Shift Tool Manual

WorkDo Tool Guide

V.190712

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I Tools (in Do Page)

WorkDo has many tools in the Do page of different levels within the workplace. This means workplace, groups and buddies all have a specific Do button and set of tools to use. Below is Table I-1) that shows which tools are available at which level.

Tools such as HR, Leave, Expenses, Approvals and Conf. Rm are set to activate once you created a workplace while other tools such as Attendance, Leave, Leave Pro, Overtime, Expenses and Approvals (depend on HR) need to be activated manually according to the needs of your company. This means the HR tool needs to stay activated for the other tools to function.

▼ Table I-1. WorkDo Tools

Tool	Workplace	Group	Buddy	Dependency
HR	●	x	x	
Attendance	●	x	x	HR
Leave	●	x	x	HR
Leave Pro	●	x	x	HR
Overtime	●	x	x	HR
Expenses	●	x	x	HR
Approvals	●	x	x	HR
Shifts	●	x	x	
Conf. Rm	●	x	x	
CRM	●	x	x	
Cashbook	●	●	●	
Phonebook	●	●	●	

Tool	Workplace	Group	Buddy	Dependency
We Buy	●	●	x	
IOU	●	●	x	

II Shift：Easy Shifts Scheduling

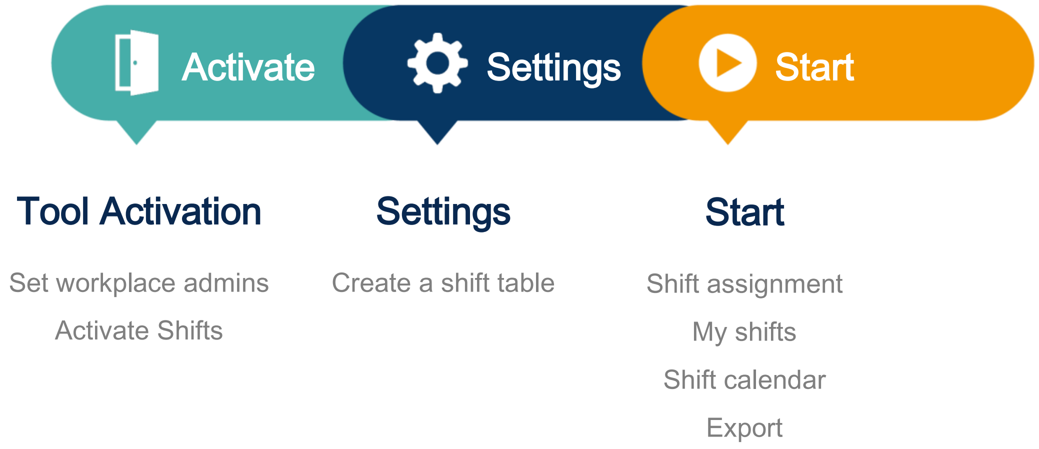
The Shift tool is essential to those who work in the service industry that relies on shift scheduling. With Shift, employees can easily stay on top of their schedules and use the comment sections to leave notes and notices to the next shifts. The Shift tool grants managers and employees the freedom to quickly assign and take up shifts to achieve the perfect work-life balance without sacrificing team productivity.

Once the tool is activated, all you need to do is to set available shifts and you can start to assign employees to desired shifts, give it a try!

III Set Up

In this section, we will guide you on how to use the Shift tool. The web interface is more comprehensive over the app interface, but you can choose your preferred device to set up Shift. This guide will only be focused on the web interface.

The process includes 3 stages: tool activation, settings and start as shown below.



▲ Image III-1. Setup Process

STEP 1. Tool Activation

In order to ensure information is compartmentalized among all members in the workplace, WorkDo was designed to have workplace admins and tool admins. (Table Step 1-1)

Workplace admins include an owner and multiple admins that can adjust workplace settings and are usually management and IT employees. Tool admins [1] manage the data others see per tool. Tool activation is done by workplace admins.

▼ Table STEP 1-1. Admin Authorities

Authority	Workplace Owner	Workplace Admin	Tool Admin
Delete workplace	●	x	x
Change workplace ownership	●	x	x

[1] For more information on tool admin authorities, please see STEP 1-b Set Up Tool Roles.

Authority	Workplace Owner	Workplace Admin	Tool Admin
Maintain workplace settings	●	●	x
Activate workplace tools	●	●	x
Change tool roles	●	●	x
Maintain tool settings	x	x	●

a. Confirm/Assign Workplace Admins

As you can see from Table Step 1-1, workplace admins are assigned by the owner or other admins. If you are a workplace admin, you can skip this portion and go to step 1-b, Set Up Tool Roles, and if you need to be a workplace admin, please have one of the admins to assign you the role. You can find out whether you are a workplace admin by following the steps below.

Manage Workplace Admins

1. Ask the workplace admins to go to the Workplace page.
2. Click the gear icon to enter Workplace Settings.
3. Click Manage Admin, the red crown marks the owner and the blue crown marks the admin.
4. Click Add Admin.
5. Choose member(s).
6. Click Done and wait for the success message.
7. Now refresh the page to see admin-only menus.

b. Set Up Tool Roles

WorkDo has many tools that require different members within the workplace to take on the roles of Tool Admin or HR Staff to manage information. Please read the description of the roles for each tool carefully when assigning tool roles to each member within the workplace.

In Shift, there are three types of roles, including No Role, Employee and Manager. Obviously, Employee is viewed as a normal member; he/she could check their shift schedules and related settings, they can also leave comments for other employees. While Manager is viewed as a tool admin, able to create and edit multiple shift tables including shift types, times and the employees on rotation. If your tool authority is set to No Role, the Shift tool will not appear in your tool box.

Upon tool activation, the system will automatically assign all members as Employees; you will then have the workplace admins manually assign Manager(s).

Manage Tool Roles

1. Ask the workplace admins to go to the Workplace page.
2. Click the Workplace Settings.
3. Click the Tool Box and the Advanced tab is available for you to activate, deactivate and manage tools.
4. Make sure Shift is activated, then click Manage.
5. Click Manage All Member Roles.
6. Use the search bar quickly locate the members for role changes.
7. Click the drop down menu and edit members' roles, repeat until all roles have been assigned correctly.

STEP 2． Start

The Shift tool is the best way for you to effectively manage employees’ shift schedules to truly achieve a healthy work-life balance for everyone.

Once you have activated the tool, shift manager(s) can start creating shift tables, types and rotational employees, it’ s that simple!

a. Create a Shift Table

Base on STEP 1-b Set Up Tool Roles, only the Manager(s) should have the authorization to change the settings, if you are not unauthorized to do so, please use the method described in the section to change your tool role.

When managing multiple departments with different shifts, you could create different shift tables for specific shift types, times and rotational employees.

Create Shift a Table

1. Have the Shift Manager click Shift in the Do page.
2. Click the Shift Settings on the left of the menu.
3. Click +Create and fill out the fields(* must be filled)
   - Shift Table Name
   - Desc.：Description for the shift table.
   - Employees：Select rotational employees for the shift table and click save to finish editing.
   - Shifts : Click + Add Shift to add a shift type to the shift table.
     - Shift Name
     - Time
4. Click Save to complete.

b. Shift Assignment