

# Getting started with Findmyshift

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## Managers

[Creating your first schedule](#)

[Adding employees to your team](#)

[Inviting your employees to log in](#)

[Choosing your settings](#)

[Entering shifts](#)

[Publishing shifts](#)

[Handling requests and cancellations](#)

[Handling time off requests](#)

[Adding pay rates to track employees costs](#)

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## Staff

[Requesting or cancelling a shift](#)

[Requesting time off](#)

[Updating your profile picture](#)

## Managers

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### Creating your first schedule

Creating an employee schedule from start to finish takes less than 30 seconds. If you have an employee list (CSV or Excel) then you might want to keep that handy, or you can enter your employees manually.

① Click on "create a schedule" in the top menu.

2 Enter your employee names, or if you have an employee list handy you can drag it on to the page.

3 Start scheduling!

**TIPS:**

- You won't be asked to register an account at first, but you'll need to register an account later if you want to save your schedule.
- You don't need to upload all of your employee data at once. You can always upload or enter more data later.

## Adding employees to your team

Whether you're just getting started or you're adding employees to an existing team, adding your employees is easiest if you have your employee listed in a CSV file, or Excel spreadsheet. If you don't have an employee list handy, you can always enter your employee data manually, or you could start putting a list together using [a template](#).

1 If you're adding new employees to an existing team, click "Employees" > [Add new employees](#) in the top menu.

2 If you have an employee list handy you can drag and drop it on to the page, or click "Upload a CSV or Excel file" at the bottom.

**TIPS:**

- We'll take any data you upload and merge it with any existing employees to avoid adding any duplicates.
- Suggested columns include: First name, Last name, Email, Mobile, Department, Job title, Date of birth, Hourly rate
- There are no strict requirements for the column headings but anything we don't recognize will be ignored.

## Add more staff members

When adding new staff members you don't need to enter everything at once - you can start with their first names and fill in the details later. Alternatively if you have a spreadsheet containing your staff's names, you can upload that below.

1.	Amy Bruce	amy.bruce@email.com	Mobile numbers
2.	John Ro		
3.			
4.			
5.			

[Upload a CSV or Excel file](#) ⓘ

[Import staff from another app](#) 🔄

↑  
More lines will

## Inviting your employees to log in

After adding employees to your team and adding some shifts, you might want to invite them to log in so they can check their shifts, submit requests or request time off. Like most systems, your employees will need a login and password to identify themselves - typically their email address and an auto-generated password.

After you add a new employee, Findmyshift will automatically generate a welcome message and queue it in the "Outbox", containing their login and password to access the site.

### **IMPORTANT!**

The welcome messages generated for new employees need to be authorized by a manager before they're sent. To authorize them, a manager must visit the "Outbox", select the appropriate delivery methods and click "Send".

## Choosing your settings

Findmyshift's default settings won't always be perfect for everyone, but as an administrator you can change the settings of your team at any time via the "Settings" menu.

Aside from the option under "Settings" menu, on every page you'll find an "Options" menu. These options only affect you, and in some cases can be used to override the selected options under the "Settings" menu.

**TIPS:**

- The options chosen under the "Settings" menu apply to everyone on your team.
- The options chosen under the "Options" menu on each page will only apply to the logged in user.

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## Entering shifts

Once you've entered your employees you'll be taken to the schedule, typically called the "Overview", but if you're scheduling facilities as well then you'll find it's called the "Employee view" to avoid confusion.

This view is your main entry screen, and works very much like an Excel spreadsheet. You can drag & drop, copy & paste, make changes to multiple cells at once and access most options with the right click menu.

- To select a cell, click it with your mouse, or you can use the arrows on your keyboard.
- To add a new shift to the selected cell and start typing, or double click it, or right click and select "Add" > "Shift".
- To delete a shift, press the  key on your keyboard, or right click and select "Delete".

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## Publishing shifts

Depending on your settings, you may need to publish shifts before your employees can log in and see them. To know whether you need to publish a shift, you'll see a small red dot in the bottom left hand corner of its cell. To publish:

- 1 Select the cell (or cells) you'd like to publish.
- 2 Right click the selected cell(s) and select "Publish". Once published, the red dots will disappear.

**TIP:** If you're not seeing any red dots on your schedule, you may have "Automatic publishing" switched on under "Settings" > "General".

The screenshot shows the findmyshift interface with a staff schedule for the week of November 20th to 26th. The schedule is displayed in a grid format with columns for each day and rows for each staff member. A context menu is open over the schedule grid, showing options like Add, Appearance, Find & Replace, Cut, Copy, Delete, Select, Publish, and Unpublish. The staff members listed are Laura, Thomas, James, Matthew, Sophie, Charlie, Charlotte, Luke, and Sarah. The schedule includes various shifts such as Kitchen, Bar, On Call, and Rostered Day Off.

	Mon. Nov. 20	Tue. Nov. 21	Wed. Nov. 22	Thu. Nov. 23	Fri. Nov. 24	Sat. Nov. 25	Sun. Nov. 26
Laura	Kitchen 12:00pm-8:00pm	Kitchen 12:00pm-6:00pm	Kitchen 12:00pm-6:00pm	Kitchen 12:00pm-6:00pm	Rostered Day Off		On Call
Thomas	Kitchen 8:00am-1:00pm	Kitchen 8:00am-1:00pm	Kitchen 8:00am-1:00pm	Kitchen 8:00am-1:00pm	Kitchen 8:00am-1:00pm		
James	On Call	On Call	10:00am-4:00pm		On Call	Kitchen 9:00am-2:00pm	Kitchen 10:00am-3:00pm
Matthew				On Call		Kitchen 1:00pm-6:00pm	Kitchen 1:00pm-5:00pm
Sophie	Bar 9:00am-6:00pm 1 hour break	Bar 9:00am-6:00pm 1 hour break	9:00am-6:00pm	Kitchen 10:00am-6:00pm	Kitchen 12:00pm-6:00pm	On Call	On Call
Charlie	Bar 8:00am-1:00pm	Bar 8:00am-1:00pm	8:00am-1:00pm	Bar 10:00am-1:00pm	Bar 8:00am-1:00pm		
Charlotte	On Call	On Call		Bar 10:00am-1:00pm	Bar 8:00am-1:00pm	Bar 12:00pm-6:00pm	Bar 12:00pm-6:00pm
Luke	Kitchen 9:00am-6:00pm 1 hour break	Kitchen 9:00am-6:00pm 1 hour break	9:00am-6:00pm 1 hour break	9:00am-6:00pm 1 hour break	Kitchen 9:00am-6:00pm 1 hour break	Bar 1:00pm-6:00pm	Bar 1:00pm-5:00pm
Sarah			Bar 10:00am-4:00pm	Bar 10:00am-4:00pm	10:00am-4:00pm	9:00am-2:00pm	Bar 10:00am-3:00pm

## Handling requests and cancellations

Once an employee has made a shift request or a cancellation, as a manager you can approve or decline the requests.

- To approve requests, select the request, or the cell(s) containing the requests, right click and select "Requests" > "Approve".
- To decline requests, select the request, or the cell(s) containing the requests, right click and select "Requests" > "Decline".

Once you approve (or decline) requests, notifications for employees need to be authorized by a manager before they're sent. To authorize them, a manager must visit the "Outbox", select the appropriate delivery methods and click "Send".

## Handling time off requests

If you are an administrator or time off manager, you may be notified when employees request time off.

When employees request time off, you will see this time off on your schedule highlighted yellow, as well as at the top of the "Time off" page.

- To approve requests directly from the schedule, select the request or the cell(s) containing the requests, right click and select "Requests" > "Approve".
- To approve the requests from the "Time off" page, click the "thumbs-up" icon to the right of the request.
- To decline requests directly from the schedule, select the request or the cell(s) containing the requests, right click and select "Requests" > "Decline".

## Adding pay rates to track employees costs

To track employee costs you'll either want to enter an hourly rate, day rate or salary for each of your employees.

To enter these rates, open an employee's profile and select the "Pay & time off" tab, where you'll see an entry box for "Hourly rate", "Daily rate" and "Salary". The first time you enter these rates you'll just be entering an amount, however any subsequent attempts to edit these rates after you save your changes will open an advanced edit window, allowing you to enter additional rates and specify each rate's start and finish date.

The screenshot displays the 'findmyshift' interface. At the top, there are navigation links: 'Create a rota', 'Demo', 'Pricing', 'Help', and 'Log in'. Below this is a secondary navigation bar with 'Staff view', 'Facility view', 'Staff', 'Facilities', 'Notice board 16', 'Time off 1', 'Outbox 1', 'Send a message', 'Timesheets', 'Reports', and 'Settings'.

The main content area is titled 'Hours report'. On the left, there are two employee profiles:

- Laura Taylor : 4360**

Day	Date	Start	End	Hours	Cost
Mon	18/12/2017	12:00pm	6:00pm	6	£57.00
Tue	19/12/2017	12:00pm	6:00pm	6	£57.00
Wed	20/12/2017	12:00pm	6:00pm	6	£57.00
Sun	24/12/2017	12:00pm	6:00pm	6	£114.00
				<b>18</b>	<b>£171.00</b>
				<b>2</b>	<b>£114.00</b>
- Thomas Young : 4890**

Day	Date	Start	End	Hours	Cost
Mon	18/12/2017	8:00am	1:00pm	5	-
Tue	19/12/2017	8:00am	1:00pm	5	-
Wed	20/12/2017	8:00am	1:00pm	5	-
Thu	21/12/2017	8:00am	1:00pm	5	-
Fri	22/12/2017	8:00am	1:00pm	5	-
				<b>25</b>	<b>-</b>

The 'Laura Taylor' profile is open, showing the 'Pay & time off' tab. The profile details are as follows:

- General:** Payroll ID: 4360, Tax rate: [icon]
- Hourly rate:** £9.50, Exceptions: [icon]
- Day rate:** [input field], **Salary:** [input field]
- Break rules:** [icon]
- Holiday allowance:** 20 days
- Sick allowance:** 10 days
- UPDATE PROFILE** button
- Permissions:** Delete this staff member

On the right side of the profile, there is a '24 hours / £285' summary and a 'REFRESH' button. Below this is a table with columns 'Multiplier', 'Hours', and 'Cost'.

# Staff

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## Requesting or cancelling a shift

Depending on your manager's settings, you (as an employee) may be able to request and cancel shifts on your schedule.

- To request a shift from the "Employee view", select one or more cells next to your name (corresponding with the required dates), right click and select "Request". In the box that appears, type the start and finish times, facility name, or comments you would like to request and press  .
  - To request a shift from the "Facility view", right click any cell next to the facility you would like to request, right click and select "Request". In the box that appears, type the start and finish times you would like to request and press  . If you do not want to specify a start and finish time for the request, you can leave the box blank.
  - To cancel a shift from either view, select a shift (or select one or more cells), right click and select the appropriate "Cancel" option. You will be prompted to provide a comment for the cancellation, however this is optional.
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## Requesting time off

To request time off, click on "Time off" > "Request time off" and select the required options.

If you are requesting regular time off, click the "Never" link next to "Repeat" and select the cycle of the regular time off.

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## Updating your profile picture

To change your profile picture, click on your default profile picture in the top-right area of the page. Once your account appears, hover over the default profile image and click on the camera icon (to take a new photo) or the image icon (to upload a photo).