



Aspect Software, Inc.
Back-office software for restaurateurs

Employee Scheduling

Support Guide for Scheduling Employees

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How To: Employee Scheduling

Overview - Employee Scheduling

Entering a schedule in Aspect is a simple process. Before you can enter a schedule though, you need to create some schedule names and schedule positions. This is a one-time thing. When this is done, you will be ready to enter your first employee schedule in Aspect.

Schedule Names

Before employees schedules may be entered in Aspect, you must name each schedule that will be created. For example, most restaurants have bar, wait, busser, host, kitchen and manager schedules.

To enter schedule names, open the Navigator by clicking on the Lightning Bolt, select Employee Scheduling on the left and then Schedule Names. Press the green '+' at the top to add each schedule name. Make sure you add things like Bar, Kitchen, Server, etc. Do NOT put employee names here.

Default budgets may be entered for each schedule. When a schedule is entered, the actual cost of the schedule will be evaluated against the budgets that are entered. You can come back and enter the budgets later if you like.

Schedule Positions

After you have entered schedule names, positions must be created for each schedule. For example, a kitchen schedule might include positions like Grill, Prep, Dish, Line, Expediter, etc. A server schedule might include only a single position named Server.

Positions let you create a schedule more quickly. A default job code and clock in / out time are assigned to each position. So when you enter a shift, you only need to specify the position. Aspect will fill in the job code and clock in / out times for you. Aspect will also fill in the correct pay rate based on the job code defined by the position. You can override any of these entries if necessary.

To enter schedule positions, select Schedule Positions from the Navigator. Press the green '+' to add a position. Enter the name of the position and an abbreviation. Select the schedule that the position belongs to and the job code that employees will clock in with when they work this position. Finally, enter default in/out times for each day of the week. This is the time that MOST employees will clock in/out when they work this position. These times are optional and you can override them when you create the actual schedule. Most people find it useful to use positions like AM Server and PM Server rather than just Server so that default times can be entered.

Note that you are NOT entering employee names here. You are entering positions that employees will work.

Opening An Employee Schedule

After schedule names and schedule positions have been entered, you are ready to begin entering an employee schedule. Select Weekly Schedule from the Navigator. The default date of the schedule should be the end of the upcoming week. Correct the date if necessary and select OK.

(If the date is incorrect, select Payroll Setup from the Settings menu and then Payroll Settings. Click on the Overtime button and correct the starting date of the current pay period).

Selecting A Schedule

After opening a schedule, Aspect displays a grid containing all active employees.

Normally, you will want to limit the display to show only the employees on a particular schedule. For example, you might limit the display to show only bartenders or servers. To do this, click on the binoculars to open the list of displays. Highlight the display named "Schedule - Worksheet" where Schedule is the name of the schedule that you wish to work on. For example, highlight 'Bar - Worksheet'. Don't press Ok yet.

If this is the first time that you have entered schedules, you will need to tell Aspect how to display only those employees that belong on a particular schedule. To do this, press the Custom button and turn on the check box labeled 'Only employees who can work' and select Bar from the drop-down list. If you didn't create a schedule named bar, select the appropriate job code. You are telling Aspect to only display employees who can work this particular job code. Press the Save button and Ok. You will have to do this one time for each worksheet display.

Entering Shifts

To enter a shift, double-click an empty box on the schedule. When you select a position for the shift, Aspect fills in the job code, rate, time in and time out for you. Press the Tab key to move through the fields in the window and adjust the time in and out if necessary. Press the Ok button to save the shift.

Double-click on the box for the next day and continue adding shifts for the employee until all shifts have been scheduled. Notice that when you enter the next shift, Aspect automatically fills in the position based on the last position that you entered for the employee.

If Aspect does not automatically fill in the job code and time in/out when you select a position, check the default settings you entered when you created the position. Aspect may also fail to initialize the rate properly if an employee is not set up to work the selected job code on your POS system.

Entering Double-Shifts

To add a second shift for an employee on a particular day, double-click on the employee's name. Aspect will open a new window showing all scheduled shifts for the employee.

To add a shift in this window, press the Insert button and enter a date for the shift. Notice that you can schedule two shifts on the same day by entering two shifts, each with the same date. An employee can be scheduled for up to 3 shifts on a single day.

Press Ok to close the window and return to the schedule. If you added a double shift for the employee, you will find that the employee now has two lines in the schedule. You can add additional double shifts for the employee directly from the schedule.

Adding a column for total pay

The total hours scheduled for each employee are displayed in the last column of the schedule. You can also add a column for total pay so you can view the total pay for each employee and the schedule as a whole.

To do this, click on the binoculars and press Custom. In the list of 'Fields Selected', scroll to the bottom and highlight the blank line beneath the last field. Scroll through the list of 'Available Fields' until you find 'Total Ttl Pay' and double-click on it to add it to the selected fields. Press the Save button and Ok.

If you add total pay to the schedule, make sure that you add it to one of the worksheet displays, for example, Bar - Worksheet. These worksheet displays are for you to use as you create the schedule and they may contain information that you don't want to print and hang on the wall. When you're ready to print the employee schedule, select one of the schedule displays, for example, Bar-Schedule.

Entering Budgets

To enter budgets, right-click anywhere on the schedule and select Budget from the pop-up menu. Aspect will open a new window showing totals by day for each schedule. Budgets are entered by day for each schedule. For example, you will enter a Bar budget for Monday, Tuesday, Wednesday, etc.

To enter or change a budget, double-click the line containing the budget and enter budgeted pay for the selected day. Press the Tab key to enter budgeted hours, if desired, and select Ok to save the budget.

You can change the display from budgeted pay to budgeted hours and visa versa by pressing the Display button. Current versions of Aspect also include a display for projected labor percentages. For information on viewing projected labor percentages, see the topic named 'FAQ: Labor & Scheduling.

Printing The Schedule

When you are ready to print the schedule, click on the binoculars and select the display named "Schedule - Schedule" where Schedule is the name of the schedule you wish to print, for example, 'Bar - Schedule'. Only employees that have shifts on the selected schedule will be displayed. To print the schedule, select Print from the File menu.

Saving The Schedule

It is important to note that changes made to the weekly schedule are not saved until you exit the schedule. This means that a system crash or power failure can cause you to lose a significant amount of work.

To prevent this, use the auto-save feature to automatically save your work every few minutes. To enable the auto-save feature, right-click anywhere on the schedule and select Auto Save.

The Auto Save window is used to specify how often the schedule should be saved. For example, a value of five will cause the schedule to be saved every five minutes. Enter a value of zero to disable the Auto Save feature.

Importing A Schedule

If you are starting with a blank schedule, you may wish to import a previous schedule and modify it for the upcoming week.

To do this, right-click anywhere on the schedule and select Import Previous Schedule. Select the schedule to import and the ending date of the week to import from. You may also choose to add to or replace the existing schedule. If you choose to replace the existing schedule, the current schedule will be completely deleted and replaced with the imported schedule.

Important: If you choose to replace the existing schedule, the entire schedule will be erased and replaced by the import, even if you have filtered the display to include only particular employees. For example, if you are working on a Bar schedule and you import from a previous week with the 'replace existing schedule' option turned on, you will replace not only the Bar schedule, but the Server schedule, the Kitchen schedule and any other schedules as well. This is true even if you only import the Bar shifts from a previous week. Be sure not to erase another person's work when you import!

Exporting A Schedule To Your POS System

Aspect currently exports employee schedules to H.S.I., Aloha, and RCS point-of-sale systems. These POS systems use the exported schedule to ensure that employee clock in/out at the correct time. If an employee tries to clock in/out outside of a specified grace period, they must get a manager's approval.

To export a schedule, select Export Schedule from the Payroll menu. Enter the beginning and ending date of the week to be exported. Make sure the checkbox labeled 'Update the point-of-sale system after exporting' is turned on and that 'Export POS Schedule' is selected in the drop-down list. Press Ok to export the schedule.

If you are exporting a schedule to H.S.I. or Aloha, you will need to enter grace periods into Aspect before you export the schedule. To do this, select Payroll Setup from the Settings menu and then Job Codes. Double-click on any job code. At the bottom, you will see a place for four grace periods - early in, late in, early out and late out. These grace periods must be entered for every job code. If you don't want to enforce the clock-out times, enter large grace periods, for example 120 minutes. After entering grace periods, you will also need to ask your HSI or Aloha representative to enable the scheduling feature on the POS system.

To enter grace periods for RCS, select Payroll Setup from the Settings menu and then Payroll Settings. You will find a line that says 'If an employee clocks in within...'. The value you enter here will be the grace period for both the clock in and out times. For example, enter 10 to set the grace period to 10 minutes. A secondary effect will be that employees clocking in early will automatically be rounded up to their scheduled clock in time. You do not have to enable the scheduling feature on RCS. RCS will begin enforcing the schedule as soon as you export it.

Projected Hours

When you enter an employee schedule in Aspect, you know what your labor cost will be for the upcoming week - at least in theory. In reality, employees will come in early, leave late, swap shifts and otherwise depart from the schedule.

The Projected Hours report gives you an up-to-date projection of what your labor cost will be based on what has actually happened so far and the remaining scheduled hours. For example, if you open a Projected Hours report at the beginning of the week, it will project the same cost as your schedule. However, if you open it on Friday morning, it will show the actual cost for Monday thru Thursday and the remaining scheduled cost for Friday thru Sunday. This makes it easy to see which employees will be going into overtime by the end of the week even if they were not scheduled for overtime.