Allison Olson	Total Hours	24.00	24.48	0.00	0.00	8.00	8.30	8.00	8.20	0.00	0.00	8.00	7.98	0.00	0.00	0.00	32.00	32.23	
	Regular Hours	24.00	24.23			8.00	8.15	8.00	8.10			8.00	7.98				32.00	32.07	
	Special Hours	0.00	0.00														0.00	0.00	
	Overtime Hours	0.00	0.25				0.15		0.10								0.00	0.17	
Andrea Heim	Total Hours	31.52	31.83	8.00	8.40	8.00	7.82	8.00	7.87	7.52	7.75	0.00	0.00	0.00	0.00	0.00	23.52	24.08	
	Regular Hours	31.52	31.63	8.00	8.20	8.00	7.82	8.00	7.87	7.52	7.75						23.52	23.87	
	Special Hours	0.00	0.00														0.00	0.00	
	Overtime Hours	0.00	0.20		0.20												0.00	0.22	
Andrea Mauldin	Total Hours	32.00	24.48	8.00	8.20	8.00	8.33	0.00	0.00	8.00	7.95	8.00	0.00	0.00	0.00	0.00	32.00	31.48	
	Regular Hours	32.00	24.22	8.00	8.10	8.00	8.17			8.00	7.95	8.00					32.00	31.48	
	Special Hours	0.00	0.00														0.00	0.00	
	Overtime Hours	0.00	0.27		0.10		0.17										0.00	0.00	

Note: Many of the payroll report sheets (e.g. spreadsheet tabs) are designed so that they can easily be converted into tables using spreadsheet software.

Find a Staff Member

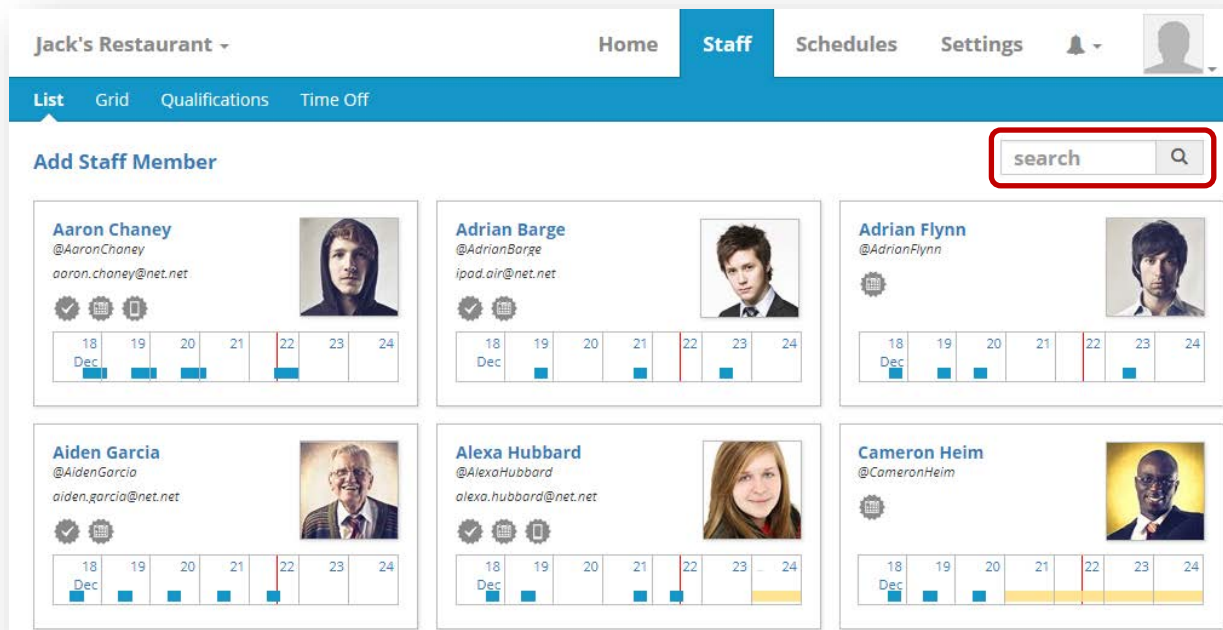
Click on the **"Staff"** tab. Click the **search bar** and begin to type a staff member's name. The search bar will filter the staff members as you type.

The staff member cards will show each staff member's shifts (in the theme's highlight color) and vacations (in yellow) for the current week.

Badges under a staff member's name indicate the following:

-  The user has signed in to MyNextWeek.
-  The user has entered their availability.
-  The user has installed the phone app (Android or iOS) on at least one device.

Click on the staff member's name to view additional details.



The screenshot shows the 'Staff' tab of the MyNextWeek interface for 'Jack's Restaurant'. The top navigation bar includes 'Home', 'Staff' (selected), 'Schedules', and 'Settings'. Below this is a sub-navigation bar with 'List' (selected), 'Grid', 'Qualifications', and 'Time Off'. A search bar is located in the top right corner of the staff list, highlighted with a red box. The staff list displays six staff members in a grid:

- Aaron Chaney** (@AaronChaney, aaron.chaney@net.net): Signed in, availability entered, phone app installed. Shifts: 18 Dec (blue), 19 (blue), 20 (blue), 21 (blue), 22 (blue), 23 (blue), 24 (blue).
- Adrian Barge** (@AdrianBarge, ipod.air@net.net): Signed in, availability entered. Shifts: 18 Dec (blue), 19 (blue), 20 (blue), 21 (blue), 22 (blue), 23 (blue), 24 (blue).
- Adrian Flynn** (@AdrianFlynn): Signed in. Shifts: 18 Dec (blue), 19 (blue), 20 (blue), 21 (blue), 22 (blue), 23 (blue), 24 (blue).
- Aiden Garcia** (@AidenGarcia, aiden.garcia@net.net): Signed in, availability entered. Shifts: 18 Dec (blue), 19 (blue), 20 (blue), 21 (blue), 22 (blue), 23 (blue), 24 (blue).
- Alexa Hubbard** (@AlexaHubbard, alexa.hubbard@net.net): Signed in, availability entered, phone app installed. Shifts: 18 Dec (blue), 19 (blue), 20 (blue), 21 (blue), 22 (blue), 23 (blue), 24 (blue).
- Cameron Heim** (@CameronHeim): Signed in. Shifts: 18 Dec (blue), 19 (blue), 20 (blue), 21 (blue), 22 (blue), 23 (blue), 24 (blue).

Add or Edit Multiple Staff Members (Grid)

Click on the **"Staff"** tab then select the **"Grid"** submenu tab. This page allows you to edit the minimum hours per week, preferred hours per week, maximum hours per week, and daily maximum hours for each staff member.

Click on a cell to edit staff member details. Edited fields will be shown highlighted with **pale yellow**. Time entries will be rounded to the nearest quarter hour (i.e. 15 minute increments are used). Drag the **blue** box in the lower right corner of the selection to **"Fill Down"** data to the cells below.

To delete a staff member click on the "remove" (⊖) button. **Pink** highlighting indicates a staff member who is flagged for deletion. If you click on the "remove" (⊖) button a second time, the pink highlighting will disappear and the staff member will no longer be flagged for deletion.

To add a new staff member, type the user information into the last row (a new row will be created).

When you have finished making changes, press the **"Save"** button to save your changes. If you navigate away from the page before pressing the **"Save"** button your changes will be discarded. Once you save, the **"Qualifications"** page will appear with the new staff members highlighted; from this page you can assign their positions, locations, and chat channels.



Caution: Once you press **"Save"**, these changes cannot be undone. If you delete a user, any shifts, time off requests, or payroll data associated with that user will be permanently deleted.

Jack's Restaurant ▾

HomeStaffSchedulesSettings

14

ListGridQualificationsTime Off

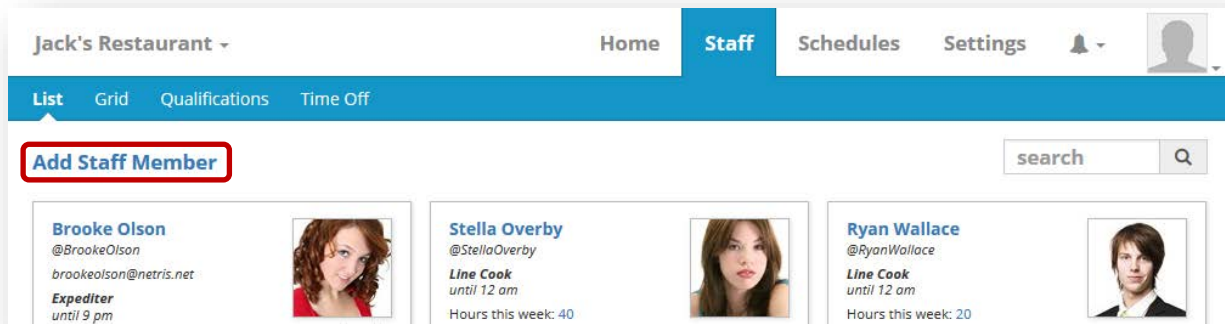
NewNo accountWith accountAvailability setConnected smartphone

	First Name	Last Name	Email	Phone	Min Hrs	Pref Hrs	Max Hrs	Daily Max Hrs
⊖	Allison	Rees	arees@jacks.com	555-555-5555	15	35	45	10
⊖	Anthony	Edington			15	35	45	10
⊖	Brianna	Palmi			12	35	45	10
⊖	Brooke	Chaney			12	35	45	10
⊖	Brooke	Olson	brookeolson@jacks.com		12	35	45	10
⊖	Brooklyn	Pedigo			12	35	45	10
⊖	Cameron	Garcia	Garcia@jacks.com		15	35	45	10
⊖	Camila	Caesar			15	35	45	10
⊖	Candy	Baker	candy.baker@jacks.com		15	35	45	10
⊖	Isabella	Ford			15	35	45	10
⊖	Jack	Smith	jack@jacks.com		15	35	45	10
⊖	Jaden	Nurse	jaden.nurse@jacks.com		15	35	45	10
⊖	Logan	Dawkins	bob@jacks.com		15	35	45	10
⊖	Madison	Edington			15	35	45	10
⊖	Mia	Armstrong			15	35	45	10
⊖	Natalie	Nesbitt			15	35	45	10
⊖	Nolan	Hill	nolanhill@jacks.com		15	35	45	10
⊖	Ryan	Wallace			15	35	45	10
⊖	Sophia	Caesar			15	35	45	10
⊖	Stella	Overby			15	35	45	10
	Susie	Smith	Susie.Smith@jacks.com					

Save

Add a Single New Staff Member

Click on the **"Staff"** tab. Click on the **"Add Staff Member"** link.



Jack's Restaurant ▾ Home **Staff** Schedules Settings 🔔 👤

List Grid Qualifications Time Off

Add Staff Member search 🔍

Brooke Olson
@BrookeOlson
brookeolson@netris.net
Expediter
until 9 pm



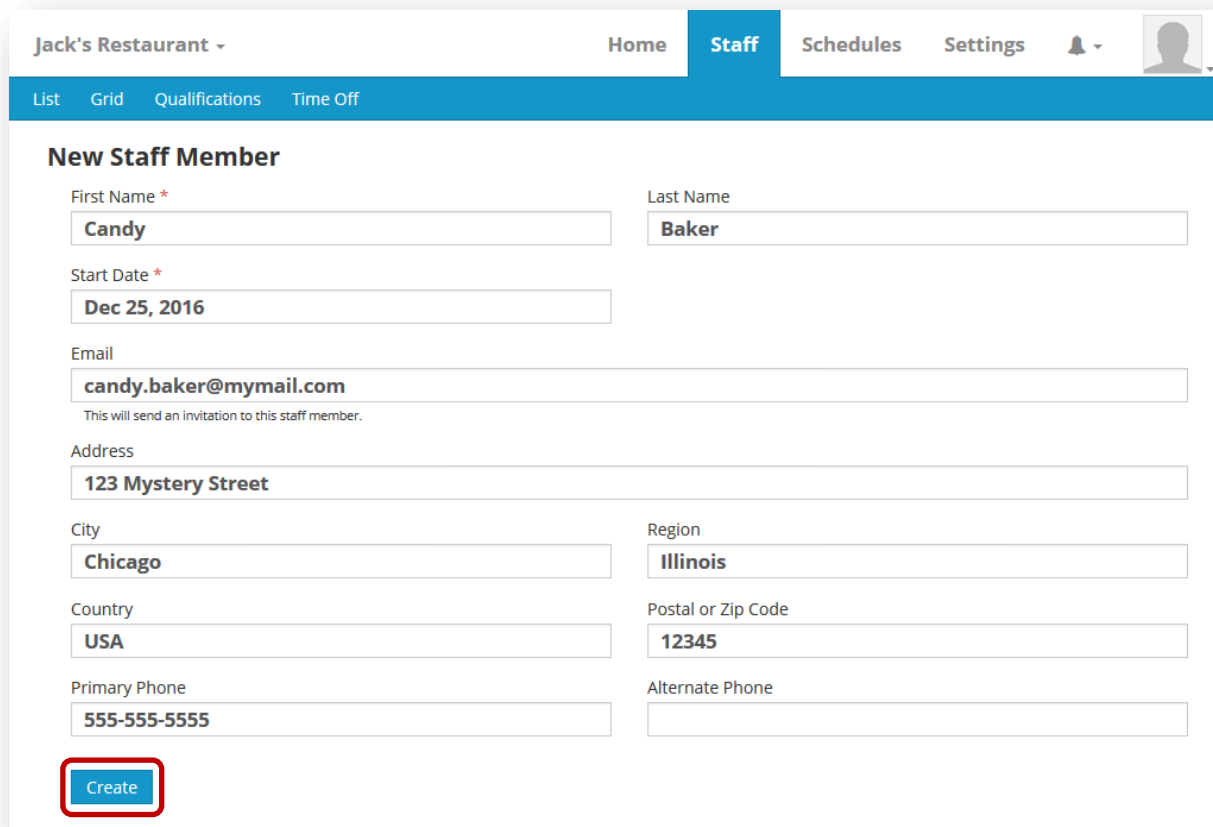
Stella Overby
@StellaOverby
Line Cook
until 12 am
Hours this week: 40



Ryan Wallace
@RyanWallace
Line Cook
until 12 am
Hours this week: 20



Enter the first name, last name, and start date for the new staff member.



Jack's Restaurant ▾ Home **Staff** Schedules Settings 🔔 👤

List Grid Qualifications Time Off

New Staff Member

First Name * Last Name

Start Date *

Email
This will send an invitation to this staff member.

Address

City Region

Country Postal or Zip Code

Primary Phone Alternate Phone

Create

Click **"Create"** and the staff member will be created. At this point, the form will reload and you may add another new staff member.

Alternatively, you may click on the green notification link to open the [staff member details](#) page, where you can add additional details for the newly created staff member.

Candy Baker created. [Click here](#) to edit.

Edit Staff Member Details

Click on the **"Staff"** tab. [Search](#) to find the staff member you wish to edit, then click on the staff member's name to bring up the **"Details"** tab for the staff member.

Modify the staff member details as desired. Upload a picture by pressing the **"Upload Picture"** button and selecting a picture file. When finished, click the **"Save"** button to save your changes.

A user who is set as a **"Trusted Timekeeper"** will be able modify the clock times on their own shifts. Any changes will be recorded in the audit trail for the shift. This is particularly useful for workers who set their own hours.

Jack's Restaurant ▾ Home **Staff** Schedules Settings ▾

Candy Baker **Details** Schedule Time Off Accruals Competency Availability Compensation

Staff Member Details

First Name * Last Name

Title @Handle
Job title in the organization. Used for replying to comments.

Employee Id
Useful for syncing data with external systems.

Positions (edit)

Locations (edit)

Email
[Click here](#) to disconnect the user account and prevent access.

Email Type	Sent To	Current Status
Other email	candy.baker@jacks.com	Delivered Jul 19, 2016 12:32 pm
Invitation	candy.baker@jacks.com	Clicked Jul 19, 2016 12:32 pm

☒ Get Notified By Email
This is in addition to any notifications you get on mobile devices.

Access Level ☐ Trusted Timekeeper
Owners can change anything. Managers can change schedules. Permitted to modify the clock times on their own shifts.

Contact Information

Address

City Region

Country Postal or Zip Code

Primary Phone Alternate Phone

Save **Delete**

Continued on next page....

...continued from previous page.

To designate the positions and locations for this staff member, save any changes then click on the "(edit)" link to open the ["Qualifications"](#) page. The staff member will be highlighted in blue by default. Edit the locations, positions, and affinities for this staff member then save your changes.

Notes:

- **Notification Emails** are sent to the staff member when an event occurs (for example, a shift is modified, a bid request is approved, or an open shift becomes available). These will be generated by the same events that generate notifications in the mobile apps; you may wish to turn off notification emails if you are already using the mobile app.
- **Access Level** is the level of access this staff member has inside the software system (i.e., employee, location manager, manager, or owner).
- **Positions** are the shift types that the staff member is qualified to fill. Each staff member can have multiple positions.
- **Locations** are the areas where the staff member will normally work. Each staff member can have multiple locations.

Staff Member Access Levels

Note: If you create an organization, you will automatically be set as an owner. Each organization must have at least one owner.

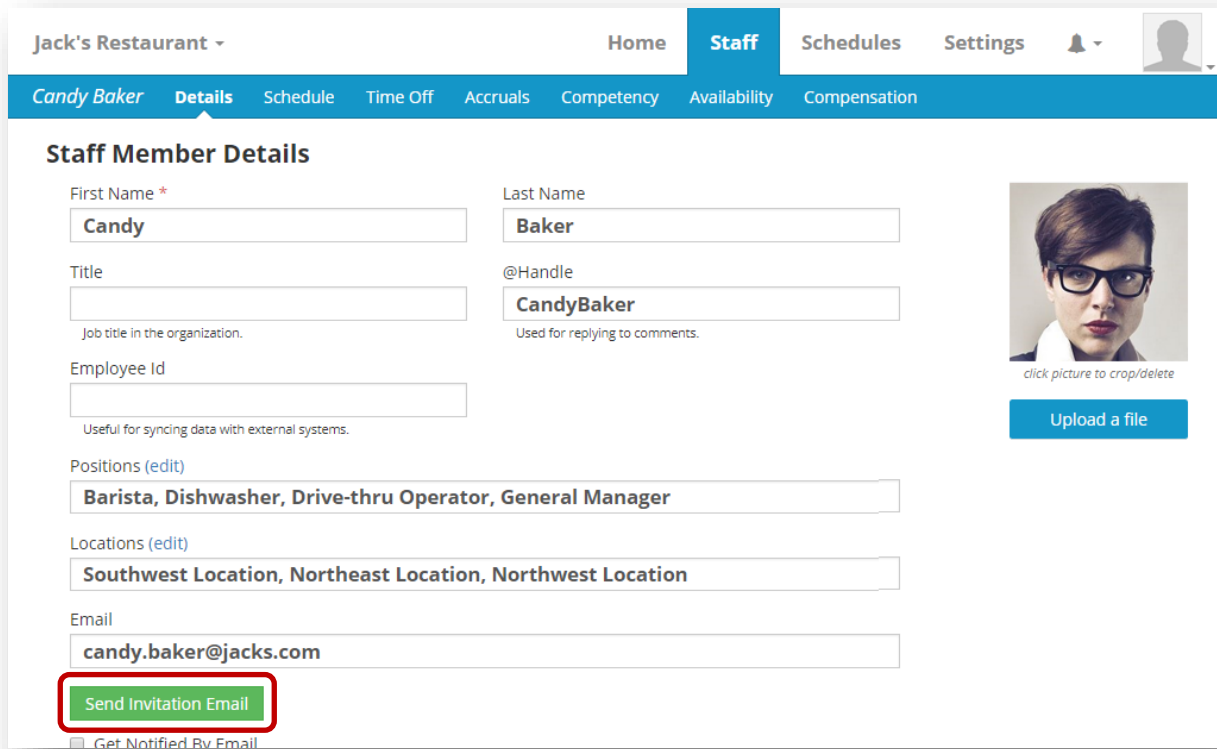
There are three access levels in **MyNextWeek.com**, including Employee, Location Manager, Manager, and Owner. The permissions for each access level are shown in the chart below. To set the access level for a user, go to the [staff member details](#) page.

Access Level	Employee	Location Manager	Manager	Owner
Can view their own schedule information and request shift trades.	✓	✓	✓	✓
Can view comments.	✓	✓	✓	✓
Can edit schedules.		✓	✓	✓
Can publish shifts.		✓	✓	✓
Can create, edit, or delete staff members, locations, positions, etc.		✓	✓	✓
Can edit organization settings (scheduling considerations, break types, theme, shift trade settings, time off categories, time zone, organization name, default scheduling preferences for new staff, etc.).				✓
Can delete, create, subscribe, or unsubscribe the organization.				✓
Can view and edit billing information (stored credit card, invoices, etc.).				✓

Send Invitation Email

Ensure an email address has been entered for the Staff Member, then press **"Save"** to save your changes. Click on **"Send Invitation Email"** to send an email to the specified email address.

Note: The invitation button will not be available after the staff member has accepted the invitation.



The screenshot displays the 'Staff Member Details' page for 'Candy Baker' in the 'Jack's Restaurant' system. The page is divided into several sections for editing different aspects of the staff member's profile. The 'Details' tab is active, showing fields for First Name, Last Name, Title, @Handle, Employee Id, Positions, Locations, and Email. The 'Send Invitation Email' button is highlighted with a red box at the bottom left of the form.

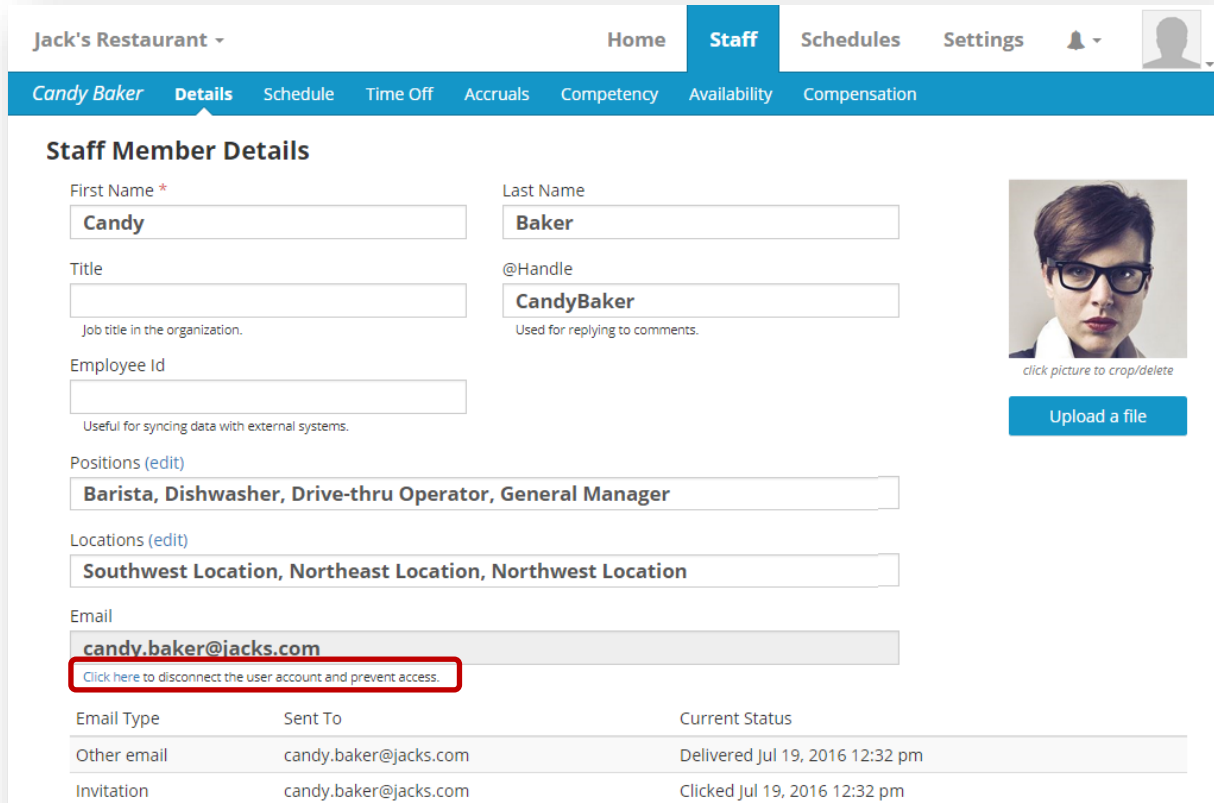
Field	Value
First Name *	Candy
Last Name	Baker
Title	
@Handle	CandyBaker
Employee Id	
Positions (edit)	Barista, Dishwasher, Drive-thru Operator, General Manager
Locations (edit)	Southwest Location, Northeast Location, Northwest Location
Email	candy.baker@jacks.com

Send Invitation Email

Change an Staff Member's Email Address / Revoke Access

Removing a staff member's email address will block the staff member from logging into their account in the organization.

To change a staff member's email address, you must first disconnect the email by clicking on the link below the email address, then enter a new email address and [send a new invitation email](#).



Jack's Restaurant ▾ Home **Staff** Schedules Settings ▾

Candy Baker **Details** Schedule Time Off Accruals Competency Availability Compensation

Staff Member Details

First Name * Last Name

Title @Handle
Job title in the organization. Used for replying to comments.

Employee Id
Useful for syncing data with external systems.

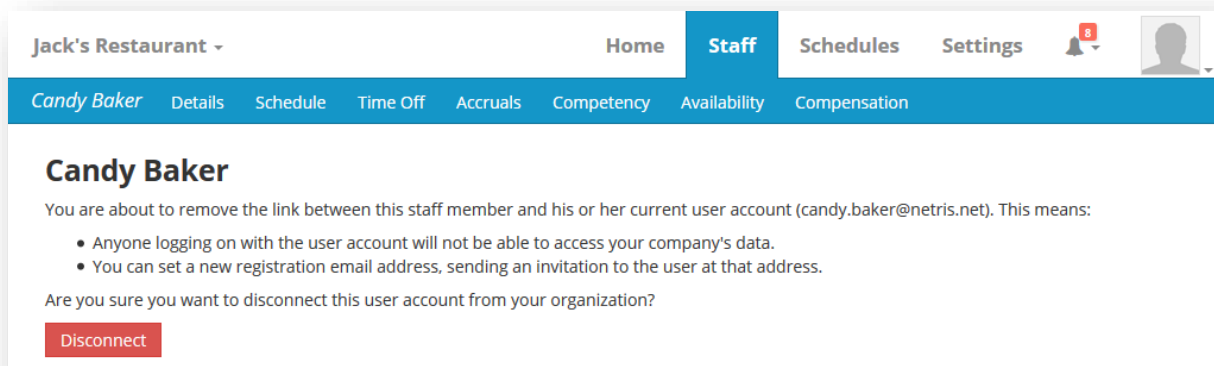
Positions (edit)

Locations (edit)

Email
[Click here to disconnect the user account and prevent access.](#)

Email Type	Sent To	Current Status
Other email	candy.baker@jacks.com	Delivered Jul 19, 2016 12:32 pm
Invitation	candy.baker@jacks.com	Clicked Jul 19, 2016 12:32 pm

After clicking the link to disconnect the email, click the **"Disconnect"** button to confirm the disconnection.



Jack's Restaurant ▾ Home **Staff** Schedules Settings ▾

Candy Baker Details Schedule Time Off Accruals Competency Availability Compensation

Candy Baker

You are about to remove the link between this staff member and his or her current user account (candy.baker@netris.net). This means:

- Anyone logging on with the user account will not be able to access your company's data.
- You can set a new registration email address, sending an invitation to the user at that address.

Are you sure you want to disconnect this user account from your organization?

Disconnect

Crop a Staff Member's Picture

Note: Cropping only affects how the picture is displayed; the original picture is not modified. The aspect ratio for the image crop box is locked to maintain layout consistency.

Click on the **"Details"** tab for the staff member. Click on the picture to crop or delete it.

Jack's Restaurant ▾ Home **Staff** Schedules Settings ▾

Candy Baker **Details** Schedule Time Off Accruals Competency Availability Compensation

Staff Member Details

First Name * Last Name

Title @Handle
Job title in the organization. Used for replying to comments.

Employee Id
Useful for syncing data with external systems.

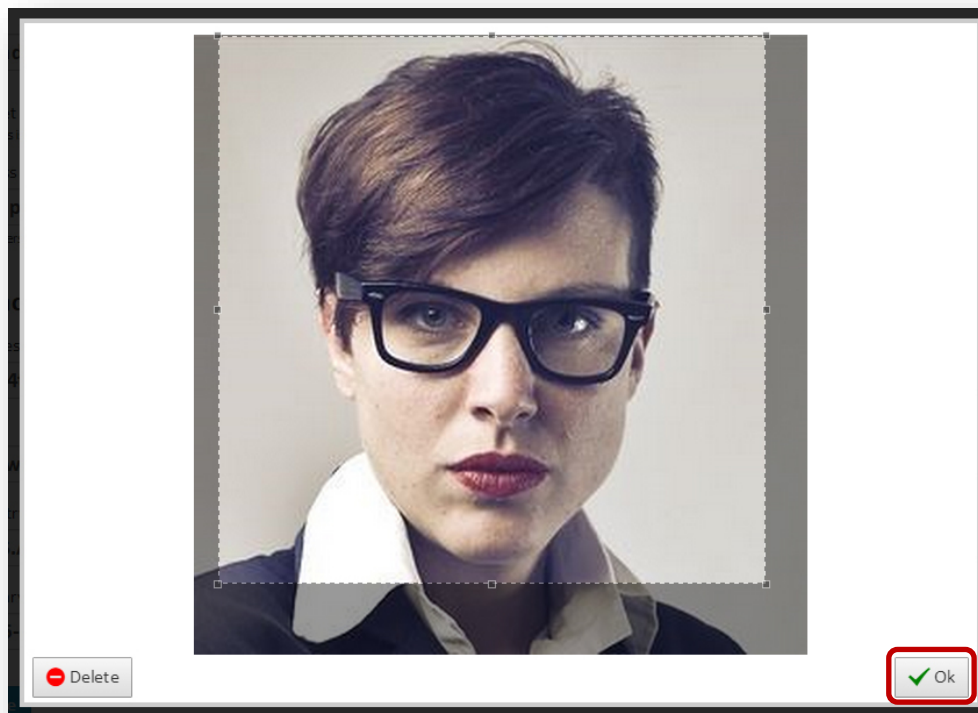
Positions (edit)

Locations (edit)

click picture to crop/delete

[Upload a file](#)

On the opened photo, click and drag to draw a crop box. Resize the box by dragging the box endpoints in or out. Adjust the box position by dragging the box to the desired location on the photo. Click outside of the crop box to remove the cropping. When finished, click the **"Ok"** button to save.



Picture File Requirements

Pictures files must be in JPEG format. The maximum allowed size for each file is **8 MB**. Uploaded images are scaled down to a maximum dimension size of **2048px**.

Delete a Staff Member's Picture

Click on the **"Details"** tab for the staff member. Click on the picture to open the edit page.

Jack's Restaurant ▾ Home **Staff** Schedules Settings 

Candy Baker **Details** Schedule Time Off Accruals Competency Availability Compensation

Staff Member Details

First Name * Last Name

Title @Handle
Job title in the organization. Used for replying to comments.

Employee Id
Useful for syncing data with external systems.

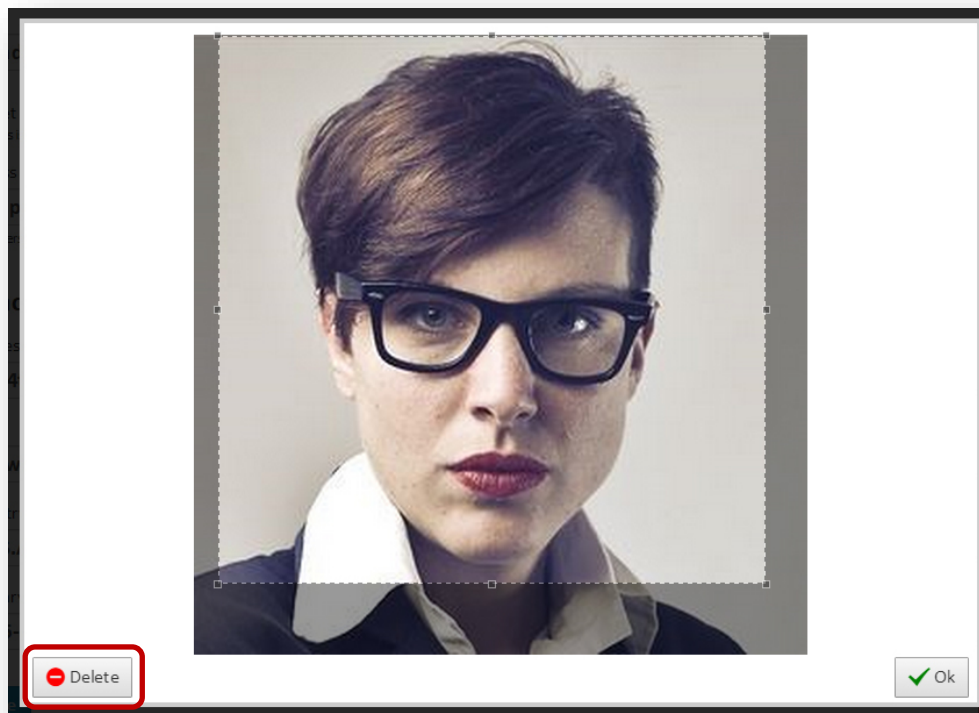
Positions [\(edit\)](#)

Locations [\(edit\)](#)


click picture to crop/delete

[Upload a file](#)

Press the **"Delete"** button in the lower left hand corner.



Edit Staff Member Qualifications (Locations, Positions, and Chat Channels)

Click on the **"Staff"** tab then select the **"Qualifications"** submenu tab. Click on the boxes to toggle the checkmarks and edit staff member locations and positions.

Note: You can click on row and column titles to highlight the rows and columns; this makes editing easier. A red flag (🚩) on the cell indicates that the staff member **does not** have the required competencies for the assigned position. A green (🟢) flag indicates that the staff member **does** have the required competencies for the unassigned position.

When you are finished editing, click on the **"Save # Changes"** button to save your changes.

The screenshot shows the 'Qualifications' tab for 'Jack's Restaurant'. The interface includes a top navigation bar with 'Home', 'Staff', 'Schedules', and 'Settings'. Below this is a sub-navigation bar with 'List', 'Grid', 'Qualifications', and 'Time Off'. The 'Qualifications' tab is active, showing a grid of staff members and their qualifications. The grid is organized into three main sections: Locations, Positions, and Channels. The 'Locations' section has two columns: '301 822 10th St' and 'Location B'. The 'Positions' section has columns for various roles: Barista, Cashier, Dishwasher, Drive-thru Operator, Fryers, General Manager, Grill, Order Taker, Sandwich Maker, and Shift Manager. The 'Channels' section has two columns: 'General' and 'Manager'. The staff members listed are Aaron Chaney, Adrian Barge, Adrian Flynn, Aiden Garcia, Alexa Hubbard, Alexander Mays, Alexis Paddock, and Alyssa Scalise. The grid cells contain checkmarks (✓) indicating qualifications. A red flag (🚩) is visible in the 'Cashier' column for Aiden Garcia. A green flag (🟢) is visible in the 'Dishwasher' column for Aiden Garcia. The 'Save 15 Changes' button is highlighted with a red box.

	Locations		Positions										Channels	
	301 822 10th St	Location B	Barista	Cashier	Dishwasher	Drive-thru Operator	Fryers	General Manager	Grill	Order Taker	Sandwich Maker	Shift Manager	General	Manager
Aaron Chaney	✓	✓		✓			✓						✓	
Adrian Barge	✓	✓	✓	✓			✓	✓	✓		✓		✓	✓
Adrian Flynn	✓			✓								✓	✓	
Aiden Garcia	✓		✓							✓			✓	
Alexa Hubbard	✓	✓							✓	✓			✓	✓
Alexander Mays	✓	✓		✓			✓						✓	✓
Alexis Paddock	✓		✓	✓			✓	✓					✓	✓
Alyssa Scalise	✓			✓				✓					✓	

Edit Staff Member Qualifications (Location Affinity, Position Affinity)

Click on the **"Staff"** tab then select the **"Qualifications"** submenu tab.

Use the **"Edit"** dropdown list to select **"Affinity"**. This lets you set each staff member's affinity for locations and positions. Affinity is used to weight positions or locations when automatically assigning shifts. For example, if a manager has an affinity of 9 for her "Manager" position but only 2 for her "Busser" position (e.g., she can bus tables, but only if nobody else is available), the algorithm will show a strong preference for the manager position. Users can be qualified for many positions with a different affinity for each position.

When you are finished editing, click on the **"Save # Changes"** button to save your changes.

Note: Leave the position affinity at neutral (i.e. 5) if there is no preference for one position over another. Similarly, leave the location affinity at neutral (i.e. 5) if there is no preference for one location over another. Affinity can also be used to designate seniority (for example, more senior staff can be given a higher affinity for a position, while less senior staff can be given a lower affinity for a position); this will cause the algorithm to prioritize more senior staff for shifts.

Jack's Restaurant ▾ Home Staff Schedules Settings 🔔 👤

List Grid **Qualifications** Time Off

Edit

Affinity ▾

Save 23 Changes

	Locations		Positions										Channels	
	301 822 10th St	Location B	Barista	Cashier	Dishwasher	Drive-thru Operator	Fryers	General Manager	Grill	Order Taker	Sandwich Maker	Shift Manager	General	Manager
Aaron Chaney	9	1		1	5			10					✓	
Adrian Barge	2	5	3	5			5		1	6		9	✓	✓
Adrian Flynn	5			5								5	✓	
Aiden Garcia	5		7								5		✓	
Alexa Hubbard	5	5							5	5			✓	✓
Alexander Mays	5	5		5			5						✓	
Alexis Paddock	5		5	5			5		5				✓	✓
Alyssa Scalise	5			5					5				✓	

Save 23 Changes

Approve a Time Off Request / View Time Off Heat Map

On the web application, click on the **"Staff"** tab then click on the **"Time Off"** submenu. At the top of the page, a heat map shows the distribution of time off requests for the year. Days with pending time off requests are indicated by a white inner square. Click on a specific day on the heat map to see time off requests for that day. **"Forward"** (➡) and **"Back"** (⬅) buttons allow you to navigate forwards and backwards in time.

Below, the **"Time Off Cards"** show time off requests in the selected time range (by default, the current year). A **green** banner indicates an approved time off request. A **red** banner indicates a denied time off request. Click on the pen icon (✎) to edit, approve, or deny a time off request. Click on the chat icon (💬) to comment on a time off request or see the audit history.

Jack's Restaurant ▾ Home Staff Schedules Settings 🔔 👤

List Grid Qualifications **Time Off**

2018

Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec

Tue

Thu

Sat

Pending Requests Less More

Requests in 2018

Request Time Off

✈ Time Off · Pending Approval

10 days

Aaron Chaney

Medical: Surgery

Jul 13 to Jul 23

Begins 6 months from now

Mon	Tue	Wed	Thu	Fri	Sat	Sun
9 Jul	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29

☐ Pending Time Off

✎ 💬

✈ Time Off · Approved By Emily Day **Approved**

3 days

Sebastian Brazil

Medical: Testing

Feb 21 to Feb 24

Begins one month from now

Mon	Tue	Wed	Thu	Fri	Sat	Sun
19 Feb	20	21	22	23	24	25

■ Sebastian's Shift
■ Approved Time Off

✎ 💬

✈ Time Off · Pending Approval

10 days

Aaron Chaney

Medical: Surgery

Jul 13 to Jul 23

Begins 6 months from now

Mon	Tue	Wed	Thu	Fri	Sat	Sun
9 Jul	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29

☐ Pending Time Off

✎ 💬

✈ Time Off · Denied by Geoff Armstrong **Denied**

6 days

Geoff Armstrong

Vacation: Example Vacation.

✎ 💬

✈ Time Off · Pending Approval

4 days

✎ 💬

Continued on next page...

...continued from previous page.

Edit the time off request if needed (e.g. category, start date, return date) and change the approval status from **"Pending"** to **"Approved"** or **"Denied"**.

Note: If an entry is an adjustment entry (for example, to manually add extra vacation days), check the **"Adjustment Entry Only"** box.

Press the **"Save"** button to save your changes. This will send a notification to the staff member.

Jack's Restaurant ▾ Home Staff Schedules Settings ▾

Geoff Armstrong Details Schedule **Time Off** Accruals Competency Availability Compensation

This request is pending approval by a manager. ✕

Name
Geoff Armstrong

Time Off Category
Medical ▾

Start Date *
Apr 19, 2018
Unavailable to work starting on this date.

Return Date *
Apr 20, 2018
Returning to work starting on this date.

Reason
Dentist Appointment

Approval Status
Pending ▾

Time Bank Adjustment (hours)
-8
How is the employee's time bank affected (+/-)

☐ Adjustment Entry Only
This entry is only for time bank accounting purposes.

Save Delete

Chat icon



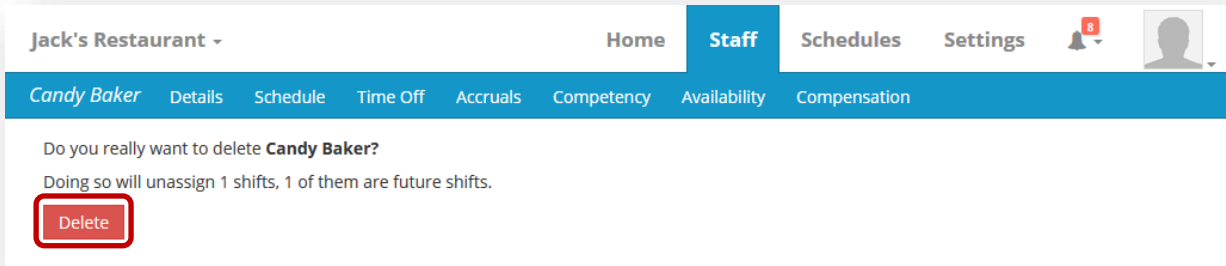
Click on the chat icon to view the comments or the change history for the time off request.

Note: Time off categories may be customized via the [organization settings](#).

Delete a Staff Member

Click on the **"Staff"** tab. [Search](#) to find the staff member you wish to delete, then click on the staff member's name to open the **"Details"** tab for that staff member.

Press the **"Delete"** button at the bottom right side of the page to delete the staff member. When prompted, press the **"Delete"** button to confirm.



Caution: Deleting a staff member will also delete any current or historical shift data associated with this position. **This action cannot be undone.**

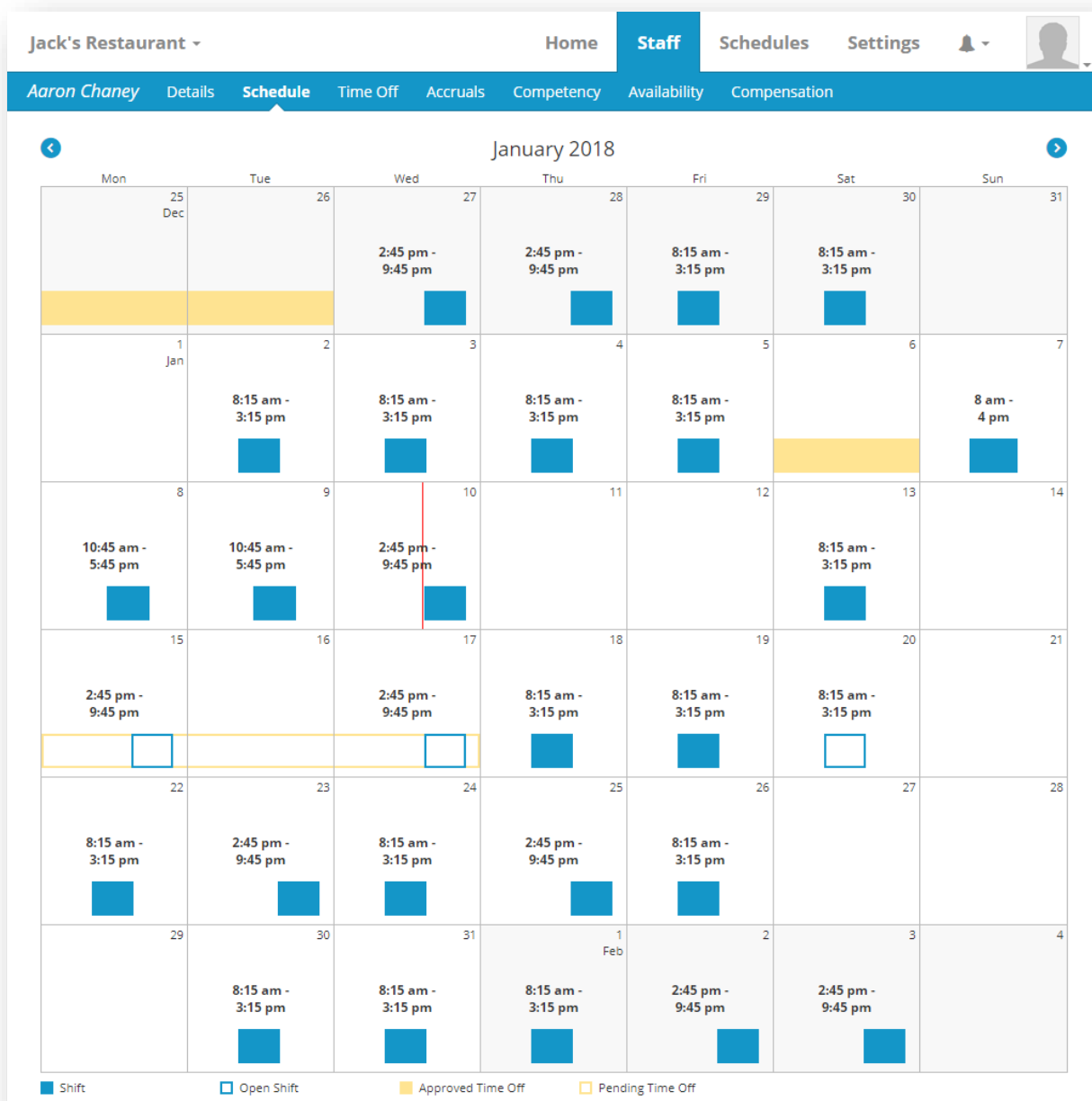
View the Schedule for a Staff Member

Click on the **"Staff"** tab. [Search](#) to find the staff member you wish to edit, then click on the staff member's name to bring up the **"Details"** tab for the staff member. Click on the **"Schedule"** submenu tab to show the schedule for the selected staff member.

The schedule shows:

-  scheduled shifts
-  shifts (open for bidding)
-  approved time off
-  pending time off

Click on a shift or a time off request to view more information.



View the Time Off Requests for a Staff Member

Click on the **"Staff"** tab. [Search](#) to find the staff member you wish to edit, then click on the staff member's name to bring up the **"Details"** tab for the staff member. Click on the **"Time Off"** submenu tab to show the time off requests for the selected staff member. The status (approved or denied) is indicated by a colored banner in the upper right corner of the time off request.

To edit (or delete) a time off request, click on the edit icon (✎). To comment on a time off request or see the audit history, click on the comment icon (💬).

Jack's Restaurant ▾

HomeStaffSchedulesSettings🔔👤

Alexa HubbardDetailsScheduleTime OffAccrualsCompetencyAvailabilityCompensation

Request Time Off

✈ Time Off · Pending Approval

4 days

Alexa Hubbard

Medical: Appointment

Mar 15 to Mar 19

Begins 2 months from now

Mon	Tue	Wed	Thu	Fri	Sat	Sun
12 Mar	13	14	15	16	17	18
19	20	21	22	23	24	25

⬜ Pending Time Off

✎💬

✈ Time Off · Denied by Geoff Armstrong

1 day

Alexa Hubbard

Medical: Appointment

Jan 26 to Jan 27

Begins 14 days from now

Mon	Tue	Wed	Thu	Fri	Sat	Sun
22 Jan	23	24	25	26	27	28

■ Alexa's Shift

⬜ Pending Time Off

✎💬

✈ Time Off · Approved By Geoff Armstrong

1 day

Alexa Hubbard

Vacation: Going to Hawaii!

Jan 12 to Jan 13

Begins 11 hours from now

Mon	Tue	Wed	Thu	Fri	Sat	Sun
8 Jan	9	10	11	12	13	14

■ Alexa's Shift

⬜ Approved Time Off

✎💬

MyNextWeek.com

26-Jan-2018

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View the Accruals for a Staff Member

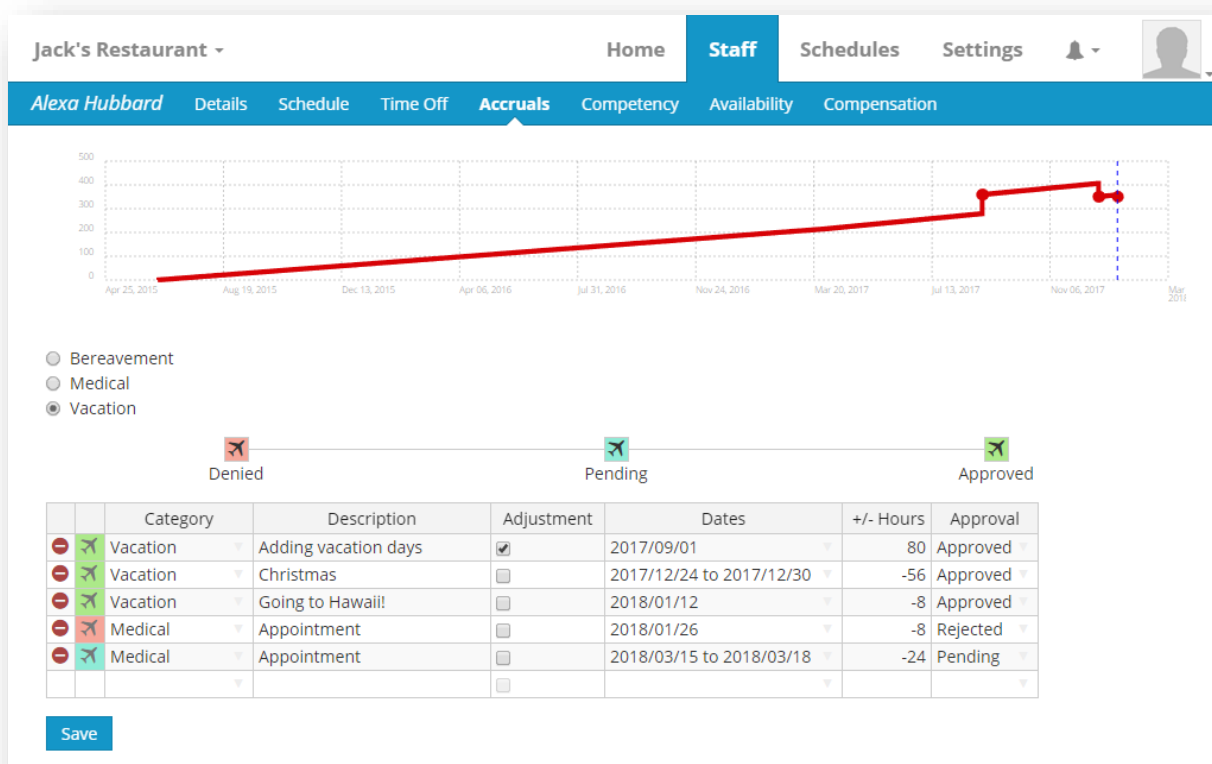
Click on the **"Staff"** tab. [Search](#) to find the staff member you wish to edit, then click on the staff member's name to bring up the **"Details"** tab for the staff member. Click on the **"Accruals"** submenu tab to show the competencies for the selected staff member.

From this page, select the time off category to display on the chart. Custom time off categories can be created on the ["Organization Settings"](#) page. Adjustments, time off, and gradual accruals (hourly or annual) are shown on the chart. The status of time off requests is also shown on this page.

Press the "remove" (⊖) button to remove a time off entry. To enter a new time off entry, enter the information in the bottom row. Select the time off dates (or the effective date in the case of an adjustment). When you are finished making changes, click the **"Save"** button to save your changes.

Adjustments allow accounting adjustments to the time off bank. This can be a positive adjustment (e.g. crediting pre-existing vacation from a previous timekeeping system) or a negative adjustment (e.g. paying out vacation time in lieu of time off). Check the **"Adjustment"** box to indicate that an entry is an adjustment.

Note: Time off can be set to automatically be accrue on an hourly or yearly basis. This is set on the staff member's ["Compensation"](#) page.



View the Competencies for a Staff Member

Click on the **"Staff"** tab. [Search](#) to find the staff member you wish to edit, then click on the staff member's name to bring up the **"Details"** tab for the staff member. Click on the **"Competencies"** submenu tab to show the competencies for the selected staff member.

The top **"Competencies"** list shows the competencies that the selected staff member has completed. Expired competencies have a yellow background. If a competency never expires, leave the expiry date blank. To add a new competency that does not yet exist in the system, click on the top "add" (+) button and type in the name of the competency. Click the "remove" (−) button to remove a competency from the completed competencies list.

The bottom **"Competency Gaps"** list shows the competencies that the selected staff member requires but has not yet completed. The right column shows the assigned positions that require this competency. Click the "add" (+) button to add the competency to the completed competencies list.

When you are finished making changes, click the **"Save"** button to save your changes.

The screenshot shows the 'Competencies' page for staff member Alexa Hubbard. The page has a navigation bar at the top with tabs: Home, Staff, Schedules, Settings, and a user profile icon. Below the navigation bar is a sub-navigation bar with tabs: Details, Schedule, Time Off, Accruals, Competency (selected), Availability, and Compensation.

The main content area is divided into two sections:

- Competencies**: This section displays a list of completed competencies. Each row includes a 'Competency' dropdown menu and an 'Expires' date field. The 'Expires' field has a clear button (X). The 'First Aid' competency is highlighted with a yellow background, indicating it is expired.

Competency	Expires
Assistant Manager Training Course	
Barista Training	Aug 23, 2018
First Aid	Dec 11, 2017
- Competency Gaps**: This section displays a list of competencies that the staff member requires but has not yet completed. Each row includes a 'Competency' dropdown menu and a 'Required By' field.

Competency	Required By
Food Safety	Barista
Orientation Training	Barista, Dishwasher

At the bottom of the page is a blue 'Save' button.

Set the Staff Member Availability (Work Schedule Preferences)

Click on the **"Staff"** tab. [Search](#) to find the staff member you wish to edit, then click on the staff member's name to bring up the **"Details"** tab for the staff member. Click on the **"Availability"** tab to show the availability preferences for the staff member.

Jack's Restaurant ▾

HomeStaffSchedulesSettings

Candy BakerDetailsScheduleTime OffAccrualsCompetencyAvailabilityCompensation

Work Hours

Minimum hours worked per schedule
15

Maximum hours worked per schedule
45

Preferred hours worked per schedule
35

Maximum hours worked per day
10

Weekly Availability

Start Date
Dec 25, 2016
This is the start of this availability period.

Finish Date
Jan 5, 2017
This is the automatically-calculated start of the next availability period. If it is not correct, you need to edit the start date of one of the other availability periods.

	12a	1	2	3	4	5	6	7	8	9	10	11	12p	1	2	3	4	5	6	7	8	9	10	11
Mon	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Tue	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Wed	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Thu	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Fri	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Sat	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Sun	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■

■ Prefer to work

□ No preference

■ Prefer not to work

■ Cannot work

Description
Worker requested different working hours.
Reason for availability change.

Delete Period

Start Date
Jan 5, 2017
This is the start of this availability period.

Finish Date
This is the automatically-calculated start of the next availability period. If it is not correct, you need to edit the start date of one of the other availability periods.

	12a	1	2	3	4	5	6	7	8	9	10	11	12p	1	2	3	4	5	6	7	8	9	10	11
Mon	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Tue	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Wed	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Thu	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Fri	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Sat	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Sun	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■

■ Prefer to work

□ No preference

■ Prefer not to work

■ Cannot work

Description
Taking night classes.
Reason for availability change.

Delete Period

Add Period

Save

Continued on next page...

...continued from previous page.



The following options can be set on for each time block on the availability screen:

-  **Prefer to work** (The algorithm will attempt to assign shifts during these periods.)
-  **No preference**
-  **Prefer not to work** (The algorithm will try to avoid assigning shifts during these periods.)
-  **Cannot work** (The algorithm will never assign shifts during these periods.)

Note: Managers can still create shifts manually during "Cannot work" periods.

To add a new availability period, press the **"Add Period"** button. Enter a start date (i.e. effective date) for the new availability period; the finish date will be calculated automatically. Enter a reason for the availability change. Click and drag across a range of days and times to "paint" the staff member's weekly availability.

Enter a reason for the availability change. Press the **"Save"** button to save your changes.

Note: Staff members may also edit their own availability, however the manager(s) will be notified with the details and the reason for the change in availability.

Managers can edit any of the different availability periods (current, past, or future), delete periods, or add new periods. All availability periods will appear in chronological order on this page.

Managers may edit the minimum hours, maximum hours, and preferred hours per schedule (week) for the selected user. Managers may also edit the maximum hours per day for the selected user.

Set the Staff Member Compensation

Click on the **"Staff"** tab. [Search](#) to find the staff member you wish to edit, then click on the staff member's name to bring up the **"Details"** tab for the staff member. Click on the **"Compensation"** tab to show the availability preferences for the staff member.

Enter the start date for the compensation period. The end date will be automatically calculated for each compensation period. The end date for the last period in the sequence will be blank (no end date). Compensation is effective-dated; when you generate historical [reports](#), the past pay will be calculated based on the effective rate(s) for each period. The [rate card](#) defines overtime rules.

Pay can be set on an hourly, monthly, weekly, per-diem, and/or per-shift basis. These different categories will aggregate (i.e. stack together). For most companies, only one category will be used at a time. Position-based pay will override the normal hourly rate if the staff member is working in the specified position. For instance, if a cashier works as an assistant manager, they may be paid more for those hours.

To track accrued time off, enter the [time off category](#), the hour accrual rates, and the overdraw limit (i.e. the limit on the number of time off hours that can be used before they are accrued).

To edit a past period, click on the start date for the period on the top bar. To create a new period, click the **"Add Period"** button. To delete a period, click on the **"Delete Period"** button. Press the "add" (+) button to add an item or the corresponding "remove" (-) button to remove an item. When you are finished making changes, click the **"Save"** button to save your changes.

Jack's Restaurant ▾ Home **Staff** Schedules Settings ▾

Candy Baker Details Schedule Time Off Accruals Competency Availability **Compensation**

◀ 2011-08-31 2016-01-12 2016-08-11 2017-01-11 ▶

Add Period **Delete Period**

Start Date *
This is the start of this compensation period.

Finish Date
This is the automatically-calculated start of the next compensation period. If it is not correct, you need to edit the start date of one of the other compensation periods.

Hourly Rate
Dollars paid per hour of work.

Rate Card
These are the rules governing overtime.

Monthly Salary
Dollars paid per month.

Weekly Salary
Dollars paid per week.

Per Diem
Dollars paid per day of work.

Per Shift
Dollars paid per shift worked.

+ Position Hourly Rate

-

-

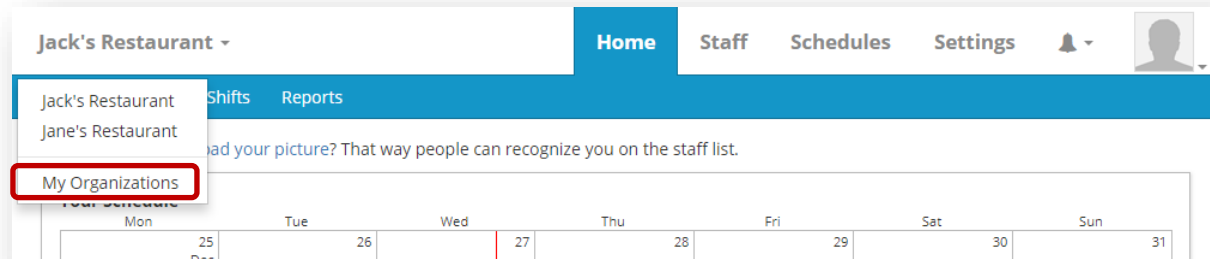
+ Time Off Category Hours Accrued Per Hour Worked Hours Accrued Per Year Worked Overdraw Limit (Hours)

-

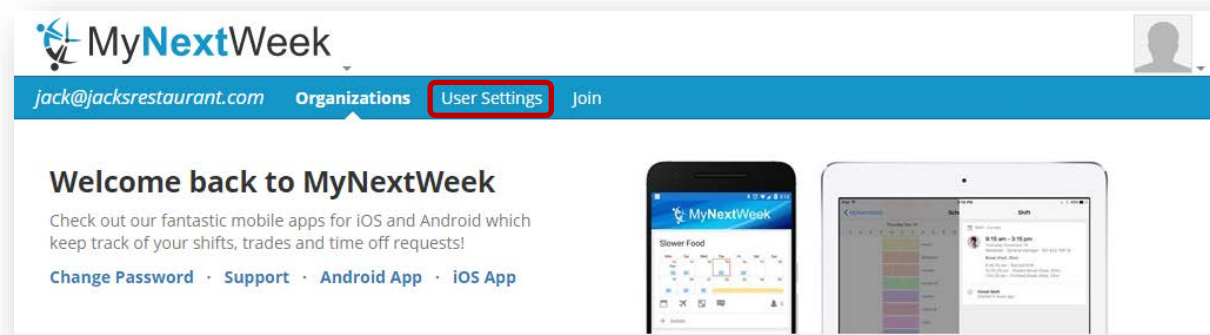
Save

Change My Email Address

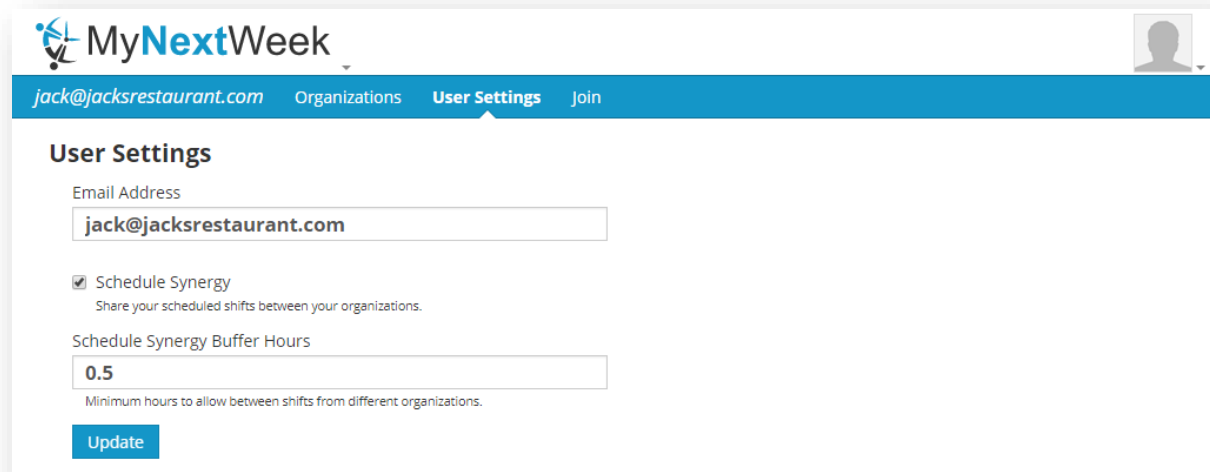
Click on the organization name in the upper left corner, then choose **"My Organizations"** from the dropdown list.



Select the **"User Settings"** submenu tab.

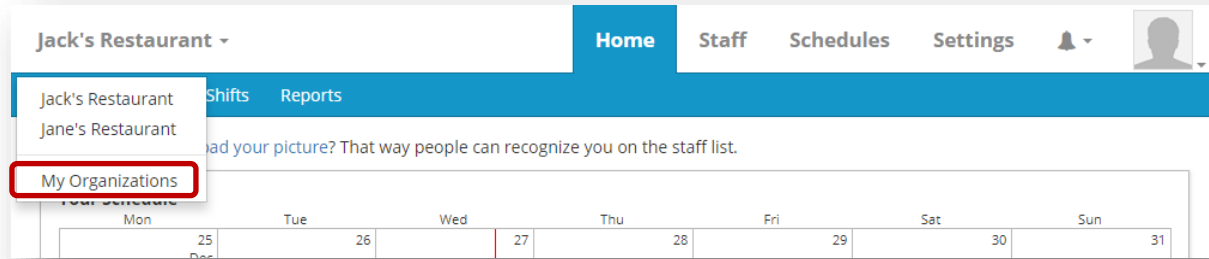


To change your email address, enter your new email address and press **"Update"** to save your changes.

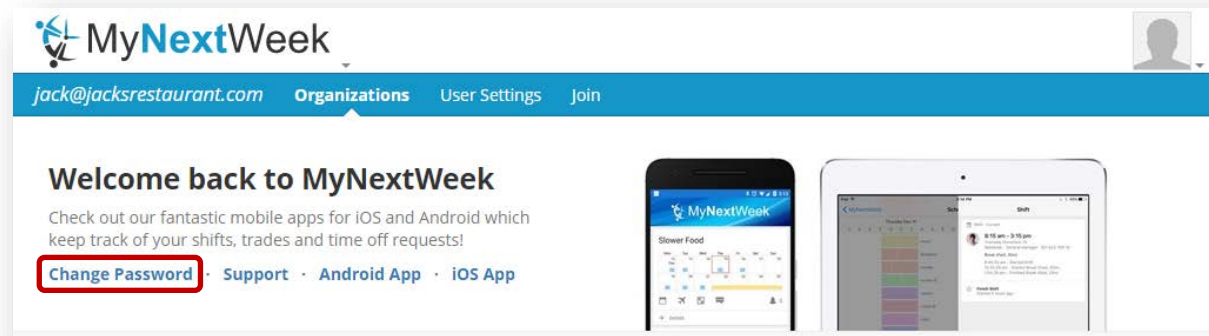


Change My Password

Click on the organization name in the upper left corner, then choose **"My Organizations"** from the dropdown list.



To change your password, click on **"Change Password"**.



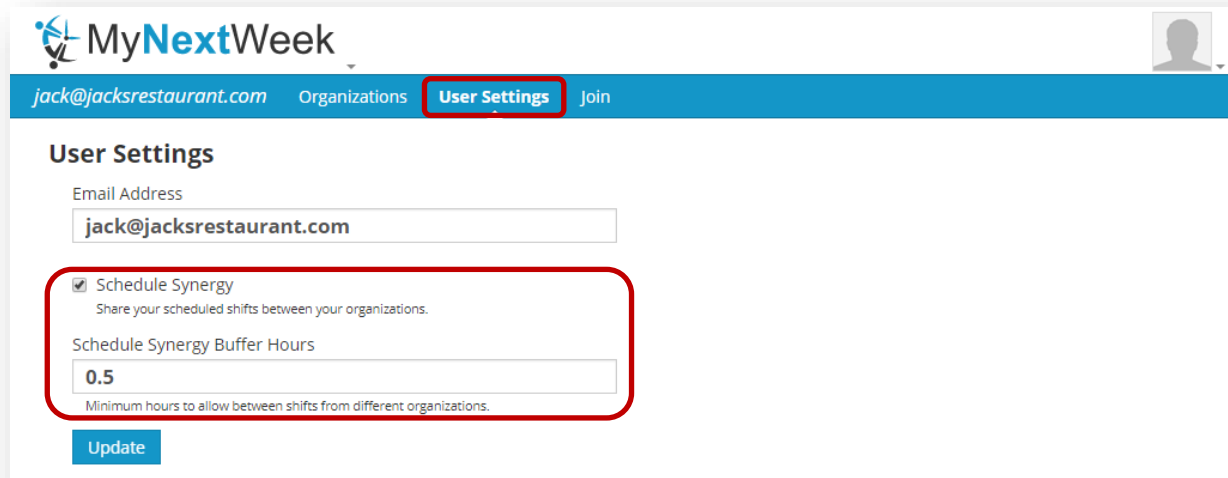
From the **"Change Password"** dialog, enter your current password. Then enter your new password and re-enter your new password to confirm. Press **"Change Password"** to save your changes.

A screenshot of the 'Change Password' dialog box. It contains three input fields: 'Current Password', 'New Password', and 'Confirm New Password'. Each field is filled with dots. At the bottom right, there are two buttons: 'Change Password' (highlighted with a red rectangle) and 'Cancel'.

Enable or Disable Schedule Synergy

If a staff member belongs to multiple organizations in MyNextWeek, the staff member can enable **"Schedule Synergy"** for their account. This means that the staff member's availability due to shifts in other organizations will be synchronized and visible between the two organizations. This setting must be enabled by the staff member, otherwise this data will not be shared for the staff member.

Click on the organization name in the upper left corner, then choose **"My Organizations"** from the dropdown list. Select the **"User Settings"** submenu tab.



The screenshot shows the MyNextWeek user interface. At the top, the logo and navigation bar include 'jack@jacksrestaurant.com', 'Organizations', 'User Settings' (highlighted with a red box), and 'Join'. Below the navigation bar, the 'User Settings' section is displayed. It contains an 'Email Address' field with 'jack@jacksrestaurant.com'. A red box highlights the 'Schedule Synergy' checkbox (which is checked) and the 'Schedule Synergy Buffer Hours' input field (which contains '0.5'). Below the input field is a small text note: 'Minimum hours to allow between shifts from different organizations.' At the bottom of the settings section is an 'Update' button.

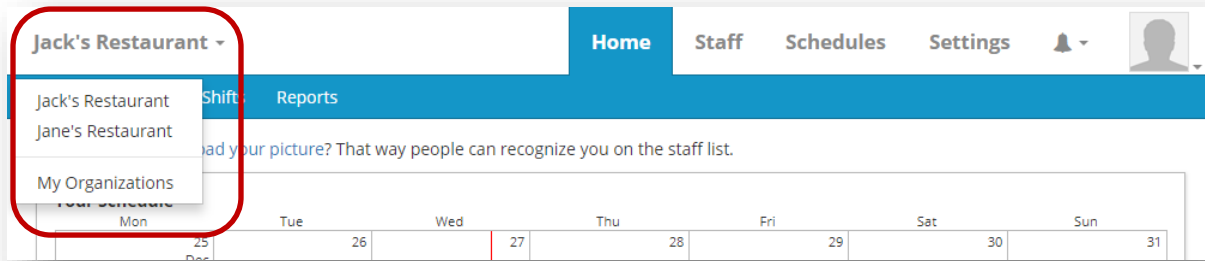
Click the checkbox to enable **"Schedule Synergy"** then enter the number of buffer hours and press **"Update"** to save your changes.

Note: The **"Schedule Synergy Buffer Hours"** is the number of hours that you want in between shifts (e.g. the time required to travel between locations and get ready for work).

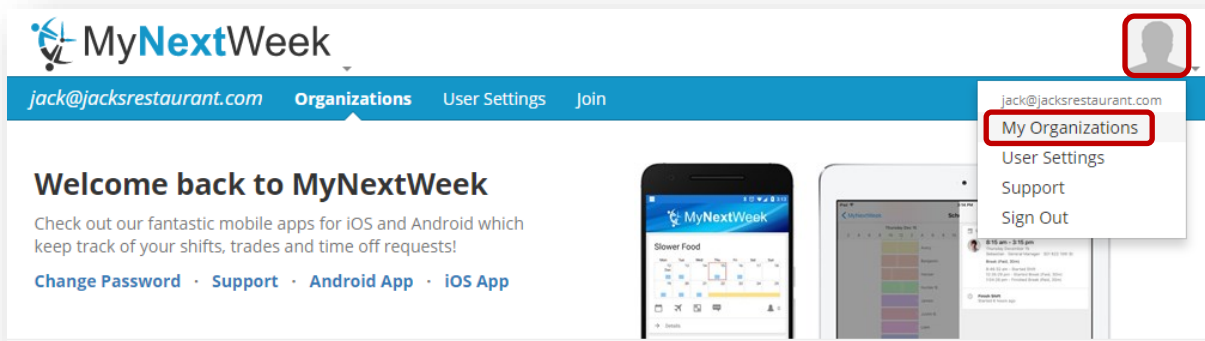
On the ["Organization Settings"](#) page, there is an option to apply shift rules to external shifts. When this setting is enabled, **"Schedule Synergy"** shifts will be taken into account when determining the maximum hours per day, minimum time between shifts, etc. for the users.

Switch Organizations or View Organizations

To switch organizations, click on your organization name in the upper left corner. This will bring up a drop menu where you can click on one of your other organizations to select it.



To view your organizations, choose **"My Organizations"** from the organization drop down menu or from the profile drop down menu.



From the [organizations](#) page, you can click on an organization's name to switch to that organization. You can also join an existing organization or create a new organization.

From this page, owners can create a demo organization or create a new trial organization. Staff members can join an existing organization using the invitation code sent by their manager.

My Organizations

The **"Organizations"** page shows all of the organizations to which you belong. It also shows your two-week look-ahead schedule for each organization. Click on an organization's card to open that organization. Documentation, support info, and links to phone apps can also be found here.

From this page, you can join an organization using your invitation code, create a new organization (with a 30-day free trial), or create a demo organization (a pre-populated temporary organization so that you can quickly try out the features of MyNextWeek).

Welcome back to MyNextWeek

Check out our fantastic mobile apps for iOS and Android which keep track of your shifts, trades and time off requests!

[Change Password](#) · [Support](#) · [Android App](#) · [iOS App](#)

Slower Food
Owner
Monthly75 · trialing · 71 / 75 staff
Expires on Jan 29, 2018

Mon	Tue	Wed	Thu	Fri	Sat	Sun
25 Dec	26	27	28	29	30	31
1 Jan	2	3	4	5	6	7

Jack's Restaurant
Owner
Trial Period · trialing · 33 staff
Scheduled for deletion on Jan 6, 2018

Mon	Tue	Wed	Thu	Fri	Sat	Sun
25 Dec	26	27	28	29	30	31
1 Jan	2	3	4	5	6	7

Jane's Restaurant
Owner
Trial Period · trialing · 33 staff
Scheduled for deletion on Jan 4, 2018

Mon	Tue	Wed	Thu	Fri	Sat	Sun
25 Dec	26	27	28	29	30	31
1 Jan	2	3	4	5	6	7

I Was Invited
I have a invitation code that was emailed to me!
[Join Existing Organization](#)

New Organization
I want to start a new organization and invite other people!
[Create New Organization](#)

Demo
I just want to take a look around, make a demo organization for me!
[Create Demo Organization](#)

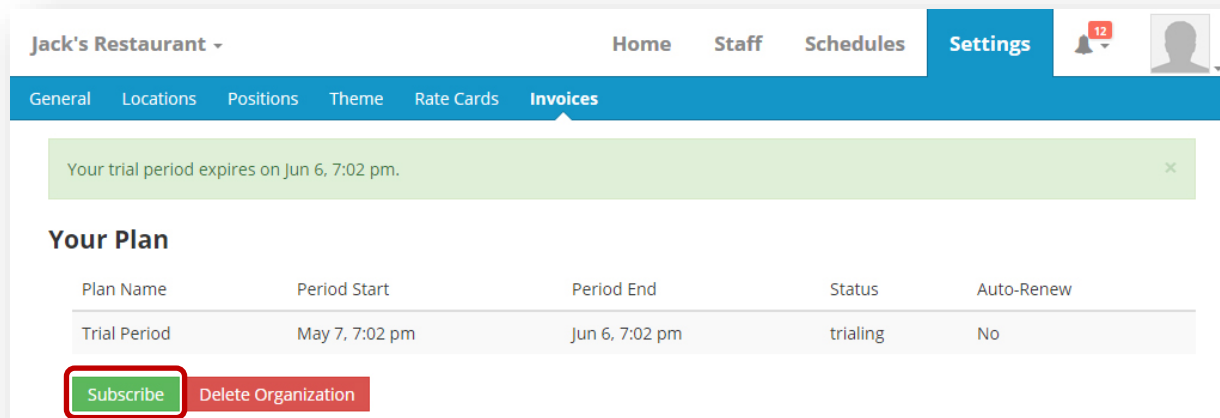
Typically, a user will only belong to a single organization. However, it is possible for a user to belong to more than one organization.

In these scenarios, a staff member has the option to enable **"Schedule Synergy"** to share their shift data across organizations. Schedule Synergy can be useful when:

- A staff member with two part-time jobs who wants their availability to be shared with both employers automatically.
- A staff member belongs to more than one organization at the same employer (for example, a nurse who works for two different hospital departments with separate organizations in MyNextWeek) and the employer wants to ensure that total maximum weekly hours are not exceeded between both departments.

Subscribe to a Plan

Click on the **"Settings"** tab, then click on the **"Invoices"** submenu tab. Click on the **"Subscribe"** button to open the plan options.



The screenshot shows the MyNextWeek.com web application interface. At the top, there is a navigation bar with the following items: 'Jack's Restaurant' (with a dropdown arrow), 'Home', 'Staff', 'Schedules', and 'Settings' (which is highlighted in blue). To the right of the 'Settings' tab are a notification bell icon with a red '12' badge and a user profile icon. Below the navigation bar is a submenu with the following items: 'General', 'Locations', 'Positions', 'Theme', 'Rate Cards', and 'Invoices' (which is highlighted in blue). Below the submenu, there is a green banner that reads 'Your trial period expires on Jun 6, 7:02 pm.' with a close button (X) on the right. Below the banner is the 'Your Plan' section. It contains a table with the following data:

Plan Name	Period Start	Period End	Status	Auto-Renew
Trial Period	May 7, 7:02 pm	Jun 6, 7:02 pm	trialing	No

Below the table are two buttons: 'Subscribe' (highlighted with a red box) and 'Delete Organization'.

Select a plan based on your maximum number of users. Each plan includes scheduling, communication (chat), mobile apps, time clocking (with facial recognition), and payroll reporting. This plan can be upgraded or downgraded later as the number of users changes.

Note: **MyNextWeek.com** does not store your credit card information; it is stored in a third-party payment processor.

Continued on next page...

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Select a plan then enter your billing information. Press **"Save"** when your changes are complete.

Jack's Restaurant ▾

Home Staff Schedules **Settings** 12

General Locations Positions Theme Rate Cards **Invoices**

Select A Plan (you have 32 users)

Select A Plan

35 Users, \$75/month ▾

Credit Card

New Credit Card Number *

Feel free to include the spaces.

CW2 *

The CW2 is the three or four numeric digits, generally found on the back of your credit card.

Expiry Month *

01 ▾

Expiry Year *

2017 ▾

Name *

Address Line 1 *

Address Line 2

City *

Country *

United States ▾

State *

New York ▾

Postal/Zip Code *

Save

Note: Prices shown are subject to change.

View Your Plan / Update Credit Card / View Your Invoices

To view your invoice history, click on the **"Settings"** tab, then choose the **"Invoices"** submenu tab.

Your current plan is shown at the top of the page. Click on **"Change Payment Method"** to change your credit card details.

Your past invoices are shown at the bottom of the screen. Click on an invoice date to view details for a specific invoice. The total column shows the total payment for the invoice. A checkmark indicates that the invoice has been paid.

Jack's Restaurant ▾ Home Staff Schedules **Settings** 12

General Locations Positions Theme Rate Cards **Invoices**

Your Plan

Plan Name	Period Start	Period End	Status	Auto-Renew
100+ Users: \$1.89/user/month	Dec 29, 2016, 7:52 pm	Jan 29, 7:52 pm	active	Yes

[Change Subscription](#) [Cancel Subscription](#)

Your Payment Method

Visa number ends in 4242, expires January 2018

This card will be automatically charged on invoice due dates.

[Change Payment Method](#)

Past Invoices

Invoice Date	Total	Paid
Dec 30, 2016	\$198.45	✓
Nov 30, 2016	\$198.45	✓

Note: Prices shown are subject to change.

Change a Subscription

Note: You must be an organization owner to modify a subscription.

Click on the **"Settings"** tab then click on the **"Invoices"** submenu tab. To change a subscription, click the **"Change Subscription"** button.

The screenshot shows the 'Invoices' settings page for 'Jack's Restaurant'. The 'Settings' tab is selected, and the 'Invoices' submenu is active. Under 'Your Plan', a table shows the current subscription: '100+ Users: \$1.89/user/month' starting 'Dec 29, 2016, 7:52 pm' and ending 'Jan 29, 7:52 pm', with a status of 'active' and 'Auto-Renew' set to 'Yes'. Below the table are two buttons: 'Change Subscription' (highlighted with a red box) and 'Cancel Subscription'. Under 'Your Payment Method', it shows a Visa card ending in 4242, expiring January 2018, with a 'Change Payment Method' button. The 'Past Invoices' section shows two invoices: 'Dec 30, 2016' for \$198.45 and 'Nov 30, 2016' for \$198.45, both marked as 'Paid'.

Plan Name	Period Start	Period End	Status	Auto-Renew
100+ Users: \$1.89/user/month	Dec 29, 2016, 7:52 pm	Jan 29, 7:52 pm	active	Yes

[Change Subscription](#) [Cancel Subscription](#)

Your Payment Method

Visa number ends in 4242, expires January 2018
This card will be automatically charged on invoice due dates.

[Change Payment Method](#)

Past Invoices

Invoice Date	Total	Paid
Dec 30, 2016	\$198.45	✓
Nov 30, 2016	\$198.45	✓

Select a new plan, then click on **"Save"** to confirm the change.

The screenshot shows the 'Invoices' settings page with the 'Select a New Plan' dropdown menu open. The dropdown is titled 'Select a Plan' and shows the selected option '50 Users, \$115/month' (highlighted with a red box). Below the dropdown is a 'Save' button. The 'Your Current Plan' section shows the current subscription: '100+ Users: \$1.89/user/month' starting 'Dec 30, 2016' and ending 'Jan 30', with a status of 'active'.

Your Current Plan

Name	Period Start	Period End	Status
100+ Users: \$1.89/user/month	Dec 30, 2016	Jan 30	active

Select a New Plan (You have 32 Users)

Select a Plan

50 Users, \$115/month

[Save](#)

Note: Prices shown are subject to change.

Cancel a Subscription

Note: You must be an organization owner to modify a subscription.

Click on the **"Settings"** tab then click on the **"Invoices"** submenu tab. To cancel a subscription, click the **"Cancel Subscription"** button.

The screenshot shows the 'Invoices' page under the 'Settings' tab for 'Jack's Restaurant'. The page has a blue header with navigation links: General, Locations, Positions, Theme, Rate Cards, and Invoices. Below the header, there are three main sections: 'Your Plan', 'Your Payment Method', and 'Past Invoices'. In the 'Your Plan' section, there is a table with columns: Plan Name, Period Start, Period End, Status, and Auto-Renew. Below the table are two buttons: 'Change Subscription' and 'Cancel Subscription'. The 'Cancel Subscription' button is highlighted with a red box. The 'Your Payment Method' section shows a Visa card ending in 4242, expiring in January 2018, with a 'Change Payment Method' button. The 'Past Invoices' section shows a table with columns: Invoice Date, Total, and Paid. The table lists two invoices: Dec 30, 2016 and Nov 30, 2016, both with a total of \$198.45 and a status of 'Paid' (indicated by a checkmark).

Plan Name	Period Start	Period End	Status	Auto-Renew
100+ Users: \$1.89/user/month	Dec 29, 2016, 7:52 pm	Jan 29, 7:52 pm	active	Yes

[Change Subscription](#) [Cancel Subscription](#)

Your Payment Method

Visa number ends in 4242, expires January 2018
This card will be automatically charged on invoice due dates.

[Change Payment Method](#)

Past Invoices

Invoice Date	Total	Paid
Dec 30, 2016	\$198.45	✓
Nov 30, 2016	\$198.45	✓

Click on **"Cancel Subscription"** to confirm the cancellation.

The screenshot shows the 'Cancel Subscription' confirmation dialog. It has a blue header with navigation links: General, Locations, Positions, Theme, Rate Cards, and Invoices. Below the header, there is a section titled 'Cancel Subscription' with a warning message: 'Are you sure you want to cancel your subscription? If you do, then your subscription will expire on Jan 29, 7:52 pm. If you change your mind, you can reactivate it or flag it to be deleted from your [user settings page](#).' Below the message is a red button labeled 'Cancel Subscription', which is highlighted with a red box.

Cancel Subscription

Are you sure you want to cancel your subscription? If you do, then your subscription will expire on Jan 29, 7:52 pm. If you change your mind, you can reactivate it or flag it to be deleted from your [user settings page](#).

[Cancel Subscription](#)

After cancelling the subscription you will be able to use the service as usual up to the end of the current billing period. Once the current billing period elapses:

- user accounts will be unable to log in
- organization owners will be unable to edit schedules
- organization owners will still be able to see historical data and create reports

Once the subscription elapses, you may [schedule your organization for deletion](#).

Reactivate an Organization

Note: You must be an organization owner to reactivate a subscription after it has been canceled.

Click on the **"Settings"** tab then click on the **"Invoices"** submenu tab. To reactivate a subscription, click the **"Reactivate Subscription"** button.

Jack's Restaurant ▾ Home Staff Schedules **Settings** 12

General Locations Positions Theme Rate Cards **Invoices**

Your subscription has been cancelled and you will not be billed again. Your subscription ends on Jan 29, 7:52 pm. ✕

Your subscription will end on Jan 30 ✕

Your Plan

Plan Name	Period Start	Period End	Status	Auto-Renew
100+ Users: \$1.89/user/month	Dec 29, 2016, 7:52 pm	Jan 29, 7:52 pm	active	No

Reactivate Subscription

Your Payment Method

Visa number ends in 4242, expires January 2018

This card will not be charged again because you cancelled your subscription on .

Change Payment Method

Past Invoices

Invoice Date	Total	Paid
Dec 30, 2016	\$198.45	✓
Nov 30, 2016	\$198.45	✓
Oct 30, 2016	\$198.45	✓

Permanently Delete an Organization

Note: You must be an organization owner to delete an organization. The organization can only be deleted after the subscription has ended.

Click on the **"Settings"** tab then click on the **"Invoices"** submenu tab. Click the **"Delete Organization"** button.



Caution: The organization and all associated data will be permanently deleted seven days after the delete organization button is clicked. The 7 day waiting period is intended as a safety margin to prevent accidental deletion.

Jack's Restaurant ▾ Home Staff Schedules **Settings** 12

General Locations Positions Theme Rate Cards **Invoices**

Your Plan

Plan Name	Period Start	Period End	Status	Auto-Renew
Trial Period	Aug 28, 2016, 4:42 pm	Sep 27, 2016, 4:42 pm	trialing	No

[Subscribe](#) [Delete Organization](#)

To delete an organization, click on the checkbox next to **"Schedule Organization for Deletion"** then press **"Save"**. A red banner will appear showing that the organization is scheduled to be deleted.

Jack's Restaurant ▾ Home Staff Schedules **Settings** 14

Jack's Restaurant

This organization is scheduled to be deleted on Jan 10, 12 am. ×

Delete Organization?

☒ Schedule Organization for Deletion

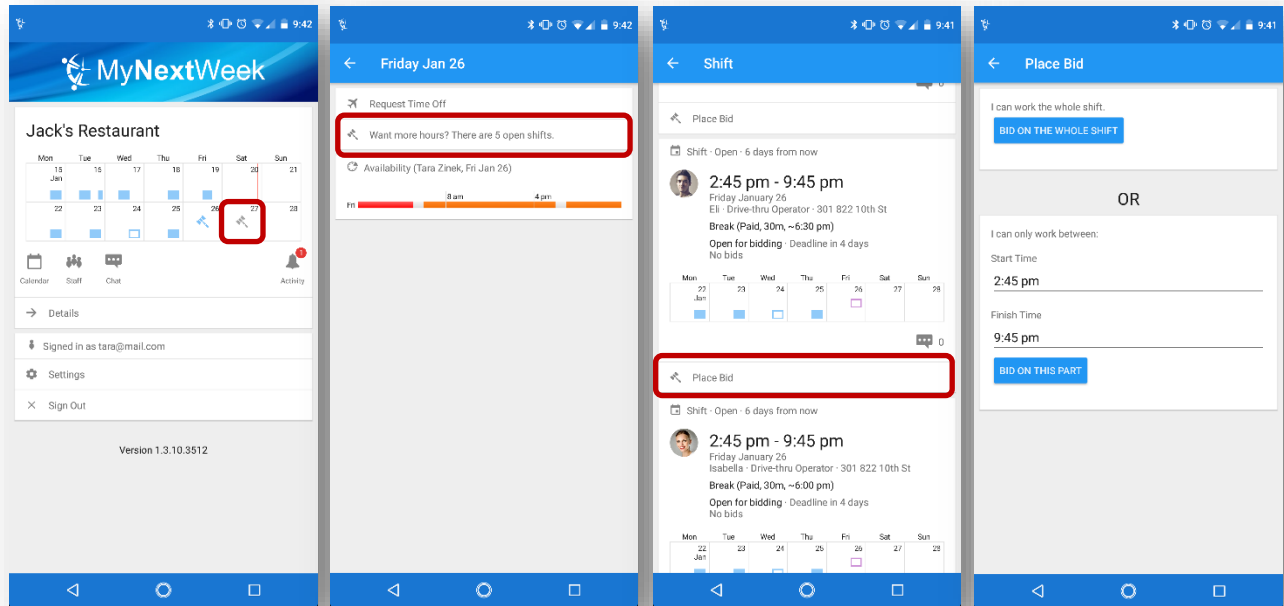
[Save](#)

Note: Prior to the indicated date, you may cancel the deletion of an organization by clicking on the **"Delete Organization"** button, unchecking the box, and pressing **"Save"**.

View and Bid on Available Open Shifts

On the mobile application, days with open shifts will be indicated by a grey gavel. Click on the calendar icon (📅) to bring up your full calendar.

Click on a day with open shifts, then click on **"Want more hours?"** to open the available shifts for that day. Your shifts will be shown in blue and the shift that is up for bid will be shown with a purple outline. Click on **"Place Bid"** (🔨) below the shift. At this point, you may either bid on the whole shift or bid on a portion of the shift.



A blue gavel (🔨) will be shown on days where you currently have an active bid on an open shift. To remove your bid, click the delete icon (🗑️) below the open shift.

Continued on next page...

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On the web application, click on the **"Home"** tab then select the **"Open Shifts"** submenu tab. This will show all open shifts. If one of your shifts is up for bid, you may click on **"Cancel Bidding"** (🔧) to cancel bidding and keep the shift.

Jack's Restaurant ▾

Home Staff Schedules 🔔 👤

Dashboard Open Shifts

📅 Shift · Open · Tomorrow

10:00 am - 8:00 pm

Thursday January 4

Unassigned · Sandwich Maker · 301 822 10th St

Break (Paid, 60m, ~5:00 pm)

Break (Paid, 30m)

Open for Bidding · Deadline in 13 hours

You bid

Mon Tue Wed Thu Fri Sat Sun

1 2 3 4 5 6 7

Jan

☐ Open Shift

☐ Your Shift

☐ Your Open Shift

Remove Bid

📅 Shift · Open · Tomorrow

2:45 pm - 9:45 pm

Thursday January 4

Unassigned · Order Taker · 301 822 10th St

Break (Paid, 30m)

Open for Bidding · Deadline in 18 hours

No bids

Mon Tue Wed Thu Fri Sat Sun

1 2 3 4 5 6 7

Jan

☐ Open Shift

☐ Your Shift

☐ Your Open Shift

Place Bid

📅 Shift · Open · 2 days from now

2:45 pm - 9:45 pm

Friday January 5

Alexa Hubbard · Sandwich Maker · 301 822 10th St

Break (Paid, 30m)

Open for Bidding · Deadline in 1 day

No bids

Mon Tue Wed Thu Fri Sat Sun

1 2 3 4 5 6 7

Jan

☐ Open Shift

☐ Your Shift

Cancel Bidding

📅 Shift · Open · 3 days from now

Place Bid

📅 Shift · Open · 3 days from now

Cancel Bidding

Click on **"Place Bid"** (+) to bid on a shift (or part of a shift). From this page, you can bid on the full shift or on a portion of the shift.

Place Bid

☒ Full Shift

You would like to work the full shift.

☐ Partial Shift

You would like to work only this period:

Start Time

8:00 pm

Finish Time

5:00 am

Place Bid Cancel

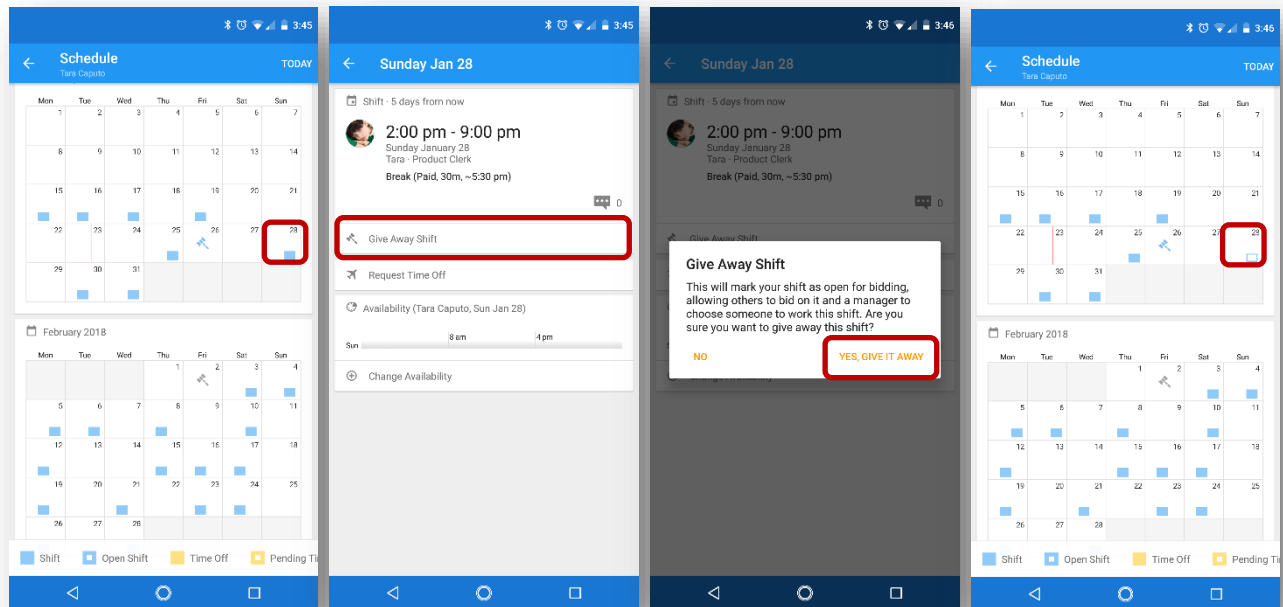
Click on **"Remove Bid"** (⊖) to rescind your bid.

Note: You may also bid on shifts using the mobile apps.

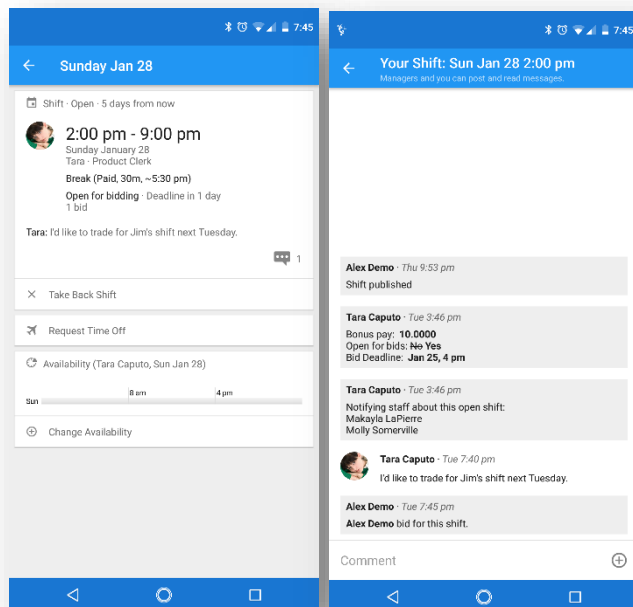
Give Away (Trade) Your Shift

On the mobile application, shifts are indicated in blue. Click on the calendar icon (📅) to bring up your full calendar.

Click on the day with the shift you want to trade. Click on **"Give Away Shift"** to open the shift up for bids, then press **"Yes"** to confirm. The shift will then be shown on the schedule with a blue outline.



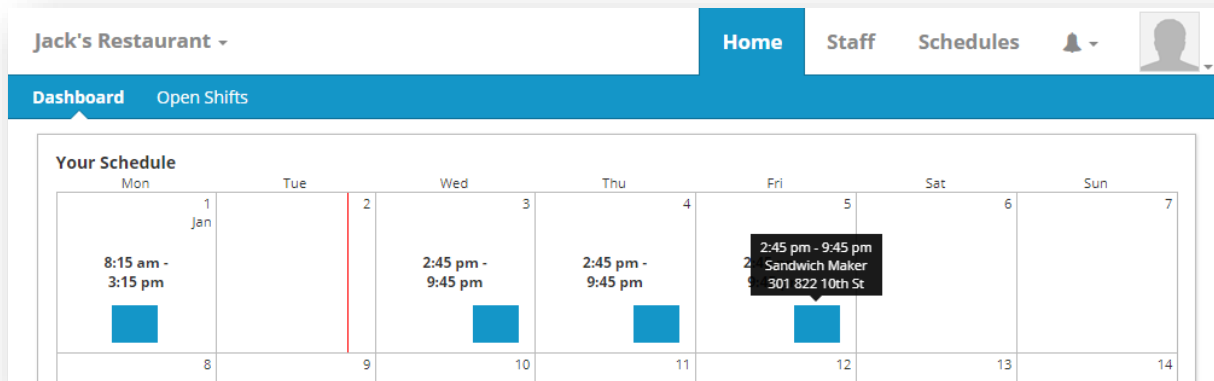
If you prefer to trade your shift with a specific person, use the shift comments (💬) to let your manager know with whom you would like to trade shifts. The shift comments will also show an audit trail of changes made to the shift, as shown in the left screenshot below. If you change your mind and decide to keep your shift, click on **"Take Back Shift"** to cancel.



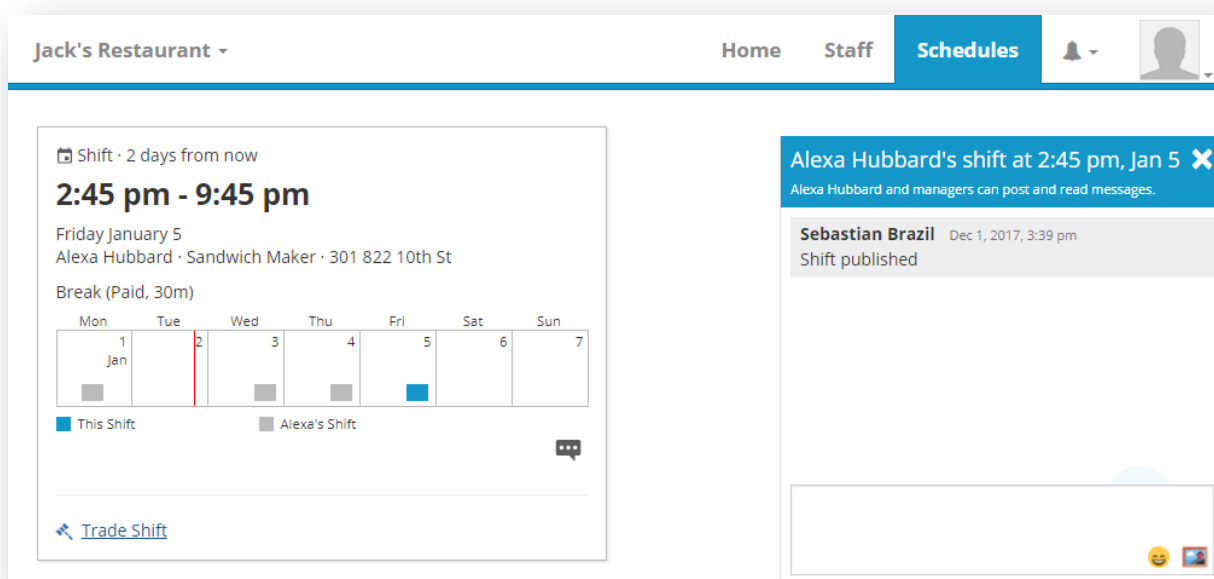
Continued on next page...

...continued from previous page.

On the web application, click on the **"Home"** tab to show your schedule. Click on the shift you would like to trade. This will open the shift card for the selected shift.



At the bottom of the shift card, press **"Trade Shift"** to open the shift up for bids. Press **"Yes"** to confirm.



Note: To cancel bidding on your shift, open the shift card then press **"Cancel Bidding"**. Press **"Yes"** to confirm.

View My Profile

Click on your picture () then click on **"My Profile"** to see your profile information. From this page, you can edit your profile details. After changing your details, press the **"Save"** button to save your changes.

Jack's Restaurant ▾

HomeStaffSchedules  

Alexa HubbardDetailsScheduleTime OffAvailabilityCompensation

Staff Member Details

First Name *
Alexa

Last Name
Hubbard

Title
Job title in the organization.

@Handle
AlexaHubbard
Used for replying to comments.

Positions
Order Taker, Sandwich Maker

Locations
301 822 10th St , West Location, North Location

Email
alexahubbard@jacks.net
You can edit your email address in your [user settings](#).

Email Type	Sent To	Current Status
Other email	alexahubbard@jacks.net	Delivered Jul 19, 2016 1:08 pm
Invitation	alexahubbard@jacks.net	Clicked Jul 19, 2016 1:06 pm

☐ Get Notified By Email
This is in addition to any notifications you get on mobile devices.

Contact Information

Address

City

Region

Country

Postal or Zip Code

Primary Phone

Alternate Phone

Save

Delete

Alexa Hubbard

My Profile

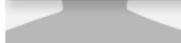
My Schedule

My Organizations

User Settings

Support

Sign Out


click picture to crop/delete

Upload a file

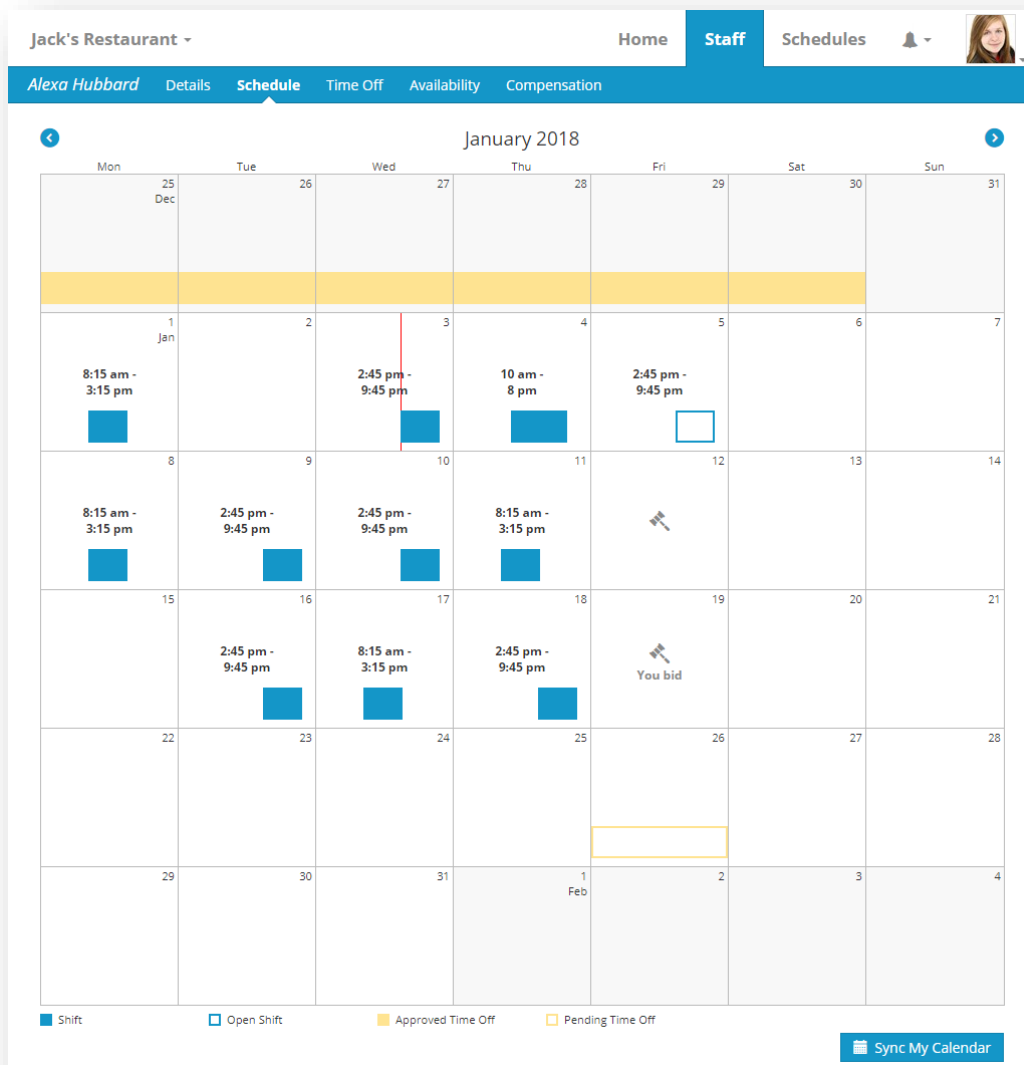
View My Schedule

Click on your picture () then click on **"My Schedule"** to see your schedule. Alternatively, from the main dashboard, you may also click **"See Your Calendar"** to access this page.

"Forward" () and **"Back"** () buttons allow you to navigate forwards and backwards in time through the monthly schedules. The schedule also shows:

-  your scheduled shifts
-  your shifts (open for bidding)
-  days with available shifts (click on the gavel to view available shifts)
-  your approved time off
-  your pending time off

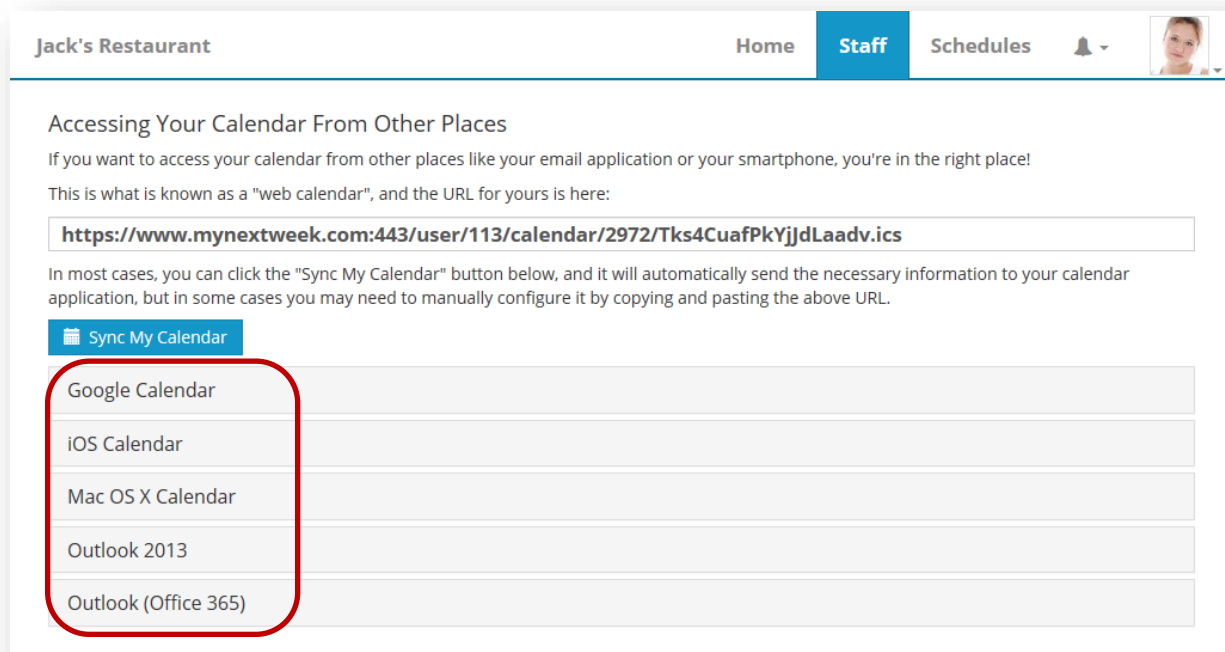
Note: From this page, you can [sync your calendar](#) using the button at the bottom of the page.



Sync My Calendar

To sync your calendar, [view your schedule](#) then click on the **"Sync My Calendar"** button.

Click on the specific calendar type that you want to sync (i.e. Google Calendar, iOS Calendar, Mac OS X Calendar, Outlook) for instructions on how to sync your calendar.



The screenshot shows a web interface for 'Jack's Restaurant'. At the top, there is a navigation bar with 'Home', 'Staff', and 'Schedules' tabs. A user profile picture is visible in the top right corner. The main content area is titled 'Accessing Your Calendar From Other Places'. It contains a paragraph explaining that users can access their calendar from email or smartphones, followed by a URL: `https://www.mynextweek.com:443/user/113/calendar/2972/Tks4CuafPkYjJdLaadv.ics`. Below this, there is a 'Sync My Calendar' button with a calendar icon. Underneath the button is a list of calendar types: Google Calendar, iOS Calendar, Mac OS X Calendar, Outlook 2013, and Outlook (Office 365). This list is enclosed in a red rounded rectangle.

Jack's Restaurant

Home Staff Schedules

Accessing Your Calendar From Other Places

If you want to access your calendar from other places like your email application or your smartphone, you're in the right place!

This is what is known as a "web calendar", and the URL for yours is here:

`https://www.mynextweek.com:443/user/113/calendar/2972/Tks4CuafPkYjJdLaadv.ics`

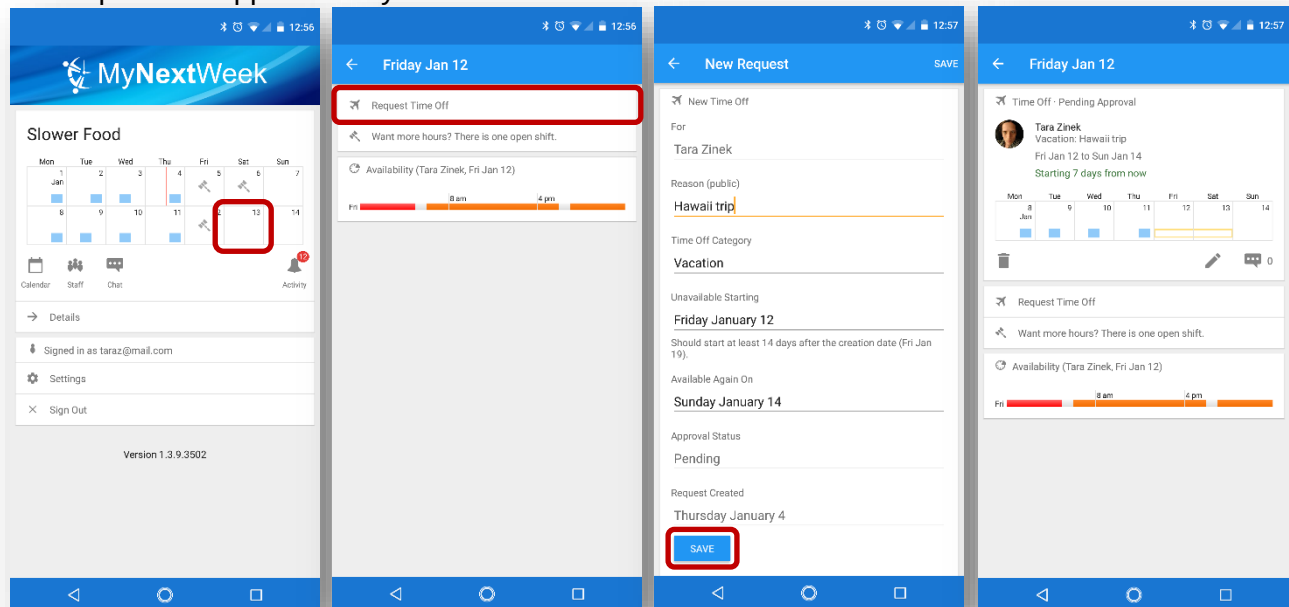
In most cases, you can click the "Sync My Calendar" button below, and it will automatically send the necessary information to your calendar application, but in some cases you may need to manually configure it by copying and pasting the above URL.

Sync My Calendar

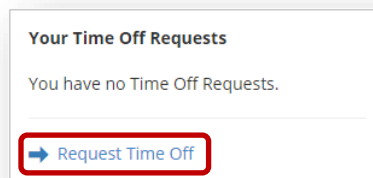
- Google Calendar
- iOS Calendar
- Mac OS X Calendar
- Outlook 2013
- Outlook (Office 365)

Request Time Off

From the mobile dashboard, click on a calendar day then click on **"Request Time Off"**. Enter details for your time off request then press **"Save"** to submit the time off request. The pending time off request will appear as a yellow outline on the time off card.



From the web dashboard, click on **"Request Time Off"**. Your accrued time off balances are shown at the top of the page. Enter details for your time off request then press **"Save"** to submit the time off request.



Jack's Restaurant ▾

HomeStaffSchedules

Alexa HubbardDetailsSchedule

Your Balances

Category	Balance (days)
Vacation	24.0
Medical	-8.0

New Request

Staff Member

Alexa Hubbard ▾

Time Off Category *

Vacation ▾

Start Date *

Jan 12, 2018

Unavailable to work starting on this date.

Return Date *

Jan 13, 2018

Returning to work starting on this date.

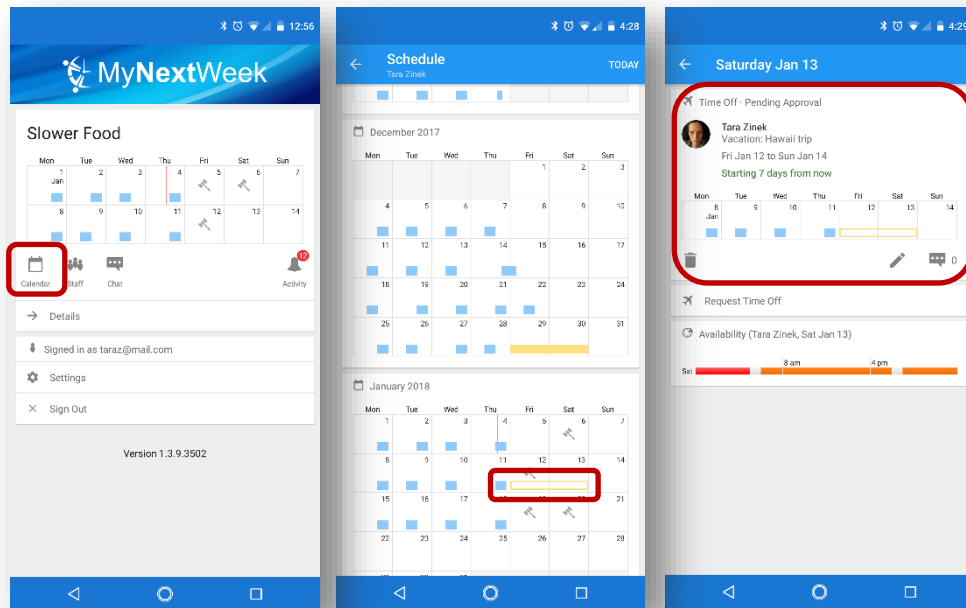
Reason (public) *

Going to Hawaii!

Save

View and Edit My Time Off Requests

From the mobile dashboard, click on the calendar icon (📅) to bring up your calendar. Click on a time off request (yellow outline or solid yellow) to view the details for that time off request. Click the edit icon (✎) to bring up the edit screen, then press **"Save"** to save any changes. To delete a time off request, click the delete icon (🗑).



The web dashboard will show upcoming time off requests, as well as the status of each request (Approved, Denied, or Pending Approval). To view or edit a pending time off request, click on the edit icon (✎) for the specific time off request. To delete a time off request, click the delete icon (🗑).

Your Upcoming Time Off Requests

✈ Time Off - Approved By Geoff Armstrong

1 day

Alexa Hubbard

Vacation: Going to Hawaii!

Jan 12 to Jan 13

Begins 2 days from now

Mon	Tue	Wed	Thu	Fri	Sat	Sun
8	9	10	11	12	13	14

■ Your Shift
■ Pending Time Off

🗑 ✎

✈ Time Off - Denied by Geoff Armstrong

1 day

Alexa Hubbard

Medical: Appointment

Jan 26 to Jan 27

Begins 16 days from now

Mon	Tue	Wed	Thu	Fri	Sat	Sun
22	23	24	25	26	27	28
Jan						

■ Your Shift
■ Pending Time Off

🗑 ✎

✈ Time Off - Pending Approval

4 days

Alexa Hubbard

Medical: Appointment

Mar 15 to Mar 19

Begins 2 months from now

Mon	Tue	Wed	Thu	Fri	Sat	Sun
12	13	14	15	16	17	18
Mar						

■ Pending Time Off

🗑 ✎

➔ Request Time Off

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Edit the start date, return date, and reason as desired, then press "**Save**" to save any changes.

Jack's Restaurant ▾

HomeStaffSchedules



Alexa Hubbard

DetailsScheduleTime OffAvailabilityCompensation

This request is pending approval by a manager. ×

Name

Alexa Hubbard

Time Off Category

Medical ▾

Start Date *

Mar 15, 2018

Unavailable to work starting on this date.

Return Date *

Mar 19, 2018

Returning to work starting on this date.

Reason

Appointment

Approval Status

Pending ▾

Time Bank Adjustment (hours)

-24

How is the employee's time bank affected (+/-)

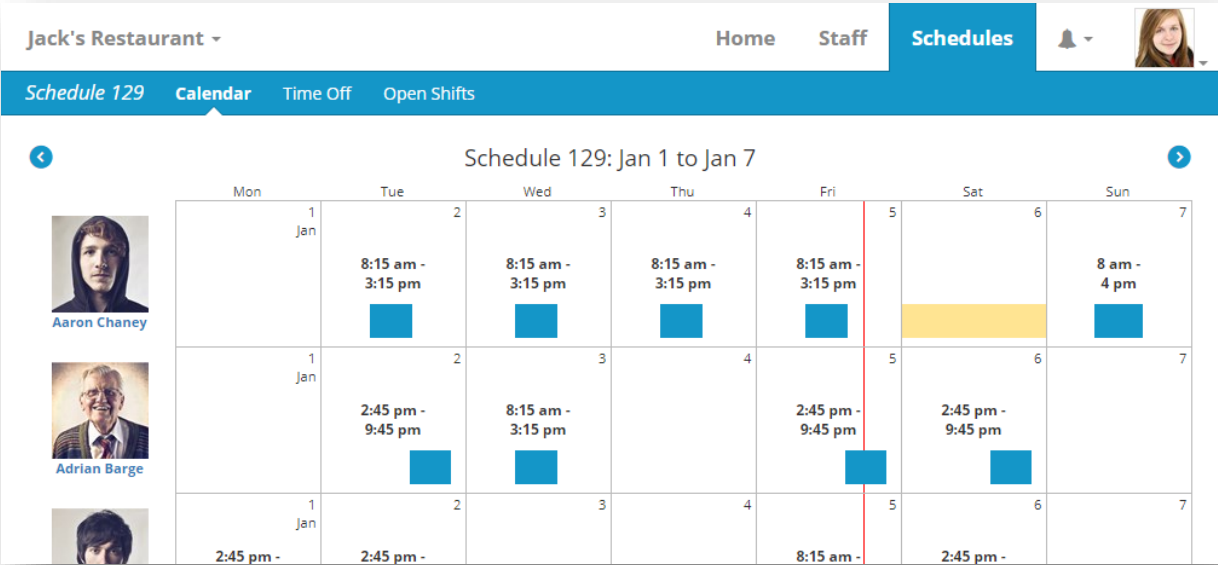
Save

Delete

View Weekly Schedule Information for the Organization

Click on the **"Schedules"** tab. This section shows information for one schedule (week) at a time for the entire organization. Use the **"Forward"** (➡) and **"Back"** (⬅) buttons to navigate forwards and backwards in time through the schedules. A vertical red line shows the current date and time on all of the calendars.

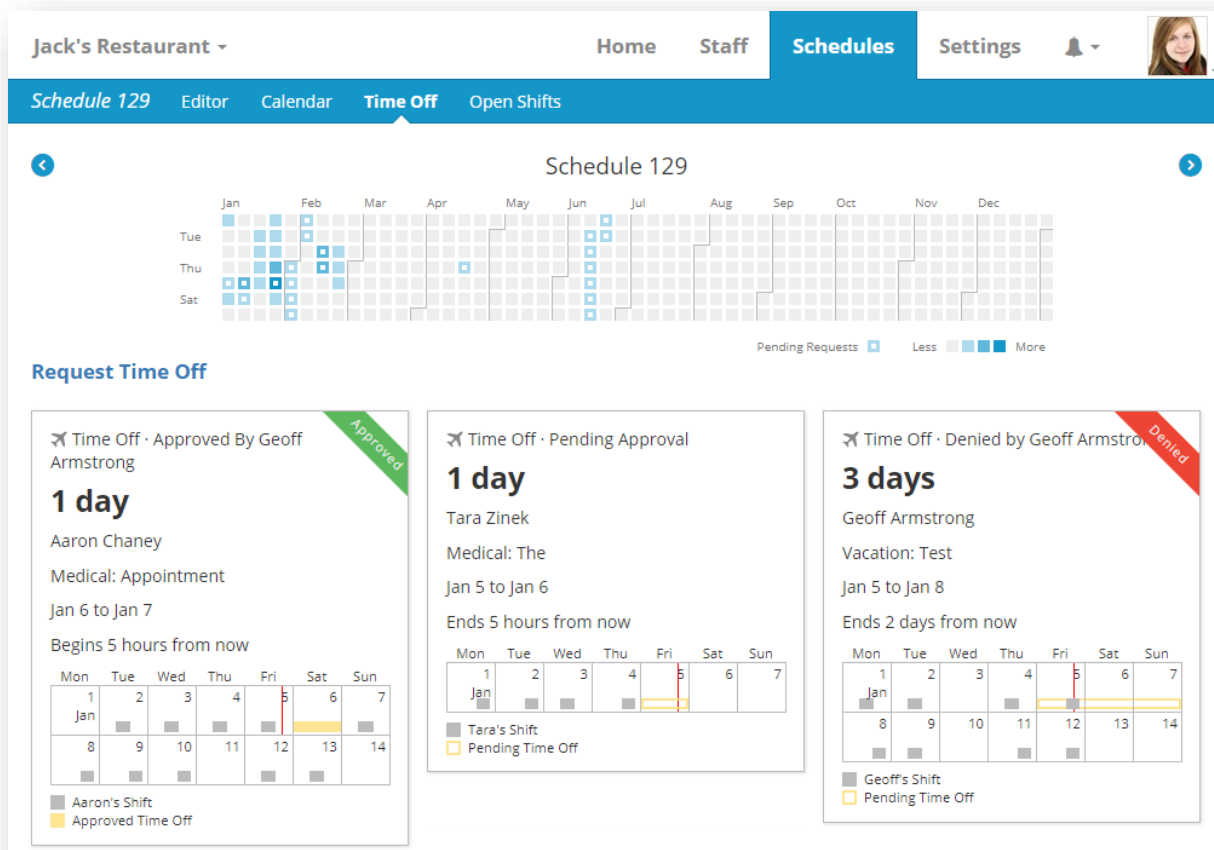
The **"Calendar"** submenu tab shows the calendar for the current indicated schedule for all of the staff members in the organization, including assigned shifts (theme color) and time off (yellow).



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The **"Time Off"** submenu tab shows all time off requests for all staff members that overlap the indicated schedule, as well as a heatmap showing the vacation requests for the year. Days with pending time off requests are indicated with a white square.



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The **"Open Shifts"** submenu tab shows all of the shifts that are up for bid in the current schedule for all of the staff members in the organization.

Jack's Restaurant ▾ Home Staff **Schedules** ▾

Schedule 129 Calendar Time Off **Open Shifts**

Schedule 129: Jan 1 to Jan 7

Shift · Open · Tomorrow

1:15 am - 8:15 am

Sunday January 7
Unassigned · Order Taker · 301 822 10th St
Break (Paid, 30m)
Open for Bidding · Deadline in 6 hours
You bid

Mon	Tue	Wed	Thu	Fri	Sat	Sun
1 Jan	2	3	4	5	6	7
8	9	10	11	12	13	14

☐ Open Shift
☒ Your Shift

Remove Bid

Shift · Open · Tomorrow

1:15 am - 8:15 am

Sunday January 7
Unassigned · Order Taker · 301 822 10th St
Break (Paid, 30m)
Open for Bidding · Deadline in 6 hours
No bids

Mon	Tue	Wed	Thu	Fri	Sat	Sun
1 Jan	2	3	4	5	6	7
8	9	10	11	12	13	14

☐ Open Shift
☒ Your Shift

Place Bid

Shift · Open · Tomorrow

7:45 am - 2:45 pm

Sunday January 7
Unassigned · Order Taker · 301 822 10th St
Break (Paid, 30m)
Open for Bidding · Deadline in 13 hours
You bid

Mon	Tue	Wed	Thu	Fri	Sat	Sun
1 Jan	2	3	4	5	6	7
8	9	10	11	12	13	14

☐ Open Shift
☒ Your Shift

Remove Bid

Custom Business Rules

Custom business rules can be enabled via the "[Organization Settings](#)" page. This setting allows you to run custom business rules against the scheduled shifts before the shifts are published. Custom business rules are written in standard **JavaScript**.

To add a custom business rule, click on the rules icon (⚙️) on the schedule editor toolbar to open the rules editor.

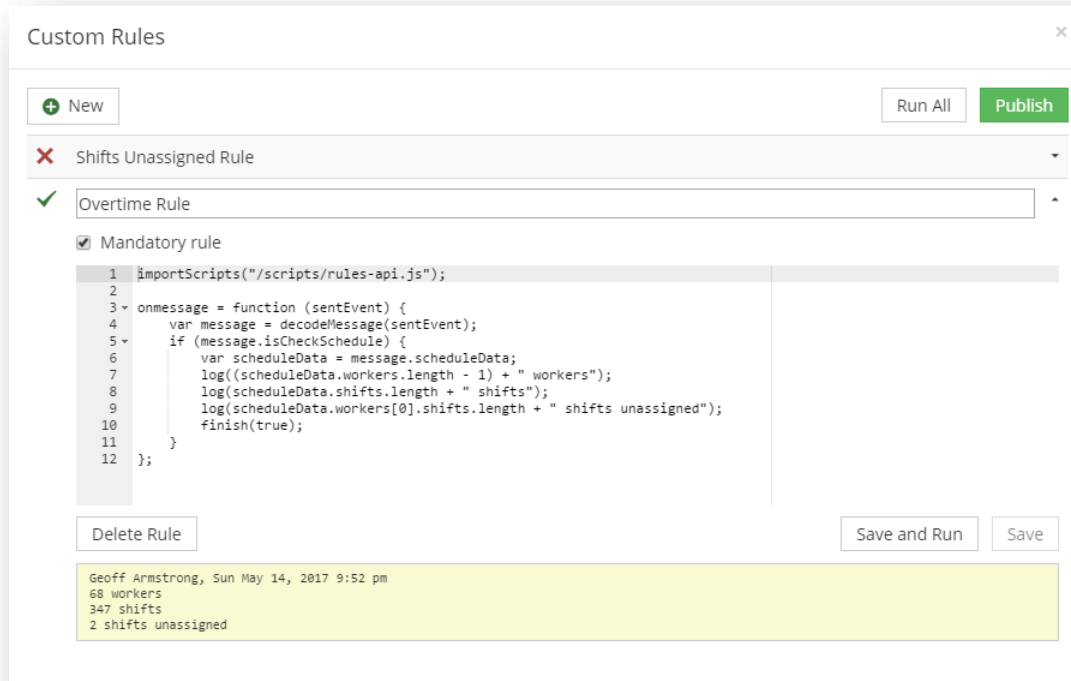
Note: The rules icon will only appear on the schedule editor when business rules are enabled via the organization settings page.

Mandatory rules will prevent a manager from publishing a shift if the rule is not met. Non-mandatory shifts never prevent a manager from publishing a shift. Owners can publish a shift even if the mandatory rules are not met.

When custom rules are enabled and you press the "**Publish**" button, the custom rules interface comes up. Next, press "**Run All**" to run all the rules against the current schedule, or press "**Run**" on a specific rule to run the rule on the schedule. A checkmark icon (✓) indicates that the schedule meets the rule requirements. A cross icon (✗) indicates that the schedule fails the rule requirements. If the rules pass, then the "**Publish**" button will be enabled, and you can press it to publish all unpublished shifts.

Note: Rules are run against all shifts in the schedule, but only the selected unpublished shifts will be published.

Use the  **New** button to create a new rule. Press the down arrow to open an existing rule; once the rule is open you can edit, save, delete, or run the rule.



The screenshot shows the 'Custom Rules' dialog box. At the top, there is a '+ New' button and 'Run All' and 'Publish' buttons. Below this is a dropdown menu showing 'Shifts Unassigned Rule' (marked with a red X) and 'Overtime Rule' (marked with a green checkmark). The 'Overtime Rule' is selected and expanded, showing a 'Mandatory rule' checkbox which is checked. The rule's JavaScript code is displayed in a text area, starting with 'importScripts' and containing a function 'onmessage' that checks the number of workers and shifts. At the bottom of the rule editor, there are 'Delete Rule', 'Save and Run', and 'Save' buttons. A yellow status bar at the very bottom displays the results of the rule execution: 'Geoff Armstrong, Sun May 14, 2017 9:52 pm', '68 workers', '347 shifts', and '2 shifts unassigned'.

Chat and Audit History

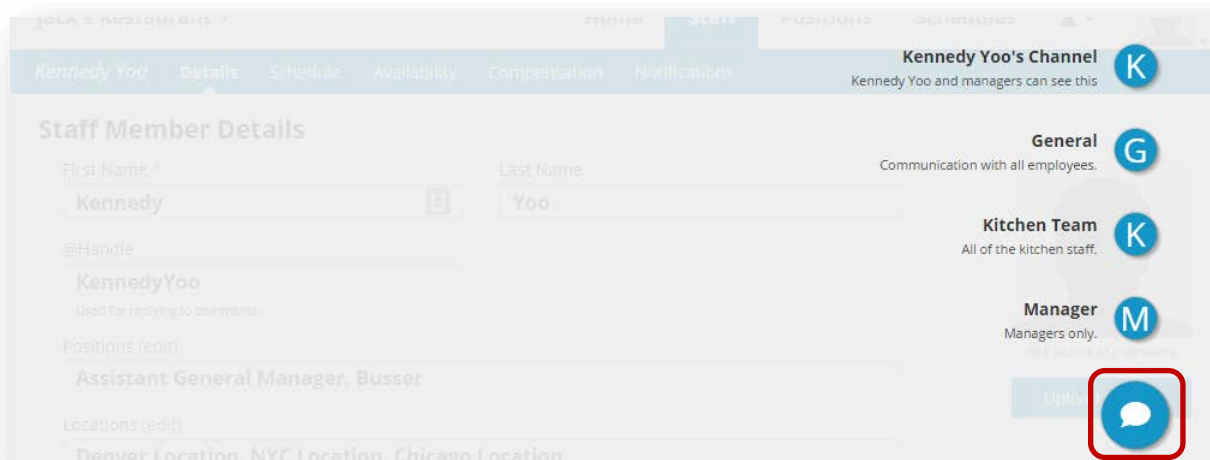


To view available chat channels and audit history, click on the chat icon.

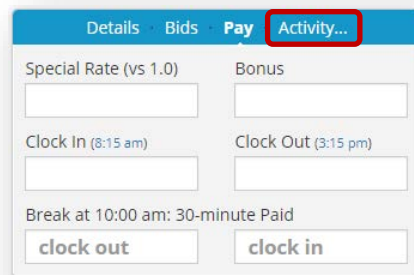
A list of all available chat channels will be shown above the chat icon. To create a new chat channel, go to the ["Organization Settings"](#) page. To add users to a chat channel, go to the ["Qualifications"](#) page.

Chat Handles: To reference another staff member in a chat channel, use their handle (e.g. [@FirstnameLastname](#)); this will notify the staff member that you have referenced them in the chat channel.

Staff Member Audit History: When you view a [staff member's details](#) page, you will also be able to see the staff member's personal channel. This chat channel only be viewed by the managers and the specified staff member. This channel will also show an **audit history** of any changes made to the staff member.

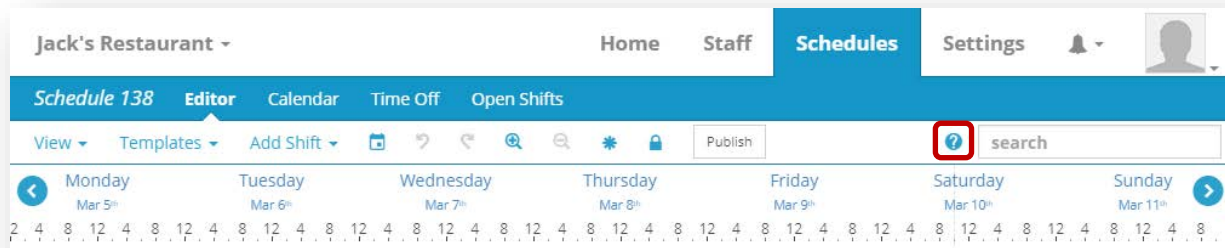


Shift Audit History: In the [schedule editor](#), when you click on a specific shift, you can click on the **"Activity..."** tab to display the audit history for the shift in the sidebar.



Help Videos and Shortcut Keys

To view the help videos for the schedule editor, click on the  symbol inside the schedule editor.



The shortcut keys include:

- Ctrl-X Cut
- Ctrl-C Copy
- Ctrl-V Paste
- Ctrl-Z Undo
- Ctrl-Y Redo
- Ctrl-A Select All
- Del Delete

Tip: To select all shifts in the currently displayed week, press CTRL-A or click the  icon.

Support

The following support is available from the “Support” dropdown:

- User Manual (PDF Format)
- Training Videos
- Email Support
- Chat Support

