HOTSCHEDULES RELEASE 4.0.56.1

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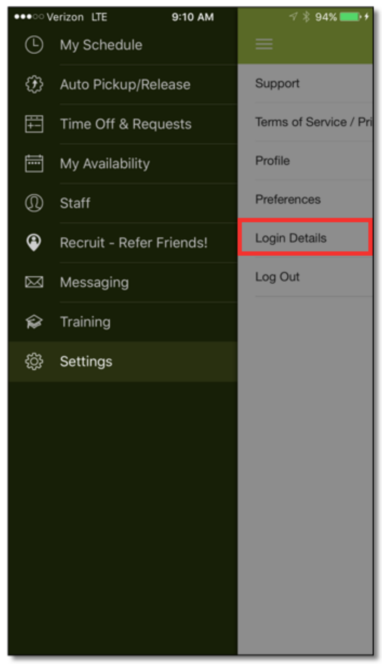
Table of Contents

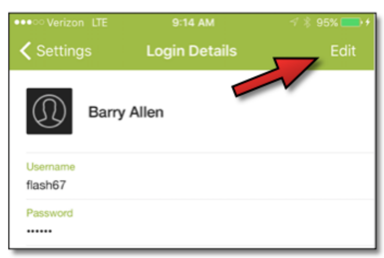
New Features & Improvements | Mobile

Security Questions

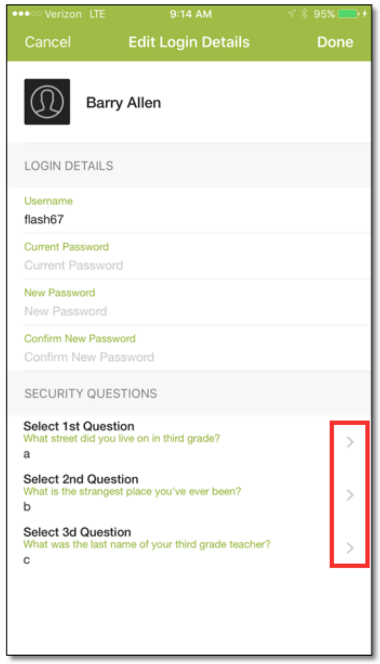
Security questions can now be viewed and edited in the Android and iOS apps. While in the app, users can tap **Login Details** from the Settings menu item.



To see the previously-answered questions, users can tap **Edit**.

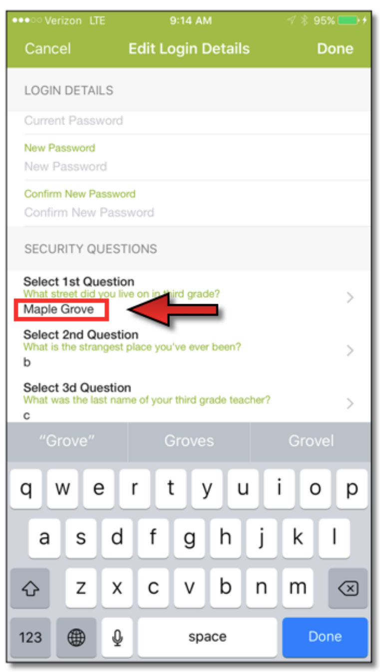


By tapping the right-facing arrow, users are able to select new security questions.



Questions can only be used once

Users can also edit their Security Question answers by tapping the current answer to reveal the keyboard before tapping **Done**. Users will then be be prompted to re-enter their password before they can save the new answer.



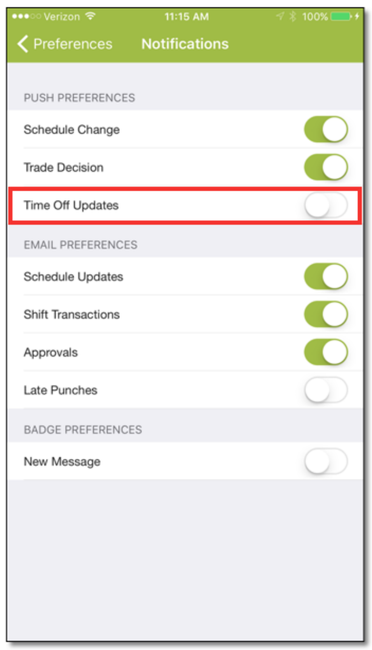
Posted Schedule Push Notifications

The following improvements have been made to push notifications regarding posted schedules:

- Store and Schedule names are now included
- Date and time of shifts are included
    - The out time of a shift will only display if the **Show Out Times** permission is enabled.
- Notifications that are opened will take users directly to the appropriate week of the My Schedule screen

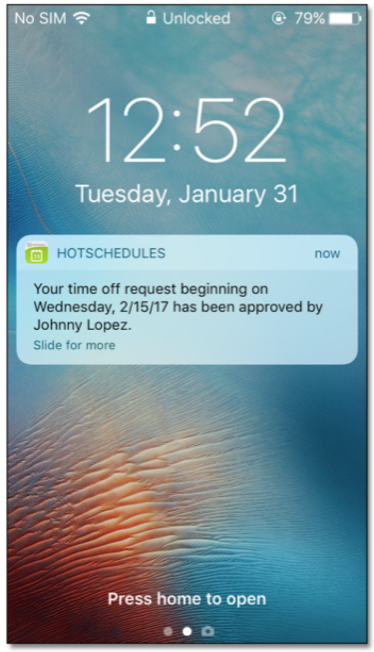
Time Off Updates Push Notification

A new "Time Off Updates" push notification preference is now available for Android and iOS users with the **Request Time Off** permission.



The preference is OFF by default

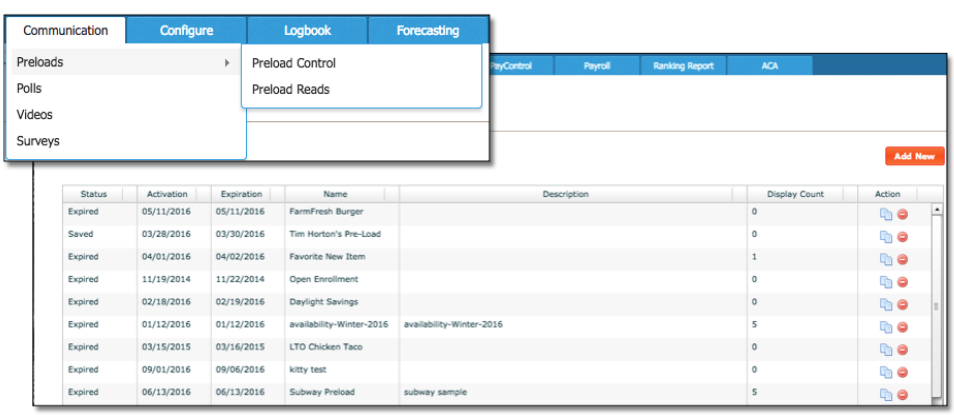
The notification will include the type of request being made, the manager's name who has made the decision to approve or deny the request, the amount of paid hours (when available), the start date of the request, and what the request decision was.



New Features & Improvements | Web

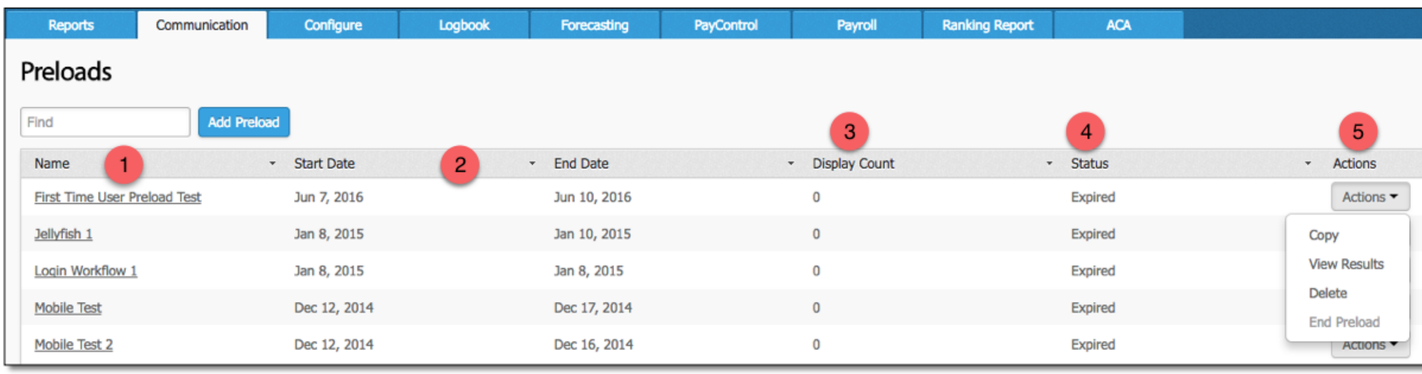
ASC - Preloads

Previously, there were two sub-tabs of Preloads within the Communication tab in the Above Store Console; one was intended to upload and edit, while the other was to provide the number of views a Preload received at each store it was assigned to.

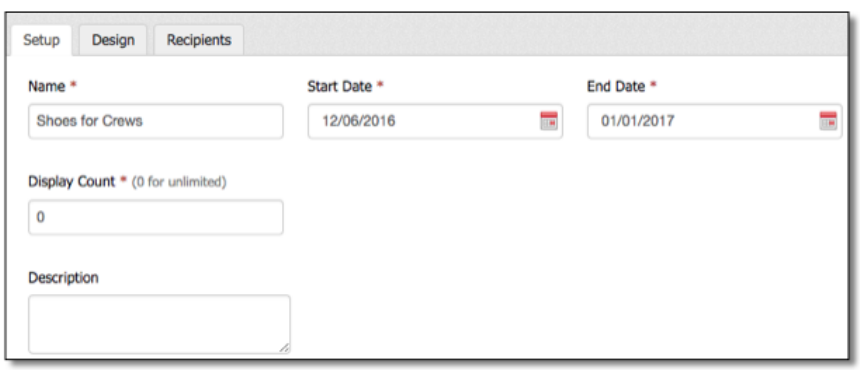


Now that Preloads have been migrated to HTML, all actions can be done from one, much more intuitive area. The main screen will display:

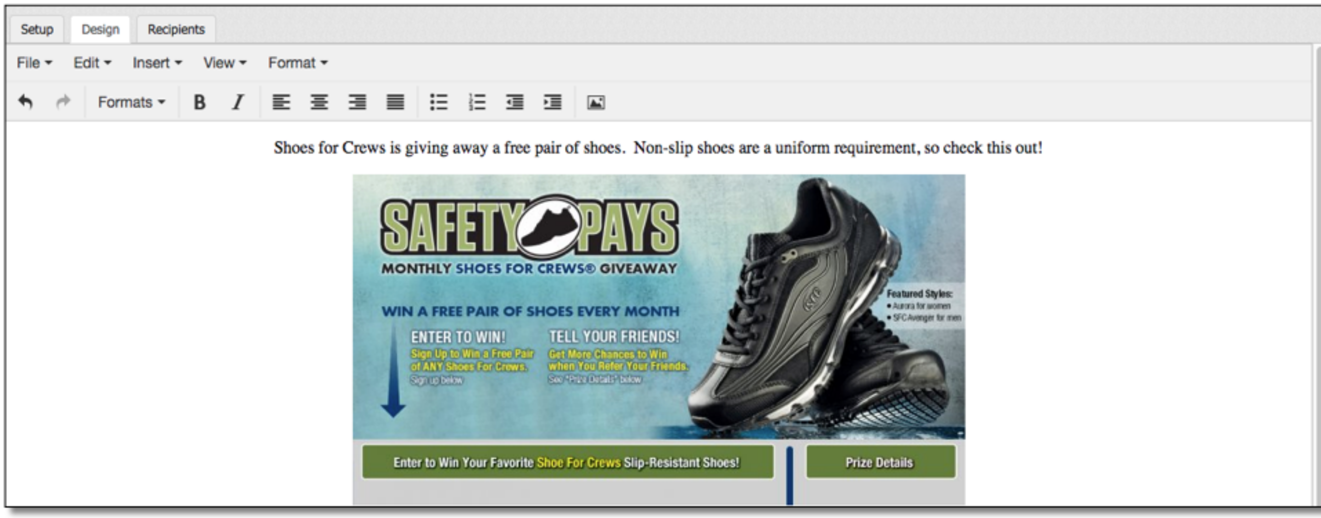
- **(1)** - The name of the Preload
- **(2)** - The active date range of the Preload
- **(3)** - How many times the Preload displays for users
    - A Preload with a Display Count of 0 will display for users until the expiration date, or until it is manually deleted by an ASC user
- **(4)** - Whether or not the Preload is currently active
- **(5)** - More actions for the Preload including:
    - The ability to copy an expired Preload to reuse
    - The option to view how many times the Preload was viewed at each store it was assigned
    - The ability to delete the Preload
    - The option to manually end a currently-active Preload



By clicking **Add Preload**, users are presented with three tabs. The **Setup** tab is where users are required to name the Preload, set the start and end dates for its run, and list the number of times they wish the Preload to display for each user. As mentioned above, when the Display Count is set to 0, the Preload will display until its expiration date, or until it is manually deleted by an ASC user.

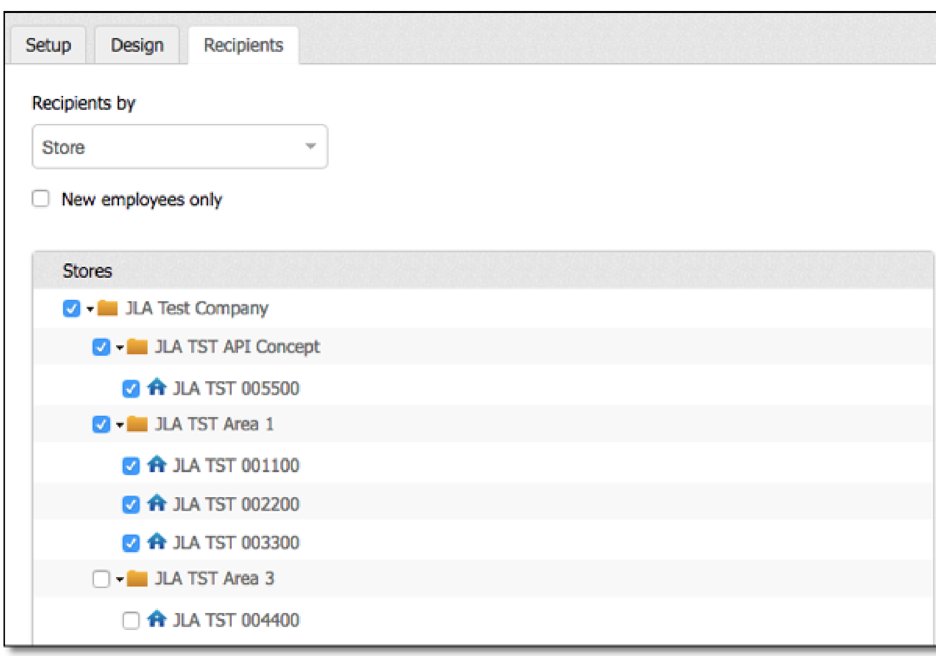


The **Design** tab allows users to upload an image, type a message, and to use a variety of formatting options to make their Preload look great.



Selecting the "Recipients by" dropdown in the **Recipients** tab allows users to assign Preloads to:

- Everyone at a particular store
- Users of a particular store and job
- Users of a particular store and permission
    - Please note that a maximum of 5 permissions can be selected
- Users of a particular store and schedule

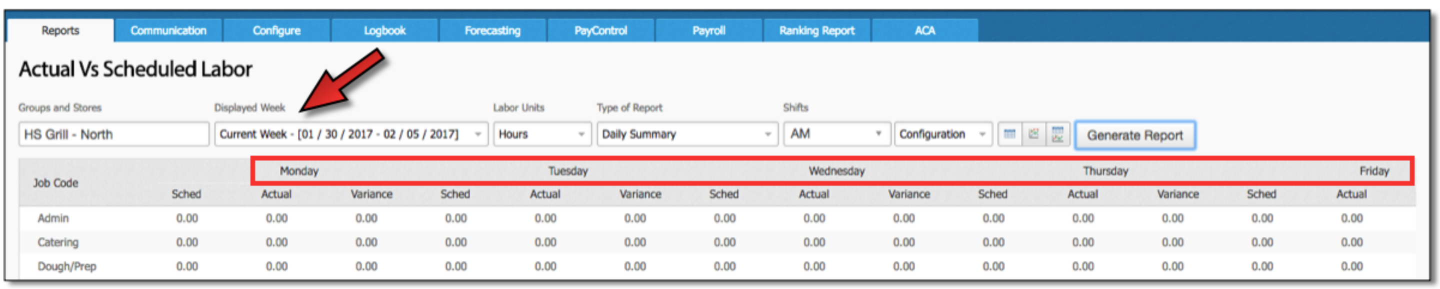


ASC - Updated Schedule Status Report PDF

The PDF export of the Schedule Status report in the ASC has been updated to match the HTML and Excel formats.

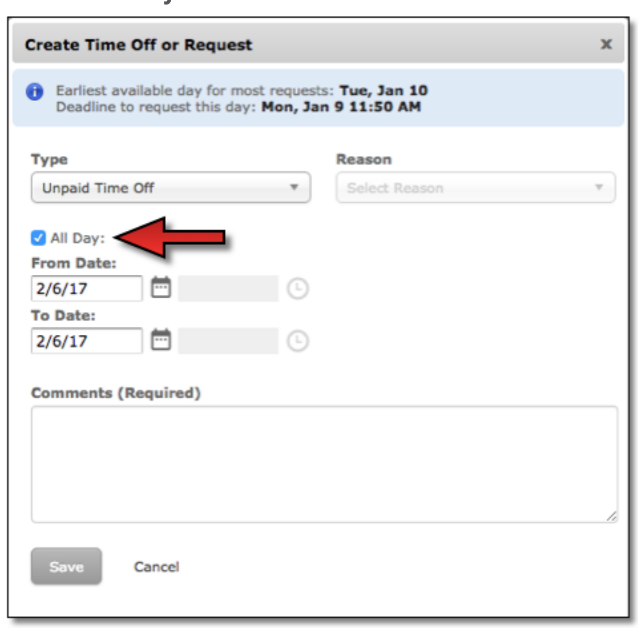
ASC - Actual vs. Scheduled Report Dates

Improvements have been made to the Actual vs. Scheduled Labor report so that the days displayed more-accurately represent the work week of the store(s). For example, selecting to view a store whose week starts on a Monday will display Monday as the first date in the report. When viewing two stores with two different starting days to the week, the store's week with the closer day to Sunday will display. For example, if one store has a Wednesday - Tuesday week, and another store has a Thursday - Wednesday week, the date range in the report would display Wednesday - Tuesday.

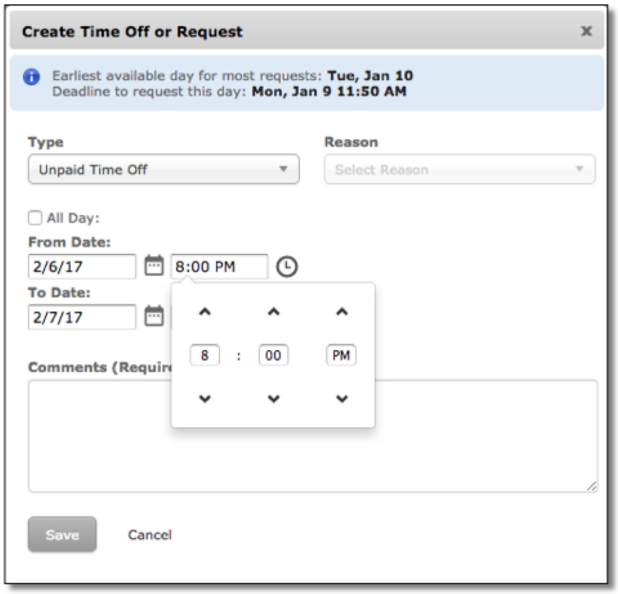


Time Range for Time Off

Sites using the New Scheduler can now be configured so they are no longer restricted by their Day Parts when submitting Time Off. This is helpful if an employee is able to work part of a morning shift, but not all of it. Now a request is for the calendar day and not the business day. The feature works similarly to the current functionality used in the Time Off & Requests sub-tab of the Home tab, however instead of selecting which Day Part an entry will apply to, users can uncheck an **All Day** box.

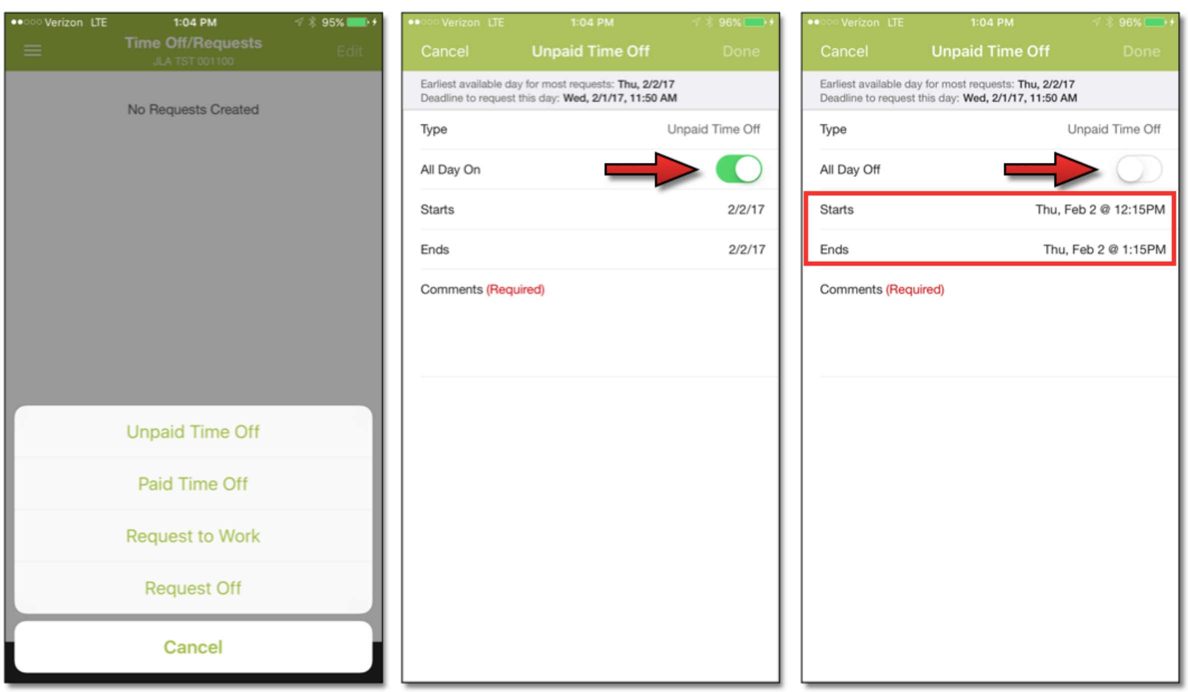


Unchecking the box allows users to click on the window to the right of each date to submit a start time to request as well as an end time.



The "From" and "To" dates/times are required before being able to save. The Comments are only required when a site requires a reason. (Please see the next feature write-up.)

Mobile users are able to submit an entry by time range as well. From the Time Off/Requests screen, users will first need to select the type of request they want to submit. The **All Day** toggle will be set to ON by default, but turning it OFF will allow users to select their start and end times to the request.

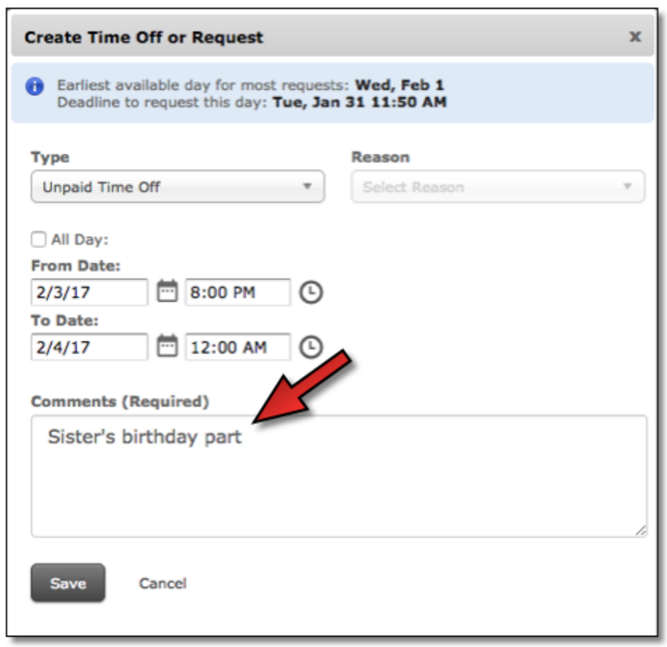


When reviewing the request in the **Manage Time Off** sub-tab of the Home tab, managers can tell whether a request was submitted as a time range **(1)** or for an entire day **(2)**.

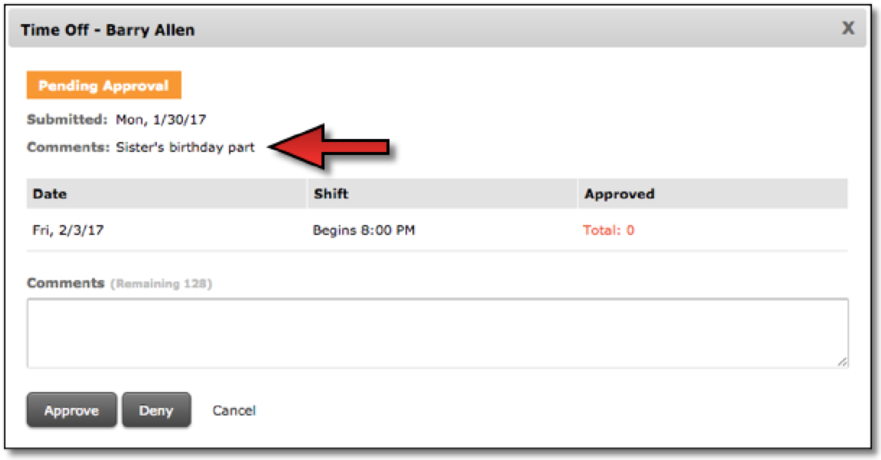
Requested From	Requested To	
2/3/17 8:00 PM	2/4/17 12:00 AM	1
2/4/17	2/4/17	2

Requiring a Comment for Time Off Requests

Sites can now be configured to require employees to submit a comment when submitting their Time Off and Requests. From the employees' perspective, they will not be able to save an entry without first entering a comment.

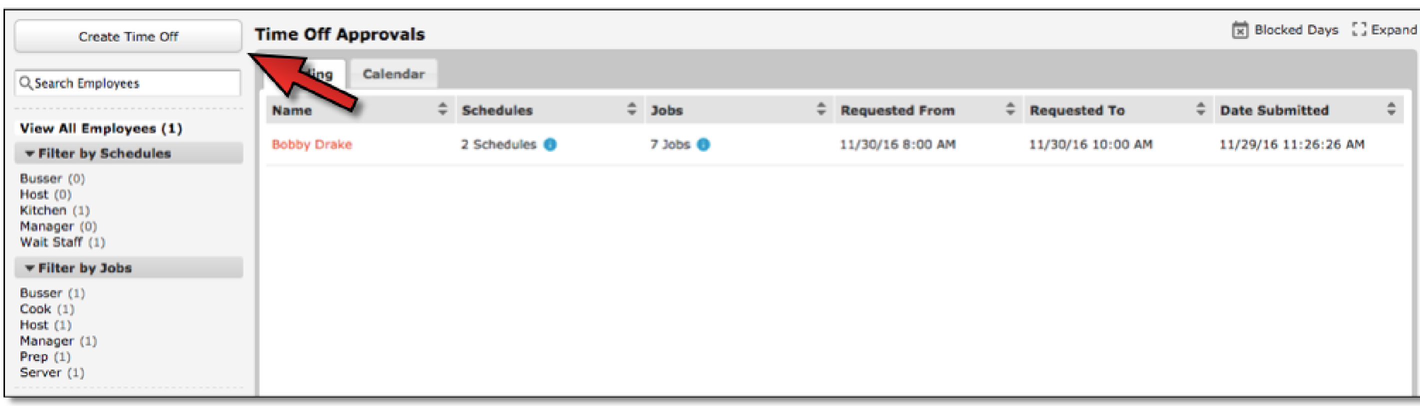


Managers can then view the comments when approving/denying an entry.



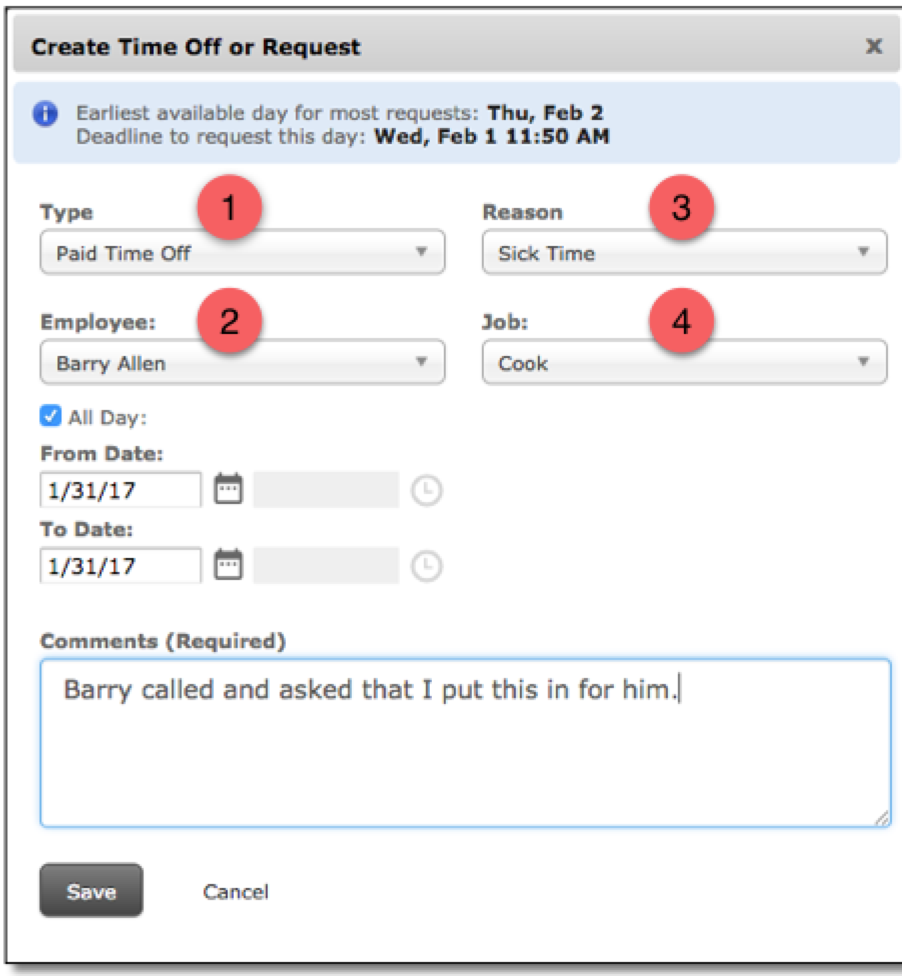
Time Off on Behalf of Employees

With the necessary permissions, managers will have a **Create Time Off** button within the Manage Time Off sub-tab of the Home tab where they can submit Time Off on behalf of their employees.

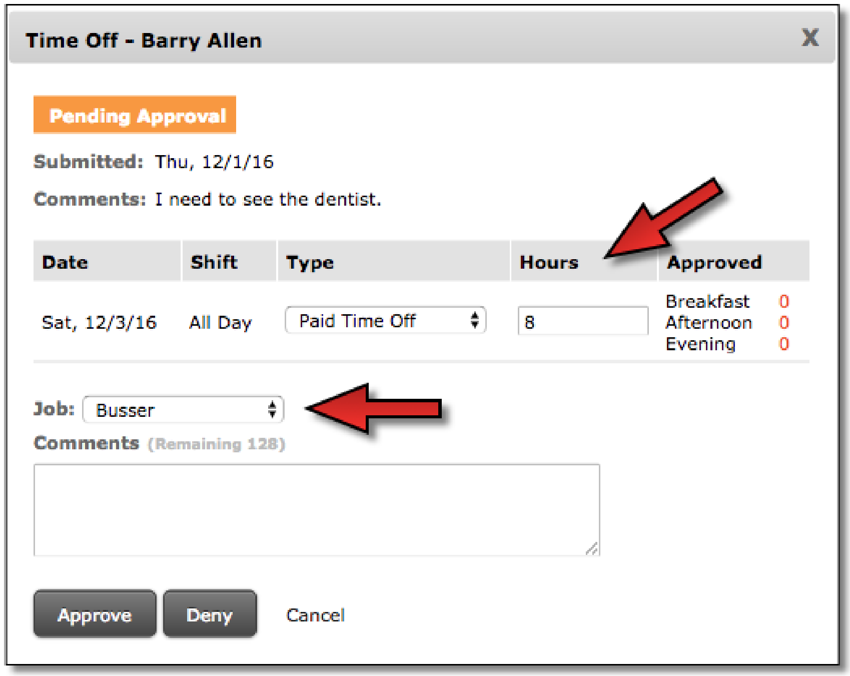


The Create Time Off or Request modal is where managers can make entries for their employees. When submitting on behalf of their staff, managers can override cut off limits and blocked days. Furthermore, if the site is configured for Paid Time Off, but an employee's permission doesn't allow him/her to submit the time, managers can do it on their behalf.

- **(1)** The Type dropdown allows managers to select what type of entry to enter (Unpaid Time Off, Paid Time Off, Request Off, Request to Work)
    - These options are directly related to the configuration of the site
- **(2)** Managers can use the Employee dropdown to select for whom the entry is intended
- **(3)** When Paid Time Off is being entered, the Comments dropdown allows managers to choose a reason for the entry
    - The reasons are created in the Time Off sub-tab of the Configuration tab at the ASC level
- **(4)** When Paid Time Off is being entered, a Job must be selected from which those paid hours are calculated from

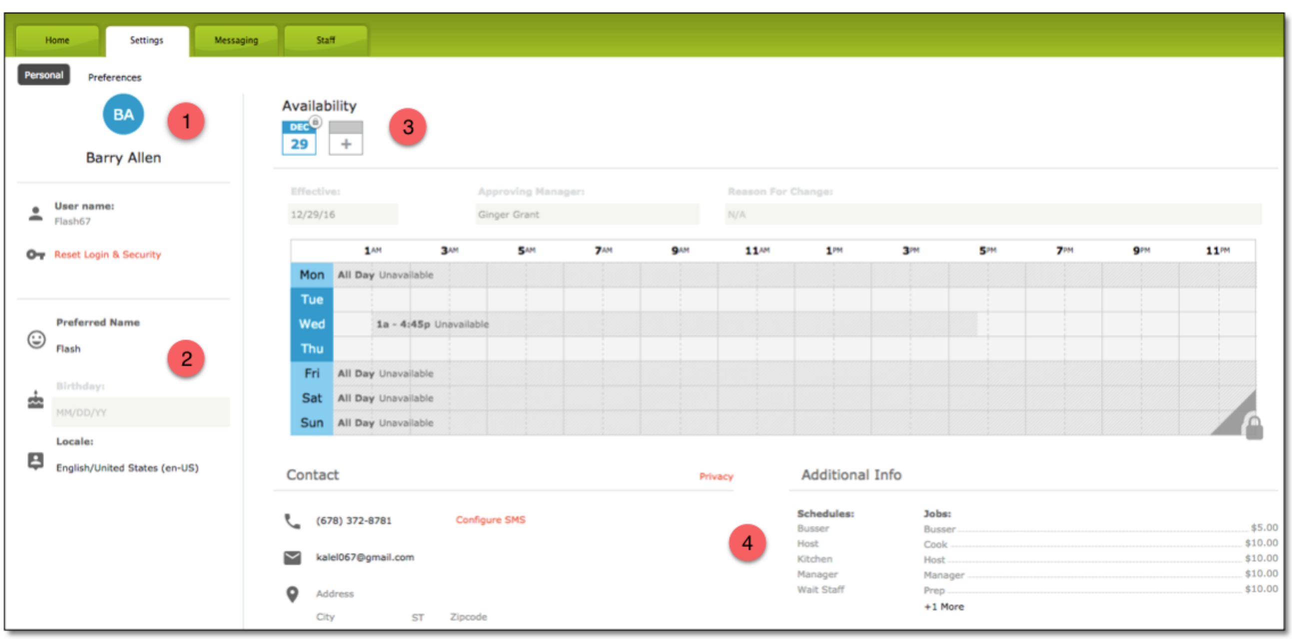


Upon saving a **Paid Time Off** entry, the modal for approving and denying entries will be displayed to allow managers to select how many hours will be "paid hours" before approving the entry.



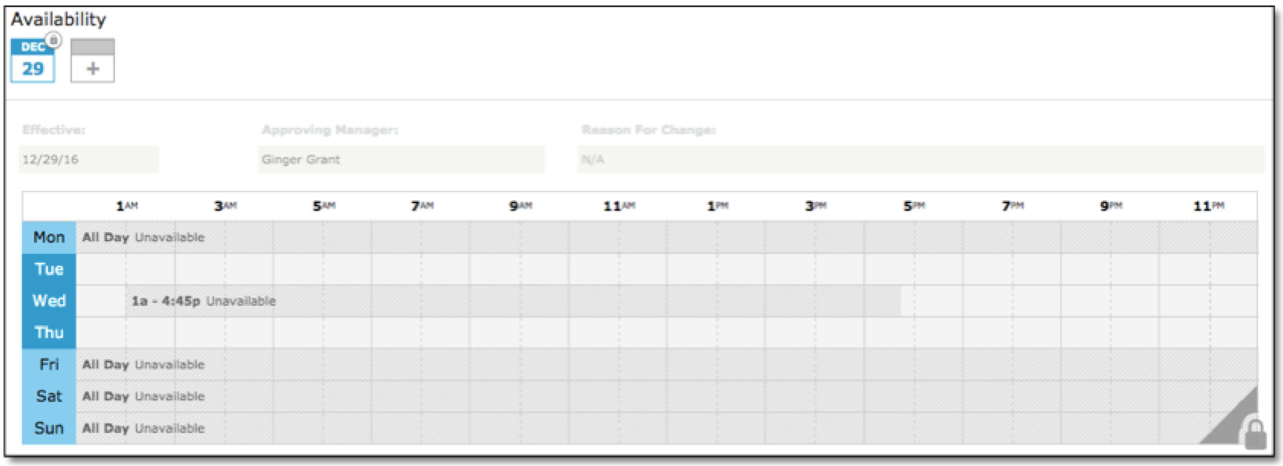
New Personal Settings

The Personal Settings page has been updated with a new look, and depending on permissions, will allow users to upload a profile picture **(1)**, edit their Preferred Name, Birthday, and Locale **(2)**, submit Availability **(3)**, edit their Contact information and view Schedule and Job assignments **(4)**.



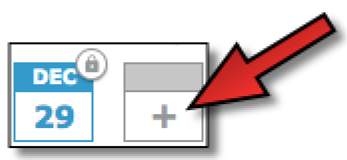
Time Range for Availability

One of the features of the new Personal page is the ability to submit an Availability by a range of time instead of being restricted to Day Parts. This feature is only available to sites using the New Scheduler, and is dependent on the calendar day and not the business day. The Personal sub-tab landing page will display the current Availability.



When enabled, the Employee Availability sub-tab of the Staff tab will be removed.

The current Availability will always be locked so users can't edit it, however they can submit a new Availability by clicking the **Add** icon.

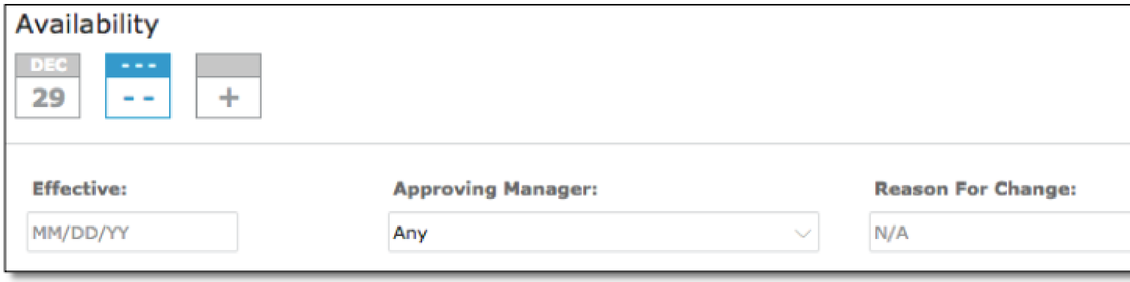


The dates indicate when the availability became effective.

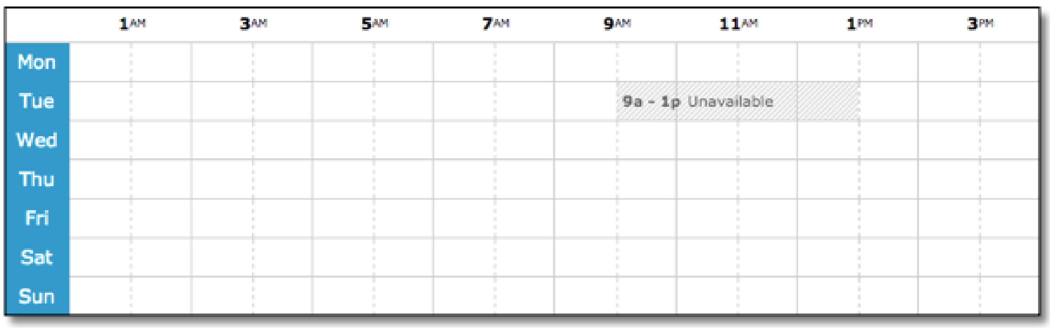
Users are required to enter an "Effective" date for the new Availability. By leaving the Approving Manager drop-down set to "Any," any manager with the **Staff - Edit Employee** permission will be able to approve the submission. If users want to select a specific manager to approve, they will need to select the manager from the drop-down.

It should be noted, however, that if they're going from any sort of limited availability to fully available, no manager approval is needed. In these instances, managers with permissions to approve will receive a HotSchedules Message indicating the employee is fully available now and that no other action is required.

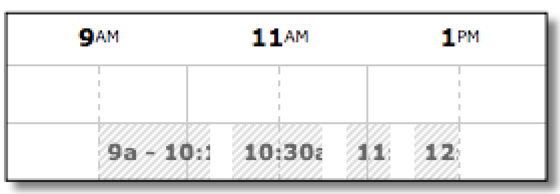
Additionally, users will have the option to provide a reason why the availability will be changing.



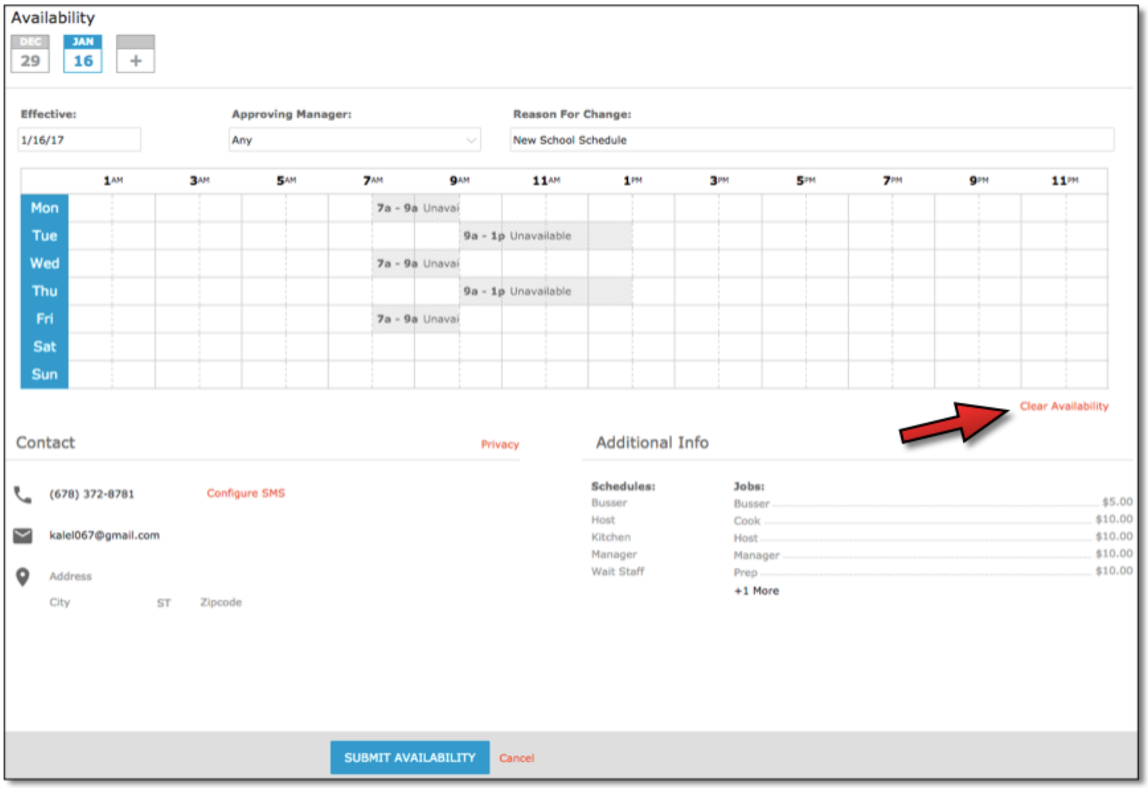
Any white on the Availability grid will display when users are available, so when they are **not** available to work, the slot will be in gray. To enter a time of unavailability, they can simply click and drag anywhere in the grid to create the entry.



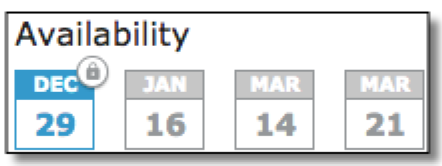
The time will move in increments of 15 minutes. If users make a mistake, they can hover the mouse on either side of the entry until an arrow displays, and then click and drag to make their adjustment. Users might also find situations where they attempt to drag an entire entry, but will end up creating 15-minute available slots within their unavailable entry.



To mark an entire day Unavailable, users can click on the day once, or twice to clear all entries for the day. To wipe the grid clean and start from scratch, they can click the **Clear Availability** button at the bottom. When the Availability is ready to submit, users can simply click **Submit Availability** at the bottom of the page.

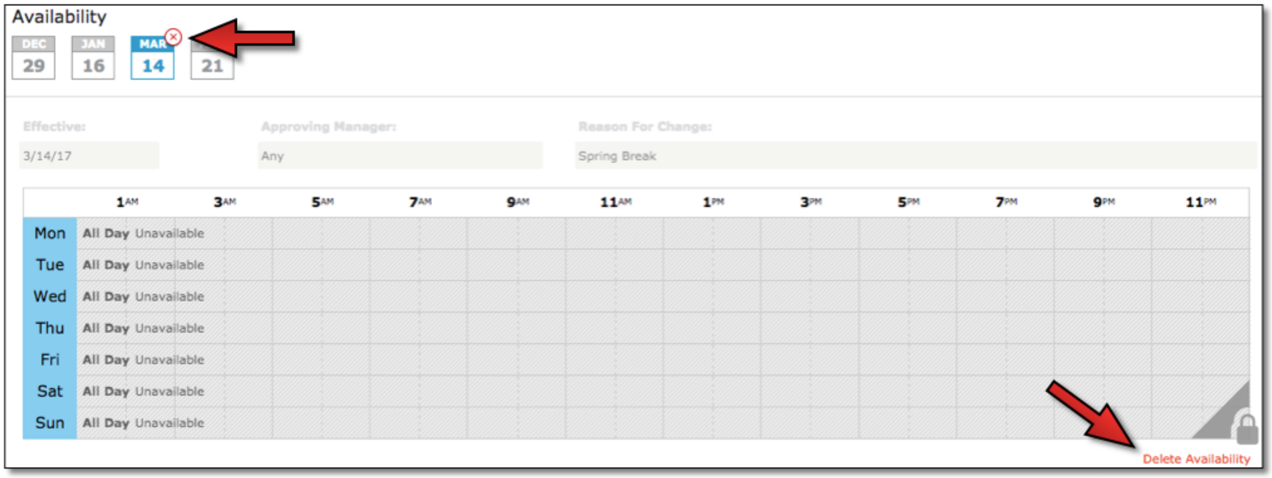


One of the benefits of this new interface is the ability to have up to 4 availabilities submitted at any given time. This allows employees to submit temporary Availabilities for things like Spring Break and school schedules.



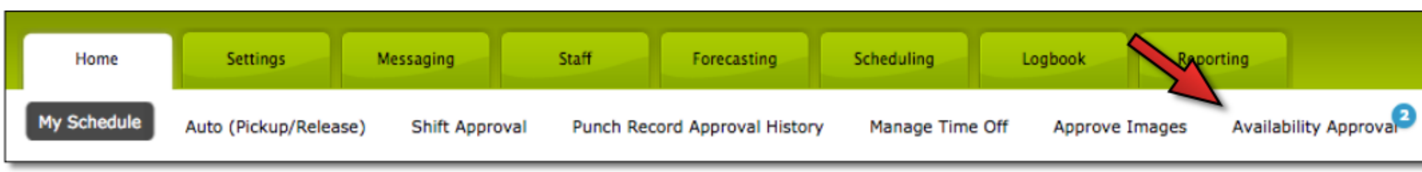
Once 4 submissions have been made, the Add option will no longer display.

When Availabilities have been approved, clicking any of the Availabilities will allow users to view what the submitted Availability was for that effective date, and also allow them to delete it if necessary by clicking the **X** or **Delete Availability** button.



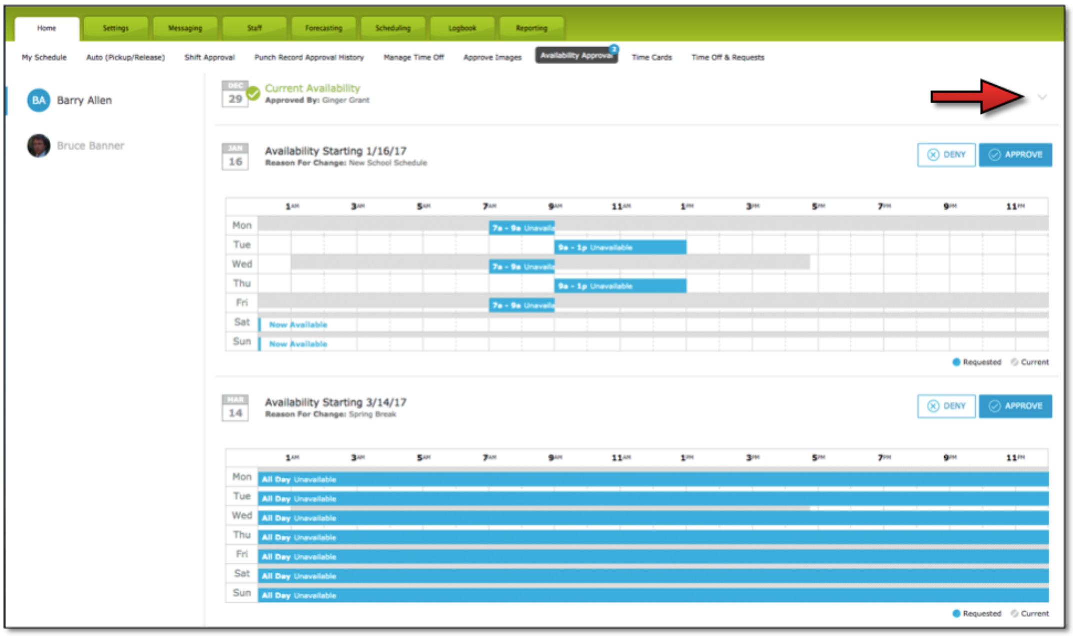
Once an Availability is submitted and approved, it cannot be edited. Users will need to delete it, and create a new one.

Managers who have the **Staff - Edit Employee Availability** permission will have the new Availability Approval interface along with an updated sub-tab in their Home tab which will display badge notifications. When there are Availabilities to approve, there will be a numbered badge icon on the sub-tab for every employee with a pending Availability change.



Upon clicking the sub-tab, managers will see the employees on the left who have Availabilities that need to be approved. Employees are ordered by those with older requests at the top of the list, followed by employees with the most recent requests at the bottom. In other words, those who have been waiting the longest for an approval will be at the top of the list.

When selected, each of the employee's Availabilities will be displayed on the right. The current Availability, and who it was approved by will be listed first, followed by the Availability that needs approval, and then each Availability in order of their effective date. The gray bars in each grid is the employee's current Availability, and the blue bars is the newly-submitted Availability. To view just the current availability, managers can select the expand icon.

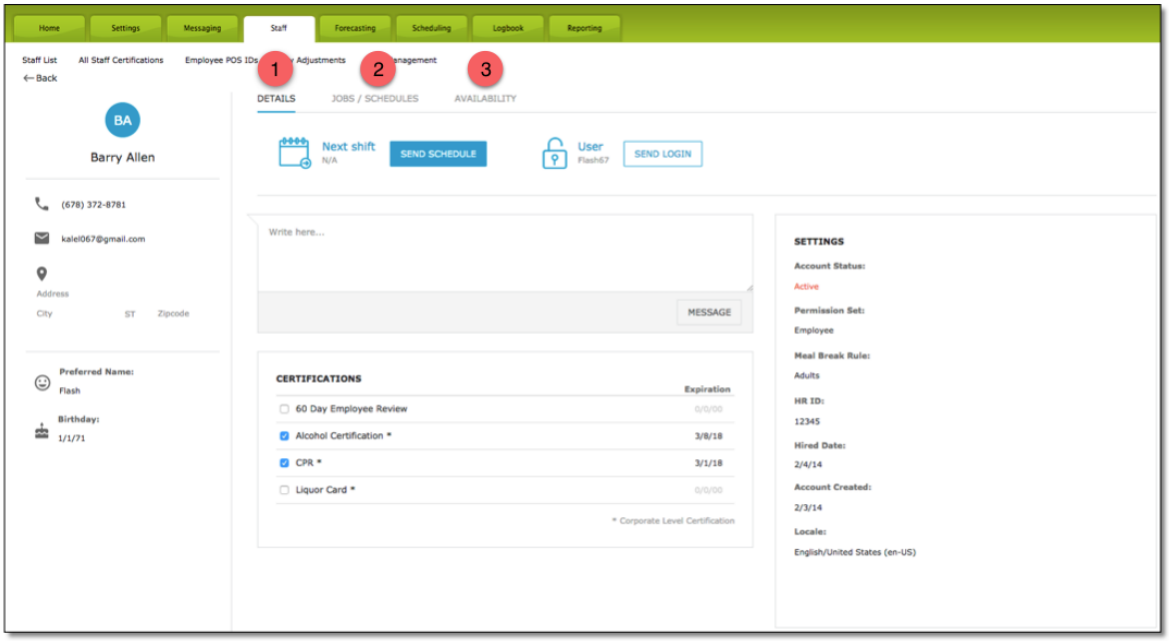


When denying an Availability, managers can provide a reason why. The system does **not** require them to provide a reason when they deny, but they still have to click **Send** to complete the denial. Each approval and denial will be sent to the employee in the form of a HotSchedules Message. Additionally, when the employee logs into the web, and navigates to his/her Personal settings, a similar message will display indicating the status of their Availability request.

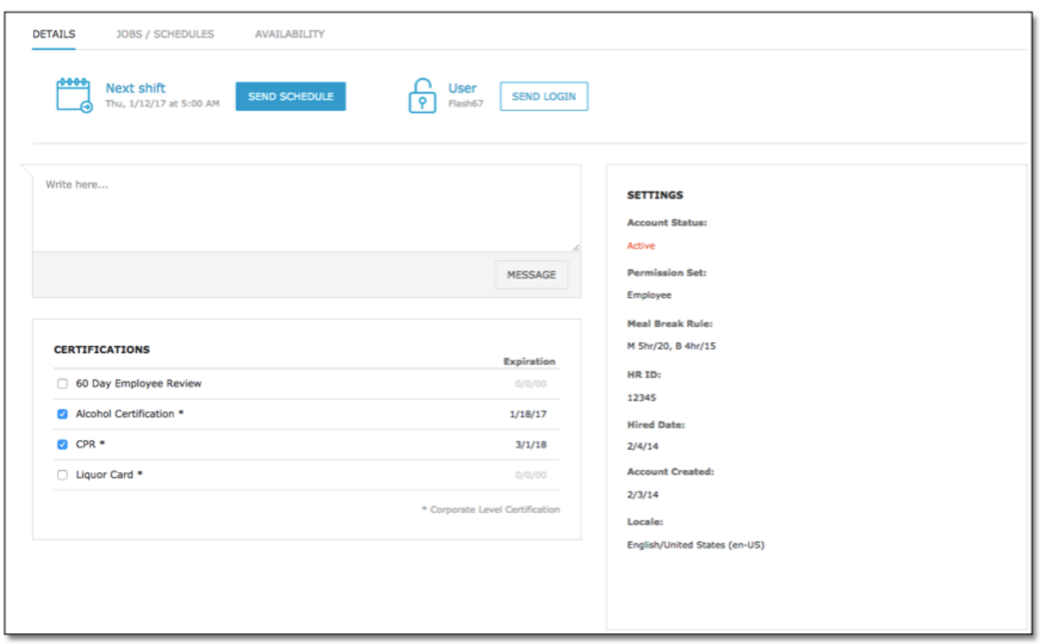
Please note there is no UNDO option when approving or denying.

New Staff Profile Interface

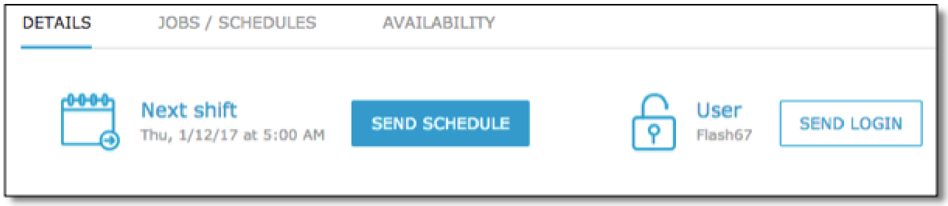
Sites using the new Personal interface will also be configured to use a redesigned Staff Profile page for managers who click on an employee's name in the Staff List. On the left, managers are able to edit personal information such as phone number and email address. On the right, the Details tab **(1)** displays by default, followed by the Jobs/Schedules tab **(2)**, and then the Availability tab **(3)**.



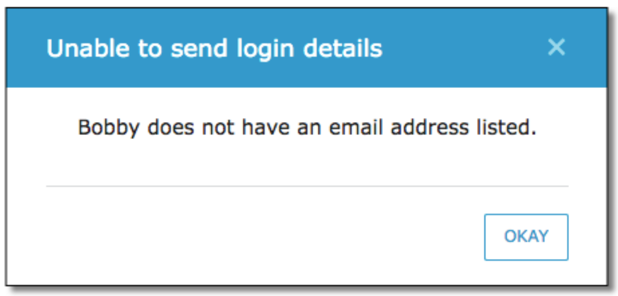
The **Details** tab of an employee's profile is where managers can go for important information about the employee such as when their next shift is and what certifications they have.



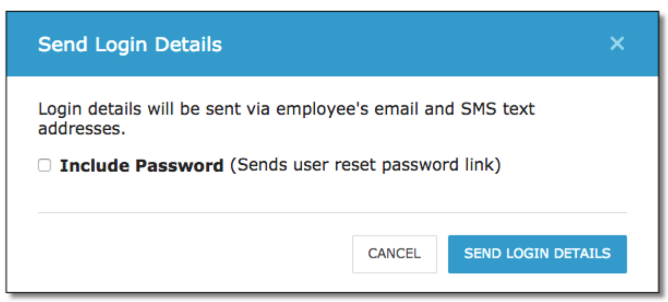
The top section of this tab will display the employee's next shift and what his/her username is to access the account.



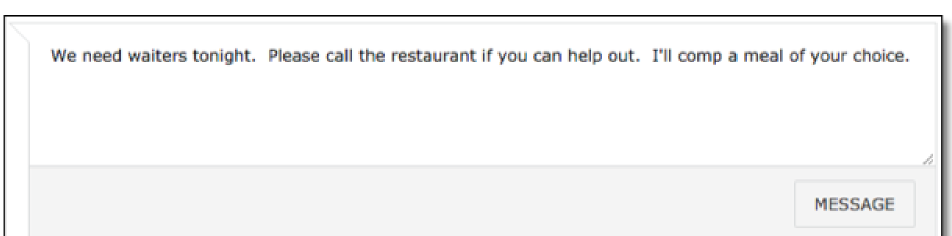
For employees who have a confirmed email address, or have their text messaging configured, managers can click the **Send Schedule** button to send a copy of any posted schedule. If an employee doesn't have his/her email confirmed, the manager will be notified.



Managers can also send login details to users with a confirmed email or configured text messaging. By clicking **Send Login**, they will have the option of sending just the username, or they can check the **Include Password** box to send the employee a link so they can securely change their password.

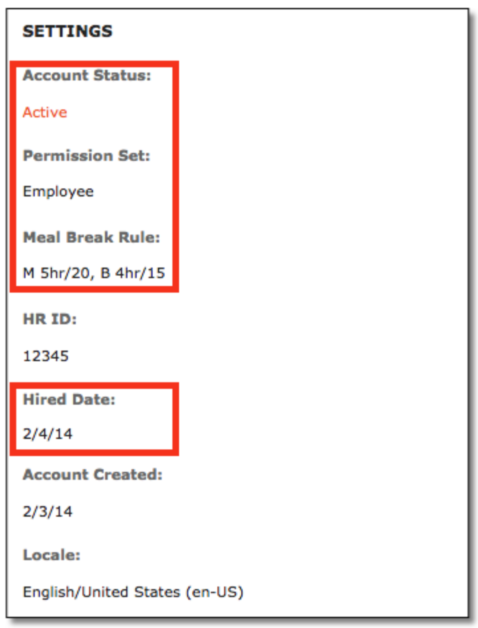


While on the Details tab of the Staff Profile, managers can send a quick HotSchedules Message with the Message tool.



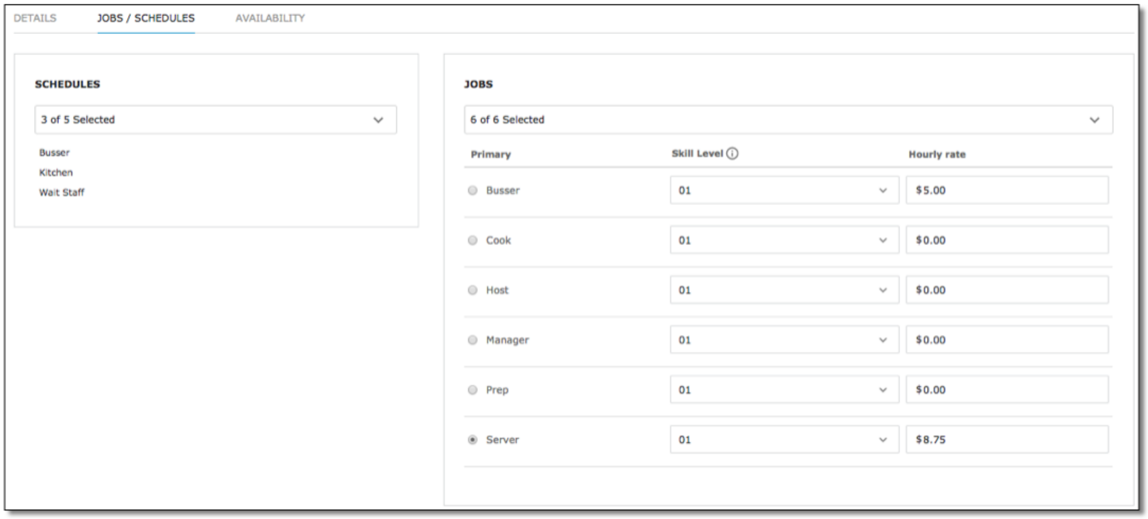
Managers can select from the certifications configured for their site to assign to employees. Enabling a new certification will automatically display a date picker to configure the expiration date, but users can also click the dates of previously-assigned certifications to enter a new expiration date.

The Settings panel is where various employee configurations can be made such as account status, permission set, and hired date.



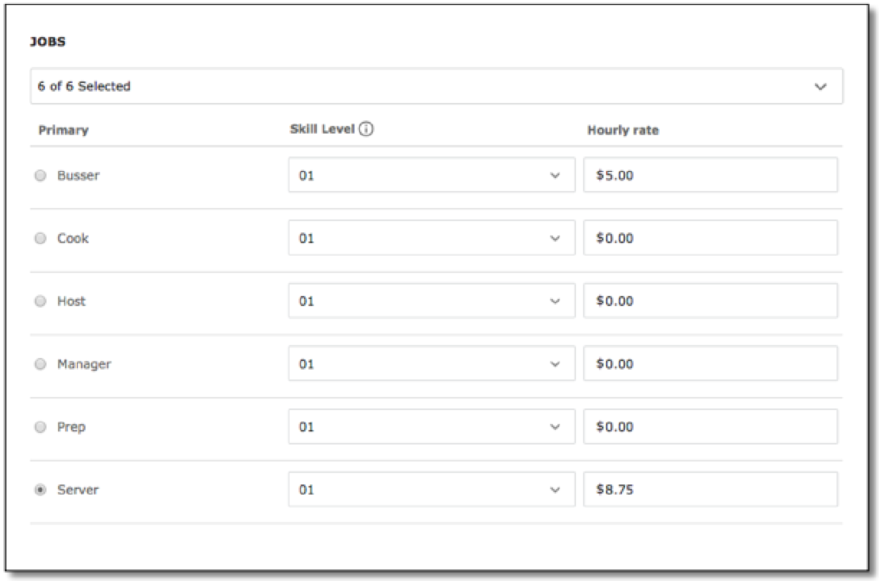
Marked fields are editable by clicking the field and selecting an option.

The **Jobs/Schedules** tab is where managers can assign jobs and schedules to their employees.



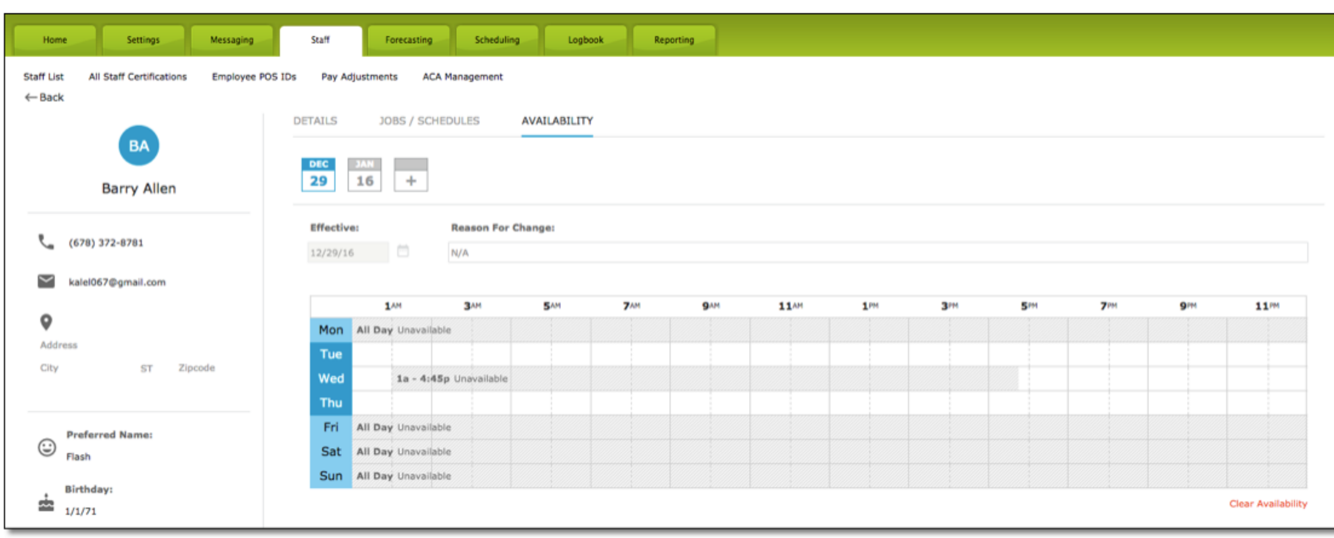
The **Schedules** pane will display the schedules that are assigned below a drop-down menu of all the schedules available to assign. When collapsed, the menu will display the number of assigned schedules out of the total number available.

The **Jobs** pane will display the jobs that are assigned below a drop-down menu of all the jobs available to assign. When collapsed, the menu will display the number assigned jobs out of the total number available.

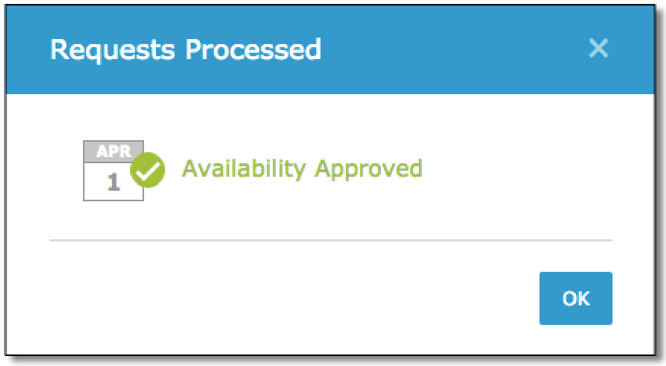


- Imported and new-employee accounts will not have a default Primary job, however selecting one makes it easier and quicker to schedule newly created shifts in the Scheduler.
- The **Skill Level** for each job is an indication of the employee's ability for the specific job, and provides more options when using the AutoScheduler tool.
- Most sites integrate their jobs with a Point of Sale system, so the Hourly Rate for each job tends to come from there.

With the **Availability** tab, managers can view the employee's Availability as well as submit a new Availability on behalf of the employee. Submitting an Availability on behalf of an employee works the same as outlined in the **Time Range for Availability** section above.



Each time an employee's Availability is saved, the employee will receive a notification when they navigate to their Personal settings that a new availability was approved.



Employees will NOT receive an HS Message when a manager submits availability on their behalf.

Reports Affected by Time Range for Availability and Time Off

The following scenarios will occur when a customer uses **Time Range for Availability**:

- The Availability Report will be removed
- The Availabilities option will be removed when configuring the Extended Schedule Report
- The Availabilities option will be removed when configuring the Weekly Roster Report

The following scenarios will occur when a customer uses **Time Range for Time Off**:

- The Approved Time Off and Employee Request Reports will be removed
- The Approved Time Off and Requests options will be removed when configuring the Extended Schedule Report
- The Requests option will be removed when configuring the Weekly Roster Report

Please note that the reports listed above are under construction, so they will be back soon. In the meantime, the information they contain can be found in the Employee Information Center in the Scheduler, or from the Time Off Calendar tab within the Manage Time Off sub-tab.

New Scheduler - Update to the Create House Shift Modal

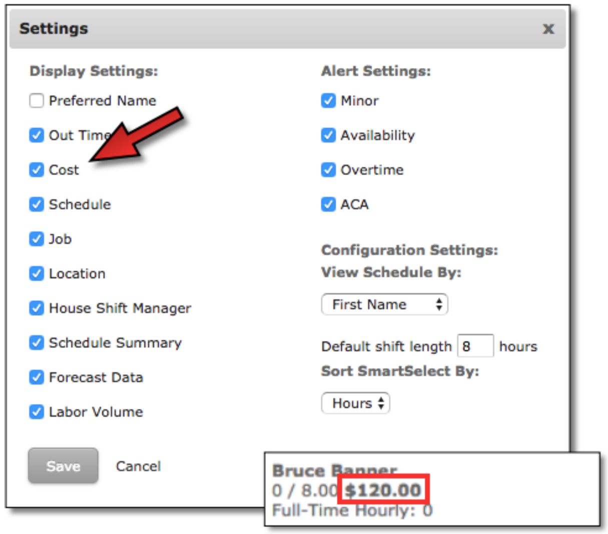
The 4.0.55.1 Release (12.22.2017) introduced the ability to easily create house shifts by clicking ALT+CTRL+H if on a PC, or ALT+COMMAND+H if on a Mac. Updates have been made to the Create House Shift modal so that only assigned jobs and schedules will display to alleviate the risk of posting a house shift no one can pick up.

New Scheduler - Continued Removal of Locations

The 4.0.53.0 Release (09.15.2016) removed the Locations options from several areas of the Scheduler if a site did not have any Locations configured. The option has now been removed from the AutoScheduler, the Roster Report, and the SmartSelect tool.

New Scheduler - Display Cost Setting

Managers now have the option to hide the cost in the Scheduler. The option is enabled by default, but to remove it from displaying, they can navigate to the Scheduler Settings and uncheck the box.

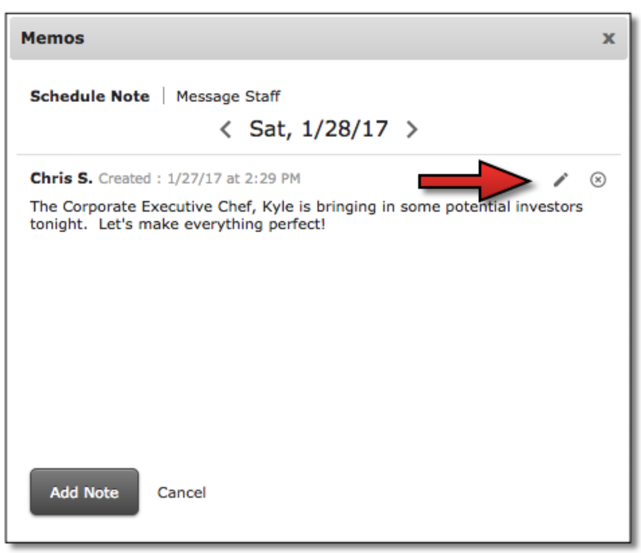


New Scheduler - Forecasting Data

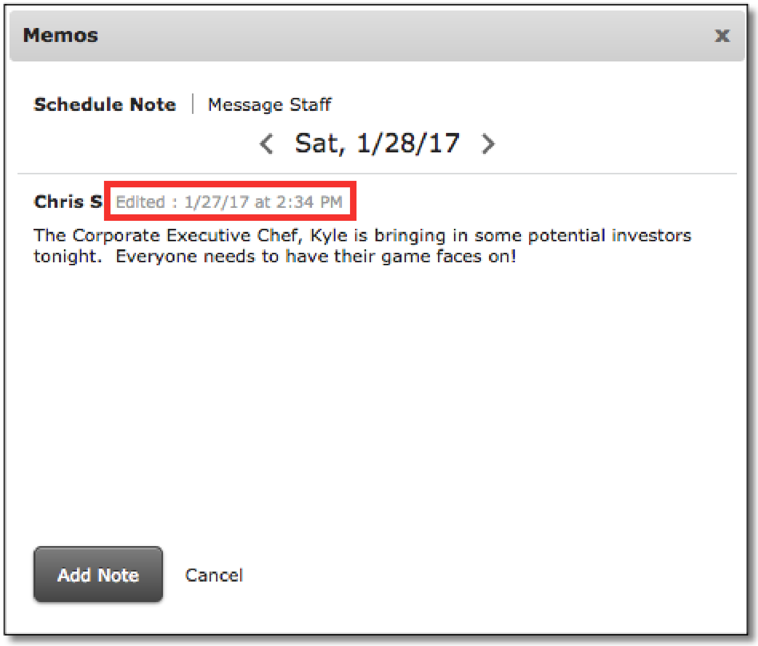
Improvements have been made to the forecasting data in the Scheduler to match the forecasting data on the Forecast Projections page.

New Scheduler - Editing Day Notes

Day Notes in the Scheduler can now be edited by their creator, or deleted by any user with the permission to create them. While viewing a Day Note, the creator of that note can hover the mouse over it to show the edit pencil or delete icons in the upper, right-hand corner.



Clicking the pencil icon will allow the creator of the note to make in-line changes that will save in real time, and upon clicking outside of the text box, the timestamp label for the note will change from “Created” to “Edited” with the updated date and time.



Matching Forecasting and Proforma Reports

Improvements have been made to back-end calculations so that figures within the Forecasting tab will now match the projections in the Labor Proforma II reports.