PeopleMatter Scheduling

Target Labor
Getting Started Guide

PeopleMatter
POWERED BY FOURTH ®

Getting Started, Schedule Feature: Target Labor

This document is intended to help anyone that wants to understand PeopleMatter Scheduling target labor functionality and configure target labor for one or more locations in a company.   It also includes the manual entry of Forecasted Sales and Target Labor % that can be used to calculate Allowed Dollars.

Schedule Dashboard / Target Labor

Target Labor

Oct 6, 2013 - Oct 12, 2013

Locations ▾ All Departments ▾   View 10 ⇕ Items Page ◂ 1 ⇕ ▸

	Sun 06	Mon 07	Tue 08	Wed 09	Thu 10	Fri 11	Sat 12	Total
STORE #5908								
Target Labor Hours	200.00	200.00	200.00	200.00	200.00	200.00	200.00	1,400.00
Schedule Hours	78.00	71.00	53.00	53.75	48.75	55.75	28.75	389.00
Difference	-122.00	-129.00	-147.00	-146.25	-151.25	-144.25	-171.25	-1,011.00
Percent Variance	% -61.00	% -64.50	% -73.50	% -73.12	% -75.62	% -72.12	% -85.62	% -72.21

Before You Begin Configuration

+ TARGET LABOR - OVERVIEW

Target Labor can help you control labor costs by providing warnings and notifications when schedules exceed the allowed dollars or allowed hours that have been given to a location (department/area). Target Labor is used for making sure that the schedules for hourly team members are in line with corporate budgets or forecasts.

Target Labor gives you visibility into information that resides in multiple systems in a manual/paper process today. It also enables you to have better control over enforcing your labor cost and hours early in the scheduling process, versus waiting until it is too late when payroll data comes through.

Managers will be able to view their store's target labor against their draft and published schedules and will receive warnings if they need to make adjustments.   There is an above store view where you can quickly see which stores have labor applied to future weeks and which have none.   You can also see visually, which stores have schedules that are outside of the configured thresholds by looking at any variances appearing in a light orange color. The above store users will also get a notification if anyone publishes outside of the variance threshold.

Target Labor can be configured by location, department or department area. For example, you may have a different budget for your Deli (Food Service) versus for your Customer Service team. You can monitor Target Labor by week or day. Some clients monitor by the week and let managers decide how to allocate labor each day. Others want tighter controls around the day.

You can setup different Target Labor rules and thresholds for each Location. This would allow you to give a more senior GM additional flexibility whereas a new manager has tighter controls (they have to stay within their budget). This is also

helpful for stores with varying traffic. If you have a store in a busy location, you may allow flexibility and for stores in slower locations (or days), you can keep tighter controls.

+ TARGET LABOR - TERMINOLOGY

Let's get familiar with some PeopleMatter **Target Labor** Terminology.

Location – A single business unit. A location can only belong to one target labor policy.

Department/Area – A grouping of jobs within a location, such as Retail vs. Food Service or Back of House vs. Front of House vs. Management. Departments can be broken down into smaller groupings, called areas. Examples of areas are Back of House – Cooks, Back of House – Cleaning.

Target Labor Policy – Is the configuration for a grouping of locations, departments/areas that you want to measure target labor. This policy includes the thresholds that are used for publish warnings and highlighting exceptions when scheduled hours or cost exceed the labor targets by a certain percentage over or under or an absolute amount over or under. Target Labor Policies can be set up for one or more locations and/or their departments/areas.

Target Value - This is the measurement that you would like to use to compare against either the estimated scheduled cost or scheduled hours. The options are Allowed Hours or Allowed Dollars. Allowed hours is the budgeted amount of hours that this location and/or department is being given for a scheduling week.   Allowed dollars, is the budgeted cost that the location and/or department is being given for a scheduling week. Allowed dollars can either be entered manually or can be derived with the manual entry of your forecasted sales and target labor percentage. The target value with tolerance thresholds applied, will determine if a schedule is flagged as being out of compliance with the hours or cost that has been given to the location by corporate or an above store manager.

Target Labor Threshold – These can be set as a percent or absolute amount over or under the given allowed hours/dollars before the manager will be warned on publish (if you have turned this on). Also, the variance will be highlighted and notifications sent to above store users when these thresholds are exceeded. Note: amounts are entered as percentages, so 16.50, means 16.5%.

Percent Threshold - If thresholds are set tho **Percent**, this is a more relative comparison across schedule weeks, depending upon the number of hours or cost allowed. The system will take the difference between the target labor allowed cost or hours and the scheduled cost or hours and divide it by the target labor cost or hours. This will give a percent variance. If the percent variance exceeds the threshold percent over/under the targets, then the schedule will be flagged for warnings (if set to on) and notifications. The system will always show the location manager and the above store manager, the percent variance, but will also show the net difference over/under the hours/cost, so that the manager can see how many hours or dollars they are over or have left that they can schedule.

Absolute Threshold - If thresholds are set as **Absolute**, the system will take the net difference of hours or dollars and compare the schedule to the target labor and if the difference is over or under the configured amounts, then the schedule is flagged for warnings (if set to on) and notifications. An example is the location can only go $50 over/$25 under –or- 10 hours over/20 hours under on scheduled cost or hours vs. the allowed target labor cost or hours.

+ TARGET LABOR - QUESTIONS TO CONSIDER

Before you begin to configure your company's target labor policies, you will want to have the answers to the following:

1. Allowed Hours or Dollars:
    a. To determine how many policies need to be set up, Do I have:
        i. A consistent method of measuring budget/target allowed hours or allowed dollars policy across all of my locations, such as everyone is given an amount of hours that they can use each schedule week.
        ii. Some locations that are given hours and others that are given cost targets.
    b. If allowed dollars is used:
        i. Do I use Labor Cost as a Percentage of Sales? If so, you will be able to manually enter Forecasted Sales and the Labor % and the system will calculate the allowed dollars.
        ii. Do I have the allowed dollars and I can just manually enter them?
        iii. Do I use a different method to come up with allowed dollars like labor cost/customer or labor cost/transaction, sales per labor hour, etc...? If so, then you will need to wait for future functionality.
    c. If allowed hours is used:
        i. Am I prepared to manually enter these allowed hours?
        ii. Future functionality -
            1. Do I use an average hourly rate to derive my allowed hours?
            2. Do I include manager/salaried hours in my allowed hours? PM currently only tracks target labor for hourly team members.
2. Do I use Labor Cost/Customer, Labor Cost/Transaction or another method, am I prepared to derive the allowed hours or dollars for these?
3. Thresholds - Do I have:
    a. A standard tolerance threshold across all of my locations for how far over/under budgeted hours or cost they are allowed to go on scheduling?
    b. Tolerance thresholds that vary by location –maybe certain locations are given more flexibility than other locations where labor needs to be more strictly enforced.
4. Daily or Weekly - Do I want to give my locations:
    a. Daily labor targets? For example, I really want to help guide my managers on which days they should allocate hours based upon expected sales volumes.
    b. Weekly labor targets? For example, I just want to give my managers a maximum number of hours or cost and they can decide how to allocate this amount in the schedule.
5. Locations and/or Departments & Areas - Do I want to keep labor targets at the location level and/or give specific departments/areas their own allowed hours/dollars?
    a. You can mix and match the allowed hours or allowed dollars. For example, you may want to measure allowed dollars for a location, but a particular department within that location like back of house or retail, may be given allowed dollars.
    b. You can choose not to use location targets at all and just break down the allowed amounts by department/area.
    c. You can choose to give targets for the location and just one of many departments and the system will validate the scheduled hours and estimated cost for the whole location and that one department, according to the configuration.

Set Up Target Labor (Configure Policies)

Go to Company settings and find the PeopleMatter Scheduling section and see the Target Labor Link. Administrators can update the threshold settings. If you do not see this link, you may need to contact PeopleMatter Support, so that they can turn the Target Labor feature on for you.   (Financial Admins, Primary Admins and Business Admins can configure Target Labor.)

1. COMPANY SETTINGS - PeopleMatter SCHEDULING - TARGET LABOR

Click the Target Labor link to go in and create your Target Labor Policies.
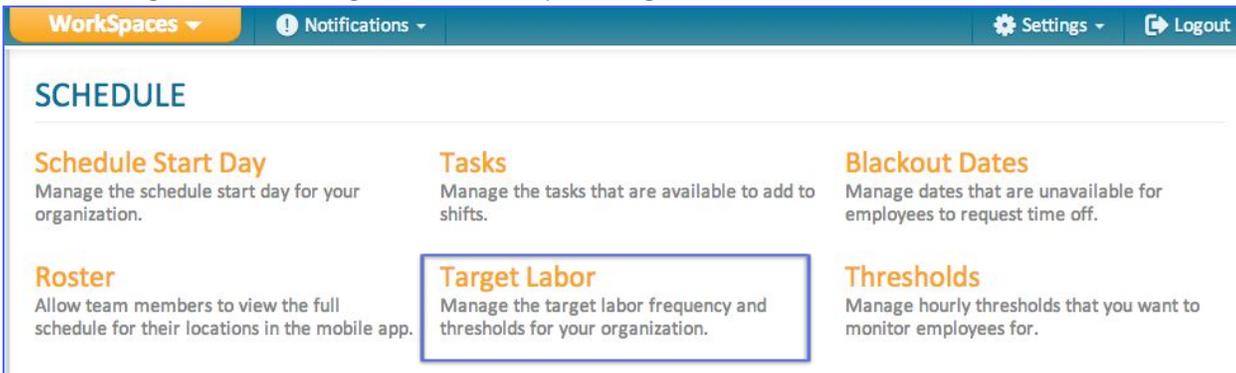
2. TARGET LABOR- ADD/EDIT POLICIES

When you click on Target Labor, you will see the following screen.

Ultra Cafe Settings / Target Labor

Target Labor

Add the target labor entries that you wish to have available throughout the system.
Press Add New to add a new entry. Press Save when done.

Target Labor | Add New

Search...

Filters
Locations ▾ | Status ▾

Displaying 3 entries | Filters | Status ×

Name	Locations
All Stores Weekly Allowed Hours	1
Daily Policy 5908 & 5910 – Allowed Hours, Locations & Departments	2
Weekly Dollars – 5911, 5912	2

First Previous 1 Next Last

Edit a Target Labor Entry | Status ON

Name *
All Stores Weekly Allowed Hours

Preferred manual data entry frequency ⓘ
○ Daily   ● Weekly

Locations
1 Location ▾

Target Values for Selected Locations
○ Off   ● On

Locations (1)

Target Value		Warn On Publish		Threshold Values	
Allowed Hours ▾		On ▾		Percentage ▾	

	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Total
+	0.00	0.00	0.00	0.00	0.00	0.00	0.00	10.00
-	0.00	0.00	0.00	0.00	0.00	0.00	0.00	10.00

Target Values for Departments / Areas
Add Departments / Areas

Cancel | Save

3. NAME, FREQUENCY & STATUS
Click the Add New button to create a new Target Labor Entry (Policy).

- You will see the right side of the screen open up and you can Name your policy. This is a meaningful name for you to reference and will only be seen on this screen. You may want to name it with the locations that are within it and the type of Target Labor that you are going to validate against. For example: Colorado Stores – Weekly Allowed Hours.
- Decide if you want to enter amounts on a daily or weekly frequency. This will determine what you see in the edit and view screens of target labor and will also determine the granularity of what is checked as far as thresholds against the schedule.
- You can flip the status to On (if you want to begin using this immediately) or Off (if you want to get it configured and turn this on later.) (I think this sentence should go at the end of this section after you talk about all the different things that can be set up for the policy.

4. CUSTOMIZE LOCATIONS

- Next, you can decide if you would like for this policy to apply to all locations or you can click customize and select the locations that should use this policy. You would customize in the case where your thresholds are different across locations or your method/frequency varies across locations.

- Select either all locations or you can click customize and you will see the following screen

- Select one or more locations that you would like to include on this policy.

- You will want to set up different policies to customize for the locations if there are any differences across locations and /or their departments/areas, for one or more of the following:
    - The levels of tolerance
    - Whether you are tracking dollars or hours
    - Granularity of tracking target labor daily/weekly
    - Or whether you want locations to receive warnings upon publishing
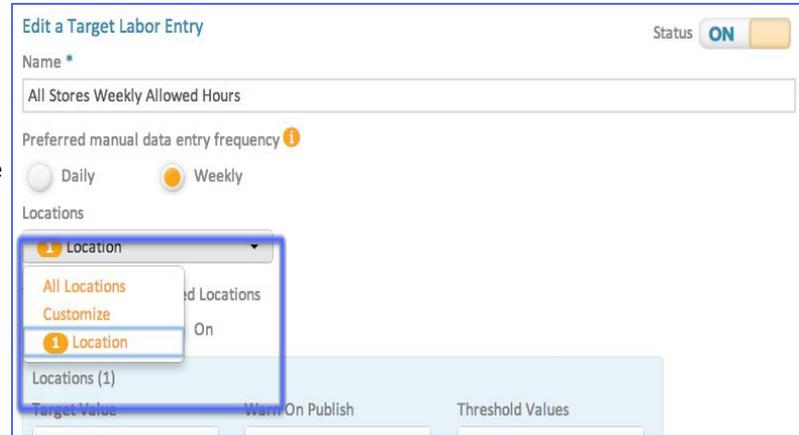
5. SET TARGET AT LOCATION LEVEL

Next, you can decide if you want to measure target labor at the location level. If you select on, then you will be able to establish target value, warn on publish, threshold values and levels of tolerance for the selected locations. If you select off, then you can set up policies at the department/area level in the next section.
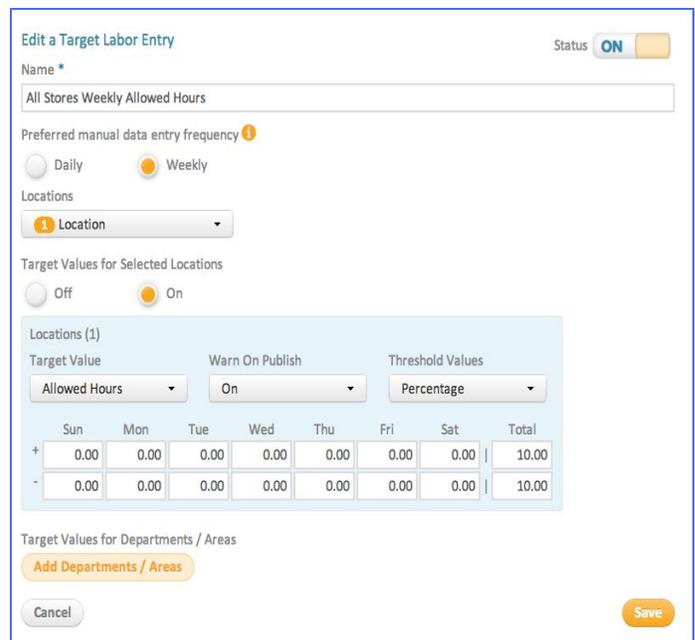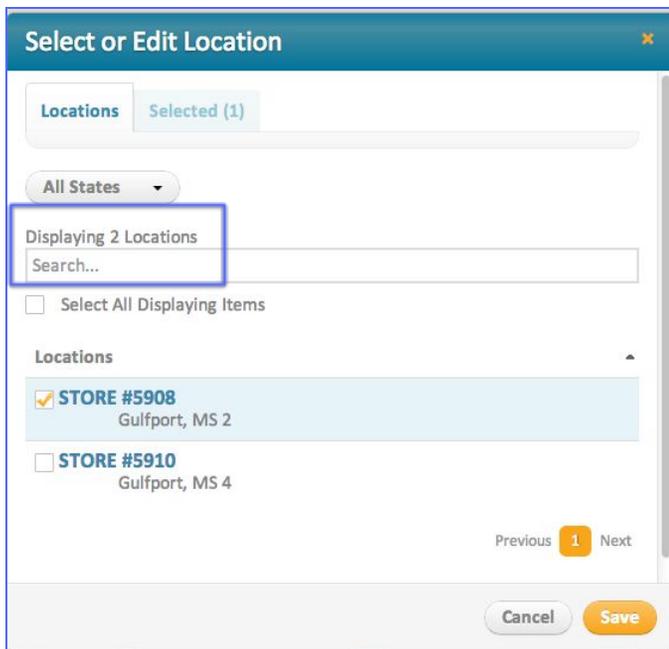
6. SET TARGET LABOR AT THE DEPARTMENT/AREA LEVEL?

Next, you can decide if you want to measure target labor for one or more departments/areas.   You can decide to watch target labor at the location level and/or department/area level. Also, you can decide that you just want to make sure labor is not over at the location level and just choose one of your many departments to monitor. The exceptions are independent between the location amounts and thresholds and those of departments/areas.

- Select which departments you want to enter targets and set thresholds for - you can choose one or all departments, as long as the settings are common. Just like locations, if there is any difference in settings, you can add another department set of configuration parameters.
- Once you have added your departments/areas, you can hover over the information icon to see which departments settings are being shown in the section.
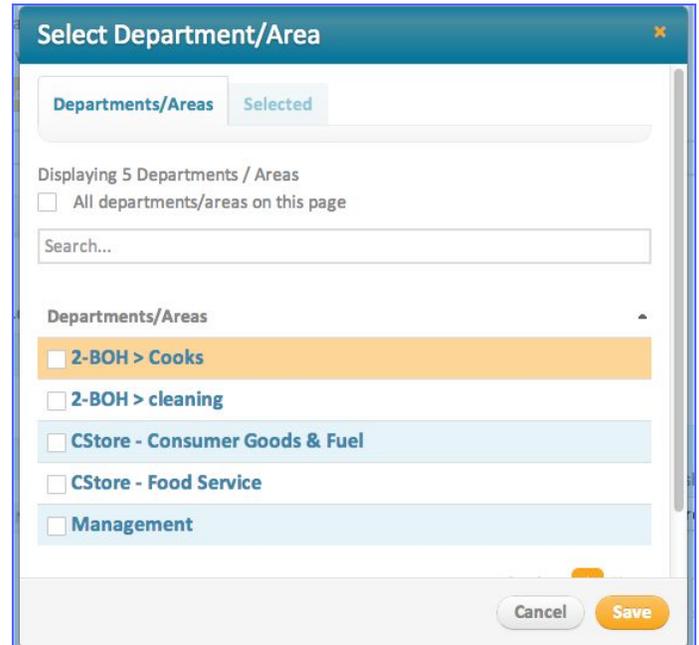
7.SET THE TARGET VALUE

- For the location or department/area section, decide if you want to measure Allowed Hours, Allowed Dollars-manual entry or Allowed Dollars – from Forecast. Allowed Hours will compare against Scheduled Hours. Allowed Dollars will measure against the estimated Schedule Cost. If you choose Allowed Dollars – from Forecast, you will see a forecast link on the schedule dashboard for the locations on this policy. That will be where you enter the forecasted sales, labor % and PM will calculate the allowed dollars that you will see in Target Labor. If you use Allowed Dollars-manual entry, you will enter the allowed dollars in the target labor screen.

8. DO YOU WANT TO USE WARN ON PUBLISH?

- You can decide if you would like for managers to get warnings when they attempt to publish a schedule with scheduled hours or cost that are outside of the configured thresholds. They will still be able to override the warning and publish.

Note: If you are not ready to rollout target labor changes, you can keep this turned off until you have communicated with managers to let them know that they will begin seeing the warning. The manager and above store managers will still be able to view target labor and see if they are over/under the thresholds by seeing the variance highlighted in the Target Labor screen. Above store managers will also receive notifications for schedules published outside of the threshold levels.

- The following screen shows an example of what the manager would see if you turn this on. The example is a configuration where target hours are entered daily and the schedule variance percentages exceed the threshold amounts over/under target values.

Publish Schedules

Wait! Before you continue...
You may want to double check the following people before publishing.

Target Labor Variances

1-FOH	Target	Schedule	Difference	Percent
Weekly Total	280.00	37.50	-242.50	-86.61%
Sunday	40.00	8.00	-32.00	-80.00%
Monday	40.00	7.00	-33.00	-82.50%
Tuesday	40.00	14.50	-25.50	-63.75%
Wednesday	40.00	0.00	-40.00	-100.00%
Thursday	40.00	0.00	-40.00	-100.00%
Friday	40.00	8.00	-32.00	-80.00%
Saturday	40.00	0.00	-40.00	-100.00%

Validation - Job 'Assistant Manager' has no shifts to publish

Cancel   **Publish Anyway**

- Select whether you want the system to warn on publish. On will show managers the warning and Off will not.

Locations (2)

Target Value	Warn On Publish	Threshold Values
Allowed Hours	Off	Percentage

	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Total
+	5.00	2.00	2.00	2.00	2.00	5.00	5.00	10.00
-	1.00	5.00	5.00	5.00	5.00	0.00	0.00	5.00

9. SET YOUR TOLERANCES, THRESHOLD VALUES

● Decide how you want to measure threshold/tolerances. These thresholds relate to how far off the schedule cost or hours can be before they are highlighted as being out of compliance, warnings and notifications are given. This can be as a percentage of the labor target or as an absolute value. This also corresponds to how the numbers in the threshold fields are interpreted.

● Choose either Percentage or Absolute from the dropdown.

Locations (2)

Target Value		Warn On Publish		Threshold Values			
Allowed Hours ▼		Off ▼		Percentage ▼			
	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Total
+	5.00	2.00	2.00	2.00	2.00	5.00	5.00	10.00
-	1.00	5.00	5.00	5.00	5.00	0.00	0.00	5.00

● Now see the +/- Sun, Mon, Tue...Total columns below:

● Set values that are either percentages or the number of hours that the schedule can be over or under targets for each day of the week and/or for the week as a whole. Please note that if you are entering values only for the week, then the daily values are not relevant and can be left as zero. In this case, you would want to enter over and under amounts in the Total column to set threshold values for the week. Zeros mean that the manager cannot go over or under the target labor amount at all. You may want to be very strict on the overage and set that to zero, but allow them to go a percentage or amount under the target, so have that set to a reasonable number, so that service levels are still met with enough hours being scheduled.

● Once you have entered all of the settings that you need, click the **save** button at the bottom right side of the screen. If you have changed your mind about this policy, you can hit the cancel button

Locations (2)

Target Value		Warn On Publish		Threshold Values			
Allowed Hours ▼		Off ▼		Percentage ▼			
	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Total
+	5.00	2.00	2.00	2.00	2.00	5.00	5.00	10.00
-	1.00	5.00	5.00	5.00	5.00	0.00	0.00	5.00

- You will then be able to see this Target Labor Policy has been added to the list on the left hand side of the screen.

- There is a variation on the configuration, if you are using the target value 'Allowed Dollars – from Forecast' on the location AND you add departments/areas with the 'Allowed Dollars – from Forecast,' you can decide if you want the location's Forecasted Sales to default into the Department/Area Forecasted Sales fields when you are editing from the Forecast link. If you have different departments and you need to split up the sales and labor percentages against the sales (like deli vs. retail or dine-in vs. delivery vs. takeout,) then you will want to leave this unchecked.

Congratulations, your Target Labor configuration is complete! Let's see Target Labor in Action.

Target Labor in Action

+ PEOPLEMATTER SCHEDULING DASHBOARD TARGET LABOR LINKS

Once you have established a policy that includes one or more locations, each location will show with a Target Labor link. We will talk about the forecast link in the next section.   If you have permissions to above store, then you will also see the link to the left for Target Labor, which is the above store view of all of the locations.

- ● **Above Store Link**
    - ○ Above store managers will see this link as well as the store-level link.

- ● **Store Level Link**
    - ○ Location managers will see the link next to each store that they have rights to view.
    - ○ Above store managers will see this link and will be able to enter/edit target labor allowed hours or allowed dollars-manual entry from using this link. If your policy says to use allowed dollars-from forecast, then you will need to enter your forecasted sales and labor % in order to have PeopleMatter calculate your allowed dollars, which needs to be done through the Forecast link that we show later in this document.

+ GETTING TARGET LABOR AMOUNTS INTO PEOPLEMATTTER
- ● There are two ways to get Target Labor into to PeopleMatter. Target labor values can be populated either via an API or manually input into the Target Labor location level screen.

+ TARGET LABOR API
The API allows the values to be automatically loaded and updated. This requires some development effort and you would need to talk with your account representative, if you would like to explore this option.

- Even if you use the API, above store users can make changes via the edit Target Labor option. If you are using the API, it would overwrite your changes, if changes come in for the same schedule week after you manually entered changes.

+ MANUALLY ADDING OR EDITING 'ALLOWED HOURS' OR 'ALLOWED HOURS – MANUAL ENTRY' TARGET LABOR AMOUNTS (AMOUNT STORE USER)

If you are not using the API, then you can manually enter values week to week. To make the editing fast, you can use cut/paste or type in quickly tabbing across the fields. Just click the **arrow** to move to the next week and the system will automatically save what you just entered and put you into editing mode for the next week. This is especially helpful, if you are entering a quarter or a year's worth of target amounts.

- To add or edit Target Labor – select the location level target labor link. Inside of this screen, if you have permissions (Business Admin, Primary Admin, Financial Admin, HR Manager with Full Access to the current location,) you will see the Edit Target Labor Link.   Click the **edit** button at the top right side of the screen.

Target Labor
STORE #5908
📅 ◀ ▶   **Sep 8, 2013 - Sep 14, 2013**   **Edit Target Labor**

- You will see a variation of the following screen, depending upon your configuration. You can edit the hours or dollar amounts for any configured locations and/or departments.

Schedule Dashboard / Manage Target Labor

Manage Target Labor
Alpharetta Location 4
📅 ◀ ▶   **Oct 27, 2013 - Nov 2, 2013**   **Save Changes**   **Cancel Changes**

Alpharetta Location 4	Total
Alpharetta Location 4	0.00 h

A: Arrow Left or Right to Save Data Quickly
- When you are done, you can quickly arrow left or right to go to the previous/next week and continue editing

B. Save or Cancel Changes
- You can click on **save** changes and the system will show you the comparison against scheduled hours or dollars.
- If you make a mistake since your last save, you can cancel your changes to restore the values back to what they were before your latest unsaved edits.

		Total
STORE #5911		
Target Labor Dollars	$	4,000.00
Schedule Dollars	$	3,335.91
Difference	$	-664.09
Percent Variance	%	-16.60

C. Enter Target Labor Hours or Dollars

- Depending upon your configuration, you will either enter daily amounts for the week or a lump-sum weekly amount. Target Labor configuration will also determine whether you are entering target dollars or target hours.

- After you save the Target Labor amounts, you will see the following screen appear with the scheduled hours or dollars, plus variances populated (according to your target labor configuration.) If the difference or percent variance is highlighted in orange, it is outside of the thresholds for being over/under on scheduled hours or cost.

+ MANUALLY ADDING OR EDITING 'ALLOWED DOLLARS - FROM FORECAST' TARGET LABOR AMOUNTS (ABOVE STORE USER)

If you are using the 'Allowed Dollars – From Forecast' target value in one or more of your policies, then you can manually enter your Forecasted Sales amounts and target labor % and PeopleMatter will calculate the allowed dollars that can be seen by you and your managers in Target Labor screens. To make the editing fast, you can use cut/paste or type in, quickly tabbing across the fields. Just click the **arrow** to move to the next week and the system will automatically save what you just entered and put you into editing for the next week. This is especially helpful, if you are entering a quarter or a year's worth of target amounts.

- To add or edit Allowed Dollars – From Forecast – select the location level Forecast link. Click this **link**. Note: In the example below, you can see that we have store #5910; you may have a department or the entire location where you need to enter Allowed Dollars-From Forecast.
- Inside of this screen, if you have permissions (Business Admin, Primary Admin, Financial Admin, HR Manager with Full Access to the current location), you will see the Edit Forecast link at the top right hand side of the screen. You are currently in just a view mode, so to get the screen to put you into editing, click the **edit** button.

STORE #5910	Sun 17	Mon 18	Tue 19	Wed 20	Thu 21	Fri 22	Sat 23	Total
Forecasted Sales ($)	7,000.00	3,000.00	3,000.00	3,000.00	3,000.00	5,000.00	8,000.00	32,000.00
Labor % of Forecast (%)	27.00	26.00	26.00	26.00	26.00	25.00	27.00	26.31

- From this view, click on **Forecast** next to the location.

- The screen will now let you enter Forecasted Sales and the Labor % of Forecasted Sales that will be used to calculate the allowed dollars for this location and/or its departments/areas.

- You can navigate to the week that you want to enter Forecasted Sales and Labor %.
- You can click into the rows and enter numbers, then tab to get to the next field across.
- The system will default the prior week's Labor % of Forecast amounts, since these do not change very often. You can overwrite them, if you need to make changes.
- If you are using location and department allowed-dollars and you checked the option to use the location's sales, then the department section will default to the location's forecasted sales amount as you are typing. You can always go into the department and change the value, if there is a special situation and you need to make changes.

A: Arrow Left or Right to Save Data Quickly
- When you are done editing, you can quickly arrow left or right to go to the previous/next week and continue editing.

B. Enter Forecasted Sales and Labor % of Forecast
- Depending upon your configuration, you will either Forecasted Sales and Target Labor % of Forecast for the Location and/or departments/areas. You will notice that when you have entered both of these numbers, that the Hourly Allowed Dollars will Calculate. Also, the system will start calculating the Total Column.

C. Save or Cancel Changes
You can click on **save** changes and the system will show you the screen in view-only mode.

- If you make a mistake since your last save, you can cancel your changes to restore the values back to what they were before your latest unsaved edits.
- You can navigate over to Target Labor, by clicking the Target Labor **link** at the top right side of the screen, if you want to see the current scheduled cost information against your targets.

Manage Forecast
STORE #5910

Go to Target Labor   **Edit Forecast**

Nov 17, 2013 - Nov 23, 2013

STORE #5910	Sun 17	Mon 18	Tue 19	Wed 20	Thu 21	Fri 22	Sat 23	Total
Forecasted Sales ($)	7,000.00	3,000.00	3,000.00	3,000.00	3,000.00	5,000.00	8,000.00	32,000.00
Labor % of Forecast (%)	27.00	26.00	26.00	26.00	26.00	25.00	27.00	26.31

- Depending upon your Target Labor Configuration, you will see a screen that looks like the following, showing you the Scheduled cost and Scheduled % Labor, plus any differences between Target Labor amounts and any draft and published Schedules amounts. If the difference or percent variance is highlighted in orange, it is outside of the customized over/under thresholds for scheduled cost.

	Sun 17	Mon 18	Tue 19	Wed 20	Thu 21	Fri 22	Sat 23	Total
STORE #5910								
Forecasted Sales	$ 7,000.00	$ 3,000.00	$ 3,000.00	$ 3,000.00	$ 3,000.00	$ 5,000.00	$ 8,000.00	$ 32,000.00
Labor % Of Forecast	% 27.00	% 26.00	% 26.00	% 26.00	% 26.00	% 25.00	% 27.00	% 26.31
Target Labor Dollars	$ 1,890.00	$ 780.00	$ 780.00	$ 780.00	$ 780.00	$ 1,250.00	$ 2,160.00	$ 8,420.00
Schedule % Labor	% 1.87	% 11.41	% 13.52	% 18.58	% 16.34	% 10.86	% 5.93	% 9.20
Schedule Dollars	$ 131.00	$ 342.37	$ 405.69	$ 557.45	$ 490.34	$ 543.03	$ 474.52	$ 2,944.40
Cost Difference	$ -1,759.00	$ -437.63	$ -374.31	$ -222.55	$ -289.66	$ -706.97	$ -1,685.48	$ -5,475.60
Cost % Variance	% -93.07	% -56.11	% -47.99	% -28.53	% -37.14	% -56.56	% -78.03	% -65.03

+ TARGET LABOR - ABOVE STORE VIEW

If you have permissions as an above store user, you will see the Target Labor above store link on the left side of the Schedule Dashboard. This screen will show you all of your locations' schedule amounts versus target labor, plus variances in one screen. Click the **link** under the Schedule Dashboard menu to enter the above store view. Note – you cannot enter/edit amounts with this view – you can do that through the location level target labor link, shown in the next section.

Schedules
View Schedules across all of your locations.

SCHEDULE DASHBOARD
- ✖ Shift Offer Requests **0**
- ⏱ Time Off Requests **3**
- ☰ Thresholds
  - ○ Overtime **1**
  - ○ ACA **1**
- ✦ Target Labor
- ▦ Manage Availabilities
- ⚙ Schedule Preferences

Why is *Schedule* so important?

Easily keep track of important scheduling activity!
Use the Schedule Dashboard to:
- Monitor scheduling activity across all of the locations to which you have access.
- View detailed scheduling information at each location to which you have access.

Show **12 ▼** entries

STORE #5908	Target Labor
STORE #5910	Target Labor
STORE #5911	Target Labor
STORE #5912	Target Labor
Teaching Facility	Target Labor

Previous **1** Next

After you click the Target Labor **link**, the following Above Store version of the Target Labor screen will appear.

A: Filtering by Location
If you only want to look at one location or a few locations, you can select the locations and choose the locations that you would like to view.

B: Filtering by Department/Area
If you would like to compare departments across locations, you can choose the department filter and just see target labor comparisons for the selected departments that belong to the filtered locations.

C: Navigate to a location's schedule
You can click on a **store** or **department/area's** orange name link and you will be taken into the location's schedule week.

+ SCHEDULE DASHBOARD - LOCATION LEVEL LINK
Store managers have two ways that they can get to the Target Labor Screen. They can either click **target labor** from the schedule dashboard or they can navigate to target labor from within a schedule.

The screen below shows the link to click to see a single location's '**Target Labor**.'

The location-level target labor screen for the current schedule week will appear. The look of the screen will vary based upon your configuration. You may see daily amounts and/or weekly amounts or just weekly amounts. You will be able to see how many hours or dollars have been entered and how this location and its departments are tracking to draft and published schedules.

+ NAVIGATING TO TARGET LABOR FROM PEOPLEMATTTER SCHEDULING

Another way that a store manager can get to Target labor, is from within the schedule. From a schedule week, the manager can click the '**Manager Target Labor**' Link at the top of the screen. The system will take them to that week's target labor screen.

+ NAVIGATING TO PEOPLEMATTTER SCHEDULING FROM TARGET LABOR

Store managers can navigate to PeopleMatter Scheduling from Target Labor by clicking the **location name** or a **department/area name** from the target labor screen.

A: Navigate to a location's schedule

- You can click either on a **store** or **department/area's** orange name link and you will be taken into the location's schedule week.

A: Navigate to a location's schedule
- You can navigate to another week with either the calendar button or the arrows to the left of the date range.
- You can see the location and the date range for the week that you are currently viewing.

B: Department Filter
- You can decide if you just want to see one or just a few departments in Target Labor. This filter works in conjunction with the location filter.

C: Edit Target Labor
- This link will only appear if the user has permissions as a Business Admin, Financial Admin, Primary Admin or HR Manager will full rights. This button will take the user to the edit target labor screen detailed in the next section.

D: Target Labor Details
- You will see either weekly or daily hours/dollars for target labor, schedule and comparisons. The difference line is the target labor amount minus the schedule amount. If your configuration looks for variance amounts as percentages, the percentage will be shown as well. Any variances/differences appearing with orange highlighting, are those that are too far over/under the thresholds.

E: Link to Schedule

- You can click the orange **location** or **department** to navigate to the schedule for the target labor week being viewed.

+ PUBLISH SCHEDULES - TARGET LABOR WARNING
- The following screen shows the information that a manager will see, if you have show warnings on publish turned on in target labor configuration. Your configuration also determines if you will see daily or weekly exceptions for the location and/or departments, dollars or hours and at what point, the thresholds are exceeded and a warning is shown. This warning will only show information relevant to what is being published. In this case, a Front of House department was published, so warnings about its variances are shown.

Publish Schedules

Wait! Before you continue... A
You may want to double check the following people before publishing.

Target Labor Variances

1-FOH	Target	Schedule	Difference	Percent
Weekly Total	280.00	37.50	-242.50	-86.61%
Sunday	40.00	8.00	-32.00	-80.00%
Monday	40.00	7.00	-33.00	-82.50%
Tuesday	40.00	14.50	-25.50	-63.75%
Wednesday	40.00	0.00	-40.00	-100.00%
Thursday	40.00	0.00	-40.00	-100.00%
Friday	40.00	8.00	-32.00	-80.00%
Saturday	40.00	0.00	-40.00	-100.00%

Validation - Job 'Assistant Manager' has no shifts to publish

Cancel   **Publish Anyway**

A: Publish Warning to the Manager
- If 'Warn on Publish' is on for this location/department/area, then if the schedule exceeds the thresholds that have been set, the system will show a warning when publishing. The manager will be able to see the target labor amounts, the schedule amounts and the difference in what was scheduled and what was allowed.

B: Publish Anyway or Cancel
- The manager can decide to cancel and make more changes to the schedule or decide that they want to continue and publish the schedule, by clicking the **Publish Anyway** link.
- If the manager overrides this publish warning, then a corporate/above store person will see a notification with a link to the schedule week and they can investigate the schedule and provide feedback to the manager about any changes that need to be made.

Appendix A: Security Roles

+ WHAT ABOVE STORE USERS CAN DO AND SEE

Primary Admin, Business Admin, Financial Admin
- Can edit target labor configuration.
- View target labor across the locations for which they have been granted access.
- Can edit target labor amounts.
- Can see everything store level users can see all of the information that store managers see.
- Receive notifications if managers publish schedules that are outside of the target labor thresholds.

HR Manager with Full Access
- View target labor across the locations for which they have been granted access.
- Can edit target labor amounts.
- Can see everything store level users can see all of the information that store managers see.
- Receive notifications if managers publish schedules that are outside of the target labor thresholds.

HR Manager with View Only Access
- Can view target labor (cannot edit).
- Can view schedule information.

+ WHAT STORE-LEVEL USERS CAN DO AND SEE

Business Unit Admin
- Can see target labor for their authorized location(s), but cannot edit target labor amounts.
- Will receive a warning if they attempt to publish a schedule that contains cost/hours that are too high or low compared to target labor thresholds.
- Can override the publish warning.

Schedule-Only Role
- Will <u>not</u> be allowed to see target labor or cost information.
- Will <u>not</u> get target labor warnings when they publish schedules with hours or cost outside of thresholds.