



Reference Manual

Version 5.5

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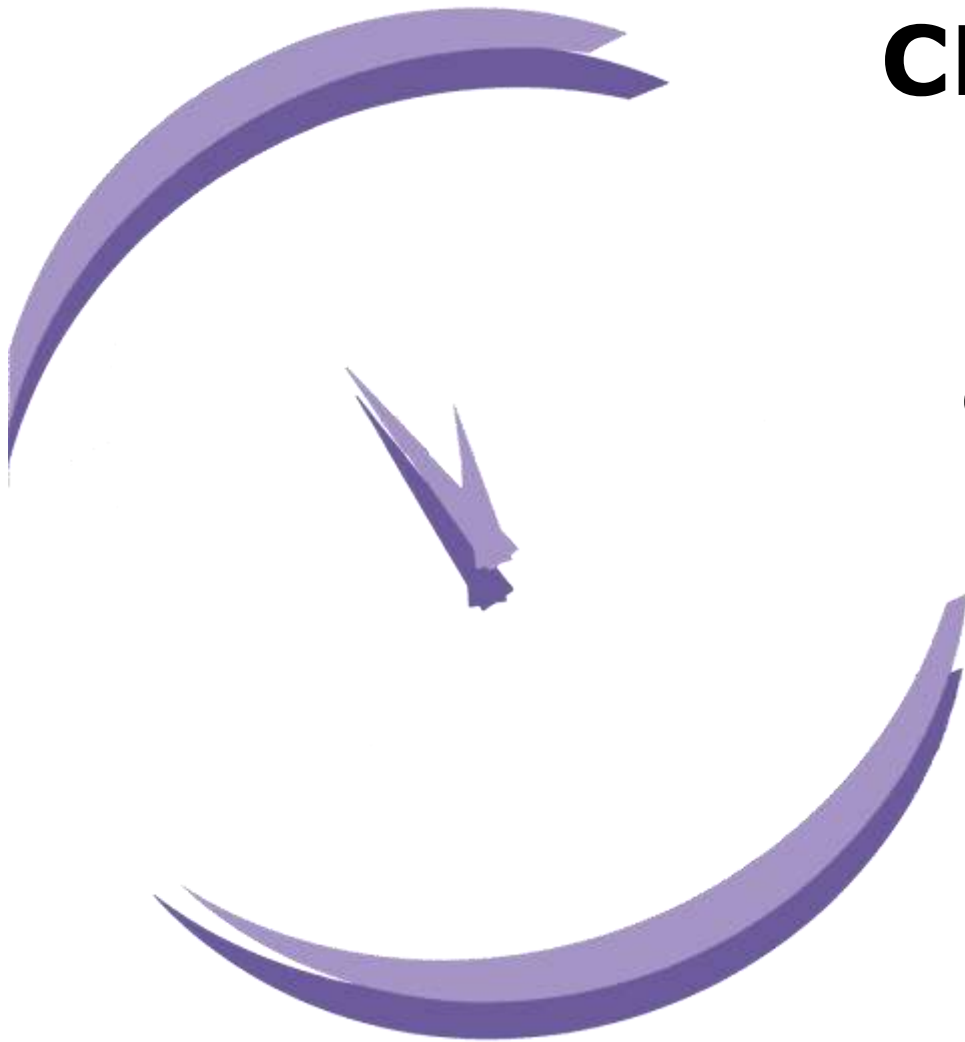
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CHAPTER

1

Getting started



Getting started

Juggling your labor forecasting and scheduling requirements can be one of your manager's biggest headaches. Accurately predicting your labor and sales patterns is only the beginning. Crew turnover and ever-changing availabilities can make scheduling the right employee at the right time a frustrating and time-consuming task. What's worse, if you inadvertently break a labor law, you could face severe fines and penalties.

The solution is in your hands: **ESP**, the **Employee Scheduling Program** from ThoughtWorks. ESP solves all of your scheduling problems and gets your managers back on the floor where they belong. ESP learns about your operation, your volume patterns and your crew abilities. Then, precisely and accurately places your crew when and where you need them. All while cutting up to one percent from your labor costs and helping you maintain the highest standards of customer service.

How to use this manual

This manual will help you become familiar with using ESP.

This chapter will enable you to get started and install ESP on your computer. Chapter 2 helps you set up ESP for your operation. The next five chapters cover the various task groups that appear on the left-side PLACES panel of ESP. If you require in-depth information about a particular task or task group, refer to the corresponding chapter in this manual. These chapters are organized in the same order as they appear on the PLACES panel:

- ✓ Chapter 3: Main
- ✓ Chapter 4: Employees
- ✓ Chapter 5: Schedule
- ✓ Chapter 6: Staffing
- ✓ Chapter 7: Reports
- ✓ Chapter 8: Settings

What ESP will do

ESP is a powerful tool that will help you produce accurate schedules in a fraction of the time it would take to produce by hand. A great deal of information is managed by ESP and hundreds of factors are taken into account when producing a schedule.

In addition to your daily schedule, ESP provides in-depth management reports that help you understand and control where your labor is being scheduled and how efficiently it is being used. All reports can be previewed on the screen before printing.

ESP produces complete and accurate schedules, but you should expect to make some final manual adjustments before posting. In a typical operation, you should be able to post a full, final schedule in ninety minutes or less.

What ESP won't do

ESP won't take the place of your scheduling manager. Even though ESP automates most aspects of the scheduling process, it will still be necessary to review the schedule produced and

make some minor changes. You can make these changes on-screen, and print the final schedule when you're satisfied.

Installation

ESP is available on a CD or can be downloaded from the ThoughtWorks website. In order to use the program you must install it onto your computer's hard disk.

If your copy of ESP came on a CD, insert the CD into your CD/DVD drive and the installation will begin automatically. If it does not, double click on the SetupESP.EXE file on the CD by opening up *My Computer* and double clicking on the CD drive where you have inserted the ESP CD. If you downloaded ESP from the ThoughtWorks website, double-click on the SetupESP.EXE file that you downloaded.

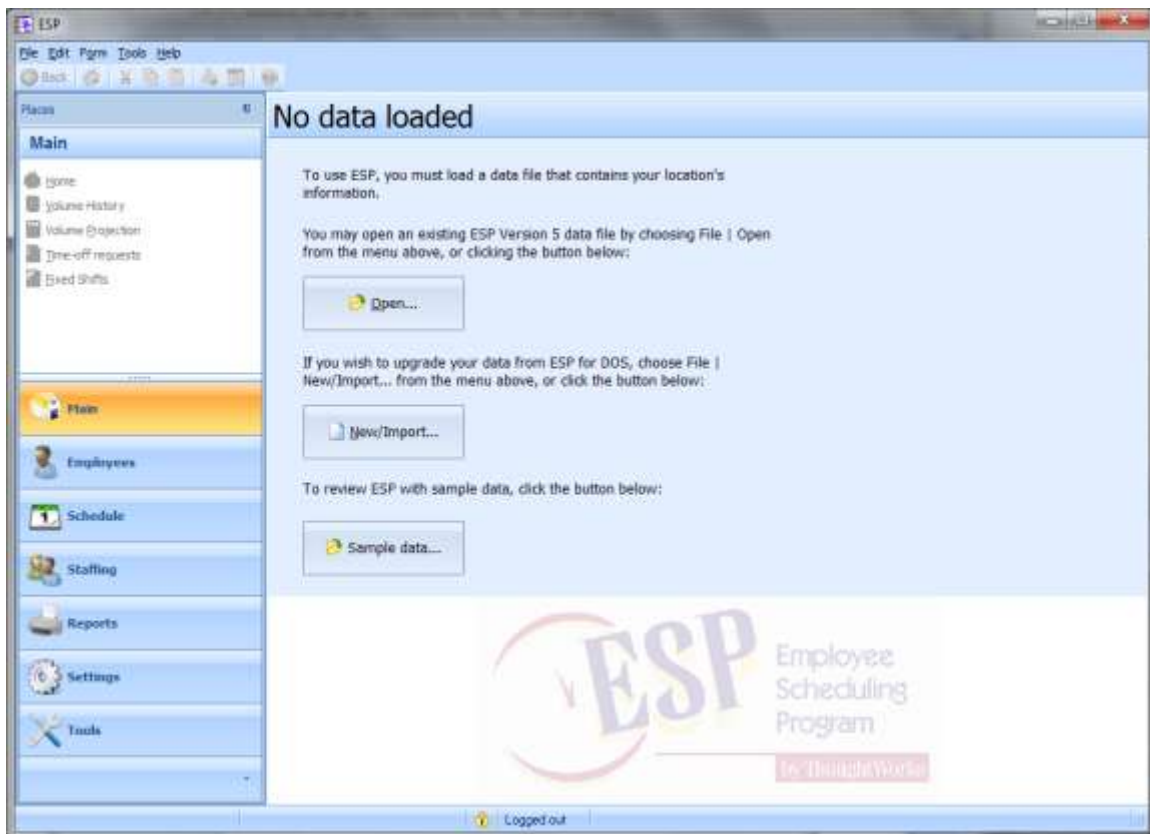
Simply follow the on-screen instructions to complete the installation. ESP automatically adds a new item to your *Start* menu.

Starting ESP

Once installation is complete, you can begin using ESP on your computer.

Start ESP by clicking on the shortcut on your Windows desktop or, click START | ALL PROGRAMS | THOUGHTWORKS | ESP | ESP.

The first time you open ESP, the following window will be displayed.



Choose OPEN to open an existing data file or NEW/IMPORT to create a blank data set or to convert data from Version 4 for DOS. Alternatively, you can experiment with the sample data provided by choosing the SAMPLE DATA button.

Open an existing data file

If you are opening an existing file, choose the appropriate data file (with the .esp extension) from the *Open* dialog.

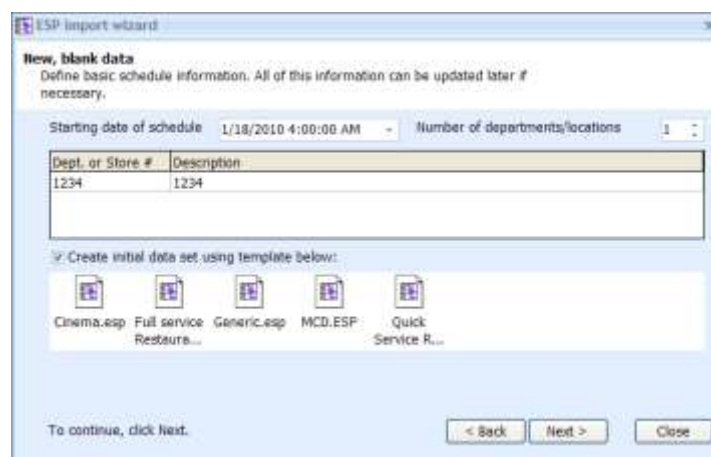
The next time you start ESP, your most-recently selected data file will be automatically loaded.

New/Import data file

If you are setting up a new location, or importing your older DOS-based information, select the NEW/IMPORT... option, which opens an IMPORT WIZARD.

From the IMPORT WIZARD select either *Import DOS data* to import your data from Version 4 or, *Create new blank data* to create a blank data file.

- ✓ If you are importing DOS data, you will be presented with a list of data files found on your computer. Select the appropriate file, click *Next*, and follow the screens to convert your data and then continue with *Understanding the ESP* screen, below.
- ✓ If you are creating new blank data files, you will be presented with the dialog box below. Enter your store details and description:
 - ✓ Select the date for the first week that you will be scheduling.
 - ✓ Choose the number of departments you will be scheduling for this location. Leave this as **1** unless you have two or more separate departments/locations that you schedule by sharing one pool of employees.
 - ✓ Enter the store number for the new location followed by a description.
 - ✓ If you wish to use a template to create your blank data, so that your initial charts are pre-filled with information applicable to a given industry, click the *Create initial data set using template below* box, and choose from the sample templates.

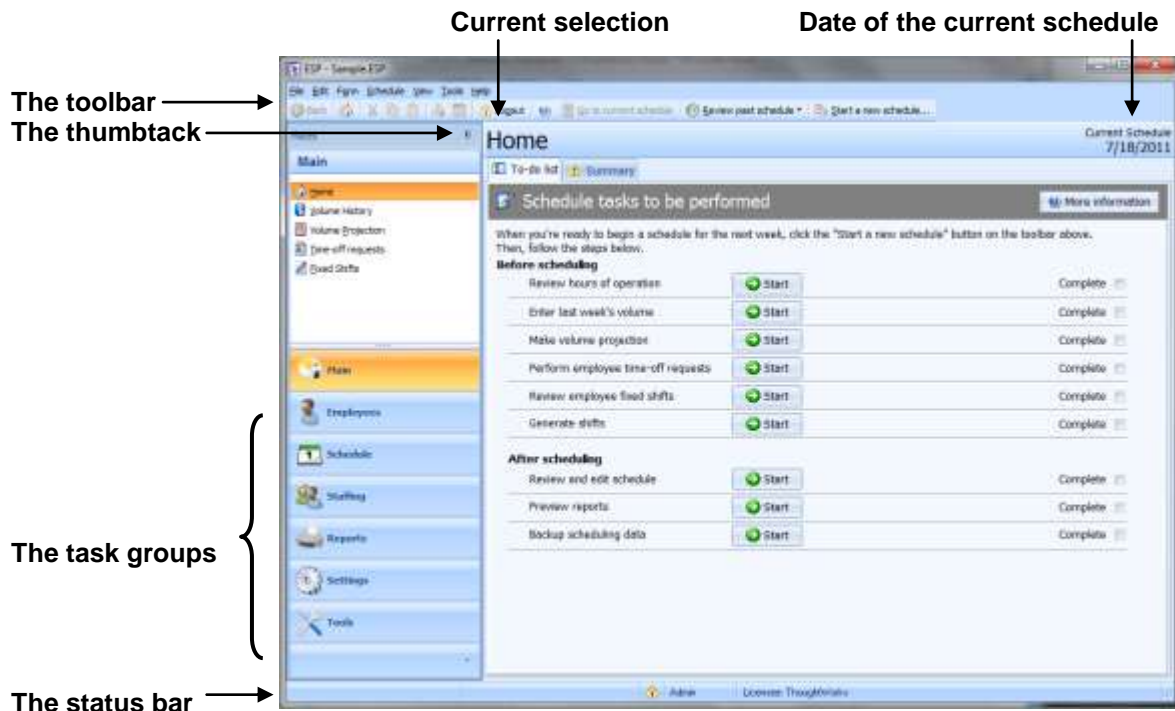


Once you have completed these fields, click *Next* and a new blank set of data will be created for you. New users should continue reading chapter 1 and then follow chapter 2 to customize ESP for your location.

Understanding the ESP screen

ESP has various screen elements that are common throughout every form or section of the software.

Main screen elements



The main screen elements you will always see are shown above. The PLACES panel at left contains a number of groups (*Main*, *Employees*, etc.). Each group contains a number of related items that allow you to navigate throughout ESP. These groups can be expanded or contracted by clicking on the group name to view or hide the group's items

As you navigate through the various groups and settings, the toolbar at the top of your screen changes to reflect the form that you are currently working on. Only the tools that apply to that particular form appear, making it easy to follow and use by reducing clutter.

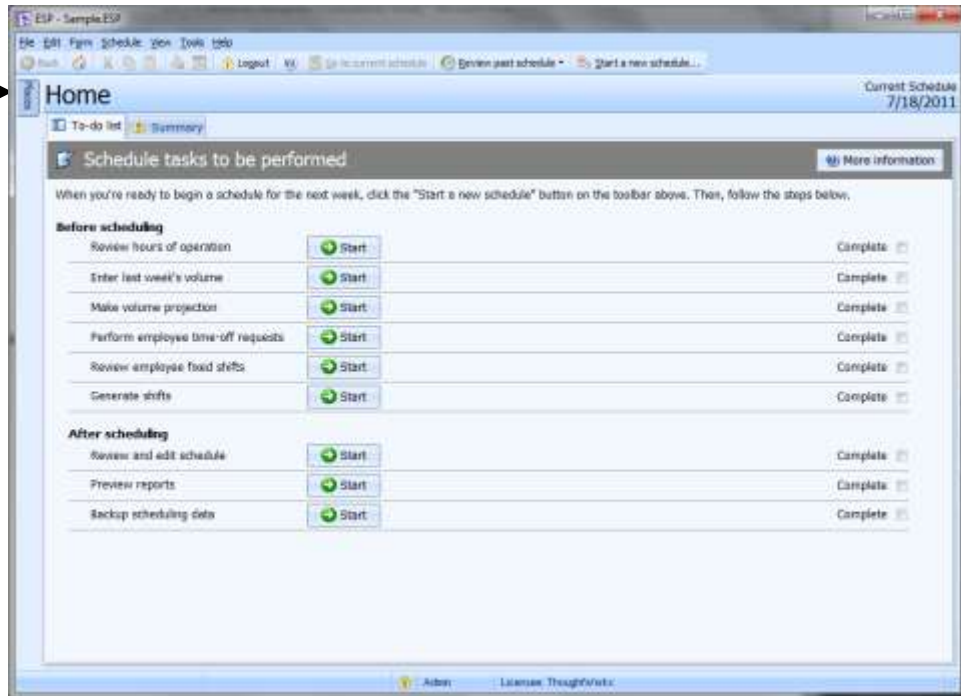
You can increase the amount of screen space you have by hiding the PLACES panel. Do this by clicking on the *thumbtack* on the panel. When the thumbtack is pointing down, it means that the PLACES panel is "pinned in place" and remains on the screen at all times. Clicking the thumbtack unpins the PLACES panel: When you move your mouse away, the PLACES panel slides to the left of the screen, and displays a tab in the left margin, as shown.

To make the PLACES panel reappear just hover over the tab, and click the thumbtack to pin it in place.



If you are using a monitor that is set to 800x600 resolution you will almost certainly need to auto-hide the PLACES panel so that more of your screen is dedicated to displaying scheduling information. On larger screens, you will probably wish to leave the PLACES panel visible at all times.







The Places tab →



The toolbar

The toolbar at the top of the screen allows you to quickly complete many common tasks at the click of a button. The tools that are available change according to the form that you are viewing. For example, when you are viewing the employee list you have a button to *Add Employee* and *Terminate Employee*. If you are viewing the HOME form, the toolbar displays buttons to *Go to current schedule*, *Review past schedule*, and *Create new schedule*.

Some of the buttons remain on the tool bar at all times. These include:

	The <i>Back</i> button takes you back to the previous form you were using
	The <i>Home</i> button returns you to the main ESP HOME form
	The <i>Copy</i> button copies the currently selected text to the clipboard
	The <i>Cut</i> button deletes the currently selected text but copies it to the clipboard for later use
	The <i>Paste</i> button will paste the contents of the clipboard into the current cursor position
	The <i>Help</i> button gives you help about the current screen.




Adding and deleting information

Many forms allow you to add or remove entire charts at a time. Where applicable, the toolbar will contain an *Add* button and a *Remove* or *Delete* button that pertains to the current form.

The add chart / delete chart buttons







A great deal of information in ESP is organized in a tabular format. When making entries into these tables, you can add new rows by filling in the fields at the top where it says *Click here to add a new row*. Once you fill in the required information, save it by moving off the row or click the green *Post* (checkmark) button at the bottom of the screen. Every table has the same set of controls at the bottom to allow you to *Post*, *Delete*, or *Undo* entries, as follows:

	The <i>Post</i> button. Click this to add a new entry to the form you are working on. You may also post the entry by simply moving off the line you are editing.
	The <i>Delete</i> button. Use this button to delete the entire row you are editing.
	The <i>Undo</i> button. This will undo the last entry made, as long as you have not moved off the row.

If you mistakenly add a new row to a form and wish to remove it, place your cursor anywhere on the row and click the *Delete* button.

Clocks and times

To enter a time, click anywhere in the time field and select the drop down arrow to display a drop-down list of all the possible time choices. Scroll through until you find the time you require and click to make your selection. Time fields have multi-colored clock icons that help you easily distinguish the times of day, as follows:

	A yellow clock indicates morning hours from 6:00am to 12:00pm (noon).
	An orange clock indicates afternoon hours from 12:00pm (noon) to 6:00pm.
	A light blue clock indicates evening hours from 6:00pm to 12:00am (midnight).
	A dark blue clock indicates late night or early morning from 12:00am (midnight) to 6:00am.

If you have a wheel on your mouse, you can scroll through the times either forwards or backwards. Using a mouse is the quickest method for entering times, but you can just as easily use the keyboard. When you start typing on the keyboard, ESP will select the earliest time that matches your first keystroke. Each keystroke after that will further refine the time.

Here are some examples:

If you type The following time will be selected

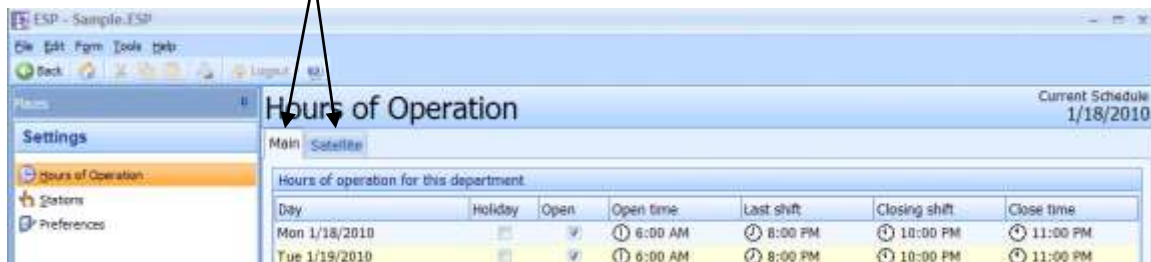
1	12:00 AM because this is the earliest time that starts with the number 1
11 or 11A	11:00 AM
4	4:00 AM
4P	4:00 PM (colon and zeros are not required)
430P	4:30 PM

Departments or secondary locations

If you have a multi-department operation, or secondary locations that share the same crew but are scheduled using different volume patterns, you will use ESP's department/multi-site features. If you have more than one department or location, certain forms allow you to specify different information for each location. Select the location you wish to work with by clicking the department/location tabs at the top of the form, just below the title bar.

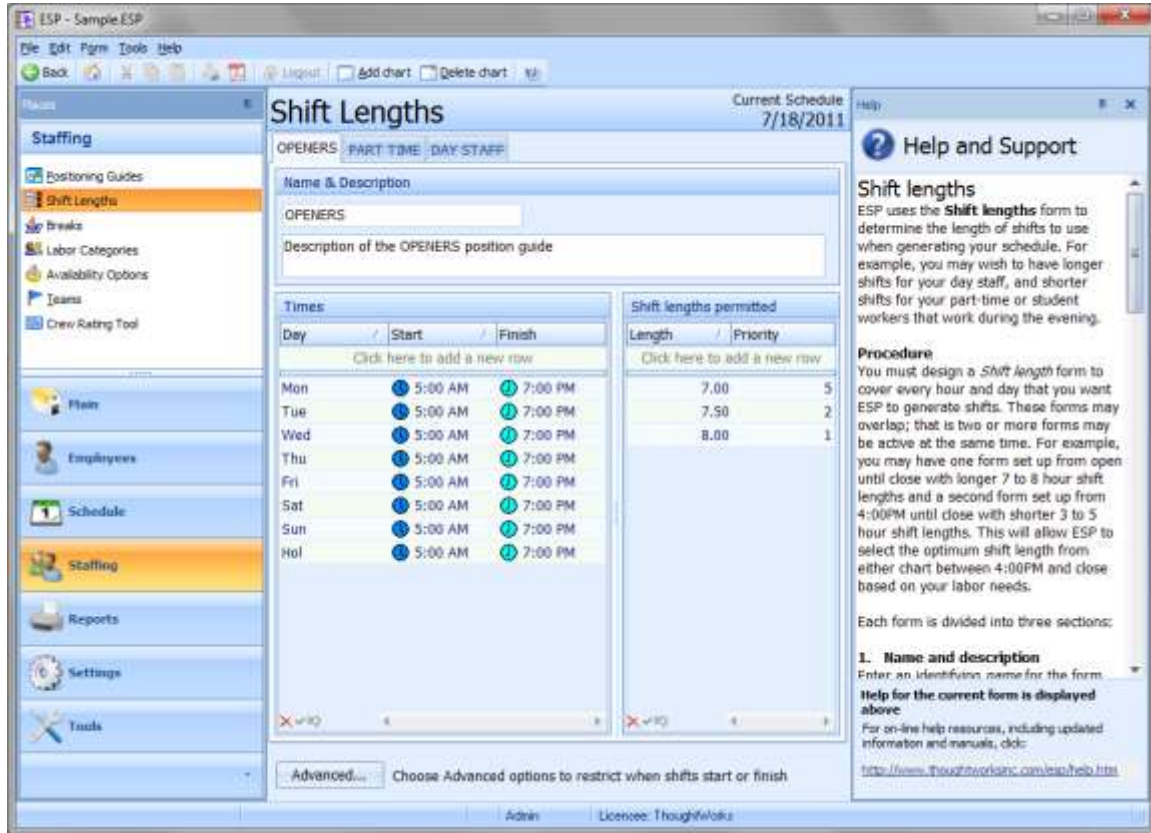
As seen in the figure below you simply click on the tab of the location whose form you wish to review or change.

The location tabs



Getting help

ESP has a comprehensive help system built in. If you need help with a particular form or feature, click the *Help* icon on the toolbar. A panel will appear on the right side of the screen, displaying detailed information about the current form. You can continue to work while the help screen is open.



The HELP panel on the right will change to reflect the form you have open. You will notice that the HELP panel also has a thumbtack just like the PLACES panel. You can hide the HELP panel in the same way as the PLACES panel, as discussed earlier.

If you require more detailed help, click on the hyperlink at the bottom of the HELP panel to go to our on-line help system and search for help on your topic of choice.

Where do I go from here

You are now ready to start using ESP to produce your first schedule. We suggest you always start from the HOME form and use the *To do list* to ensure you perform all the necessary steps in the correct order. Don't be afraid to browse through all the various PLACES groups and forms to help you become familiar with all the features of ESP Version 5.

The next chapter is designed for new users. It helps you customize ESP to your location, taking you right through to producing your first schedule with ESP.

CHAPTER

2

Setting up and
using ESP



Setting up and using ESP

This chapter will help you set up ESP on your computer and walk you through the steps to produce a basic schedule (without your own employee names) in about an hour. Then, once you've covered the basics, you will add your own employees and produce a full schedule, complete with employee names and job assignments, and ready to post on the wall.

Although this chapter provides a good introduction to many areas of the software, it is not a substitute for reviewing the complete manual. In order to produce schedules that are properly designed for your individual location, we suggest you take the time to read the entire manual and set up the charts and employee files with information relevant for your operation.

This chapter discusses single-store scheduling only. If you are using ESP to schedule multiple departments or locations (multiple sites staffed by a single set of crew), we suggest you practice using a single location first. Once you are comfortable with producing a schedule for a single location, you can begin working with multiple sites.

Getting help

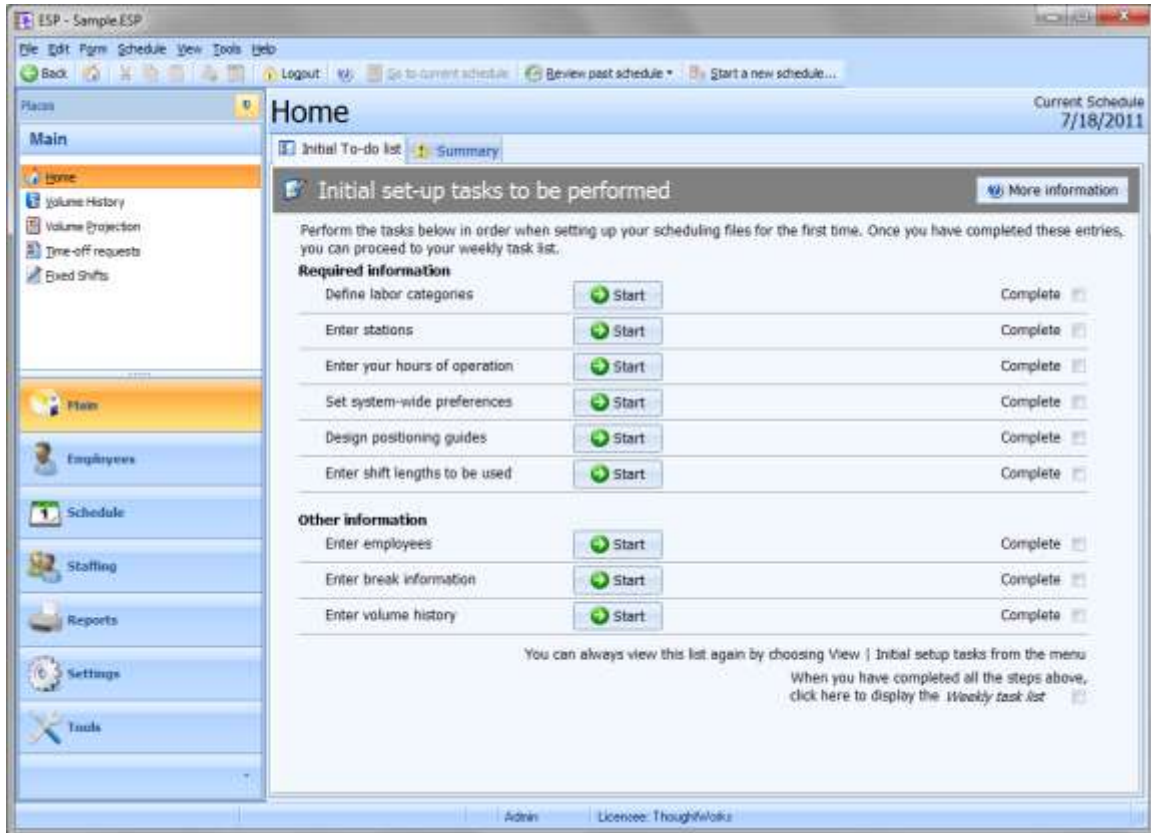
If you are ever uncertain about how to proceed or how to make an entry, you can use ESP's integrated help to display complete information on using the current form. For help on any form click the *Help* icon on the toolbar, choose HELP | ESP HELP from the menu, or press the [F1] key. If your computer is connected to the internet, you can access additional information on our website by using the link at the bottom of the HELP panel or by choosing the menu option HELP | ESP HELP ONLINE.

Of course, technical support and advice is always just a phone call away. If you need further assistance, do not hesitate to call our technical support line at the number listed at the beginning of this manual and we will be happy to help.

Let's begin

This chapter is a hands-on tutorial to help you set up ESP for your location.

To begin, make sure that you have installed ESP on your computer and that ESP is open by following the instructions in Chapter 1. If ESP did not open to the list of *Initial set-up tasks to be performed*, shown below, then select it from the toolbar option VIEW | INITIAL SET-UP TASKS LIST.



Initial chart set-up

Follow the initial task list to customize ESP with a number of charts that specify your operation's requirements. Many of ESP's charts have been pre-filled with sample values that provide an excellent starting point. Once you become familiar with ESP, you will be able to fine-tune the charts to your own location. This list is divided into two sections:

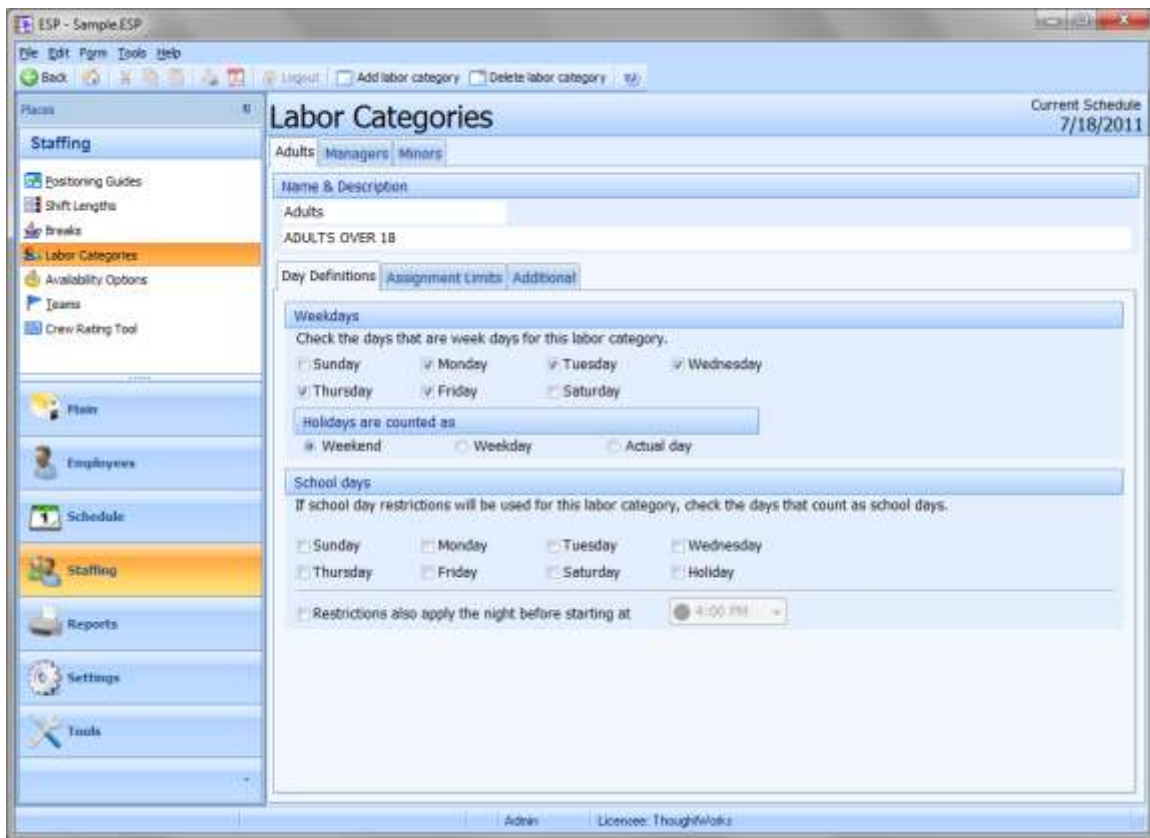
1. **Required information:** these steps include charts that you set up with information such as the number of crew required for a given volume rate, the lengths of shifts you desire, when your operation opens and closes, and so on.
2. **Other information:** these steps include entering all of your employees' information, availability, and station qualifications. In addition, you can set up your break information and enter your volume history.

Start customizing ESP by selecting the *Start* button beside the first option, *Define labor categories*. Remember you can return to this HOME form from any other form in the program by selecting the *Home* icon on the toolbar.

Defining your labor categories

Most jurisdictions have labor laws that specify restrictions on when, for how long and how often an employee may work. You may have a different set of labor laws for minor and adult employees. You can define any labor laws that apply to your local area using the LABOR CATEGORIES form, shown below. In addition to working from the *Initial set-up tasks* screen, you can access the LABOR CATEGORIES forms from the *Staffing* group or by selecting FORM | OTHER FORMS | LABOR CATEGORIES from the menu.

Every employee is assigned to an associated labor category. Setting up proper labor categories will ensure that your employees are never scheduled in violation of your own local labor regulations.



Each labor category has three sections:

1. **Day definitions:** In this section, specify how ESP should treat each day. Define the days that are to be considered *week days*, the days that are considered *weekend days*, and how ESP should count *Holiday days*. For labor categories that are specific to students, indicate any days that have *school day* restrictions and indicate if there are restrictions on the night before a school day.
2. **Assignment limits:** Use this section to indicate whether or not there are shift or hour limits for the employees in this labor category. You can set limits for both *Regular* and *Alternate* availabilities – the two separate sets of availability that may be defined for each employee. This is particularly useful for categories assigned to students as they use their regular availability during the school year and then switch to their alternate availability during the summer, when their limits are usually less restrictive.
3. **Additional:** Contains additional restrictions that you can apply to this labor category, including if split shifts are permitted. If you reserve a percentage of your employees' wages for vacation pay and include it as part of labor cost, enter the percentage in the field provided at the bottom of this screen. If not, leave the field set to **0**.

You can set up as many different labor categories as you wish. Following are examples of categories you may wish to use.

- ✓ **Managers:** For this category you might set high limits, such as a maximum of 50 hours a week and a shift length up to 10 hours or more. This is useful for managers as their shifts are more unique and less restrictive than shifts assigned to other employees.
- ✓ **Adults:** This category could be used for all your standard adult employees. Specify the rules that apply to adult workers in your jurisdiction.
- ✓ **16+ Minors:** You might use this category to represent all your employees aged 16-17 who are in school and need to have some restrictions applied during the school week.
- ✓ **14+ Minors:** While hiring employees under the age of 16 is uncommon, it is permitted in some areas. If you hire employees under 16 you can set up a special labor category for them.

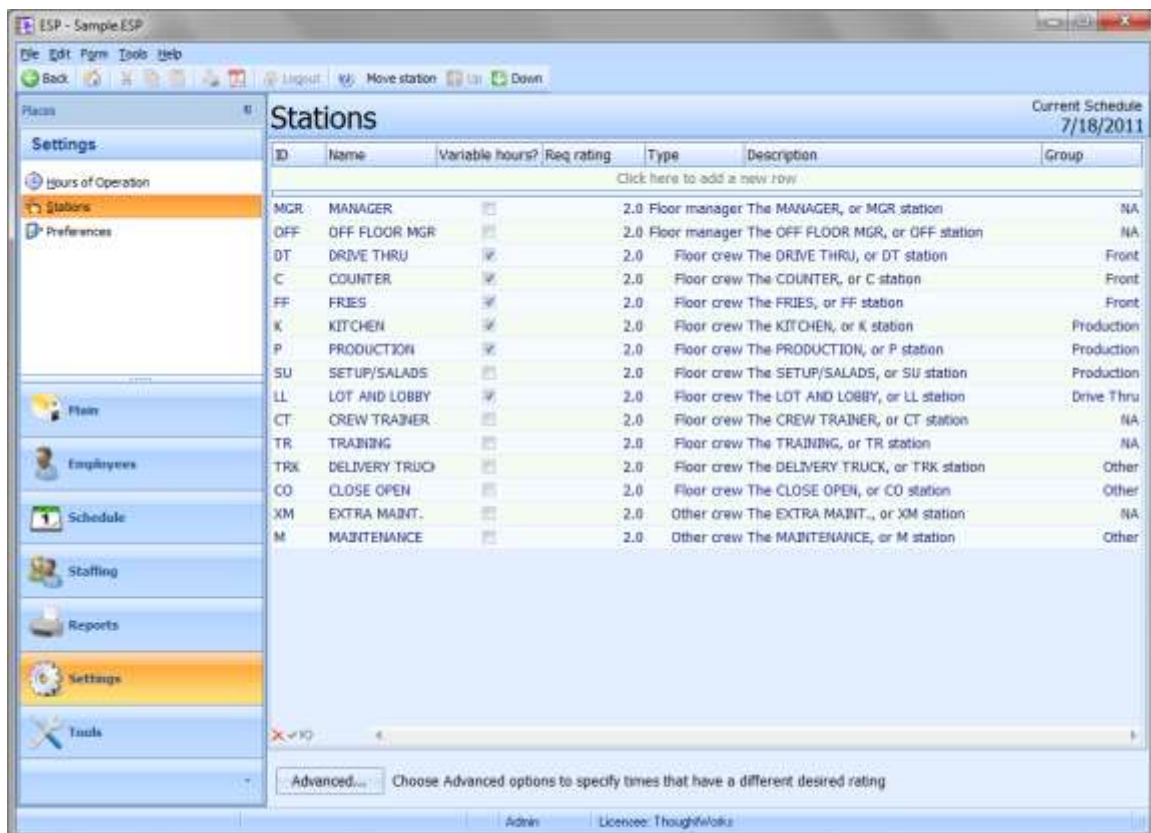
You can add as many labor categories as you wish by using the *Add labor category* button on the toolbar.

Define your stations

The next step in setting up your data is to define the stations that you want ESP to schedule. Stations are the job categories that you will be using, and often include items like Cashier, Kitchen, Lobby person, Hostess, on so on. The stations that you define appear on many of the other forms that ESP uses, and you will qualify each employee to work at various stations.

You can access the STATIONS form, shown below, from the *Settings* group or by selecting FORM | OTHER FORMS | STATIONS from the menu.

When the STATIONS form opens, any pre-defined stations will be displayed. You may add as many stations as you like.



To add a station, move to the top row labeled *Click here to add a new row* and enter the new information. Save this new information by either moving off the row or by clicking the *Post* button (the green checkmark) at the bottom of the form. To modify a station, click inside the field that you want to modify, make your changes, and then save the changes by either moving off the row or clicking on the *Post* button. To delete a station, click inside the row of the station that you want to delete and then select the *Delete* button (the red X) at the bottom. As a safety feature, a warning screen will appear asking you to confirm that you want to delete the row before it is actually removed.

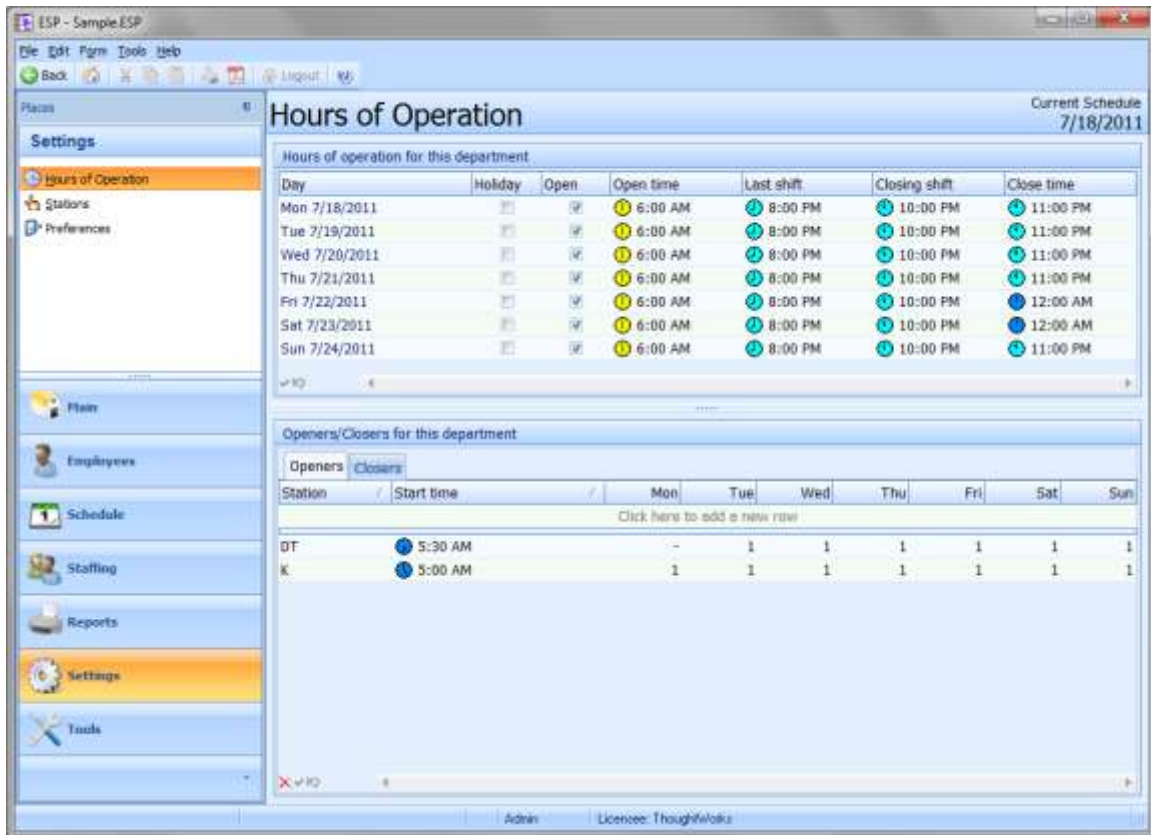
You can use the buttons on the toolbar to arrange the stations in the order that you want them to appear on the schedule. Click the *Up* or *Down* buttons to move the stations up or down the chart. The order that a station appears on this form is the same order that it appears on many reports, including the SCHEDULE form.

The fields that appear on the form are as follows:

- ✓ **ID:** Enter up to four characters in this field, which will be used to identify the station throughout the program.
- ✓ **Name:** Enter a longer, more descriptive, name for the station. This appears on some reports.
- ✓ **Variable hours:** To designate a station as variable labor, place a checkmark in the box; an empty checkbox indicates that the position will be considered non-variable labor. The stations that you schedule based on volume should be checked as variable. Stations that are scheduled using only fixed shifts, for example, management shifts, maintenance, or delivery, are considered non-variable labor and should be left unchecked.
- ✓ **Required rating:** Indicates the average skill level that you desire for the station. Each employee is given a rating on each station, and when scheduling, ESP will attempt to assign employees so that the average of all scheduled employees is as close to the required ratings as possible. After you become familiar with ESP you may define advanced entries to allow for times when you want to have a stronger or weaker crew scheduled. For this initial setup we won't be using the advanced option.
- ✓ **Type:** Defines the station as either a crew position or management position. You are given five options: *Floor crew*; *Floor manager*; *Other crew*; *Other manager* and *Unknown*. The crew-to-management ratio is displayed for each hour on the daily line bar schedule. While editing the schedule, this ratio helps you determine times of the day when you may be able to cut or add labor based upon the presence of management personnel.
- ✓ **Description:** Enter a longer and more descriptive name for the station.
- ✓ **Group:** You can assign stations to one of three groups, Front, Drive-Thru, and Production (or not applicable). If you enable the management scheduling feature, excess managers will be assigned evenly to the three groups.

Enter your hours of operation

Use the HOURS OF OPERATION form to specify your location's opening and closing information. You can access this form from the *Settings* group or by selecting FORM | OTHER FORMS | HOURS OF OPERATION from the menu.



The form is divided into two sections: Hours of operation, and Openers/Closers.

Hours of operation

The *Hours of operation* section contains the following columns:

- ✓ **Day:** The day and date in the current scheduling week.
- ✓ **Holiday:** A checkmark in this column indicates that the day is a holiday, and that ESP should use the employees' holiday availability when assigning shifts for that day.
- ✓ **Open:** A checkmark indicates the location is open on that day.
- ✓ **Open time:** The time that your operation opens its doors to the public. If you are open 24 hours a day, enter an open time of 4:00 AM.
- ✓ **Last shift:** The latest time of day that a shift is allowed to begin. This refers to shifts generated by ESP, not fixed overnight shifts, which can start at any time.
- ✓ **Closing shift:** The time that an employee must work past before their shift is counted as a close shift. This helps you control the number of times employees work late at night. If you do not place any limits on how many times your employees are allowed to work late at night, set this to the same time as your close time.
- ✓ **Close time:** Enter the time of day that you close your doors to the public. If you are open 24 hours a day, enter 4:00 AM.

Openers/Closers

The *Openers/Closers* section specifies the number of people you require to come in before your location opens and the number of people you require to stay past closing time to clean up. For example, you may open to the public at 6:00 AM, but require Kitchen and Drive-Thru openers to come in one half-hour early to set up their stations.

For each entry, specify the station the employee will be assigned to, the *Start time* for openers or *End time* for closers, and under each day, specify the number of crew you require to open or close at each station. The sample, above, shows how you would set up the *Openers* section to allow ESP to schedule an employee on the Drive-thru each day of the week one half-hour before you open and an employee on Kitchen each day of the week one hour before you open.

Enter your scheduling preferences

The PREFERENCES form, shown below, allows you to tailor ESP's operation to your own needs. You can access this form from the *Settings* group or by selecting FORM | OTHER FORMS | PREFERENCES from the menu.

The PREFERENCES form is divided into two tabbed sections: *General settings* and *Rule settings*.

General settings

The *Sales or transaction setting* allows you to specify whether you track your volume by sales or transactions. You may use either as the volume basis for scheduling.

Note: You cannot switch from sales to transactions or vice versa unless you have data for both on file. If your volume data is imported automatically from your POS you may have both sets of

information on file, but if you are manually entering your volume, it is unlikely that you have entered both sales and transactions.

Use the *Apply gross sales adjustment of* to take value added taxes into account when calculating your labor percent on your statistics report. If your sales projection includes such taxes then ESP will divide that projection by the number you enter here, to calculate your net sales. For example if your sales projection includes 5% in value added tax, then you would enter 1.05 in this field.

The *Schedule* section allows you to specify if you will allow employees to work more than one shift on the same day provided there is sufficient space between the shifts. ESP will never assign an employee to work more than one shift in a day, but you may wish to allow yourself to manually make such an assignment. For example an employee may work early in the morning then come back in to work a shift later in the evening.

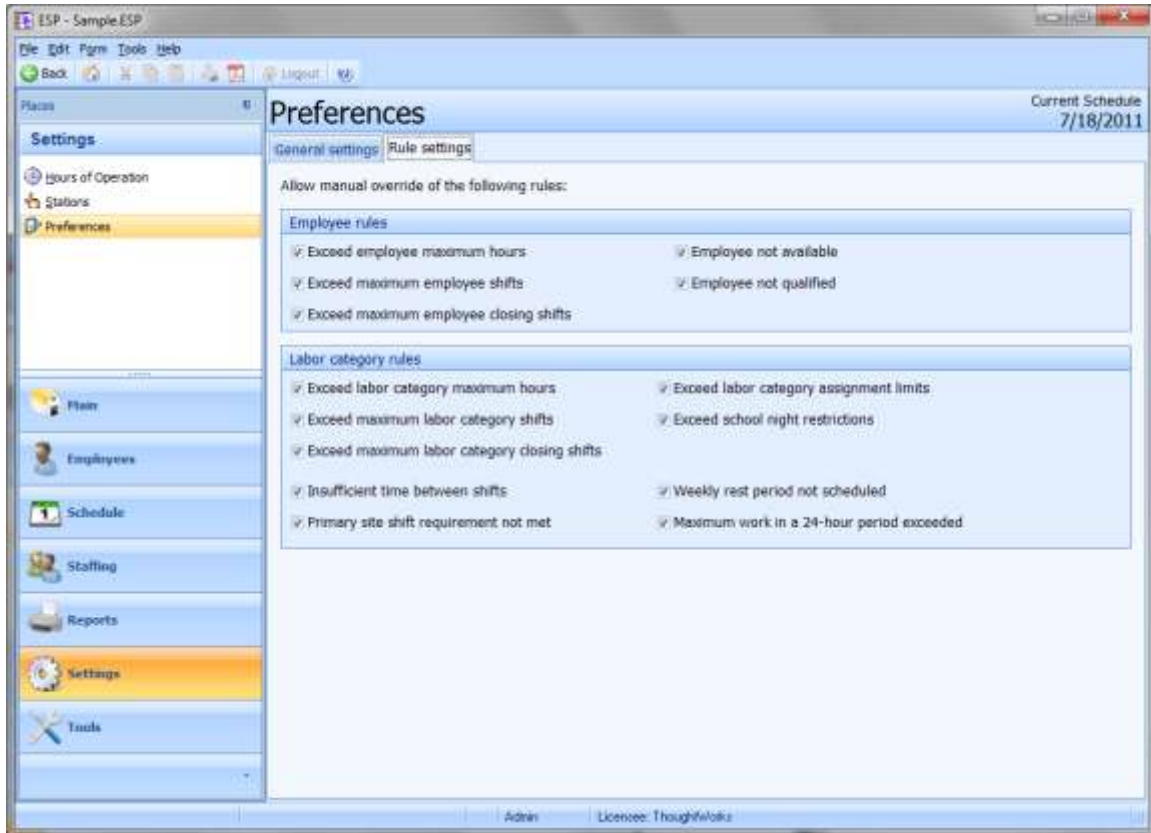
You also have the option to let ESP automatically assign managers to work productive employee stations where there are too many managers working. If you check this option you must enter the number of employees each manager is able to supervise. When there are too many managers working excess managers will be assigned productive stations.

The *Ratings* section allows you to specify how you use the station ratings. If you consider a **1** rated employee to be the best and a **4** to be the least experienced then select the first option, "Low rating number used for better employee rating". If, however, you consider a **4** rated employee to be the best then you would select the second option instead.

The *Weighting factors* section at the bottom of the screen allows you to customize certain aspects of how shifts are assigned to your employees. Use the sliders to set the importance that ESP should place on each option when it assigns your shifts. The settings range from a low of zero to a high of one hundred. The higher the setting, the more preference ESP employs when assigning an employee to a shift.

Rule settings

When ESP produces a schedule, it adheres to all the rules and restrictions that you have entered. For example, you may specify a maximum number of hours or shifts for an employee. Under no circumstances will ESP create a shift that violates any of these rules and restrictions. However, there may be times when *you* want to override a rule or restriction while you're editing the schedule. The *Rules settings* form, shown below, provides a way for you to specify the rules or regulations that are permitted to be overridden manually and the ones that are not to be overridden under any circumstances.



You may override any rule that has a checkmark; rules left unchecked may not be overridden. By default all rules are unchecked: this ensures that you don't accidentally make an editing change that results in an employee or labor violation. Manual overrides generally fall into one of two categories:

1. **Employee rules:** Rules that apply specifically to an individual employee.

For example, normally ESP does not allow you to manually edit an employee into a shift when he is not available. However, if you get permission from the employee, you may occasionally wish to assign him to fill an unassigned shift outside his/her availability. By checking the *Employee not available* rule box (first row, right side of the *Employee rules* box), you give yourself the flexibility to override this restriction. Note that ESP will still mark the shift as a potential problem, and inform you as such. Without choosing to override the rule, however, you would not be able to print the final schedule. Note also that ESP will *never* make any automatic shift assignment that breaks any of these rules: Overriding these rules only gives *you* the flexibility to make these editing changes manually.

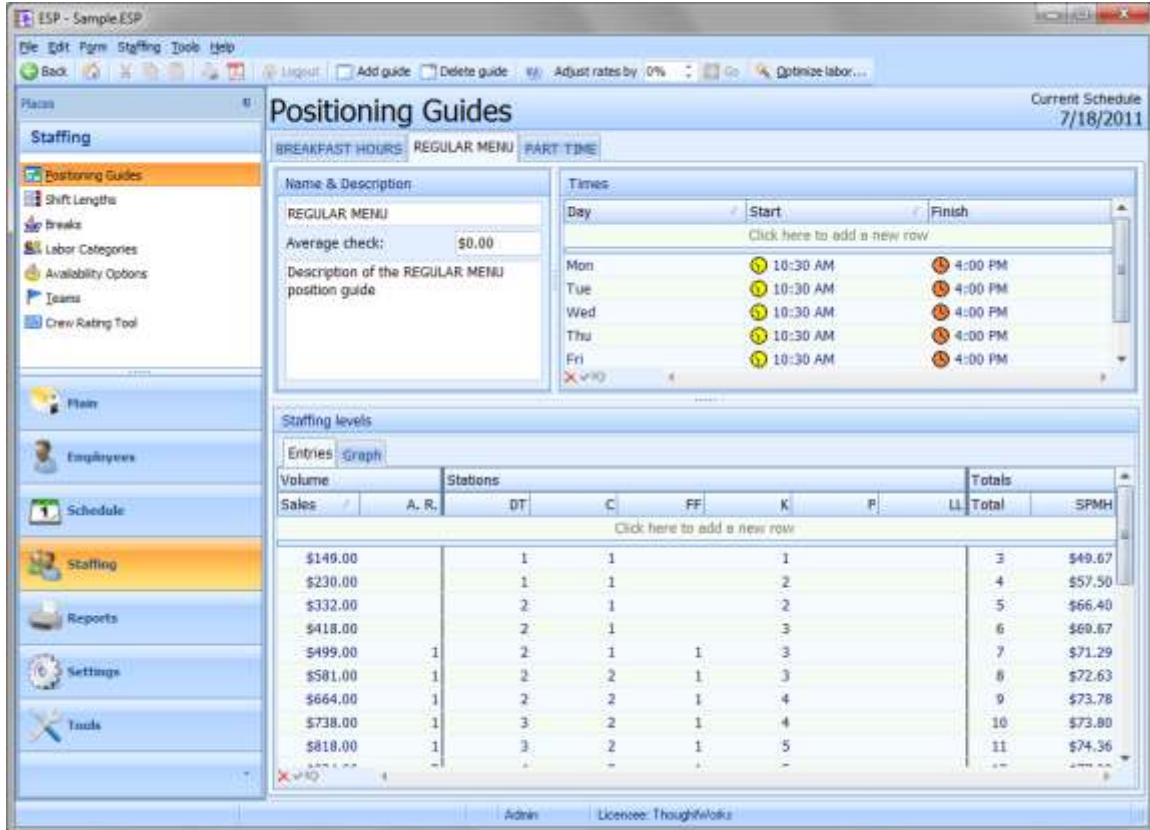
2. **Labor category rules:** Rules that apply to labor category definitions.

Similar to employee rules, above, these rules apply to entire labor categories.

Since the first schedule you produce will be without employee names, you do not need to make any changes to this form. For now just look this form over to become familiar with it before moving on. Detailed information about each of the entries on this form can be found in the *Settings* chapter.

Enter your positioning guides

The *Positioning guides*, shown below, are the heart of ESP's scheduling process. They directly control the number and placement of your staff, so care must be taken to design guides that reflect the productivity of your staff. You can access the POSITIONING GUIDES from the *Staffing* group or by selecting FORM | OTHER FORMS | POSITIONING GUIDE from the menu.



The number of guides you need depends upon your individual location. You may wish to have separate guides for your day-time staff versus evening/weekend staff. This is common in locations where the evening/weekend staff is primarily students or other part-time help whose productivity level is not as high as full time staff.

To help in designing guides, the toolbar includes options to easily *Add* and *Delete* guides. Tabs along the top of the screen allow you to easily identify and move between guides.

Each guide is divided into three sections: *Name and description*, *Times*, and *Staffing levels*.

Name and description

Fill in a name for the guide in the box at the top. This name will appear on the guide's tab. Next enter a more descriptive name in the box at the bottom of this section and enter the average check for the time that this guide is active in the *Average check* box.

Times

Fill in the days and times that you want this guide to be used in the *Times* section. Make sure that you have a guide defined for every day and hour that your operation is open. Be careful not to overlap charts; that is, make two guides valid at the same time.

Staffing levels

This section is separated into two tabbed sections: *Entries* and *Graph*.

Entries

The *Entries* section is used to define the number of crew and their placement at various volume levels.

The top row of this section displays headings for information including *Volume*, in sales or transactions; *Stations*, comprised of the variable hour stations, as set up on the *Stations* form; and the *Totals* columns, which display the total crew to be scheduled and the volume per man hour for each volume level.

Just to the right of the volume rate is the *Allowed Reduction (A.R.)* field. The A.R. field allows you to specify how understaffed you are willing to be during short sales peaks. As a general rule a setting of 0 (zero) during low sales levels and 1-2 during high sales levels produces the best effect. For a detailed description of the *Allowed reduction* field, see the *Staffing* chapter.


Across the middle of the screen, each row specifies the number of crew required to service the row's hourly volume. For example, the first entry in our chart says that for hourly sales of up to \$149, we require three people: one Drive-thru, one Counter, and one Kitchen. The second line says that for sales from \$150 (where the last line left off) to \$230 per hour, we require four people: one Drive-thru, one Counter, and two Kitchen.

You can change each volume rate and staff requirement individually, or you can quickly modify an entire chart by using the toolbar option *Adjust by_ %*. For example, if you enter 15 in this field, the volume for each level would be increased by 15%. This would have the effect of reducing your labor required by allowing the same number of crew to be scheduled for a higher volume level. Entering a negative number has the opposite effect: it would reduce the volume that can be handled by a given number of crew. You can also use this method to adjust the charts when there is a price change. For example if you increase your menu prices by an average of 3% you can easily adjust your *Positioning guides* by entering 3 in the *Adjust by_ %* field.

Graph

The *Graph* view displays the *Positioning guide* entries in an easy-to-read graphical format. If your guide is well-designed the graph will show a gradual slope upwards as you move to the right. This indicates that as you add more staff your productivity increases. A graph with dips and/or spikes indicates that your guide is requesting too many or too few people.

The graph also displays a recommended *optimum* of your guide entries, by smoothing out any dips and spikes. You can automatically update your guide to the recommended optimum using ESP's *Labor optimizer* option on the toolbar.

 *When you use the labor optimizer, ESP simply calculates what it thinks are the best values for your guide based on the existing entries. While this should result in a better guide than your original one, use your own experience to determine if further adjustments are needed to produce a perfect schedule.*

Determine the shift lengths you wish to use

In order for ESP to generate shifts, you must specify *when* to generate shifts, and the *lengths* of shifts to schedule. ESP allows you to use different lengths of shifts throughout the day and week. Use the SHIFT LENGTHS form to define your shift lengths. You can access this form from the *Settings* group or by selecting FORM | OTHER FORMS | SHIFT LENGTHS from the menu.

You can set up as many shift length charts as you like, however, two or three should be sufficient. You may easily add or remove charts using the toolbar options *Add guide* or *Delete guide*.

Each chart is divided into three sections: *Name & description*, *Times*, and *Shift lengths permitted*.



Description

Enter a name for the chart in the top box and a longer, more descriptive statement about the chart in the comments box below. The name will appear on the chart's tab at the top of the screen and allows you to quickly identify and move between charts.

Times and shift lengths permitted

ESP allows you to use different lengths of shifts throughout the day and week. Many operations prefer to schedule longer shifts for their day staff and shorter shifts for their part-time staff.

For each chart, enter the days and times that it is to be used in the *Times* section and the shift lengths that you want scheduled during that time in the *Shift lengths permitted* section. Shift lengths can range from 2 hours to 12 hours and can be entered in quarter hour increments. Give each shift length a priority from 1 to 10: Give the shift length you want used most often a priority of 1, the next most preferred shift length a priority of 2, and so on.

Refer to the sample shift length chart above. This chart is in effect from 5:00 AM until 7:00 PM every day of the week. The highest priority (#1) has been placed on an 8-hour shift length; the 7.5-hour shift length has been given a priority of 2, and 7 hours a priority of 3. If all three shift lengths were equally desirable you could give all three of them a priority of 1. No other shift lengths will be produced during this time.

You can have multiple charts active at the same time. In fact, this may be necessary to allow ESP to cover your peak hours without wasting labor. Using the *Openers* example above, this chart is in effect until 7:00 PM each day and allows long 7- to 8-hour shift lengths. But, if you have a short lunch rush around noon, and if the above chart was the only active chart, ESP would have to

schedule additional 7- and 8-hour shift lengths to cover the 1 or 2 rush hours. This would potentially waste a great deal of labor. To accommodate this situation, design a separate chart that is active between 11:00 AM and 3:00 PM, which requests shorter 3 to 4 hour shift lengths. This allows ESP to schedule shorter shifts to cover the lunch rush. Allowing short shifts only during specific times of the day gives ESP the ability to cover peak hours without wasting labor while ensuring that you are not under-scheduled when you need your people most.

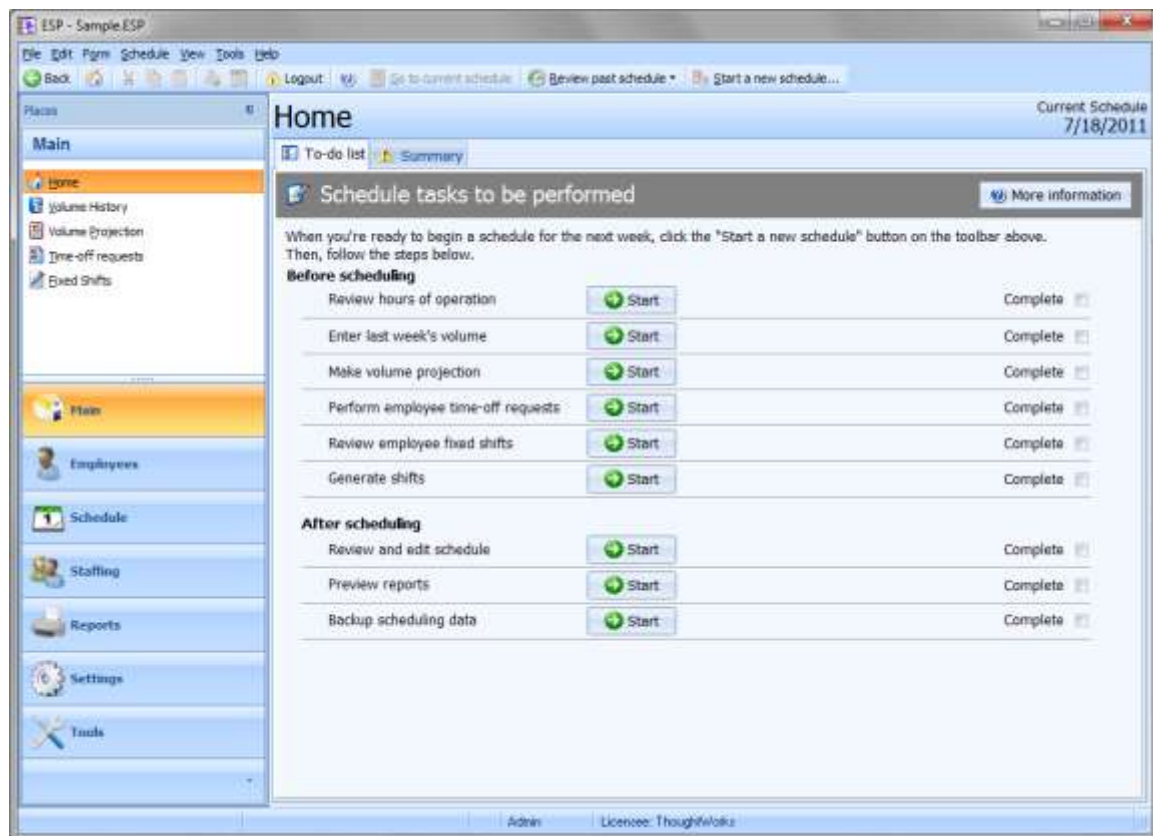
Ready to move on

You have now completed setting up the basic forms that ESP uses to generate a schedule. The above steps are only needed when you first set up ESP: They do not need to be done on a weekly basis. However, you should be reviewing these charts from time to time to keep them up to date.

Before continuing to the *Other information* section of the *Initial tasks list* we will look at the standard procedures that you will be following each week and generating a schedule without names.

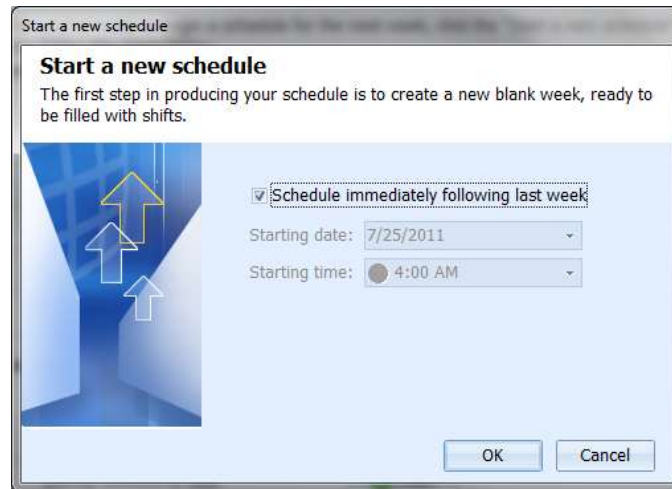
Preparing a weekly schedule

From the toolbar of the HOME form select VIEW | WEEKLY TASK LIST this will open the *To do list* of tasks that you will follow each week when preparing your schedule, shown below. This is the task list that you will see when you open ESP in future and are displayed to help you generate a complete and accurate schedule.



These tasks are grouped into two sections: *Before scheduling* and *After scheduling*. All of the tasks listed are discussed in detail in the following chapters: We just cover the basics below.

To begin your first schedule open the HOME form and choose the *Start a new schedule* option on the toolbar. The *Start a new schedule* window, shown below, will be displayed.



For this first schedule leave the information unchanged and just select the *OK* button. Doing so will prepare a new, blank scheduling week, ready to be filled with shifts. You will be returned to the *To do list*.

Step 1: Review hours of operation

The first item on the *To do list* is to verify that your *Hours of operation* are correct. Since we have just recently set up this form it's not really necessary to review it, but you should, if only to make it a weekly habit. Click the *Start* button beside the task, and the HOURS OF OPERATION form will be displayed. When complete, click the *Home* button on the toolbar to return to the HOME form. Then, mark the task as complete.

Step 2: Enter last week's volume

Click the *Start* button beside the *Enter last week's volume* task. The VOLUME HISTORY form, shown below, will be displayed. Each week before you begin producing a schedule, you will need to enter the actual hourly volume from the previous week. This information gives ESP a way to forecast volume for future schedules.

For this first schedule we will enter last week's actual volume only. After you have generated a schedule, without employee names, you will return to the *Initial set-up tasks* list where you will be entering a few more weeks of actual history into ESP's data file.

This form is divided into two sections:

Volume History 7/4/2011 Current Schedule 7/18/2011

Comments
Week of Monday, July 04, 2011
Sunny hot week.

Hour	Mon	Tue	Wed	Thu	Fri	Sat	Sun
4:00 AM	\$92.00	\$28.00	\$39.00	\$20.00	\$262.00	\$224.00	\$41.00
5:00 AM	\$83.00	\$65.00	\$26.00	\$32.00	\$88.00	\$58.00	\$114.00
6:00 AM	\$113.00	\$132.00	\$178.00	\$161.00	\$134.00	\$157.00	\$119.00
7:00 AM	\$206.00	\$259.00	\$190.00	\$270.00	\$350.00	\$457.00	\$275.00
8:00 AM	\$256.00	\$180.00	\$297.00	\$264.00	\$315.00	\$390.00	\$283.00
9:00 AM	\$242.00	\$274.00	\$302.00	\$409.00	\$426.00	\$733.00	\$577.00
10:00 AM	\$255.00	\$250.00	\$169.00	\$399.00	\$305.00	\$650.00	\$505.00
11:00 AM	\$354.00	\$458.00	\$499.00	\$577.00	\$647.00	\$639.00	\$430.00
12:00 PM	\$802.00	\$840.00	\$1,107.00	\$718.00	\$906.00	\$949.00	\$560.00
1:00 PM	\$611.00	\$653.00	\$544.00	\$646.00	\$720.00	\$824.00	\$745.00
2:00 PM	\$502.00	\$444.00	\$451.00	\$419.00	\$459.00	\$653.00	\$584.00
3:00 PM	\$352.00	\$388.00	\$390.00	\$398.00	\$461.00	\$468.00	\$394.00
4:00 PM	\$376.00	\$340.00	\$489.00	\$417.00	\$491.00	\$295.00	\$324.00
5:00 PM	\$378.00	\$504.00	\$532.00	\$522.00	\$656.00	\$512.00	\$489.00
6:00 PM	\$414.00	\$514.00	\$624.00	\$545.00	\$539.00	\$528.00	\$439.00
7:00 PM	\$378.00	\$438.00	\$576.00	\$555.00	\$588.00	\$529.00	\$552.00
8:00 PM	\$463.00	\$463.00	\$608.00	\$568.00	\$513.00	\$453.00	\$552.00
9:00 PM	\$540.00	\$535.00	\$466.00	\$417.00	\$582.00	\$422.00	\$523.00
10:00 PM	\$456.00	\$419.00	\$403.00	\$311.00	\$525.00	\$377.00	\$444.00
11:00 PM	\$274.00	\$269.00	\$364.00	\$336.00	\$531.00	\$455.00	\$293.00
Weekly total:	\$64,805.00						

1. **Date and comments:** Use the DISPLAY WEEK drop down calendar to select the week of sales or transactions that you wish to enter. Remember that this is last week, not the date of the current schedule. Use the larger comment box to record conditions such as weather, promotions, and other factors that may have affected your volume. These comments can assist you in deciding which weeks to include when projecting volume for scheduling weeks in the future.
2. **Volume (Sales or Transactions):** you defined your preferred default view (Sales or Transactions) in the PREFERENCES form during the initial set-up earlier. This area is set up in a table format with the days of the week displayed along the top row and the weekly total at the bottom. Each hour of the day is displayed on its own row. A blank field indicates no information is on file or your location was not open during that hour. Scroll down the form to view a daily total.

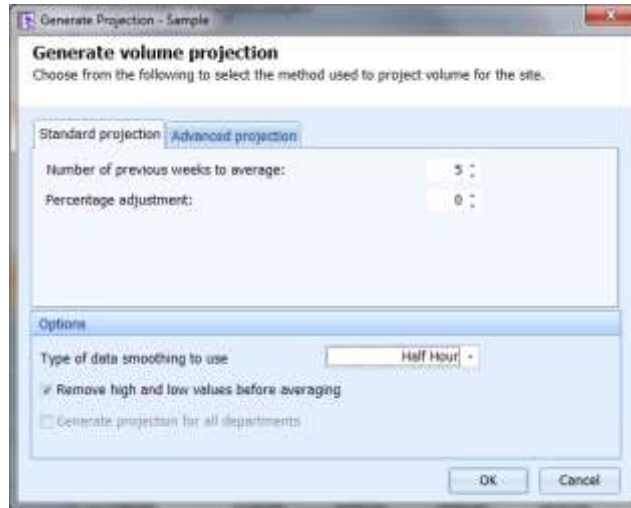
Enter reasonable hourly volume values for your location, using the form much like a spreadsheet. Once complete, return to the *To do list* by selecting the HOME form from the *Main* group, or by selecting the *Home* icon on the toolbar. Then, mark the task as complete.

You can choose to enter your volume in whole hour, half hour or quarter hour detail. The default view is whole hours. To change this click on *Volume | View detail by* on the toolbar. Then select either half hour or quarter hour view. When you click the Expand/Contract all button on the toolbar, your selected level of detail will be displayed.

Step 3: Make volume projection

Once you have entered last week's volume, you will project volume for the coming week. Click the *Start* button beside option 3: *Make volume projection* from the *To do list*.

The VOLUME PROJECTION form will open, which looks similar to the Volume History form. As you have not yet made the volume projection a blank form will be displayed. Select the *Generate projection* option on the toolbar and the *Generate Volume Projection* window will be displayed, as shown below.



For this initial schedule, since we only have the one week of actual history on file, use the default settings and press the OK button. ESP will calculate your projection, and return you to the VOLUME PROJECTION form, this time with values entered for each of the hours that your location is open. These values will be used to generate shifts for the next schedule.

Hour	Mon	Tue	Wed	Thu	Fri	Sat	Sun
4:00 AM							
5:00 AM							
6:00 AM	\$78.67	\$96.34	\$114.99	\$117.67	\$126.00	\$169.67	\$61.33
7:00 AM	\$179.67	\$236.00	\$237.00	\$203.00	\$259.33	\$280.34	\$173.00
8:00 AM	\$259.32	\$245.00	\$289.67	\$304.66	\$379.67	\$437.34	\$295.01
9:00 AM	\$217.00	\$255.66	\$249.01	\$303.33	\$369.99	\$650.67	\$426.01
10:00 AM	\$214.00	\$202.68	\$242.33	\$256.68	\$269.33	\$625.66	\$499.66
11:00 AM	\$549.33	\$595.33	\$713.33	\$666.67	\$656.99	\$625.99	\$396.00
12:00 PM	\$655.67	\$801.33	\$872.34	\$914.68	\$854.34	\$833.33	\$723.67
1:00 PM	\$591.99	\$580.01	\$670.67	\$593.32	\$671.00	\$966.33	\$794.33
2:00 PM	\$464.67	\$445.66	\$422.67	\$356.66	\$486.34	\$737.34	\$533.00
3:00 PM	\$348.34	\$375.99	\$401.67	\$395.34	\$431.01	\$669.33	\$546.01
4:00 PM	\$351.34	\$298.66	\$452.32	\$450.34	\$449.34	\$572.67	\$604.68
5:00 PM	\$393.00	\$553.00	\$581.34	\$538.34	\$659.67	\$607.33	\$573.00
6:00 PM	\$455.33	\$576.00	\$628.00	\$536.67	\$652.32	\$721.34	\$591.33
7:00 PM	\$320.68	\$468.00	\$566.00	\$476.66	\$639.67	\$581.01	\$448.00
8:00 PM	\$331.32	\$332.00	\$427.34	\$418.33	\$576.67	\$426.34	\$419.33
9:00 PM	\$288.66	\$375.00	\$430.99	\$446.67	\$588.00	\$354.66	\$359.00
10:00 PM	\$247.67	\$254.67	\$294.33	\$297.01	\$470.33	\$332.00	\$242.00
11:00 PM					\$425.00	\$363.67	
12:00 AM							
Weekly total:	\$54,113.40						

You are now ready to review and modify the projection so that it closely follows your own operation's volume. You may change any hourly, daily, or even a weekly total; you can also expand one hour using the + sign in the hour field to review and modify quarter-hour amounts. To expand or contract all the hours on the screen at once use the toolbar option *Expand/Contract all*.

When you change an hourly total, each quarter-hour amount will be adjusted proportionately. If you change a daily or weekly total, all of the amounts for that day or the week are adjusted. You can even adjust parts of a day or week by highlighting the section you want to change and choosing the *Adjust by %* option on the toolbar. Enter the percentage that you want the selection changed by, and then select the *Go* button to adjust the highlighted section by that percentage.

When you are satisfied with the projection, return to the *To do list* and check off this task.

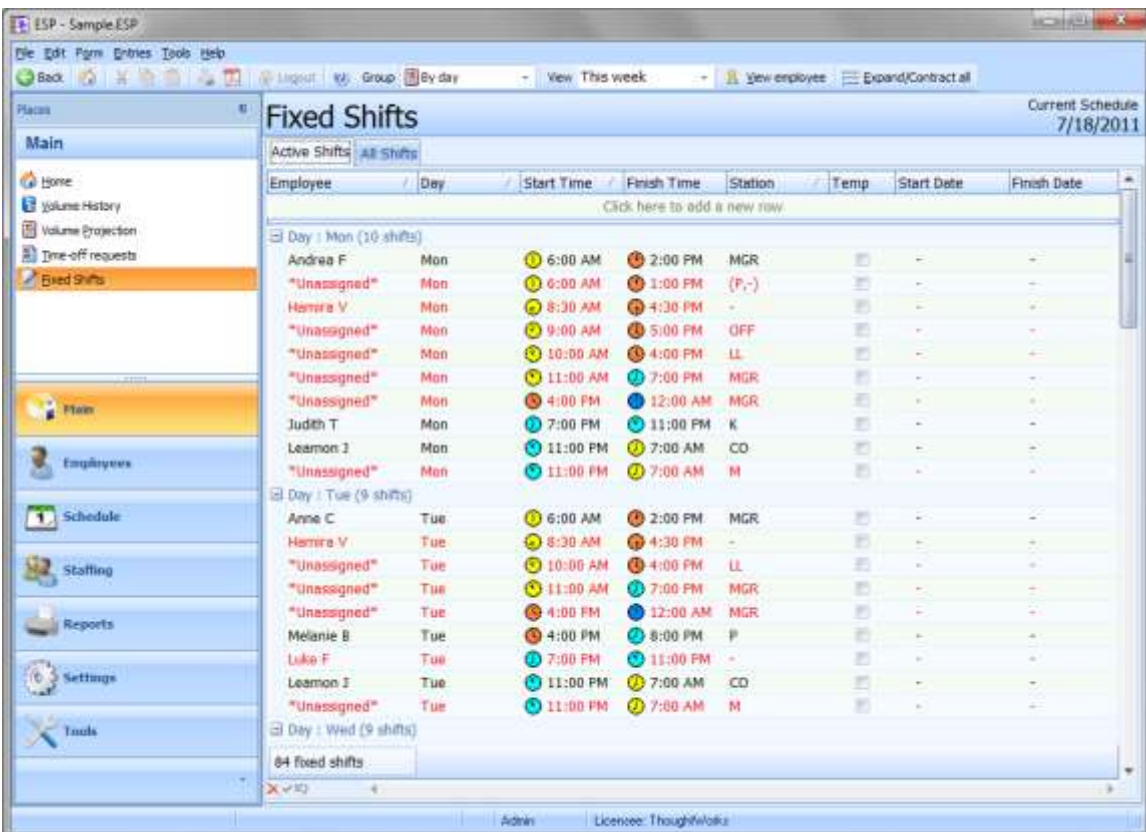
Step 4: Perform employee time-off requests

During this step in the weekly scheduling process you will normally review three different forms. The *Start* button of this task takes you directly to the TIME-OFF REQUESTS form: However, since you are not entering employees until later in the tutorial, and no employees are on file, you can skip this step. For detailed information on the TIME-OFF REQUESTS form see Chapter 2, *Main*.

Additionally, you will often review your employee information directly by choosing the EMPLOYEES choice from the navigation bar. This form is discussed later in this chapter since the first schedule you produce will be without employee names.

Step 5: Review employee fixed shifts

The final form to review during this step is the FIXED SHIFTS form, shown below, which you can open from the *Main* group or by selecting FORM | OTHER FORMS | FIXED SHIFTS from the menu.



There are two types of fixed shifts that you can request:

1. **Fixed shifts that any employee can fill:** If you require a specific shift but not a particular employee to work it. ESP will place the shift, and then assign a qualified and available employee. This is called an UNASSIGNED fixed shift.
2. **Fixed shifts assigned to an employee:** In this case you specify a fixed shift that requires a specific person. These may include your managers, full-time maintenance people (if you use them), and possibly some of your day staff. You can enter these shifts on the FIXED SHIFTS form and assign them to the appropriate employees. You may also enter these types of fixed shifts on each employee's individual form. However, if you have a large number of pre-assigned fixed shifts, entering them on the FIXED SHIFTS form will save you time: You won't have to open and close each employee's individual form.

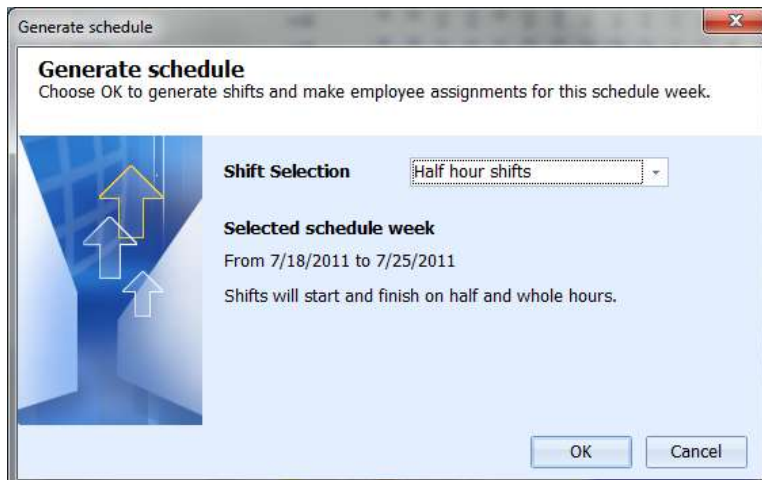
Options on the toolbar allow you to view the entries in different ways. Use the *Group* option to view your shifts grouped *By employee* (all shifts for a given employee organized under his or her name) or *By day* (all shifts for a given day organized under the day name). You may also choose to view either the current week's entries, or all upcoming entries by choosing the *This week* or *All entries* option from the *View* option. Since you can specify shifts that occur on future dates (for example, an upcoming month's worth of management shifts), it is often best to view just the entries applicable to the current week to avoid screen clutter.

To add a new entry, click inside the top row labeled *Click here to add a new row*, and enter the information. Save your entry by moving off the row or by selecting the *Post* button at the bottom of the form. To modify an entry, click inside the field you wish to change, make your change, and then save it by moving off the field or by selecting the *Post* button. To delete a row, click on a field inside the row you want to remove and select the *delete record* button at the bottom of the form.

Since the first schedule you produce will be without employee names, you will not be able to add any shifts that are assigned to a particular employee. However, if you have any non-employee specific fixed shifts, enter them here. Once you have generated this first schedule any entries that you made on this form will appear as **Unassigned** on the SCHEDULE form. You may now return to the *To do list* and mark this step complete.

Step 6: Generate shifts

You are now ready to produce a schedule with shift lines drawn but no names assigned. This will allow you to fine-tune the schedule prior to entering all your crew and their availability information. Select the *Start* button for task 6. *Generate shifts*, and the *Generate schedule* window, below, will be displayed.



The first time you generate a schedule you will select the type of shifts that you want ESP to generate from the *Shift selection* box. Choose from:

- ✓ **Quarter hour shifts:** allows ESP to start and finish shifts on quarter, half and whole hours;
- ✓ **Half hour shifts:** allows ESP to start and finish shifts on half and whole hours; or
- ✓ **Whole hour shifts:** allows ESP to start and fish shifts on whole hours only.

After making your shift selection, press the OK button. ESP will immediately begin generating your weekly schedule. A progress bar will show the progress of the schedule being generated and when finished, the completed schedule will be displayed, ready for editing or printing.

Congratulations! You've generated a schedule!

You have just generated your first schedule. Before we move to the next step, you should carefully examine the schedule you produced.

As you have not yet entered your employee information, the schedule will display only **Unassigned** shifts. These shifts have been generated from entries on the SHIFT LENGTHS forms, the POSITIONING GUIDES, and the HOURS OF OPERATION form.

Check the number of employees scheduled at each station for the volume projected. If there are too many or too few then you probably need to adjust the POSITIONING GUIDES so that ESP schedules the correct number of crew at the correct stations. However, before adjusting the *Positioning guides* read the information in the *Staffing* chapter as it provides more detailed information on this form than in this chapter.

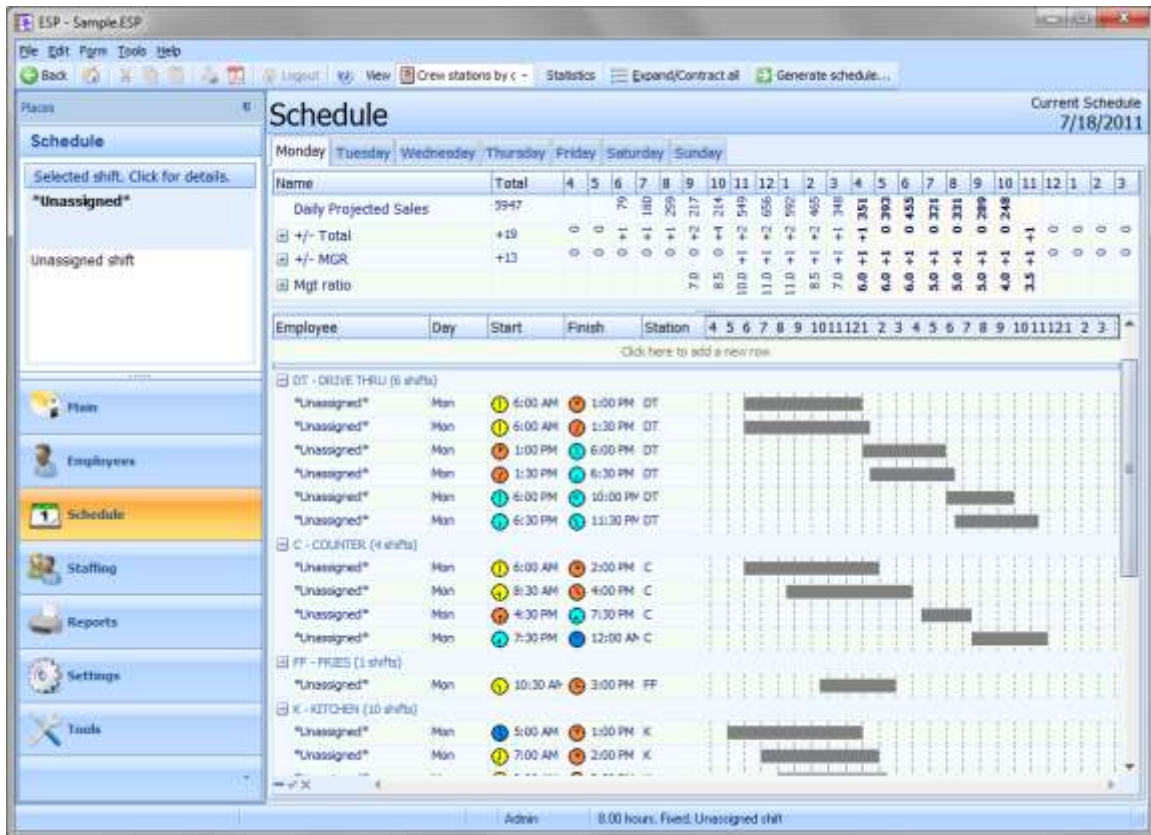
Also look at the shift lengths that were generated. If the shift lengths are not correct, then you should examine the SHIFT LENGTHS form. Before making changes to the SHIFT LENGTHS forms read the information in the *Settings* chapter as it provides more detailed information than that found here. You should be satisfied with the shift placement before you begin entering your employees.

Editing your schedule

Each week, once the schedule has been generated, you will review it to make minor adjustments and finishing touches.

One of the most powerful features of ESP is the ability to see and change the schedule on screen at any time. You may change shift times, stations, and employee assignments. You may add new shifts and remove unwanted ones. You can alter the schedule in almost any way. However, if you spend a great deal of time editing, you should spend some time reviewing your data so that ESP automatically generates a more workable schedule. As a general rule if you spend more than 45 minutes editing, you should review your charts for accuracy.

You perform editing tasks on the SCHEDULE form, shown below, before you print and post your schedule. If you're not already viewing the schedule, you can display it by clicking the *Start* button beside *Step 1: Review and edit schedule* in the *After scheduling* section on the *To do list*, or by choosing the *Schedule* choice in the places panel on the left.



The SCHEDULE form provides different options for viewing the schedule and allows quick and easy access to helpful information. The form is divided into four areas with the main area displaying all the assigned shifts. Three other areas, *Statistics*, *Employee list*, and *Shift details* contain information to help you edit the *Shifts* area.

Shifts

You can display the shifts area in different ways by clicking the drop-down list beside the *View* option on the toolbar. You can view:

1. **Shifts by Day**, which displays your schedule, grouped by day, with each of your shifts sorted chronologically by station. Details about each shift are displayed on the left side of the form with a graphical display of the shift appearing on the right side.
2. **Shifts by employee**, which is an alphabetical list of each employee's shifts for the whole week. As this is a weekly view, no graphical line bar appears.
3. **Errors**. The *Errors* view allows you to see all shifts that have errors or violations in one place. You can then quickly correct any problems associated with the shift.

Statistics

ESP displays statistics in two areas: a *Totals section* located at the top of the screen above the *Shifts* area; and on a separate *Statistics* screen, which can be opened by pressing the *Statistics* toolbar button. Both areas display live information, which is updated automatically as you edit your schedule.

Totals

When viewing your schedule as *Shifts by day*, the *Totals* area displays a comparison of the projected-to-actual hourly labor for each hour of the day and the projected-to-actual station labor for each hour of the day for the station that you are editing. When viewing your schedule as *Shifts by employee*, weekly comparisons will be displayed in the *Totals* area. You can expand the *Labor* and *Station labor* options using the [+] (plus sign) to view projected to actual differences.

The screenshot shows the 'Schedule' window in the ESP software. The main area is a table with columns for days of the week (Monday to Sunday) and hours (1-23). Rows include 'Daily Projected Sales', '+/- Total', 'Daily Projected Labor', 'Daily Actual Labor', '+/- MGR', 'Daily Projected Labor', 'Daily Actual Labor', 'Mgt ratio', 'Managers', and 'Crew'. Below this, there are sections for 'OT - DRIVE THRU (0 shifts)' and 'C - COUNTER (4 shifts)', each listing shifts with start/finish times and employee assignments represented by colored bars.

Statistics

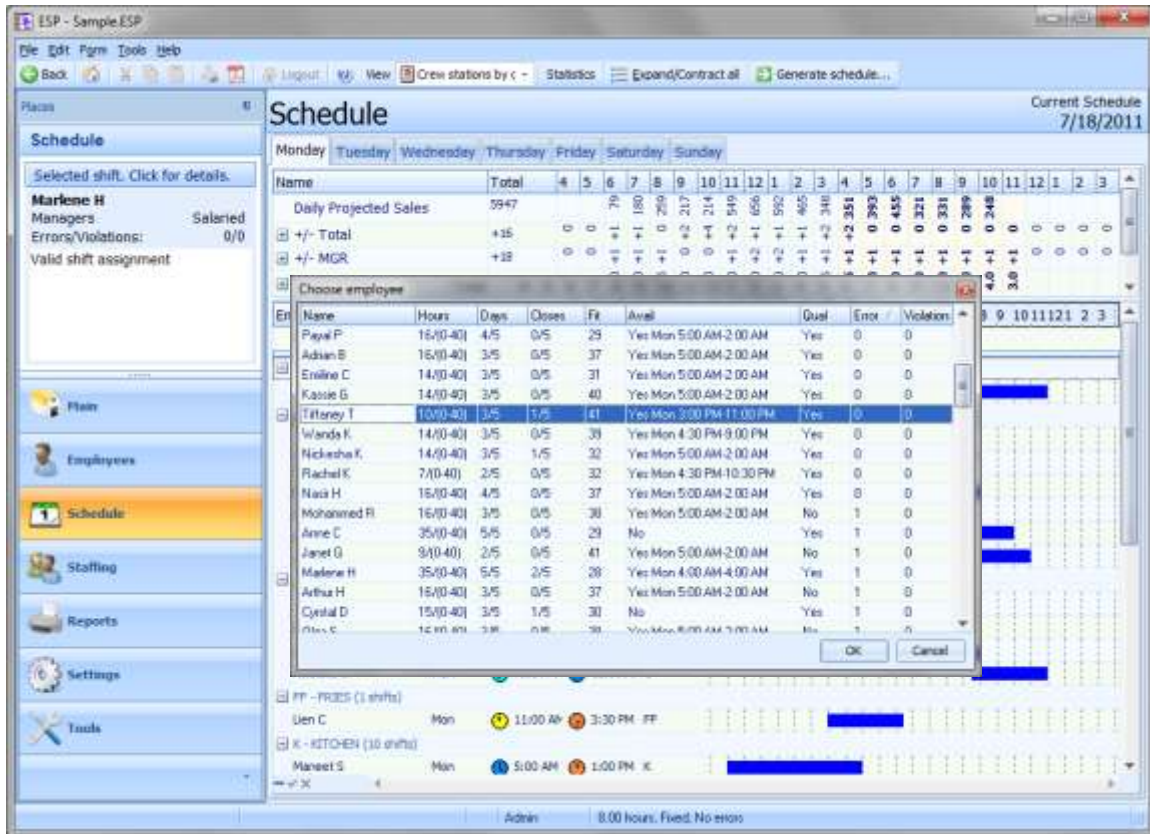
When you select *Statistics* from the toolbar, ESP will display a complete labor summary, as shown below. This summary includes daily and weekly labor cost, labor percent, hours, sales and transaction counts per man hour. The information is live and updated as you edit the schedule, so that you can see the effect that your edit changes have on your labor costs.

Statistics	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Weekly
Volume	\$7,529.96	\$9,892.64	\$1,990.69	\$7,598.90	\$6,202.40	\$6,826.06	\$7,543.96	\$54,694.23
Variable hours	128.50	153.50	160.00	137.00	126.00	140.50	142.00	987.50
Non-variable hours	24.00	26.00	32.00	36.50	32.00	46.00	29.00	224.50
Paid breaks	1.00	1.75	1.75	2.00	1.00	3.00	1.00	13.50
Unpaid breaks	5.86	13.79	24.79	12.13	11.64	9.31	10.47	77.99
Wage hours	156.64	155.71	177.21	161.37	146.36	176.19	180.13	1,124.01
Average wage	\$9.97	\$9.41	\$9.48	\$9.44	\$9.16	\$8.15	\$8.59	\$9.03
Labor cost	\$1,405.82	\$1,470.94	\$1,690.72	\$1,523.61	\$1,340.22	\$1,436.22	\$1,379.60	\$10,237.12
Labor %	18.67	16.59	16.82	20.13	21.61	20.70	18.17	18.72
SPMH	\$48.07	\$56.96	\$56.38	\$46.91	\$42.38	\$38.38	\$47.31	\$48.23
TPMH								
Variable salaried		0.00	0.00	0.00	0.00	0.00	0.00	0.00
Non-variable sal.		24.00	26.00	24.00	24.00	16.00	24.00	128.00
Total salaried		24.00	26.00	24.00	24.00	16.00	24.00	128.00
Unassigned	13		1	1	2	3		20
Errors								
Total shifts	27	32	33	33	29	37	35	226

Employee list

When selecting an employee to fill a shift, as shown below, you are given two options:

1. **Drop-down list (arrow) button:** select this option to open an alphabetical list of all employees on file.
2. **Additional (...) button:** select this option to display a list of employees with additional information to help you determine the best employee to fill a shift. See below.

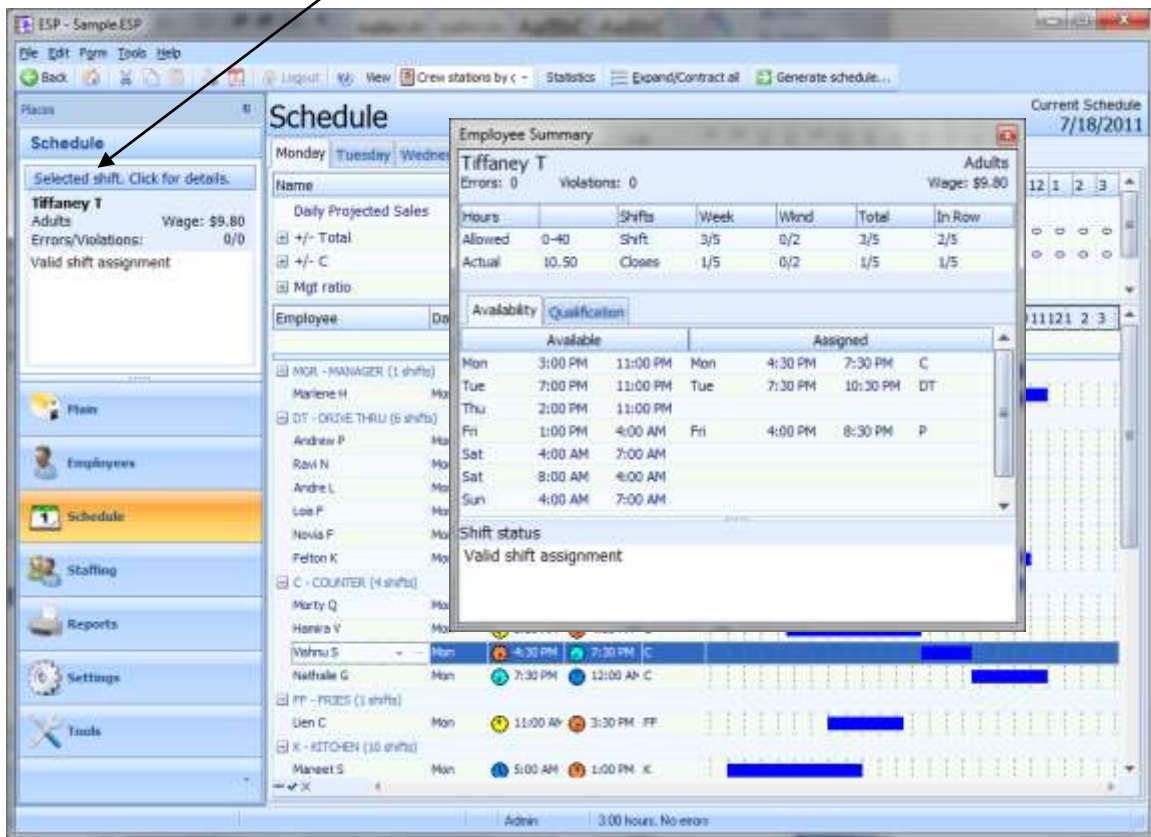


You can edit a shift's information by selecting the field that you wish to change, and either entering the information directly, or clicking on the drop-down list to display a selectable list of entries.

Status

When editing the schedule, a *Status* box appears at the top of the PLACES panel. The status box displays information about the shift that you are currently editing. This information can help you determine why a shift may be unfilled or why the listed employee may not be the best person to fill the shift.

To help you further, clicking on the *Selected shift. Click for details* bar at the top of the status as shown below, pops up complete details about the employee.



The EMPLOYEE SUMMARY window displays the shifts assigned to the employee and his or her availability, minimum and maximum hours. This information is live and will be updated immediately to reflect changes that you make on the editing screen or on the employee's information screen.

Before leaving this screen, try making a few changes to become familiar with this form. For example, change the start or end time of a shift and remove and/or add a shift. Observe how the statistics are updated to reflect your changes.

Continuing the initial set-up

Now that you have created a schedule and are more familiar with the forms that ESP uses, it's time to finish the initial set-up. Return to the HOME form and then select the toolbar option VIEW | INITIAL SET-UP TASKS LIST and move down to the *Other information* section.

Entering your employees

In order for ESP to assign employees to shifts, you must enter your employees into ESP's files. ESP stores a separate record for each employee that includes information such as when the employee is available, which stations the employee is qualified to work and the maximum number of hours and days the employee can work per week.

Depending on how many people you employ, entering them may take a couple of hours or longer so you may wish to split the process into a couple of sessions.

To begin entering employees, click the *EMPLOYEES* group on the *PLACES* panel. A sample employee form is shown below.

The screenshot shows the 'ESP - Sample.ESP' application window. On the left is a 'Places' panel with a list of 98 employees, including Adrian Beck, Ahmed K, Alexandro W, Amedka S, Amorosa G, Amy K, Andre L, Andrea F, and Andrew P. The '98 Employees' group is selected. The main window displays the 'Adrian Beck (Adrian B)' form. The form has a toolbar at the top with 'Add employee' and 'Terminate employee' buttons, and an 'Employee filter' field. The form is divided into four tabs: 'General', 'Availability', 'Stations', and 'Other'. The 'General' tab is active, showing fields for Name (Adrian Beck), Schedule name (Adrian B), Hire Date (10/24/2000), Release Date, Pay (Wage), Address/phone, City/State/Zip, Phone #(s), E-mail, Gender (Not specified), ID (67), Birthdate, Full time, and Certified Manager. A 'Photo' field is also present. The bottom status bar shows 'Adrian' and 'Licensee: ThoughtWorks'.

The toolbar has options for *Adding* or *Terminating* employees. There is also an *Employee filter* option, which allows you to easily search for a particular employee.

The *EMPLOYEE* form is divided into four tabbed sections: *General*, *Availability*, *Stations*, and *Other*. Following is a brief description of each field, by section. For detailed information on this form see the *Employees* chapter.

General

The *General* section is used to store general information about each employee. The field names in **blue** below are required and may not be left blank. The field names in black are optional.

Details

- ✓ The **Name** field is used to store the employee's name; each employee must have a unique name. The name fields are filled in automatically when you first add the employee.
- ✓ The **Schedule name** is a unique short form, generally made up of the employee's first name plus the initial of the employee's last name. The *Schedule name* is printed on many ESP reports.
- ✓ The **Hire date** field is used to indicate the hiring date of the employee and is filled in automatically when you add the employee.
- ✓ The **Release date** field is used to indicate the date the employee leaves your employ.

- ✓ The **Pay** field is used to indicate if the employee is paid a wage or a salary.
- ✓ The **Labor category** is the employee's labor category, which is specified when you add the employee.
- ✓ The **Team** field will only be visible if you have set up TEAM forms, which are found in the *Staffing* group. If this option is displayed, select the team number that the person belongs to. If the person does not belong to a team, choose *No team*.

Please read the *Staffing* chapter before assigning your employees to teams.

- ✓ The **Wage** field is only visible if the employee is paid an hourly wage. This information is used in statistics and reports.

Address/phone

- ✓ The **Address and phone** fields store the employee's contact information.

Other

- ✓ The **E-mail** field stores the employee's e-mail address. You can send each employee their weekly shift assignment by e-mail if there is an entry in this field from the *E-mail reports* under the *Reports* group.
- ✓ The **Gender** field by default is set to *Not specified*. Select the correct option from the drop down list.
- ✓ The **ID** field stores the employee's ID or badge number.
- ✓ The **Birth date** field stores the person's birth date. This is displayed on the *Employee birthday* report found in the *Employee reports* under the *Reports* group.
- ✓ **Full time** indicates if this employee is employed on a full time basis.
- ✓ **Certified shift manager** indicates managers who have completed their training and are certified to be able to run their own shifts.
- ✓ The **Photo** field can be used to store a photo of the employee. Paste a photo from your clipboard.

Notes

- ✓ The **Notes** box on the right side of this screen can be used to make free-form notes about the person.

Availability

The information on the *Availability* screen, shown below, is used by ESP to schedule valid shifts for the employee.



This screen is divided into two areas: *Limits* and *Availability*.

Limits

The entries in the limit fields help control the maximum number of days and closing shifts the employee is allowed to work each week. These entries are originally filled in based upon the labor category that the employee has been assigned to. These fields should only be changed if the employee's limits are different. It is important to remember that ESP will never schedule an employee for more shifts than you allow here. Do not unnecessarily restrict the number of days or closes; maintain enough flexibility so that all of your shifts can be filled.

Hour limits

- ✓ **Min:** The minimum number of hours the employee is allowed to work per week.
- ✓ **Max:** The maximum number of hours the employee is allowed to work per week.

Shift limits

- ✓ **Week:** The maximum number of weekday shifts (Monday to Friday) or closes that the employee is allowed to work.
- ✓ **Weekend:** The maximum number of weekend shifts or closes the employee is allowed to work per week.
- ✓ **Total:** The total maximum number of shifts or closes in a week the employee may work; includes both weekdays and weekends. For example, you may specify that the employee can work 3 weekday and 2 weekend shifts but no more than a total of 3 per week.

- ✓ **In-row:** The maximum number of shifts or closes in a row that the employee is allowed to work.

Availability

The bottom section of this screen is used to enter the employee's availability. Each employee can have up to three different availability sets:

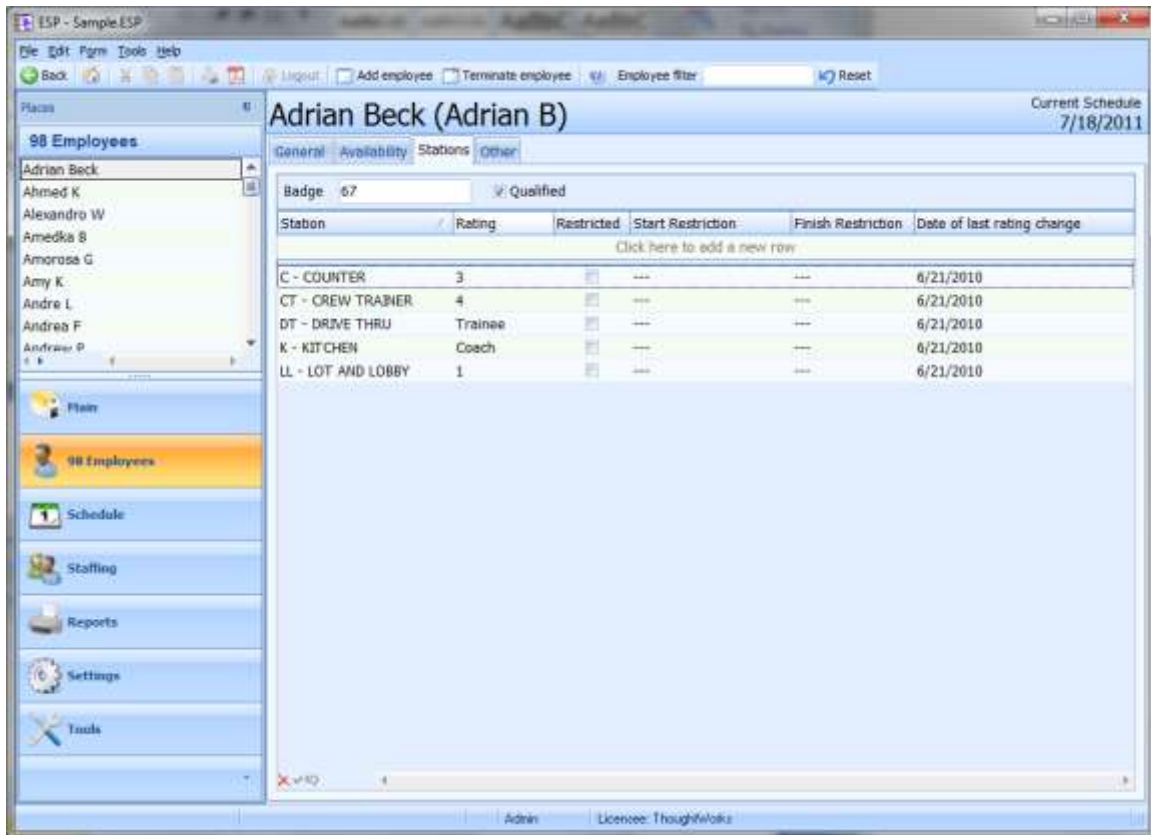
1. **Regular availability:** The employee's availability that will be used for most of the year.
2. **Alternate availability:** The employee's summer or alternate availability, if different from their regular availability. You can activate different availability sets at different times of the year. This is especially useful for students, who may have completely different availabilities during the school year than during non-school months. Rather than updating dozens of employees manually, you can specify that a group all use their alternate availability.
3. **Team availability:** Available only if you schedule using teams. When you assign the person to a team (on the *General* tab), that team's availability is automatically entered in the *Team availability* section.

For now, just work with the *Regular* availability. For each day that the employee is available, enter the following:

- ✓ **Day:** The day the employee is available to work.
- ✓ **Start time:** The time of day that the employee's availability begins for the day.
- ✓ **Finish time:** The time of day that the employee's availability ends for the day.
- ✓ **Type:** Indicates whether the employee is *Available* during this time, or if the entry is a *Day off* (temporary time-off request) or *Fixed shift*.
- ✓ **Department:** The site to which the availability or fixed shift applies. This is only visible if you schedule for multiple sites or departments.
- ✓ **Station:** This field is active only if the shift *type* is *fixed* and indicates the station that the employee works during the *fixed* shift.
- ✓ **Temp:** A checkmark in the *Temp* box indicates that the entry is for a temporary availability. You use temporary availabilities to indicate a temporary change to an employee's availability. For example, if the employee is normally available to work Saturdays, but wishes to book off the third Saturday in April to attend a wedding, you would enter a temporary time-off request by checking the *Temp* box, and entering the applicable dates in the *Start date* and *Finish date* fields, described below. Once the week that contains the temporary change has passed, the employee's availability will revert to normal.
- ✓ **Start Date:** Active only with temporary availability. This field is used to indicate the first date that this temporary availability is to be used.
- ✓ **Finish Date:** Active only with temporary availability. This field is used to indicate the last date that this temporary availability is to be used.

Stations

ESP will only assign employees to work at stations for which they are qualified. Use the *Stations* section of the EMPLOYEE form to specify the stations that the employee is qualified to work.



Enter the following information for each station:

- ✓ **Station:** Choose a station from the drop down list of all jobs. These are the stations that you have defined in the STATIONS form earlier.
- ✓ **Rating:** Rate the employee's performance for each station that he/she may work: Enter a rating between 1 and 4 or rate the employee as a Trainee or Coach.
- ✓ **Restricted:** Check this box to indicate that the employee is restricted from working the station at a certain time during the day
- ✓ **Start restriction:** Active only if the *Restricted* box is checked. This field Indicates the time of day that the employee's restriction from working this station begins.
- ✓ **Finish restriction:** Active only if the *Restricted* box is checked. This field Indicates the time of day that the employee's restriction from working this station ends.
- ✓ **Date of last rating change:** This is the date that their skill rating was last updated.

The *Qualified* checkbox at the top of the screen is used when scheduling multiple departments from a pool of employees as some employees will not be qualified to work at all locations. A checkmark in the box tells ESP if the employee is qualified to work at the location you are viewing; if the box is unchecked it means the person is not qualified to work at that location.

Breaks

The BREAKS forms, shown below, are used to specify the breaks that your employees are entitled to and whether or not the breaks are paid.

BREAKS are associated with *Labor categories* since employees in one labor category may be entitled to different breaks than those in other labor categories. For example, managers may have paid breaks while regular employees' breaks are unpaid. Likewise in some areas, younger employees are entitled to more or longer breaks due to their age.

Name	Start Length	Finish Length	Break Length	Paid
Click here to add a new row				
Short break	4.00	4.75	15	<input checked="" type="checkbox"/>
Meal break	5.00	8.00	30	<input checked="" type="checkbox"/>
Extra break	7.00	8.00	20	<input type="checkbox"/>

The fields that appear on this form are as follows:

- ✓ **Name:** Enter a name for the break, which can be up to 25 characters and is used to specify the break on the *Break report*.
- ✓ **Start length:** Enter the shortest shift length that is applicable to this break length.
- ✓ **Finish length:** Enter the longest shift length that is applicable to this break length.
- ✓ **Break length:** Enter the length of the break, in minutes.
- ✓ **Paid:** Place a checkmark in the box to indicate that the break is paid, leave the box unchecked if it is an unpaid break.

Generating a schedule with names

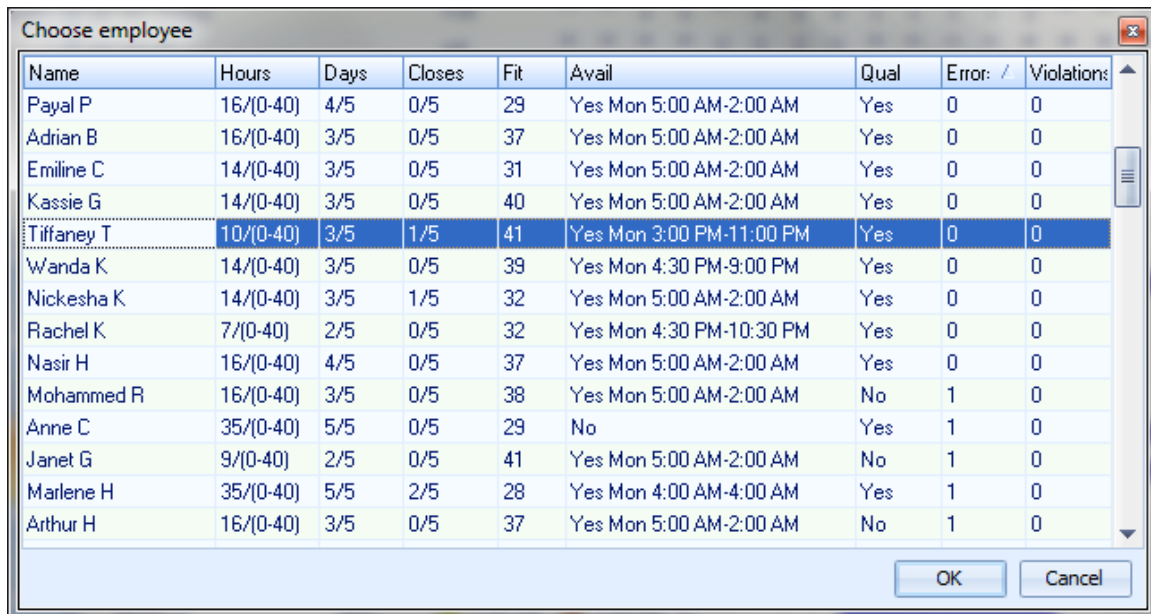
Once you have entered your employees, you can regenerate the schedule to fill the shifts with your employees. Open the SCHEDULE form from the PLACES PANEL or from FORM | SCHEDULE from the menu and then select the toolbar option *Generate schedule*. As you have already generated a schedule for this date, ESP will warn you that the newly generated schedule will overwrite your existing one. Choose *Yes* to continue.

ESP will take a few minutes to generate the schedule as it fills the shifts with your employees. Once the scheduling process is complete, you can view and edit the schedule on the screen.

You have already learned how to edit the schedule without employees. As you begin editing with your own employees you will be able to see how the *Statistics*, *Employee list* and *Status* areas help you edit the schedule. Let's edit a few shifts to see how these areas are affected while editing your actual employees' shifts.

To change the employee assigned to a particular shift, place your cursor in the employee field for the shift and begin typing the new employee's name. You will notice that as you type, the drop-down list of employee names opens to the first person whose name begins with that letter. You may then select the name from the list or continue typing it into the field.

If you are not sure which employees are available to fill a shift you can open the *Employee list* by selecting the additional (...) button beside the employee name. This option opens the *Choose employee* window, shown below, which lists all of your employees, with information to help you determine the best person to fill a shift.



The screenshot shows a window titled "Choose employee" with a table of employee data. The table has columns for Name, Hours, Days, Closes, Fit, Avail, Qual, Error, and Violations. The row for Tiffany T is highlighted in blue.

Name	Hours	Days	Closes	Fit	Avail	Qual	Error	Violations
Payal P	16/(0-40)	4/5	0/5	29	Yes Mon 5:00 AM-2:00 AM	Yes	0	0
Adrian B	16/(0-40)	3/5	0/5	37	Yes Mon 5:00 AM-2:00 AM	Yes	0	0
Emiline C	14/(0-40)	3/5	0/5	31	Yes Mon 5:00 AM-2:00 AM	Yes	0	0
Kassie G	14/(0-40)	3/5	0/5	40	Yes Mon 5:00 AM-2:00 AM	Yes	0	0
Tiffany T	10/(0-40)	3/5	1/5	41	Yes Mon 3:00 PM-11:00 PM	Yes	0	0
Wanda K	14/(0-40)	3/5	0/5	39	Yes Mon 4:30 PM-9:00 PM	Yes	0	0
Nickesha K	14/(0-40)	3/5	1/5	32	Yes Mon 5:00 AM-2:00 AM	Yes	0	0
Rachel K	7/(0-40)	2/5	0/5	32	Yes Mon 4:30 PM-10:30 PM	Yes	0	0
Nasir H	16/(0-40)	4/5	0/5	37	Yes Mon 5:00 AM-2:00 AM	Yes	0	0
Mohammed R	16/(0-40)	3/5	0/5	38	Yes Mon 5:00 AM-2:00 AM	No	1	0
Anne C	35/(0-40)	5/5	0/5	29	No	Yes	1	0
Janet G	9/(0-40)	2/5	0/5	41	Yes Mon 5:00 AM-2:00 AM	No	1	0
Marlene H	35/(0-40)	5/5	2/5	28	Yes Mon 4:00 AM-4:00 AM	Yes	1	0
Arthur H	16/(0-40)	3/5	0/5	37	Yes Mon 5:00 AM-2:00 AM	No	1	0

Select a shift and open the *Employee list*. You can sort this list by any of the columns by simply clicking on the column name. Most often, you will sort the list by the *Errors* column so that you have the best choices at the top of the list. The columns beside each name are:

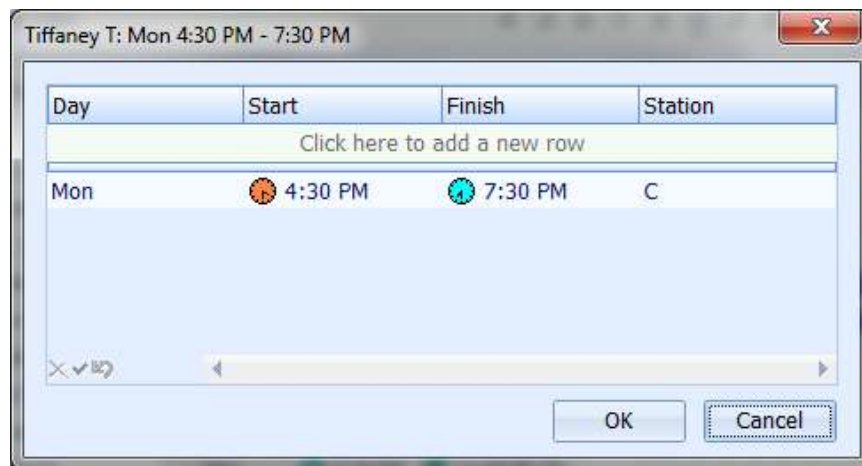
- ✓ **Hours:** Comparison of each person's scheduled to available hours.
- ✓ **Days:** Comparison of each person's scheduled to available days.
- ✓ **Closes:** Comparison of each person's scheduled to available closes.

- ✓ **Fit:** A rating that indicates how good a fit each person is to cover the shift; the higher the number the better choice the person is to fill the shift.
- ✓ **Avail:** Indicates whether or not the employee is available for this shift. If so, the employee's availability for the day is shown.
- ✓ **Qual:** Indicates whether or not the employee is qualified to work this station
- ✓ **Errors:** a zero indicates that assigning the person to the shift will **not** create an error. The higher the number the less desirable the person is to fill the shift.
- ✓ **Violations:** a zero indicates that assigning the person to the shift will **not** create a violation. The higher the number the less desirable the person is to fill the shift. If your schedule has any violations in it, printing will be disabled and you must correct the violation before proceeding.

As you move through the list, the information displayed in the *Status* box, which appears at the top of the PLACES panel, will change to display information for the employee the cursor is on. This information can help you identify errors in the employee's information that needs to be updated. Clicking on the *Selected shift. Click for details* bar at the top of the *Status* box will open a summary window that displays the employee's qualified stations, their actual availability versus what they were scheduled, and their actual versus scheduled hours and limits.

In addition to changing the employee who is scheduled to work this shift, you can also change the start and end times, and the station that the employee is working.

Choosing the additional (...) button that appears when you select the *Station* field allows you to schedule multi-segment shifts: shifts that cover more than one station during the working period. A multi-segment shift window appears, allowing you to divide the shift into segments, and assign the employee to multiple jobs throughout his scheduled shift time. After making your changes on this screen press the OK button to return to the schedule form.



While viewing the schedule on-screen, shifts that have a violation or error will appear in red. This allows you to quickly identify and correct any shifts that need attention.

To remove a shift, move to any field for the shift you want removed and press the *Delete record* icon, located at the bottom of the form. You can also delete a shift by clicking on the shift line in the grid area on the right side of the screen, and then press the DEL key. To add a new shift, move to the top row labeled *Click here to add a new* and enter the information for the new shift.

More information on all the items on the *SCHEDULE form* can be found under *Schedule* in the *Main* chapter.

When you are finished making changes, it's time to print your reports. Choose the *Reports* section on the *PLACES* panel, or return to the *HOME* form and select the *Start* button beside the *Preview reports* option on the *To do list*.

All of the reports that ESP produces are discussed in detail in the *Reports* chapter.

Moving on

At this point you have covered many of the important concepts involved in using ESP.

The remaining chapters in this reference manual cover each of ESP's forms and options in greater detail. In addition, ESP's integrated and on-line help is there to assist you when you need clarification on how to proceed or make an entry. Remember that you can contact our technical support line at the number listed at the front of this guide if you require further assistance. We are here to help.

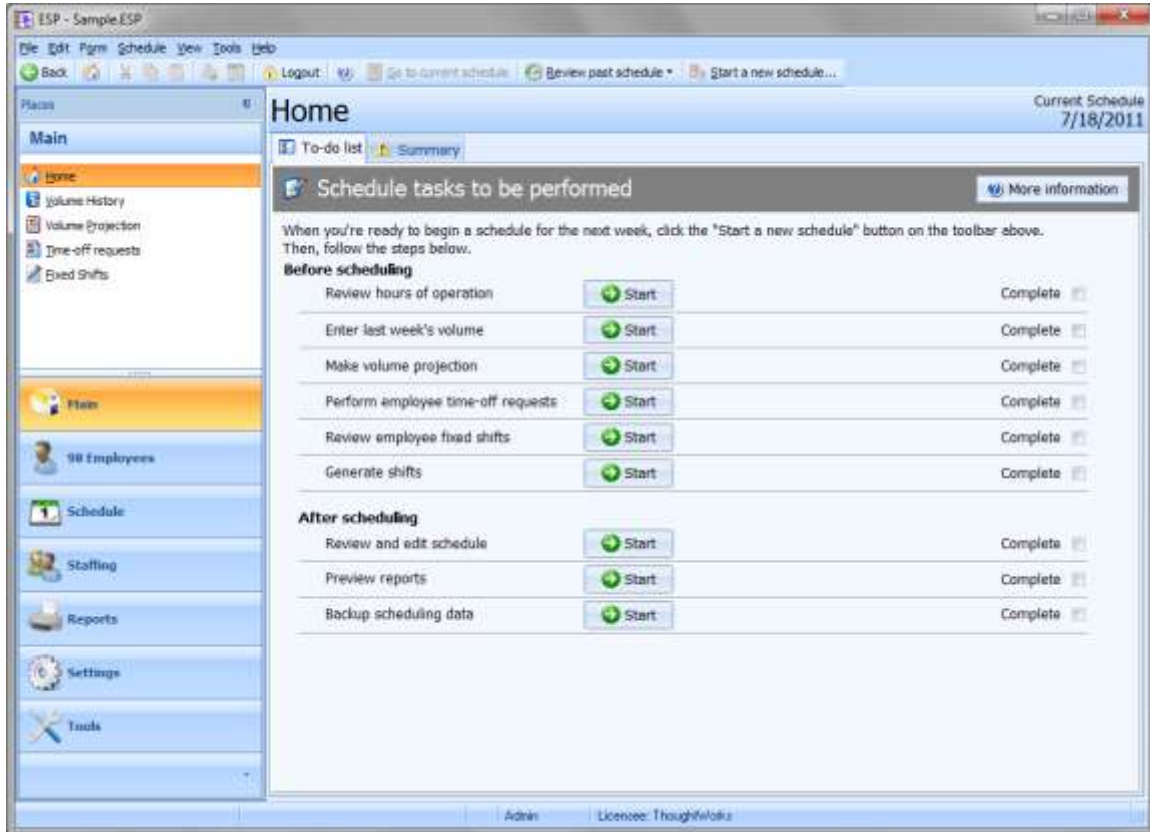
CHAPTER 3

The Main Group



The Main group

The *Main* group on the PLACES panel provides access to the forms and information used most often when producing a weekly schedule. When you start ESP you will see the HOME form with the *Main* group expanded on the left, as shown below.



From the *Main* group you have access to the HOME form, the VOLUME HISTORY form, the VOLUME PROJECTION form, the TIME-OFF REQUESTS form, and the FIXED SHIFTS form. Each of these forms is discussed in detail below.

Home

The HOME form is designed to help you prepare your weekly schedule and analyze how well your data has been prepared. This form is divided into two tabbed screens:

1. The *To Do List*, and
2. The *Summary*.

When you create a new data set ESP will open to the *Initial task list*. Once you have set up your initial files, you can close the *Initial task list* and display the *Weekly task list*. You can view either of the lists by choosing the appropriate one from the *View* menu.

To do list

The *To Do List* provides a list of tasks to perform each week while preparing your schedule. This list helps you to:

- ✓ **Stay organized.** Simply follow the tasks in order to produce a complete, accurate schedule
- ✓ **Never miss a task.** By checking off each task when complete you can be sure that you have not missed any steps required to create an accurate schedule.
- ✓ **Remain focused.** By following the tasks in order and checking them off when complete, you can return to the schedule after an interruption and continue where you left off.

Each week you begin a new schedule by selecting the *Start a new schedule* toolbar option. This allows you to specify the date of the new schedule, and start with a new, blank week, ready to be filled with shifts. Once you proceed, ESP stores the previous schedule and prepares all the forms for the new schedule.

You are now ready to begin following the steps on the *To Do List*. The steps are divided into two sections:

1. tasks that you perform before you generate your schedule; and
2. tasks that you perform after you generate your schedule.

When creating your weekly schedule, we recommend you follow the steps in order and mark them as complete as you go. Note, however, that you can also access all the forms from the groups on the PLACES panel or by selecting FORM on the menu. Each of these steps is described briefly below. More detailed descriptions are available in further chapters.

Tasks to perform before you generate your schedule

The tasks in the section labeled *Before scheduling* assist you in updating your ESP data so that you produce as accurate a schedule as possible. It is important, therefore, to take the time before you generate your schedule to follow these steps.

1. **Review hours of operation.** Review this chart for changes and be sure to take any holidays or special events into consideration
2. **Enter last week's volume.** Manually enter last week's volume or verify that the values have transferred correctly from your POS.
3. **Make volume projection.** Create a new volume projection for the upcoming schedule. The volume projection can be based on sales or transactions.
4. **Enter employee time-off requests.** Update your employees' availability information for the next schedule. Enter time-off requests, changes to availabilities, and station qualifications.
5. **Review employee fixed shifts:** This option takes you to the fixed shift form where you can review all the fixed shifts, both the assigned and the unassigned ones.
6. **Generate shifts.** Create all the shifts for the week based on the information entered in the above steps

Tasks to perform after you generate your schedule

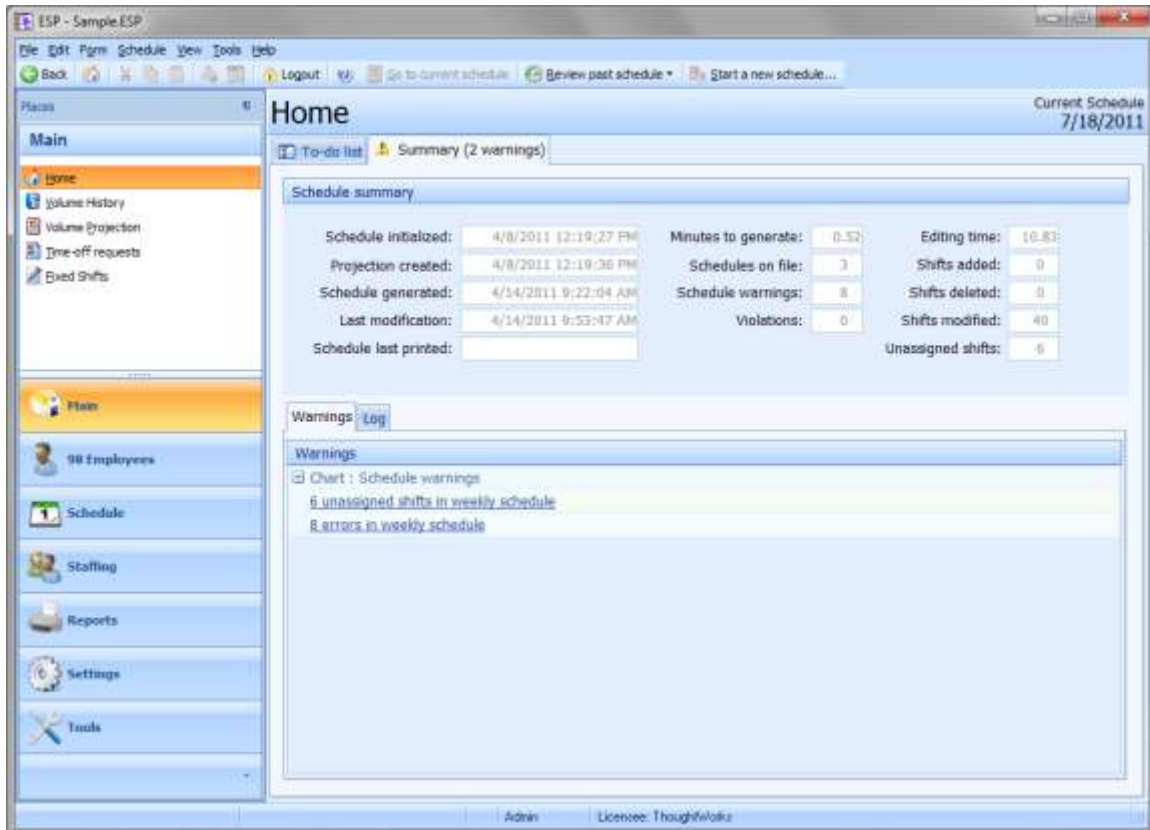
The tasks in the section labeled *After scheduling* take you from reviewing the schedule on-screen to backing up your ESP data after you post the schedule.

1. **Review and edit schedule.** Review each day for accuracy, making required changes before printing and posting the schedule.

2. **Preview reports.** Preview reports on screen before printing them.
3. **Backup scheduling data.** Backup your schedule to USB drive. This step only takes a minute but it will ensure that your data is backed up and then stored in a safe location.

Summary

The *Summary* screen, shown below, displays information about the current schedule. The information on this screen can help you determine how well your data has been set up. It can also help identify improvements that can be made: for example, if you are adding or deleting many shifts each week it may be a good indication that the *Positioning guides* need adjusting.



- ✓ **Schedule initialized:** the date and time that the schedule was started
- ✓ **Projection created:** the date and time that the volume was projected for the schedule
- ✓ **Schedule generated:** the date and time that the shifts were generated for the schedule
- ✓ **Last modification:** the date and time that the schedule was last edited
- ✓ **Schedule last printed:** the date and time that the schedule was last printed
- ✓ **Minutes to generate:** the number of minutes ESP took to generate the schedule
- ✓ **Schedules on file:** the number of schedules on file, including the current schedule
- ✓ **Schedule warnings:** the number of warnings that the schedule produced
- ✓ **Violations:** the number of violations in the schedule

- ✓ **Editing time:** the number of minutes the manager spent editing the schedule
- ✓ **Shifts added:** the number of shifts that were added during editing
- ✓ **Shifts deleted:** the number of shifts that were removed during editing
- ✓ **Shifts modified:** the number of shifts that were changed during editing
- ✓ **Unassigned shifts:** the number of shifts on the schedule that were left unfilled.

If ESP determines that there are any problems with the schedule, a *Warnings* section will appear in the bottom half of the *Summary* screen, and a yellow warning symbol will appear on the *Summary* tab. You should promptly review any warnings as the list identifies corrections that need to be made or problems requiring consideration before the schedule is complete. You can double-click on any warning to go directly to the form that is causing the problem. The warnings will be removed from the list as soon as they are corrected.

The Log tab simply lists a log of various events that help with troubleshooting. It tracks things such as when a schedule was generated, or modified, when data was imported or exported, when errors occurred and several other things.

Toolbar options

The HOME form's toolbar includes:

- ✓ **Start a new schedule:** use this option each week to begin a new schedule week.
- ✓ **Review past schedule:** use this option to examine a past schedule.
- ✓ **Go to current schedule:** use this option when you are viewing a past schedule to easily switch back to the current week.

Volume History

The VOLUME HISTORY form, shown below, is used to record current volume (sales or transactions) and access the historical volume stored by ESP.

This form can be opened from the *Main* group, the HOME form's *To Do List*, or by selecting FORM | VOLUME HISTORY from the menu. Whichever method you use, the form opens showing the current week's volume.

This form is divided into two sections:

3. Date and comments; and
4. Volume (Sales or Transactions).

Date and comments

The date and comments section indicates the week that you are viewing. Note that the date of the volume history will most likely *not* be the date of your schedule: For example, if you are scheduling for next week, the last full week of volume history will be for *two weeks* prior to the schedule date. You may also have a partial week of volume entered for the current week.

In addition to entering your current week's volume, you can view historical volume entries. To view a past week's volume, select a date from the calendar in the *Display week* toolbar option. Alternatively, selecting the *Calendar note page* on the toolbar displays a list of all of your weeks of volume on file. Simply select the desired week from the list.

Each week during the scheduling process you will update your volume history to include the volume from the previous week. Make sure you use the *Comments* box to record conditions such as weather, promotions, and other factors that may have affected your sales. These comments can assist you in deciding which weeks to include when projecting volume for scheduling weeks in the future.

Volume History 7/4/2011 Current Schedule 7/18/2011

Comments

Week of Monday, July 04, 2011

Sunny hot week.

Sales

Hour	Mon	Tue	Wed	Thu	Fri	Sat	Sun
4:00 AM	\$92.00	\$28.00	\$39.00	\$20.00	\$262.00	\$224.00	\$41.00
5:00 AM	\$83.00	\$65.00	\$26.00	\$32.00	\$88.00	\$58.00	\$114.00
6:00 AM	\$113.00	\$132.00	\$178.00	\$161.00	\$134.00	\$157.00	\$119.00
7:00 AM	\$206.00	\$259.00	\$190.00	\$270.00	\$350.00	\$457.00	\$275.00
8:00 AM	\$256.00	\$180.00	\$297.00	\$264.00	\$315.00	\$390.00	\$283.00
9:00 AM	\$242.00	\$274.00	\$302.00	\$409.00	\$426.00	\$733.00	\$577.00
10:00 AM	\$255.00	\$250.00	\$169.00	\$399.00	\$305.00	\$650.00	\$505.00
11:00 AM	\$354.00	\$458.00	\$499.00	\$577.00	\$647.00	\$639.00	\$430.00
12:00 PM	\$802.00	\$840.00	\$1,107.00	\$718.00	\$906.00	\$949.00	\$560.00
1:00 PM	\$611.00	\$653.00	\$544.00	\$646.00	\$720.00	\$824.00	\$745.00
2:00 PM	\$502.00	\$444.00	\$451.00	\$419.00	\$459.00	\$653.00	\$584.00
3:00 PM	\$352.00	\$388.00	\$390.00	\$398.00	\$461.00	\$468.00	\$394.00
4:00 PM	\$376.00	\$340.00	\$489.00	\$417.00	\$491.00	\$395.00	\$324.00
5:00 PM	\$378.00	\$504.00	\$532.00	\$522.00	\$656.00	\$512.00	\$489.00
6:00 PM	\$414.00	\$514.00	\$624.00	\$545.00	\$539.00	\$528.00	\$459.00
7:00 PM	\$378.00	\$438.00	\$576.00	\$555.00	\$588.00	\$529.00	\$352.00
8:00 PM	\$463.00	\$463.00	\$608.00	\$568.00	\$513.00	\$453.00	\$552.00
9:00 PM	\$540.00	\$535.00	\$466.00	\$417.00	\$582.00	\$422.00	\$523.00
10:00 PM	\$456.00	\$419.00	\$403.00	\$311.00	\$525.00	\$377.00	\$444.00
11:00 PM	\$274.00	\$269.00	\$364.00	\$336.00	\$531.00	\$455.00	\$293.00
Weekly total:	\$64,805.00						

Volume (Sales or Transactions)

You can choose to view your volume by sales or by transactions by clicking the *Sales* or *Transactions* button on the toolbar. If you are entering your volume manually, you will most likely enter one or the other – not both. If you are transferring your volume information from a POS system, you may find that both sales and transactions are available. You can define your preferred default view (Sales or Transactions) in the PREFERENCES form found in the *Settings* group.

If you have set up ESP to import your volume information from other software, this section will be automatically filled in with the information that was imported. Your only task is to check the information for accuracy.

If you enter volume manually and have not yet entered last week's values, the bottom section will be blank. You can enter your volume information in this section quickly and easily.

This area is set up in a table format with the days of the week displayed along the top row and the weekly total at the bottom. Each hour of the day is displayed on its own row. A blank field indicates no information is on file or your location was not open during that hour. Scroll down the form to view a daily total.

Adding or deleting volume

To help in creating accurate projections, one of the first things you should do when you begin to use ESP is to enter actual volume information for the previous few weeks.

To add a week of past volume to your history choose the *Display week* toolbar option and navigate to the week for which you wish to add volume. Most likely no volume is stored in the history for the week you have chosen, and a blank form will be displayed. Enter your actual information.

The default view when entering volume is whole hours only. You can click the EXPAND/CONTRACT ALL button to enter your volume in more detail. This will expand all the entries to quarter hour increments. If you prefer to enter your volume in half hour increments just click on VOLUME | VIEW DETAIL BY on the menu, then select the ½ hour choice.

If you ever need to remove a week of volume information, display the week by choosing the week in the *Display week* toolbar option, and then delete it by selecting the *Delete week* toolbar option.

The *Go to current week* toolbar option allows you to return to the latest week of volume history on file.

Editing/modifying values

Although the VOLUME HISTORY form normally displays hourly values, the entries are actually stored in quarter-hour increments. To view an hour's quarter-hour totals, use the + (plus) sign in the hour column to expand it. Or, you can expand all of the hours for the week by choosing the *Expand/Contract all* toolbar option.

Sales							
Hour	Mon	Tue	Wed	Thu	Fri	Sat	Sun
7:00 AM	\$248.00	\$275.00	\$407.00	\$168.00	\$168.00	\$231.00	\$212.00
7:00 AM	\$62.00	\$69.00	\$102.00	\$42.00	\$42.00	\$58.00	\$53.00
7:15 AM	\$62.00	\$69.00	\$102.00	\$42.00	\$42.00	\$58.00	\$53.00
7:30 AM	\$62.00	\$69.00	\$102.00	\$42.00	\$42.00	\$58.00	\$53.00
7:45 AM	\$62.00	\$68.00	\$101.00	\$42.00	\$42.00	\$57.00	\$53.00
8:00 AM	\$298.00	\$248.00	\$528.00	\$370.00	\$184.00	\$273.00	\$301.00
8:00 AM	\$75.00	\$62.00	\$132.00	\$93.00	\$46.00	\$69.00	\$76.00
8:15 AM	\$75.00	\$62.00	\$132.00	\$93.00	\$46.00	\$68.00	\$75.00
8:30 AM	\$74.00	\$62.00	\$132.00	\$92.00	\$46.00	\$68.00	\$75.00
8:45 AM	\$74.00	\$62.00	\$132.00	\$92.00	\$46.00	\$68.00	\$75.00
9:00 AM	\$273.00	\$314.00	\$651.00	\$554.00	\$232.00	\$333.00	\$257.00
9:00 AM	\$69.00	\$79.00	\$163.00	\$139.00	\$58.00	\$84.00	\$65.00
9:15 AM	\$68.00	\$79.00	\$163.00	\$139.00	\$58.00	\$83.00	\$64.00
9:30 AM	\$68.00	\$78.00	\$163.00	\$138.00	\$58.00	\$83.00	\$64.00
9:45 AM	\$68.00	\$78.00	\$162.00	\$138.00	\$58.00	\$83.00	\$64.00

When reviewing volume information you can alter any quarter-hour or hourly amount by selecting the field and entering your change. To save the change, move off the field or press the [Enter] key. When you change an hourly value, each fifteen-minute amount is adjusted proportionately.

Advanced feature: change of date

If the entries in the volume section are dated incorrectly, you may change the associated date. Select VOLUME | CHANGE RECORDED DATE on the menu. A new window opens that allows you to change the date for the displayed values.

Maintaining volume history for multiple sites

If you are scheduling for more than one department or location, a tab for each location is displayed at the top of the VOLUME HISTORY form. No tabs are displayed if you schedule only one location. If you do schedule for more than one location, you must review and enter volume information for every location each week.

Volume Projection

The VOLUME PROJECTION form, shown below, displays the volume that ESP will use when generating shifts for the scheduling week. You can access this form from either the *Main* group on the PLACES panel, the HOME form's *To Do List*, or by selecting FORM | VOLUME PROJECTION from the menu. Whichever method you use, the form will open with the projection for the current schedule displayed. If you have not yet projected your volume for the current week, the projection will be blank.

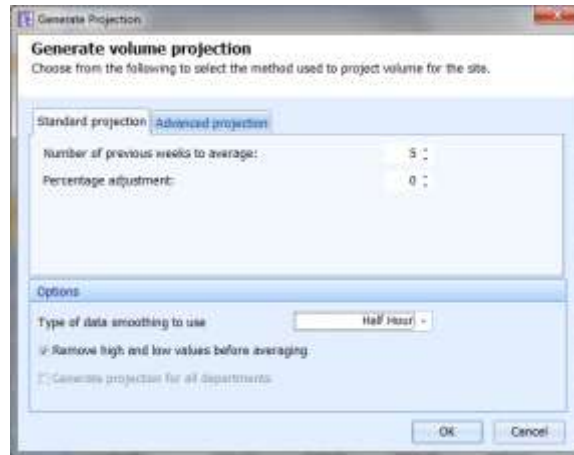
Hour	Mon	Tue	Wed	Thu	Fri	Sat	Sun
4:00 AM							
5:00 AM							
6:00 AM	\$78.67	\$96.34	\$114.99	\$117.67	\$126.00	\$169.67	\$61.33
7:00 AM	\$179.67	\$236.00	\$237.00	\$203.00	\$259.33	\$280.34	\$173.00
8:00 AM	\$259.32	\$245.00	\$289.67	\$304.66	\$379.67	\$437.34	\$295.01
9:00 AM	\$217.00	\$255.66	\$249.01	\$303.33	\$369.99	\$650.67	\$426.01
10:00 AM	\$214.00	\$202.68	\$242.33	\$256.68	\$289.33	\$625.66	\$499.66
11:00 AM	\$549.33	\$595.33	\$713.33	\$666.67	\$656.99	\$625.99	\$396.00
12:00 PM	\$655.67	\$801.33	\$872.34	\$914.68	\$854.34	\$833.33	\$723.67
1:00 PM	\$591.99	\$580.01	\$670.67	\$593.32	\$671.00	\$966.33	\$794.33
2:00 PM	\$464.67	\$445.66	\$422.67	\$356.66	\$486.34	\$737.34	\$533.00
3:00 PM	\$348.34	\$375.99	\$401.67	\$395.34	\$431.01	\$669.33	\$546.01
4:00 PM	\$351.34	\$298.66	\$452.32	\$450.34	\$449.34	\$572.67	\$604.66
5:00 PM	\$393.00	\$553.00	\$581.34	\$538.34	\$659.67	\$607.33	\$573.00
6:00 PM	\$455.33	\$576.00	\$628.00	\$536.67	\$652.32	\$721.34	\$591.33
7:00 PM	\$320.68	\$468.00	\$566.00	\$476.66	\$639.67	\$581.01	\$448.00
8:00 PM	\$331.32	\$332.00	\$427.34	\$418.33	\$576.67	\$426.34	\$419.33
9:00 PM	\$288.66	\$375.00	\$430.99	\$446.67	\$588.00	\$354.66	\$359.00
10:00 PM	\$247.67	\$254.67	\$294.33	\$297.01	\$470.33	\$332.00	\$242.00
11:00 PM					\$425.00	\$363.67	
12:00 AM							
Weekly total:	\$54,113.40						

The VOLUME PROJECTION form is similar in look and style to the VOLUME HISTORY form. Refer to the VOLUME HISTORY form for a description of how to enter and view your data.

Generating a volume projection

If the volume area is blank when you open this form, it indicates that you have not yet generated a volume projection for the current schedule. Use the *Generate projection* toolbar option to generate your volume projection or to regenerate a projection at any time. When you select this option the *Generate volume projection* window is displayed, as shown below:

You can use the options in this window to specify how ESP calculates your volume projection.

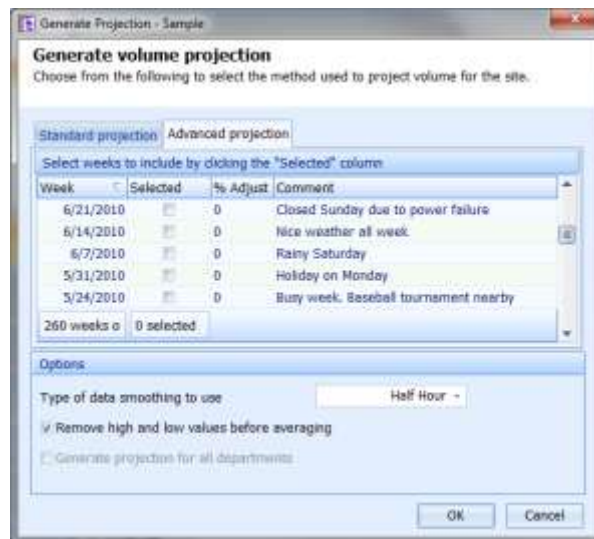


Standard projection

The *Standard projection* option allows you to quickly calculate a projection by averaging the specified number of consecutive previous weeks of volume on file. Additionally, you can adjust this projection up or down by a percentage.

Advanced projection

Selecting the *Advanced projection* option provides you with a list of all the weeks of volume on file, and displays any comments you may have entered for each week. You can select any number of weeks for ESP to include when calculating your volume projection.



To select a particular week of volume to be used in your projection, simply check the box in the *Selected* field for that week. You can also adjust the values for the week selected by entering a number in the *% Adjust* field. Each week selected may be adjusted by a different percentage.

Using the *Advanced projection* option is particularly useful for weeks when you expect your volume to be significantly different from the trend of the previous consecutive weeks. For example, during a Holiday week such as Christmas, basing your projection on your previous

week's volume history will not produce an accurate projection. In this case, you may wish to project your volume using a previous year's entries by using the *Advanced* option.

Type of data smoothing to use

Using *data smoothing* allows ESP to project your volume in a way that can help anticipate your labor needs during dramatic volume changes. ESP stores your volume history in quarter-hour periods, even if you only enter hourly values. When projecting your volume, instead of dividing an hourly volume amount into equal quarter-hour amounts, you can use data smoothing to "smooth out" rapid hourly volume changes by automatically adjusting the underlying quarter-hour entries.

For example, if your volume goes from 80 transactions at 11:00, to 200 transactions at 12:00. The 80 transactions at 11:00 are normally divided evenly into 20 transactions every quarter-hour between 11:00 and 12:00. The 200 transactions at 12:00 are normally divided evenly into 50 transactions every quarter-hour between 12:00 and 1:00. With no data smoothing used, ESP will project your volume, retaining these equal amounts in the underlying quarter-hour periods.

However, a dramatic volume change like this probably indicates that your quarter-hour sales rates have been increasing throughout the 11:00 to 12:00 period: Instead of quarter-hours with an equal 20 transactions, the actual volume is more likely similar to:

- 10 transactions between 11:00 to 11:15;
- 15 transactions between 11:15 to 11:30
- 25 transactions between 11:30 to 11:45
- 30 transactions between 11:45 to 12:00

You still have a total of 80 transactions in the hour, but a very different underlying volume pattern. Using data smoothing allows ESP to redistribute your underlying volume, retaining the total hourly rate, but accounting for significant leading and trailing volume changes in the underlying quarter-hour periods. The end result is a volume projection that more accurately anticipates your labor needs. And since your volume projection determines your shift placement, your schedule will more accurately meet your customer service needs. In this case, an employee may be brought in fifteen-minutes earlier than the hourly volume would indicate, helping cover the rush period, and allowing you to maintain higher levels of customer service.

You can choose from the following data smoothing options:

- ✓ **None or Hour:** ESP assumes that all four fifteen-minute periods that make up an hourly volume value are identical.
- ✓ **Half hour:** ESP takes your upcoming volume into account, but adjusts the underlying quarter-hour rates only in half-hour blocks:
- ✓ **Quarter hour:** ESP adjusts each underlying quarter-hour volume rate independently.

Remove high and low values

The *Remove high and low values* option forces ESP to eliminate the effect of unusual sales fluctuations. When you check this box, ESP will remove the highest and lowest value for each hour from all the weeks selected, before generating a projection based on the remaining values. This has the effect of ignoring unusual volume fluctuations, and allows you to schedule based upon your underlying volume patterns. Note that you must select at least five weeks to include in your projection for ESP to remove these values.

Once you have selected the appropriate options, click the OK button to calculate your volume projection. Depending upon the number of weeks used in the projection, calculation time can take anywhere from a few seconds to a few minutes.

Modify/edit your projection

ESP should generate an accurate projection because it is based on your actual volume history. From time to time, however, there may be conditions that affect the volume for the next schedule that cannot be effectively projected using your volume history. For example, there may be a parade in town or you may be running a special on Saturday. To account for these conditions you may edit the projected volume on the screen.

You can edit any hourly, daily, or even weekly total. You can also expand an hour using the plus (+) sign in the hour field, or use the *Expand/Contract all* toolbar button to review and modify quarter-hour amounts.

When you change an hourly total, each quarter-hour amount is adjusted proportionately. If you change a daily or weekly total, all of the amounts for that day or week are adjusted.

You can also adjust a section of the values area by the same percentage, up or down, by highlighting the section and entering a number in the *Adjust selected values by %* box on the toolbar. This option adjusts the highlighted area all at once saving you from having to manually adjust each entry.

Generating volume for multiple sites

If you are scheduling for more than one location or department, a tab for each location is displayed at the top of the form. No tabs are displayed if you schedule only one location.

In the case of more than one location, ESP allows you to choose to generate your projection for all locations at one time, or just the active location. You will see a check box at the bottom of the volume projection dialogue box which says: *Generate projection for all departments*. If you check that box then a new projection for all departments will be created. If you leave this unchecked, then a projection for the current location only will be generated.

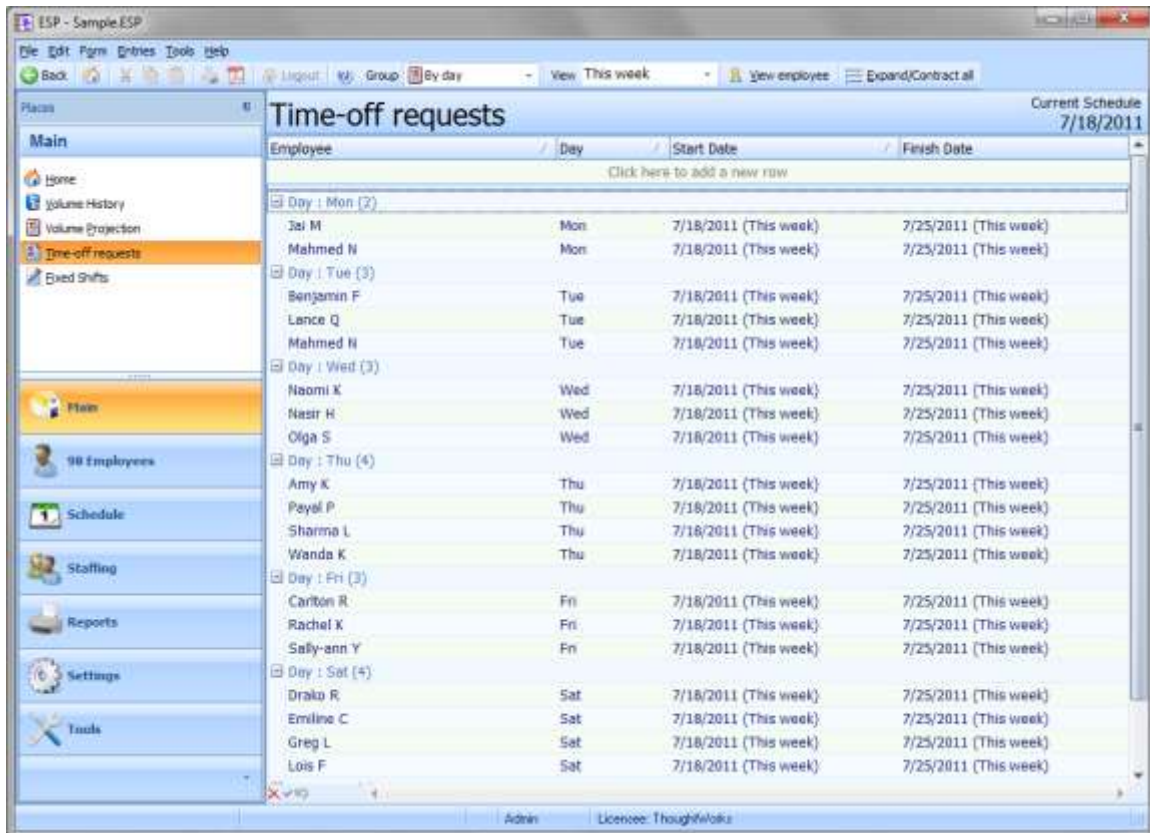
Time-off requests

The TIME-OFF REQUESTS form allows you to view and enter all of your employees' time-off requests for current and future schedules, all in one place. This saves you from having to open each employee's form and make changes individually.



It is important to note that time-off requests override availability entries. When you assign a day off to an employee, ESP will not schedule that person to work that day regardless of any other availability or fixed shifts.

You can open the TIME-OFF REQUESTS form from the *Main* group on the PLACES panel, from the HOME form's *To Do List*, or by selecting FORM | TIME-OFF REQUESTS from the toolbar. Whichever method you use, the form will open displaying any entries that were previously entered.



The toolbar options allow you to select the way that the entries are displayed:

- ✓ **Group** allows you to group the entries on this form *By employee* or *By day*. The same information is displayed using either option, but it is grouped either under the employee (for example, all the employee's time-off requests appear grouped under his or her name), or by day (for example, all entries for a given day are shown grouped together).
- ✓ **View** allows you to view entries for the current schedule only, or for the current schedule and future schedules. To display entries for the current schedule, select the *This week* option; to display entries for the current and future schedules select the *All entries* option. In general, the *This week* option is most useful, since you're usually concerned with time-off requests for the coming schedule. However, if you wish to see any future time-off requests (for example, if you wish to see if an employee has requested time off in the future), you can use the *All entries* option.
- ✓ **View employee** allows you to open the information form for a selected employee so you can make more wide-ranging changes to the employee's information.
- ✓ **Expand/Contract all** allows you to open or hide all the entries for all groups on the form at once. If you want to expand or contract the entries for only one day or one employee click on the plus (+) sign in the field beside the entry.

Fast auto-entry system

When you post an entry ESP retains the information and automatically inserts the same values for the next entry. So, you can quickly apply the same time-off request to multiple employees. Here is a closer look at how that works:

Place your cursor in the *Employee* field of the top row labeled *Click here to add a new row*. Start typing the name of the employee: ESP automatically suggests the employee name and fills it in for you as you type. Once the correct name appears, press the TAB key. This moves you to the *Day* field. Type the letter of the appropriate day and press TAB. If you are making a time-off request for the current scheduling week, your entry is complete; press the TAB key until you reach the end of the row and then press it one more time. That entry is now posted and the cursor is positioned on the *Name* field ready to enter the next employee. Type the name of the next employee: All the other fields fill in for you including the day of the week. If this is correct, tab through the remaining fields to make the entry. If it is not correct, change any information before continuing.

If you are entering time-off requests for a week other than the current scheduling week, you will need to change the start and finish dates. ESP remembers the dates that you used last so it is best to enter time-off requests for future weeks after completing all your current-week requests.

When you start typing a name, ESP opens a drop down list of names for you to choose from. Select a name from the list or continue typing it in.

ESP fills in the dates

Employee	Day	Start Date	Finish Date
Jar M		7/18/2011 (This week)	7/25/2011 (This week)
Francisco F	Mon	7/18/2011 (This week)	7/25/2011 (This week)
Greg L	Mon	7/18/2011 (This week)	7/25/2011 (This week)
Gregory M	Tue	7/18/2011 (This week)	7/25/2011 (This week)
Hajra K	Tue	7/18/2011 (This week)	7/25/2011 (This week)
Hamira V	Tue	7/18/2011 (This week)	7/25/2011 (This week)
Hassan N	Wed	7/18/2011 (This week)	7/25/2011 (This week)
Hayden W	Wed	7/18/2011 (This week)	7/25/2011 (This week)
Jar M	Wed	7/18/2011 (This week)	7/25/2011 (This week)
Naomi K	Wed	7/18/2011 (This week)	7/25/2011 (This week)
Nasir H	Wed	7/18/2011 (This week)	7/25/2011 (This week)
Olga S	Wed	7/18/2011 (This week)	7/25/2011 (This week)
Amy K	Thu	7/18/2011 (This week)	7/25/2011 (This week)
Payal P	Thu	7/18/2011 (This week)	7/25/2011 (This week)
Sharna L	Thu	7/18/2011 (This week)	7/25/2011 (This week)
Wanda K	Thu	7/18/2011 (This week)	7/25/2011 (This week)
Carlton R	Fri	7/18/2011 (This week)	7/25/2011 (This week)
Rachel X	Fri	7/18/2011 (This week)	7/25/2011 (This week)
Sally-ann Y	Fri	7/18/2011 (This week)	7/25/2011 (This week)
Drako R	Sat	7/18/2011 (This week)	7/25/2011 (This week)
Emiline C	Sat	7/18/2011 (This week)	7/25/2011 (This week)
Greg L	Sat	7/18/2011 (This week)	7/25/2011 (This week)
Lois F	Sat	7/18/2011 (This week)	7/25/2011 (This week)

Both the *Start date* and *Finish date* fields default to the current schedule week. To change the date, click inside the *Start* or *Finish date* field and select the arrow beside it then choose the date you wish from the drop-down calendar. When you change the *Start date* field the *Finish date* field automatically changes to the end of the week selected. If the individual time-off request lasts longer than one scheduling week, change the *Finish date* accordingly.

Multiple days off

If the employee wants the entire week off you can select ALL in the day column instead of a specific day. ESP will then give the employee the whole week off.

If the employee wishes multiple days off over more than just the current week, select ALL for the day, and then use the calendar in the START DATE and FINISH DATE to choose the range of days off to give the employee. They will then have all days off from the start date you select to the finish date you select (inclusive)

Fixed shifts

A fixed shift is a specific shift that you require on your schedule regardless of your volume. Often, these will be non-variable shifts such as maintenance, delivery truck, or hostess. However, any station can be fixed on the schedule.

- ✍ If you use fixed shifts to specify variable stations (those that appear on your Positioning Guides) ESP will reduce the labor requirements for the station correspondingly. For example, if you assign a Kitchen fixed shift during a time when your Positioning Guide calls for 3 Kitchen shifts, your fixed shift will count as one of the three.

There are two types of fixed shifts that you will typically use:

1. Fixed shifts where no specific employee is assigned. ESP will place the shift, and choose a qualified, available employee for you automatically.
2. Fixed shifts that are assigned to a specific employee. If the employee is qualified to work more than one (variable hour) station you can leave the station blank and ESP will schedule them at the station where they are needed most.

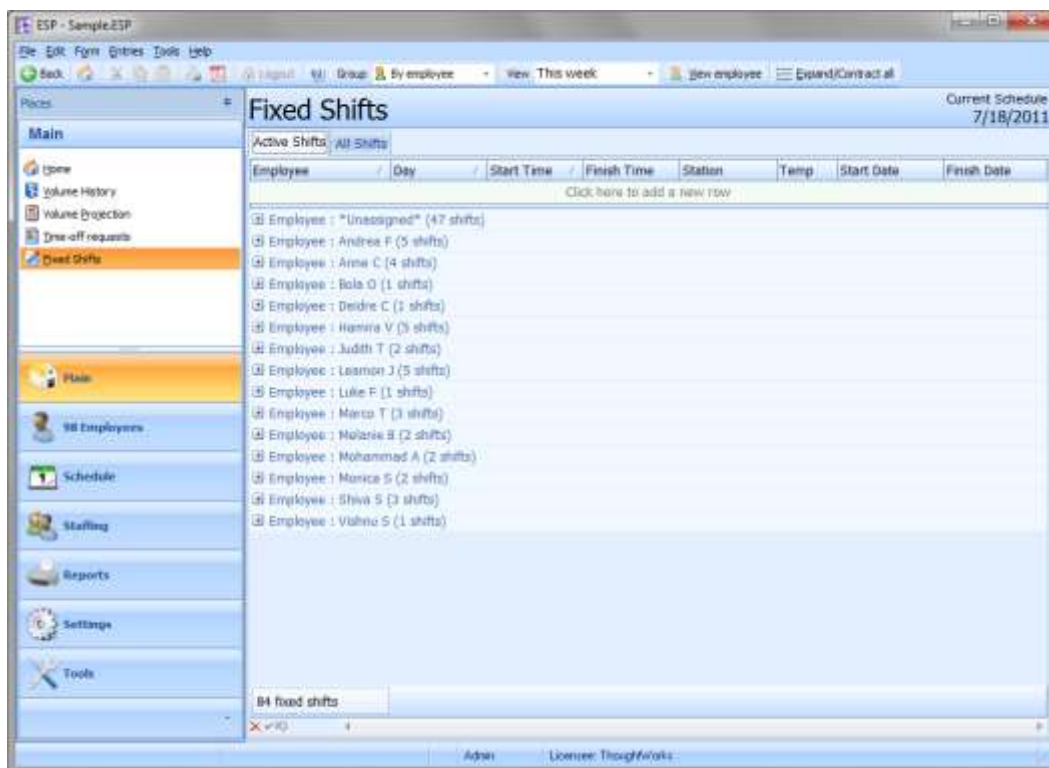
The FIXED SHIFTS form displays both types of fixed shifts.

Employee	Day	Start Time	Finish Time	Station	Temp	Start Date	Finish Date
Day : Mon (10 shifts)							
Andrea F	Mon	6:00 AM	2:00 PM	MGR		-	-
Unassigned	Mon	6:00 AM	1:00 PM	[P,-]		-	-
Hanira V	Mon	8:30 AM	4:30 PM	-		-	-
Unassigned	Mon	9:00 AM	5:00 PM	OFF		-	-
Unassigned	Mon	10:00 AM	4:00 PM	LL		-	-
Unassigned	Mon	11:00 AM	7:00 PM	MGR		-	-
Unassigned	Mon	4:00 PM	12:00 AM	MGR		-	-
Judith T	Mon	7:00 PM	11:00 PM	K		-	-
Leamon J	Mon	11:00 PM	7:00 AM	CO		-	-
Unassigned	Mon	11:00 PM	7:00 AM	M		-	-
Day : Tue (9 shifts)							
Anne C	Tue	6:00 AM	2:00 PM	MGR		-	-
Hanira V	Tue	8:30 AM	4:30 PM	-		-	-
Unassigned	Tue	10:00 AM	4:00 PM	LL		-	-
Unassigned	Tue	11:00 AM	7:00 PM	MGR		-	-
Unassigned	Tue	4:00 PM	12:00 AM	MGR		-	-
Melanie S	Tue	4:00 PM	8:00 PM	P		-	-
Luke F	Tue	7:00 PM	11:00 PM	-		-	-
Leamon J	Tue	11:00 PM	7:00 AM	CO		-	-
Unassigned	Tue	11:00 PM	7:00 AM	M		-	-
Day : Wed (9 shifts)							
B4 fixed shifts							

You can group your fixed shifts *by Employee* or *by Day* by selecting your choice from the drop-down *Group* menu on the toolbar. This allows you to view all of your shifts for a particular employee or day in one consolidated group. Most often, you will probably view your shifts by day.

The *View* setting, beside the *Group* box allows you to view the current week's fixed shifts or all upcoming fixed shifts. Choosing *This week* displays only the fixed shifts that are active on the current schedule, significantly reducing screen clutter. Choosing *All entries* displays all current and upcoming fixed shifts.

While viewing or editing a fixed shift that is assigned to an employee, you may wish to review the employee's full information. You can easily do so by clicking the *View employee* button on the toolbar. ESP will leave the FIXED SHIFT form, and open the EMPLOYEE form for the chosen employee.

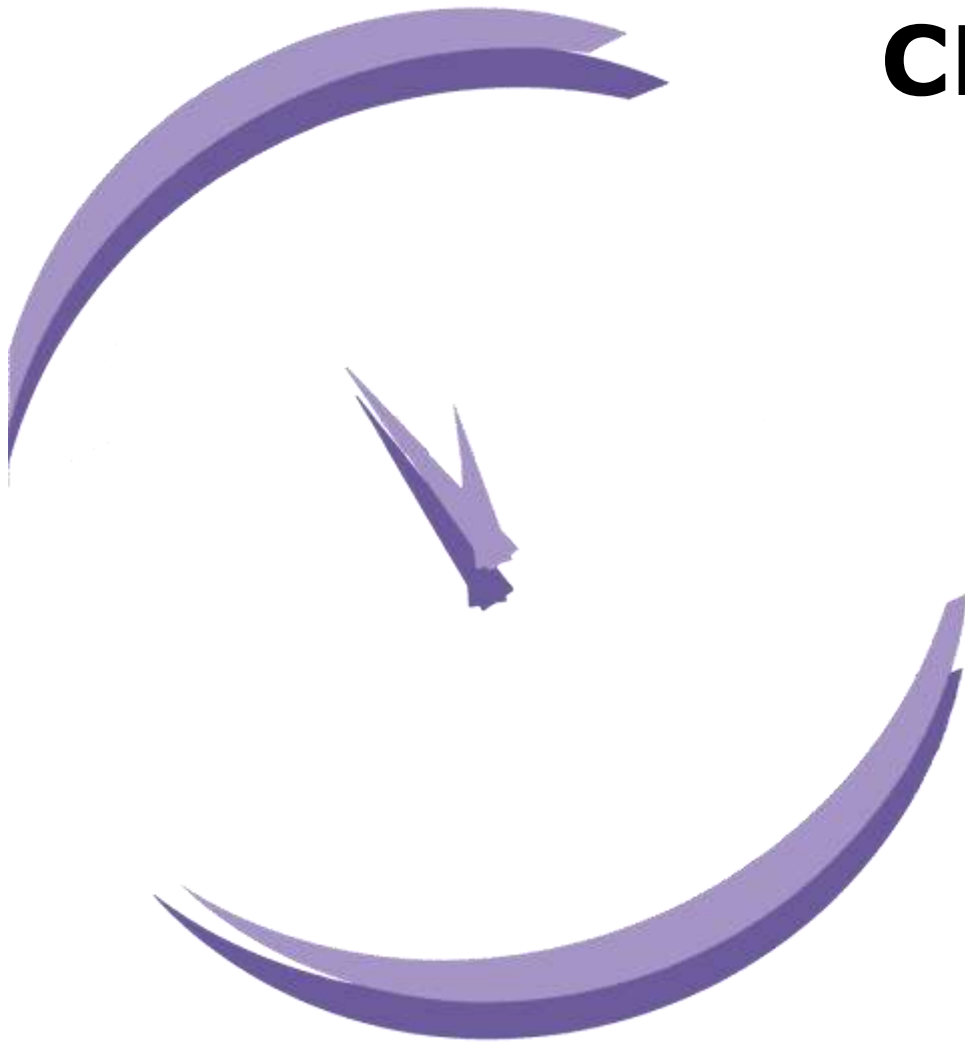


To view full details of all fixed shifts, click the *Expand/Contract all* button on the toolbar. Clicking this button once will display all shifts. Clicking it a second time will “collapse” the shifts with just the group header (employee name or day) visible for each set of shifts. You can also expand or contract the groups individually by clicking the + or – sign to the left of the group title.

ESP displays a summary of your fixed shifts for each employee or day. When grouping by employee, as shown above, the summary indicates the number of shifts assigned to each employee. When grouped by day, the summary indicates the total number of shifts on the given day. At the bottom of the list the total number of fixed shifts for the week is displayed. By comparing the total number of fixed shifts to the total number of shifts on your schedule you may be able to better control the number of fixed shifts you are using.

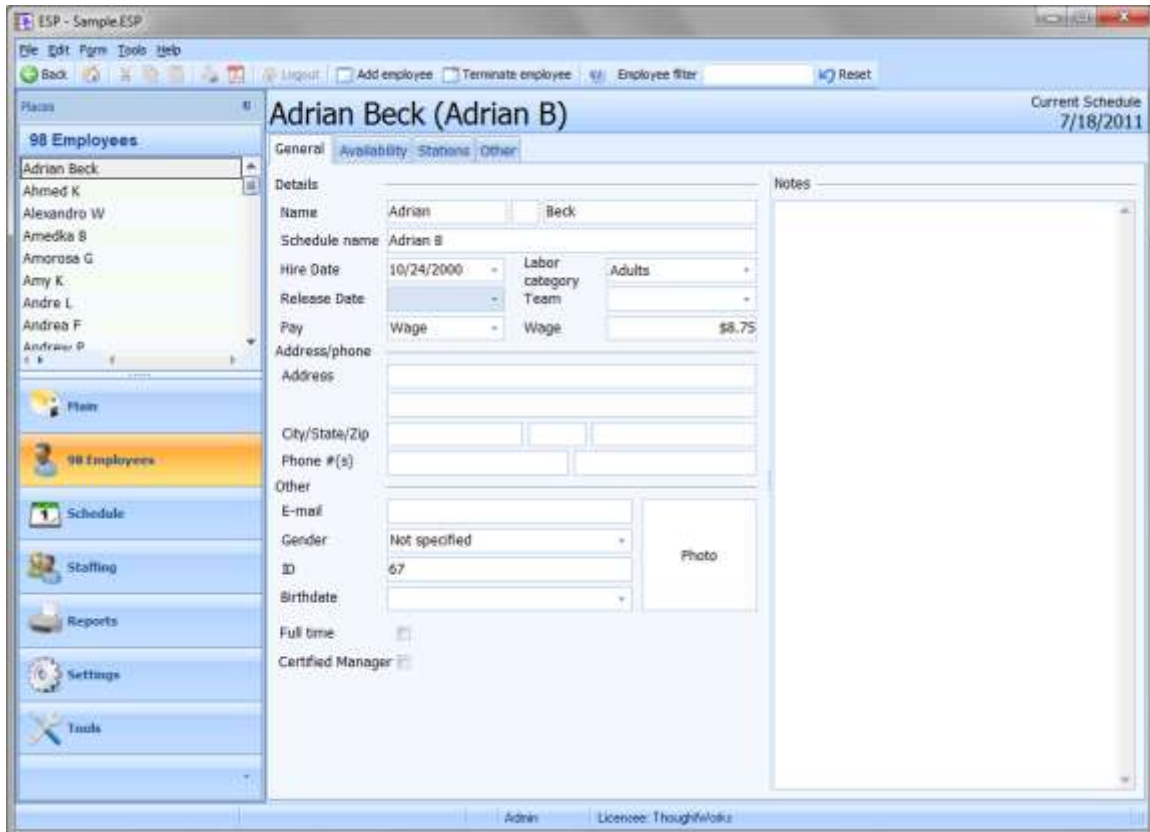
CHAPTER 4

Employees



Employees

The *Employees* group on the PLACES panel allows you to add, remove and change your employee information. Your employees are listed alphabetically. When you select this group, the information for the first person in the list is immediately displayed, as shown below.



You can scroll through the employee list using the arrows and scroll bars. To find a particular employee's profile quickly, you can enter a name, or portion of an employee's name, in the *Employee filter* box on the toolbar. For example, if you wanted to select Steve, typing the letter *S* would move you to the top of the list of *S* names, and only names starting with *S* would be displayed. Then typing the letter *t* would move you down the list further to the first person whose name begins with *St*. Once you have found the employee you wish to display, just click on their name in the employee list. To start over, select the *Reset* button on the toolbar.

When employee information in ESP is updated via an external source (for example, via the a payroll or HR system, any employees with changed or updated information are displayed in **Bold** type in the employee list. This acts as a reminder that you should review the employee's information before completing your schedule for the week.

When viewing any employee with updated information, ESP displays a special button on the toolbar labeled "Accept imported employee". Once you have reviewed the employee's information and confirmed that is correct, click the button: The employee information will be marked as accepted, and the employee name will no longer be displayed in bold type.

Note that it is not a requirement that you perform this procedure in order to produce a schedule: ESP will still produce a schedule with "unconfirmed" employee information. However, it is recommended that you review any such updated employees on a regular basis.

The EMPLOYEE form has four tabbed screens, each requiring information to be filled in before the employee can be properly scheduled. These include:

1. General
2. Availability
3. Stations, and
4. Other.

General

The *General* screen is used to store general information about each employee in the fields described below. The fields marked in **blue** are required while those in black are optional.

Details

- ✓ The **Name** fields are used to store the employee's name. Each employee should have a unique name.
- ✓ The **Schedule name** is a unique short-form name that identifies the employee for scheduling reports. ESP attempts to create a short-form name made up of the first name and last initial. However, you may wish to change it if you have two similarly-named employees
- ✓ The **Hire date** field indicates the date of hire and is automatically entered when the employee is added.
- ✓ The **Release date** field indicates the date the employee leaves your employ. This field is automatically entered when you select the *Terminate employee* option on the toolbar.
- ✓ The **Pay** field has two options: *Wage* or *Salaried*. If the employee is an hourly-paid employee, select *Wage*, and enter the employee's wage in the *Wage* field (see below). If the employee is salaried, select *Salaried*.
- ✓ The **Labor category** specifies the employee's labor category. You use labor categories to define your local labor laws. For example, you may have a *Minor* labor category that specifies the maximum number of hours and shifts a minor-age employee may work. Labor categories are defined using the *Labor Categories* choice in the *Settings* group. All employees must have a labor category.
- ✓ If you use teams (employee groups that are all scheduled together), the EMPLOYEE form will contain a **Team** field. Enter the team number that the employee belongs to. To define teams, select the *Team* choice in the *Staffing* group on the PLACES panel. To learn more about scheduling teams, refer to the *Staffing* chapter.
- ✓ The **Wage** field is visible only if the employee is paid an hourly wage. Enter the employee's wage amount in the wage field.

Address and phone

- ✓ The **Address and phone** fields store the employee's contact information.

Other

- ✓ The **E-mail** field stores the employee's e-mail address. You can send each employee their weekly shift assignment by e-mail if there is an entry in this field from the *E-mail reports* under the *Reports* group.
- ✓ The **Gender** field by default is set to *Not specified* select the correct option from the drop down list.
- ✓ The **ID** field stores the employee's id or badge number.
- ✓ The **Birth date** field stores the person's birth date. This is displayed on the *Employee birthday* report found in the *Employee reports* under the *Reports* group.
- ✓ The **Photo** field allows you to display a photo of your employee. To add a photo, right-click the *Photo* field. You are given the option to load a photo from disk, or paste one in from another program.
- ✓ **Full time**: The option simply identifies a full-time employee. It does not affect how they are scheduled.
- ✓ **Certified shift manager**: denotes managers who are fully qualified to run their own shifts.
- ✓ The **Notes** box on the right side of this screen can be used to make free-form notes about the person.

Availability

ESP uses the information found on the *Availability* screen, shown below, to control when an employee is assigned to shifts.

The screenshot shows the ESP interface for Adrian Beck (Adrian B). The top navigation bar includes options like 'Back', 'Logout', 'Add employee', 'Terminate employee', 'Employee filter', and 'Reset'. The sidebar menu on the left lists '98 Employees', 'Main', '98 Employees', 'Schedule', 'Staffing', 'Reports', 'Settings', and 'Tools'. The main content area is titled 'Adrian Beck (Adrian B)' and shows the 'Availability' tab. It includes a 'View' dropdown set to 'This week' and 'Single Line'. Below this are tabs for 'Regular Availability', 'Alternate Availability', and 'Team Availability'. A 'Shift limits' table shows 'Min' and 'Max' values for 'Week' and 'Weekend' for 'Shifts' and 'Closes'. A table below shows availability for days from Monday to Sunday, with columns for 'Day', 'Start Time', 'Finish Time', 'Type', 'Station', 'Temp', 'Start Date', and 'Finish Date'. The table shows 'Available' status for all days with start times at 5:00 AM and finish times at 2:00 AM. A 'Click here to add a new row' link is present below the table. The bottom of the window shows 'Admin' and 'License: ThoughtWorks'.

This screen is divided into three areas:

1. View
2. Limits
3. Availability.

View

The *View* area at the top of this screen allows you to view the employee's availability in different ways. The first drop-down list box gives you two options for viewing the employee's availability:

1. **This week:** displays entries only for the current schedule you are working on.
2. **All entries:** displays entries for the week you are working on, plus future weeks. This also displays the permanent availability if the person has days booked off.

The second drop-down list box provides two choices for viewing the availability section. Select the option that works best for your screen size. The choices are:

1. **Single line:** displays all the fields for each entry on one line.
2. **Double line:** displays the Temp, Start Date and Finish Date fields on a second line.

Limits

The entries in the limit fields help control the maximum number of hours, days and close shifts the employee is allowed to work each week. It is important to remember that ESP never schedules an employee more shifts than you permit on this form. Do not unnecessarily restrict the number of days or closes an employee may work to maintain flexibility for ESP when filling your shifts.

Hour limits

- ✓ **Min:** Use the *Min* field to request a minimum number of hours that the employee should work per week. Use this field carefully: unless you have guaranteed an employee a certain number of hours, set this field to zero. Minimum hours are taken as a high-priority request, but are not guaranteed, since the employee may have requested days off or reduced their availability.
- ✓ **Max:** The maximum number of hours the employee is allowed to work per week.

Shift limits

- ✓ **Week:** The maximum number of weekday shifts or closes that the employee is allowed to work per week.
- ✓ **Weekend:** The maximum number of weekend shifts or closes that the employee is allowed to work per week.
- ✓ **Total:** The maximum number of shifts or closes in a week the employee may work, including both weekday and weekend shifts. For example, you may have said the employee can work 3 weekday and 2 weekend shifts but no more than a total of 3 per week.
- ✓ **In-row:** The maximum number of shifts or closes in a row the employee may work. Note that ESP takes the previous week's schedule into consideration when determining how many shifts an employee has worked in a row.

The *Hour limits* and *Shift limits* fields are automatically entered when you originally add an employee. The information is taken from the initial *Labor category* you specify in the *Add employee* screen. You may modify the employee's limits if they are different from the assigned labor category. Note, however, that ESP will not assign amounts over the *Labor category* limits even if you set the employee's limits higher on this form. If the employee's limits conflict with the labor category, the lower of the two limits will be applied.

Availability

The bottom section of this tab is used to enter the employee's availability. There are three types of availability:

1. **Regular availability:** The employee's availability that will be used for most of the year.
2. **Alternate availability:** The employee's summer or other alternate availability if it is different from their regular availability.
3. **Team availability:** Active only if you schedule using teams. The employee's team availability automatically entered from the associated *Teams* form.

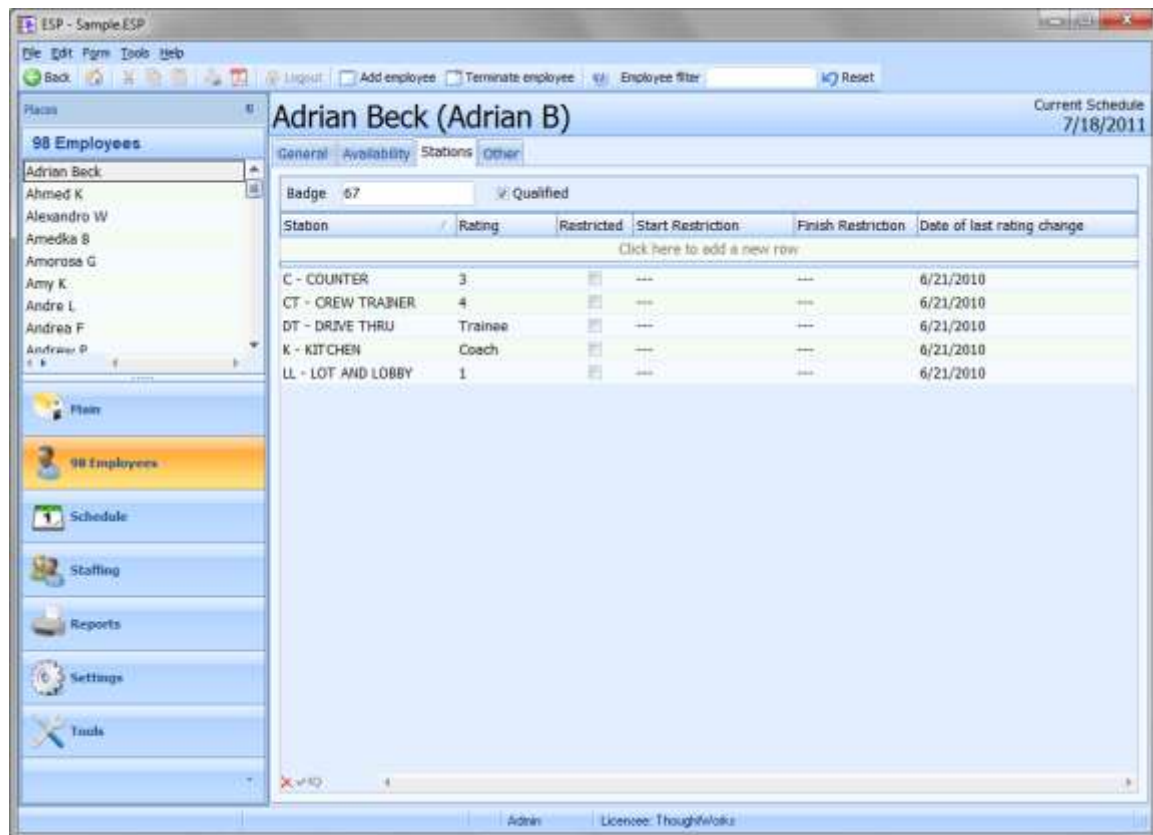
For each day that the employee is available, fill in the following fields:

- ✓ **Day:** the day that the line of availability applies to.
- ✓ **Start Time:** the earliest time that the employee is available to start working on this day.
- ✓ **Finish Time:** the latest time that the employee is available work on this day.
- ✓ **Type:** indicates whether this entry is Availability, a *Day off* (time-off request), or a *Fixed shift*. Keep in mind that a *Day off* applies to the whole day at all locations and ESP will not schedule the employee on a day that is marked as *Day off*.
- ✓ **Department:** This column is only displayed if you schedule more than one location and allows you to enter the site that the availability applies to. If you schedule only one location this option will not appear on the screen.
- ✓ **Station:** This is active only if the shift *Type* is *Fixed* and allows you to assign the station that the employee will work during the fixed shift. If no station is entered, ESP will schedule the employee where they are needed most. When you select this field you may enter the station in the field or use one of the options:
 - ✓ use the drop down arrow head to scroll through a list of all stations
 - ✓ use the additional button (...) to open the *Edit fixed shift segments* window where you may enter information about availability that involves two or more stations.
- ✓ **Temp:** A checkmark in the *Temp* box tells ESP that this is a temporary availability. When you select the *Temp* box, ESP will automatically fill in the start and finish dates with the current week. You only need to change them if this change will apply to a future week.
- ✓ **Start Date:** This field is active only if the *Temp* box is checked and allows you to enter the first date that this temporary availability applies to. The start date will always be the first day of the week to which this time off request applies.
- ✓ **Finish Date:** This field is active only if the *Temp* box is checked and allows you to enter the last date that this temporary availability applies to. The finish date will always be the first day of the week after the time off request has expired.

Example: If your schedule starts on Monday and an employee asks for Friday June 25,2010 off, the start date would show Monday June 21, 2010 and the end date would show Monday June 28, 2010. This means the employee wants the Friday off that falls between those two dates.

Stations

Use the *Stations* section to specify the stations that the employee is qualified to work. Stations for your operation are defined in the *Stations* screen, found in the *Settings* group on the PLACES panel.



Badge : Use this field if you wish to enter a time clock badge number for this employee. Employees may have a time clock number that is different from their regular ID number. They may also have a different badge number for each department where they can work, in a multi-department setup.

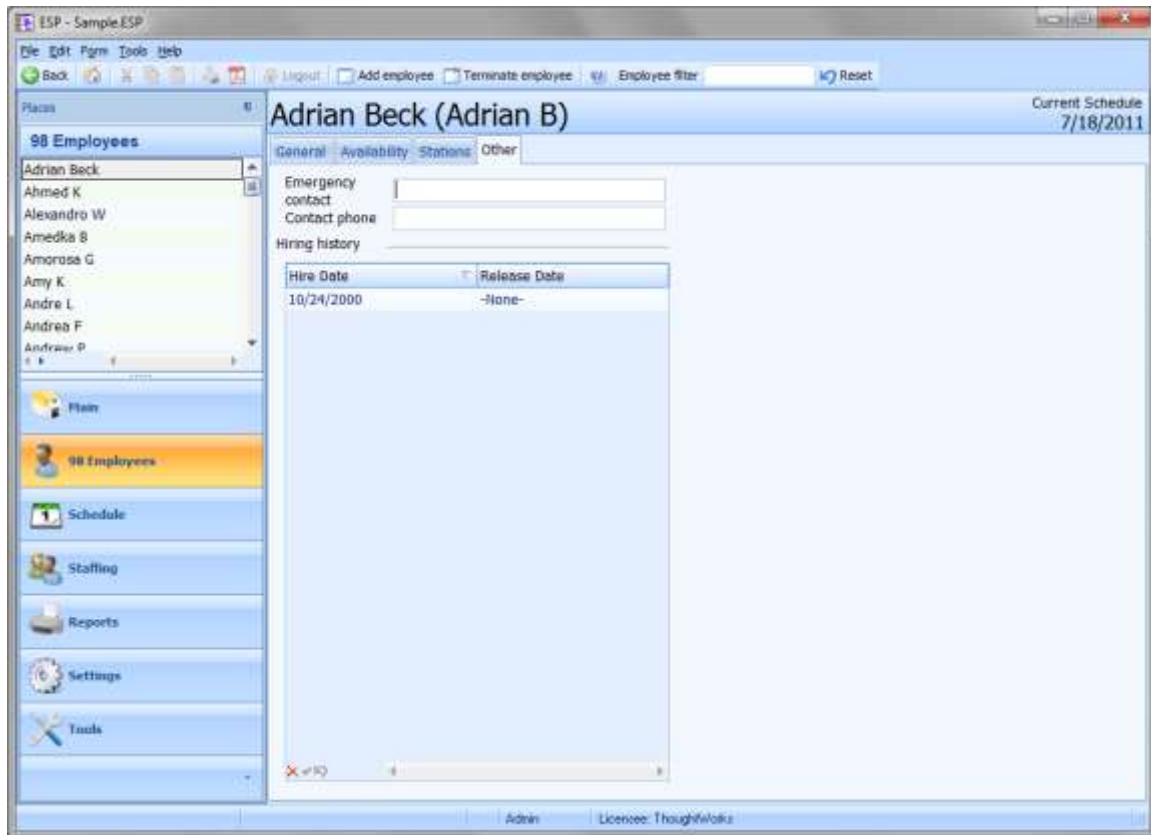
The following information is required for each entry:

- ✓ **Station:** enter the station or select it from the drop down list of all stations.
- ✓ **Rating:** Rate the employee's performance level for each station on a scale between 1 and 4. If the employee is just learning the station you may prefer to rate the station *Trainee* or, if the employee trains others at the station you may prefer to rate them *Coach*.
- ✓ **Restricted:** A checkmark in this box indicates that the employee is restricted from working the station at a certain time during the day.

- ✓ **Start restriction:** Active only if the *Restricted* box is checked. Enter the time of day that the employee's restriction for working this station begins.
- ✓ **Finish restriction:** Active only if the *Restricted* box is checked. Enter the time of day that the employee's restriction for working this station ends.

Other

The *Other* screen, shown below, is used to store additional information for the employee.



The following information is stored on this screen:

- ✓ **Emergency contact:** The person's name who should be contacted in case of an emergency.
- ✓ **Contact phone:** The phone number of the emergency contact.
- ✓ **Hiring history:** A history of the employee's hiring and release dates. This is automatically entered by ESP as you add and remove employees.

Adding employees

To add an employee to ESP's files select the *Add employee* button on the toolbar. The *Add employee* window, shown below, is displayed.



To add a new employee, enter the person's first and last names and select the labor category that the person will be assigned to. The *Schedule name* is a unique, short-form name that is made up of the employee's first name and the first initial of the last name. You can leave the SCHEDULE NAME as ESP creates it or you may modify it. When you press OK, an employee form is displayed, filled in with the employee's name, schedule name and the labor category that you have assigned the person to.

Occasionally, you may wish to reinstate an employee that worked for you in the past, or re-activate an employee that you may have deleted in error. The *Reinstate previous employee* tab displays a list of all employees who have worked for you in the past but have been removed from ESP's active employee files. Choose the employee from the list, and click OK to return them to your active employee files.

Terminating employees

Terminating an employee from ESP removes the employee from ESP's active employee files. However, the employee's information is retained in all historical schedules, and is preserved in case you wish to re-instate the employee as described in *Adding employees*, above.

Procedure

To remove an employee, display the desired employee's information screen, and select the *Terminate employee* option on the toolbar. The *Terminate employee* window, as shown below, will be displayed.

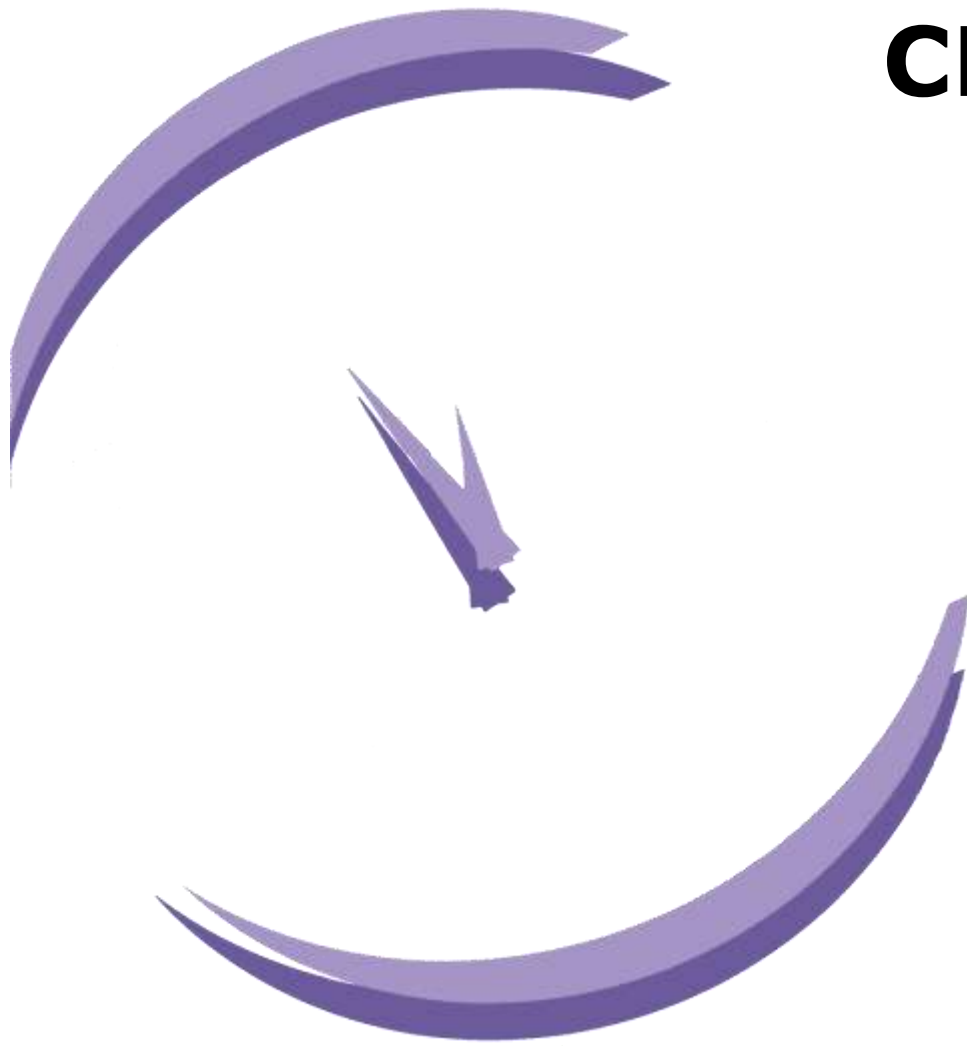


Confirm that this is the employee you wish to remove, enter the date that the person's employment will be terminated and press **OK**.

- ✔ *The termination date may be in the future, but it cannot be any earlier than the date of the current scheduling week. This is because you cannot terminate someone who may have already been scheduled on past schedules.*

CHAPTER 5

Schedule



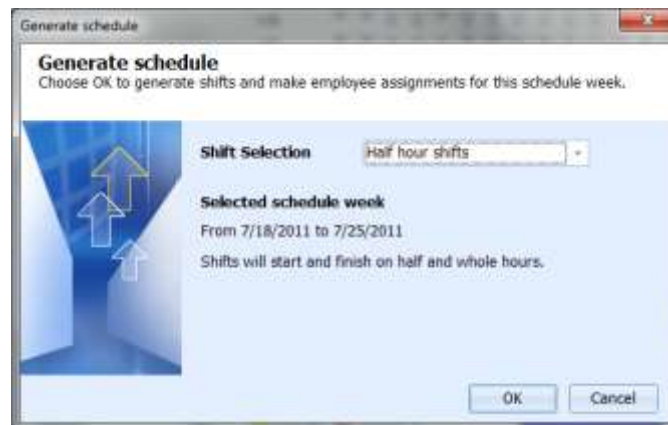
Schedule

The SCHEDULE form allows you to generate a schedule, complete with shifts and job assignments, and review and edit your schedule on-screen before you print and post it.

There are several ways to open the SCHEDULE form.

- ✓ To open the form and automatically generate shifts for the current schedule:
 - ✓ Select *Generate shifts* on the HOME form's *To Do List*.
- ✓ To open the form without automatically generating shifts:
 - ✓ Select *Review and edit schedule* from the HOME form's checklist.
 - ✓ Select *Schedule* from the *Main* group on the PLACES panel
 - ✓ Select FORM | SCHEDULE from the menu

If you have not yet generated shifts for the current week, the SCHEDULE form will be blank. To generate shifts, click the *Generate schedule* button on the toolbar. In the dialog box that appears, shown below, choose whether you want to allow shifts to start on the hour, half-hour, or quarter hour by selecting the appropriate *Shift selection* option. Then, press *OK* to begin shift generation. ESP reports its progress as it designs and fills shifts for the week. Once complete, ESP will display the schedule on the screen, ready for reviewing and editing.



After you have generated a schedule for the week, re-opening the SCHEDULE form will display the current schedule. You can review and edit the shifts, or re-generate an entirely new schedule at any time.

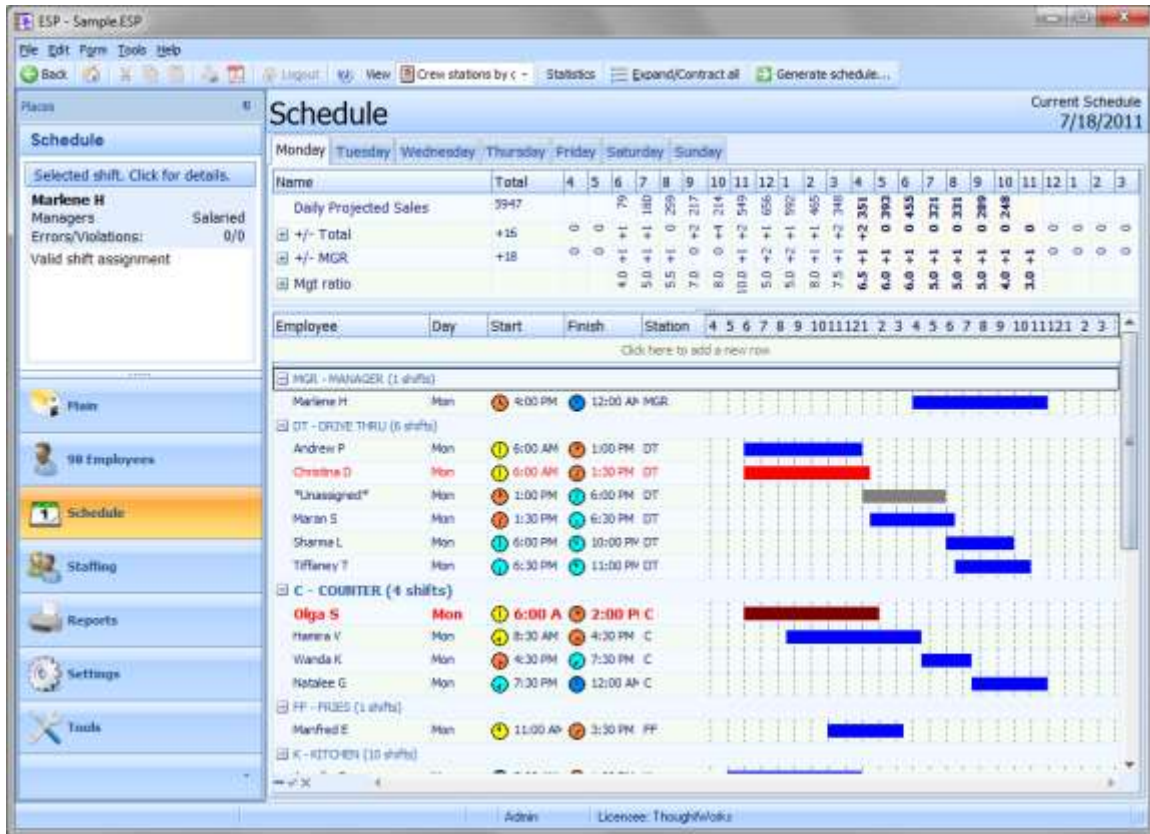
The schedule is displayed in a graphical format, with the employees and shifts grouped by station. You can edit these shifts as desired. While editing you can easily access statistical and shift status information to assist you in creating an accurate and error-free schedule.

Shifts

The shifts area can be displayed with the shifts grouped *by day* or *by employee*. Additionally, you can choose to view only shifts that contain errors or violations. Select your preference from the *View* toolbar option.

View shifts by day

The *Shifts by day* view, shown in the example above, displays your schedule for each day of the week on a single form, grouped by station. You can navigate through the days of the week by choosing the appropriate day tab at the top of the form.



Details about each shift are displayed on the left side of the form with a graphical display of the shift appearing on the right side. The graphical display lines are color coded so that you can quickly identify shifts that require attention:

- ✓ **Blue:** indicates valid shifts without errors.
- ✓ **Red:** indicates shifts with errors. The reason for the error is provided on the *Shift status* box at the top of the PLACES panel.
- ✓ **Dark Red:** indicates a shift that contains a labor violation. You can refer to the *Shift status* box for more detail. If your schedule contains any violations, printing of the final schedule will be disabled, so you must correct the error in order to print the schedule. See the *Settings* chapter to learn how to designate which labor rules are allowed to be manually overridden on the PREFERENCES form.
- ✓ **Grey:** indicates an unscheduled or unfilled shift. An unscheduled shift indicates that ESP was unable to find a qualified, available employee for the shift. You can re-arrange shift assignments manually to fill the shift.

If you schedule your employees for more than one location or department, a tab for each location will appear at the top of the screen. Use the tab to easily move between locations.

The columns displayed on the left side of the SCHEDULE form are:

- ✓ **Employee:** indicates the name of the employee assigned to the shift. If a shift is not assigned **Unassigned** is displayed in this field, easily identifying shifts that require assignment.
- ✓ **Day:** indicates the day of the shift.
- ✓ **Start:** indicates the time the shift begins.
- ✓ **Finish:** indicates the time the shift ends.
- ✓ **Station:** indicates the station(s) that make up the shift. Although most shifts are composed of a single station, some multi-station shifts may be necessary. To view a shift that is made up of multiple stations or to add a station to someone already scheduled, select the additional (...) button in the *Station* field. This opens an expanded view of the shift showing details on when each station assignment begins and ends.

View shifts by employee

The *Shifts by employee* view provides an alternate view of your schedule, grouped by employee name. This option displays a weekly view of all shifts alphabetically by employee, but no graphical line information is displayed.



Schedule by employee expanded view



Schedule by employee contracted view

Both views display the same information. However, the *Shifts by employee* view combines all the shifts for the week for all locations. The location tabs no longer appear at the top of the screen; instead, a *Department* column is included in the *Shifts* area.

The employee view allows you to quickly review each employee's shifts and find any shifts containing errors.

Viewing shifts with errors

This view allows you to see a list of only those shifts that have errors or violations. From the drop down list on the tool bar select ERRORS. Below is a sample of the errors view.

The screenshot shows the 'ESP - Sample ESP' application window. The title bar includes 'File Edit Firm Tools Help' and a toolbar with 'Back', 'Logout', 'View Errors', 'Statistics', 'Expand/Contract all', and 'Generate schedule...'. The main window is titled 'Schedule' and shows the 'Current Schedule' for '7/18/2011'. On the left, a sidebar contains a 'Schedule' section with a 'Selected shift. Click for details.' box showing 'Andre L' with 'Adults Wage: \$9.25' and 'Errors/Violations: 1/1'. Below this are buttons for 'Main', '18 Employees', 'Schedule', 'Staffing', 'Reports', 'Settings', and 'Tools'. The main area is divided into two sections: 'Totals' and 'Schedule'. The 'Totals' section has columns for days 4-13 and rows for 'Daily Projected Sales', '+/- Total', '+/- MGR', and 'Mgt ratio'. The 'Schedule' section is a table with columns for 'Employee', 'Day', 'Start', 'Finish', and 'Station'. It lists shifts for employees like Andre L, Andrea F, Bola O, Christina O, Cindy S, and Francisco F, with error icons (red and yellow) indicating violations. At the bottom, a status bar shows 'Admin 8.00 hours, Fixed: 1 violations, 1 errors'.

As you highlight each shift, an explanation of the error will appear in the status box on the top left. You can click on the DETAILS link at the top of the status box to get more detailed information about what is causing the error.

Totals section

The *Totals* area located at the top of the screen displays a comparison of projected versus actual labor for your schedule.

There are four rows that provide you with key information: the top row displays your projected volume; the second row displays the total +/- labor for each hour; the third row displays the station +/- labor; and, the final row provides the crew to management ratio for each hour. This information is live and updates automatically as you edit your schedule allowing you to keep track of the effect that your changes make to your labor cost.

The +/- values are interpreted as follows:

- ✓ a zero indicates that the labor scheduled is the same as requested in the Positioning Guide
- ✓ a positive number indicates that you are over your labor, as requested in the Positioning Guide
- ✓ a negative number indicates that you are under your labor, as requested in the Positioning Guide

For detailed information on any row, expand it using the plus (+) sign. This will display the projected and actual amounts for each hour along with the variance.

When viewing *Shifts by day*, the totals area displays a comparison of the projected-to-actual hourly labor for each hour of the day and the projected-to-actual station labor for each hour of the day for the station.

Click and drag this bar to expand the statistics area.

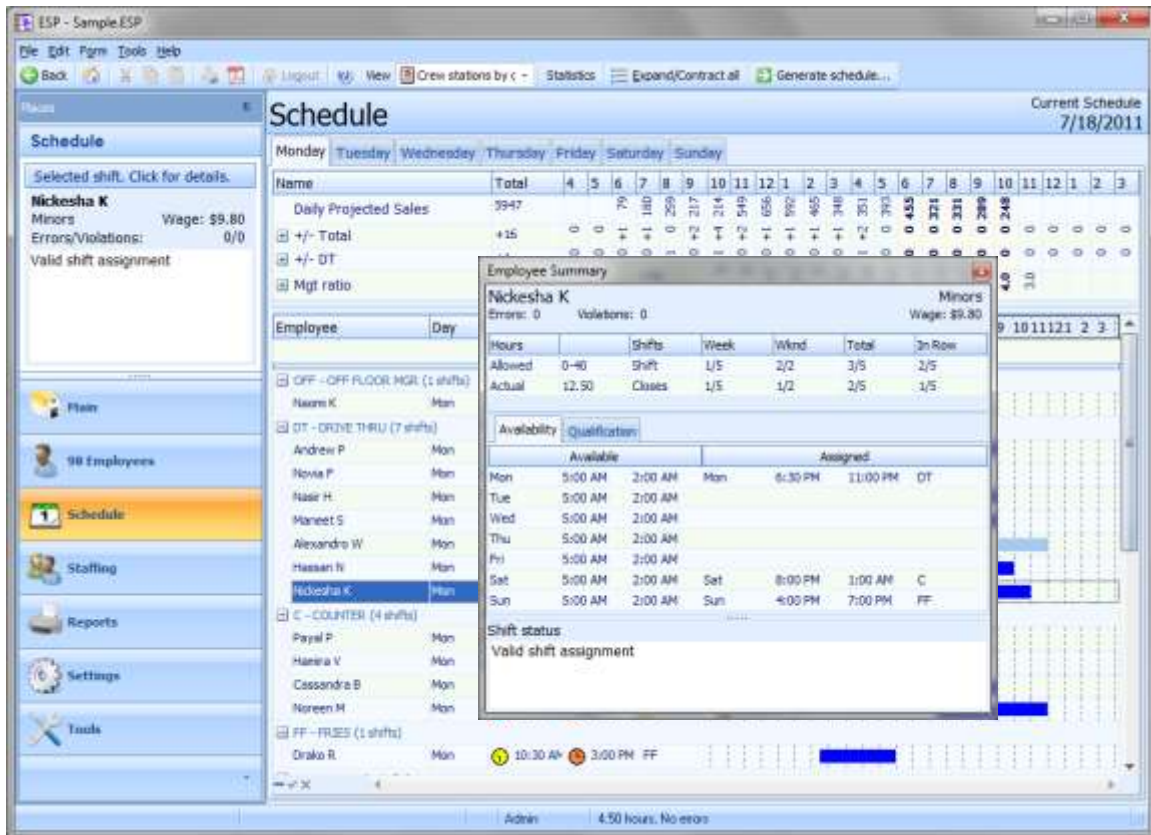


In the example above, the third line in the *Totals* section shows the plus/minus for Drive-Through, the station that is currently selected. Notice that the time of day that the shift spans is highlighted in yellow in the *Totals* section. You can make the totals section larger or smaller by dragging the splitter bar separating it from the shifts section.

Shift status

When the SCHEDULE form is open, a *Status* box appears at the top of the PLACES panel. The *Status* box displays information about the current shift, and can help you determine the cause of any potential errors or problems.

To help you further, the *Click here for details...* link at the top of the *Status* box opens an *Employee summary* window, shown below, with detailed information about the assigned employee.



This information is live and will be updated as you edit to reflect changes that you make to the schedule.

Editing your schedule on screen

One of ESP's most powerful features is the ability to view and change the schedule on screen. You can change shift times, stations, and employee assignments. You can add new shifts and remove unwanted ones. In fact, you can alter the schedule in almost any way. However, if you are spending a great deal of time editing, you should examine your chart setup for changes to allow ESP to automatically generate a more workable schedule.

As a guideline, if you spend more than 45 minutes editing a single site then you should re-examine your data's setup for improvements to help you generate a schedule closer to the one you post.

To edit information on the schedule screen select the field you wish to change. Selecting most fields will activate a drop-down list of all possible choices, allowing you to select from appropriate options.



If you simply want to scroll through the schedule be sure to click on the actual shift line in the grid areas rather than on any of the fields. Clicking on a field activates that field so moving the wheel on your mouse will change the field. By selecting the line, your mouse wheel will scroll through the schedule.

When you select the employee field you will also see an additional (...) button to the right of the employee's name. This opens a list of employees as shown below, and includes information about each employee's assigned shifts to help you determine the best person to fill an

unscheduled shift, or replace someone already scheduled. You can sort the list by any of the columns by simply clicking on the column name. In most cases you will want to sort it by the *Errors* column so that you have the best choices at the top of your list.

Name	Hours	Days	Closes	Fit	Avail	Qual	Error /	Violations
Kassie G	12/(0-40)	2/5	0/5	42	Yes Thu 5:00 AM-2:00 AM	Yes	0	0
Maneet S	18/(0-40)	3/5	0/5	36	Yes Thu 5:00 AM-2:00 AM	Yes	0	0
Felton K	17/(0-40)	3/5	1/5	38	Yes Thu 5:00 AM-2:00 AM	Yes	0	0
Alexandro W	36/(0-40)	5/5	4/5	36	Yes Mon 4:00 AM-4:00 AM	Yes	0	0
Nickesha K	17/(0-40)	4/5	2/5	29	Yes Thu 5:00 AM-2:00 AM	Yes	0	0
Sharma L	16/(0-40)	3/5	0/5	31	No	Yes	1	1
Niya Z	17/(0-40)	3/5	0/5	38	Yes Thu 5:00 AM-2:00 AM	Yes	1	0
Cyrstal D	15/(0-40)	3/5	0/5	39	No	Yes	1	1
Bola O	18/(0-40)	3/5	1/5	37	Yes Thu 8:00 AM-11:00 PM	No	1	1
Ashley L	9/(0-40)	2/5	0/5	34	No	Yes	1	1
Maran S	20/(0-40)	3/5	0/5	37	Yes Thu 5:00 AM-2:00 AM	Yes	1	0
Benjamin F	22/(0-40)	4/5	0/5	37	Yes Thu 5:00 AM-2:00 AM	No	1	1
Jerome J	14/(0-40)	3/5	1/5	33	No	Yes	1	1
Missy D	17/(0-40)	4/5	1/5	29	Yes Thu 5:00 AM-2:00 AM	Yes	1	0

The employee list contains the following columns:

- ✓ a comparison of each employee's scheduled-to-actual hours, days, and closes
- ✓ a rating to indicate how good a fit each person is to cover the shift; the higher the number, the better choice the person is to fill the shift
- ✓ the employee's availability for this day.
- ✓ whether or not the employee is qualified to work this station
- ✓ a zero in the *Errors* field means that employee can be assigned to the shift without breaking any of the rules listed on the PREFERENCES form. Essentially, the existence of an error indicates that a basic scheduling rule has been broken (employee past maximum employee hours, etc.)
- ✓ a zero in the *Violations* field means that the employee can be assigned to the shift without breaking any of the *unchecked* rules on the PREFERENCES form. Violations are more severe than errors, in that you have indicated on the PREFERENCES form that you are not allowed to override these rules.

When you choose an employee on the list, the *Status* box at the top of the PLACES panel will display information about that selected employee, including any errors that would occur if assigned the shift. As you scroll through the list, the information in the *Status* box changes to display the selected employee's information.

ESP has added features to make selecting people on this list easier.

- ✓ **Sorting:** When you open the employee list it is sorted according to your previous sort selection with your cursor on the person already scheduled. You may sort the list by any

column to help you select the best person to fill the shift. To resort the list click on the heading for the column you wish to sort by and the entries will be resorted by that column.

- ✓ **Employee searching:** if you know the name of the employee that you want to fill the shift, use employee searching to quickly move to that employee. Simply type the employee's first initial and ESP will display the first name that begins with that initial. If there are a number of people whose name begins with that letter, type the second letter (or third, or fourth) to move further down the list.

To fill the shift with the selected employee, press the OK button. To return to the SCHEDULE form without changing the scheduled employee, press the CANCEL button. You can leave the employee list on the screen at all times and move it anywhere you like by simply dragging it and sizing it to your preference. To close it, click the close button on the top right corner.

In addition to editing the employee, you can change the times and station of the shift. When you select the *Station* field, you can choose from a drop-down list of stations, or enter a multi-segment shift by pressing the (...) button. Using a multi-segment shift allows you to assign an employee to work two or more different stations in a single shift.

When you select the (...) button in the station field, the multi-segment shift window is displayed, as shown below. Use this window to edit a shift that is made up of more than one station or to add another station to a shift already scheduled. After you make your changes, select the OK button to save them or choose CANCEL to return to the SCHEDULE form without saving the changes.

Day	Start	Finish	Station
Click here to add a new row			
Sun	11:30 AM	3:30 PM	DT

On either the SCHEDULE form or the *Edit shift segments* form you can modify information the same way.

- ✓ **Add** a new entry by clicking in the top row labeled *Click here to add a new row* and enter the information under each column.
- ✓ **Save** the changes by moving off the row or by clicking the *Post* icon at the bottom of the screen.
- ✓ **Change** an entry by clicking inside the field you wish to change, make the change, and then save it by moving off the row or by clicking the *Post* icon at the bottom of the screen.
- ✓ **Remove** an entry by clicking inside the row that you wish to remove and then clicking the *Delete record* icon at the bottom of the screen.
- ✓ **Cancel** any change before it has been saved by using the *Undo* icon at the bottom of the screen.

Toolbar options

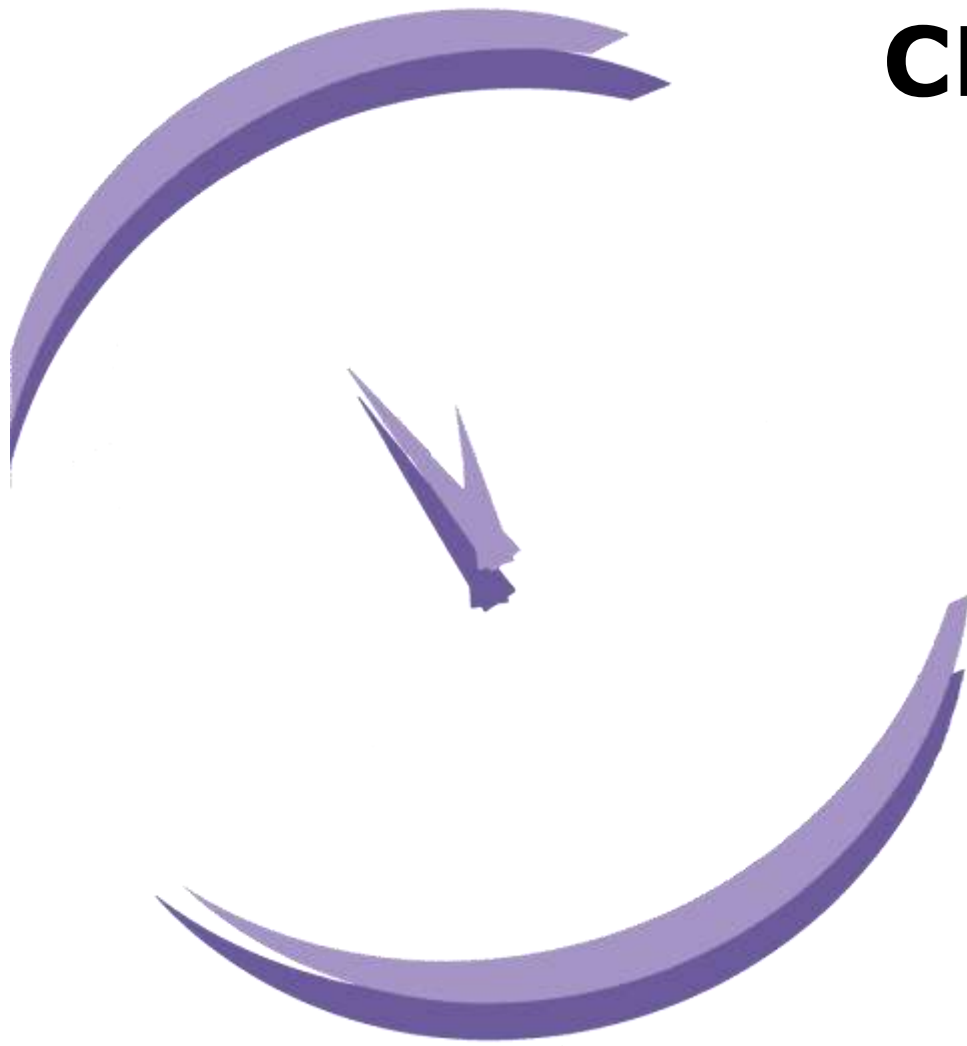
The options on the SCHEDULE form's toolbar are:

- ✓ **View:** you can choose to view the shifts *by day* or *by employee*. The *By employee* option allows you to see each employee's shift assignments for the entire week; whereas the *By day* option provides an overview of shifts for each day organized by station and includes each shift drawn on a line bar.
- ✓ **Statistics:** opens a window that displays a labor summary, including daily and weekly labor cost, labor percent, hours, and sales and transaction counts per man hour. This information is live and updated as you edit the schedule, which will help you keep track of the effect that your editing changes are having on your labor cost.
- ✓ **Expand/contract all:** this option will open or hide all of the entries on the screen at once. Alternatively you may expand or contract the entries for an individual employee or station by using the plus or minus signs beside the group's name.
- ✓ **Generate schedule:** this option can be used to generate shifts at any time during the scheduling process. Be careful, however, as selecting this option will regenerate **all** shifts and erase any edited changes.

CHAPTER

6

Staffing



Staffing

The *Staffing* group allows you to define the forms that help you specify your staffing needs. These forms include *Positioning Guides*, *Fixed Shifts*, *Breaks*, *Labor Categories*, *Teams*, and *Availability Options*.

Positioning guides

ESP uses POSITIONING GUIDES to determine how many workers are required to cover any given hourly sales volume. The positioning guides form the heart of ESP's scheduling process and have a significant impact on your labor cost each week. Care must be taken to design guides that schedule your people exactly where and when you want them.

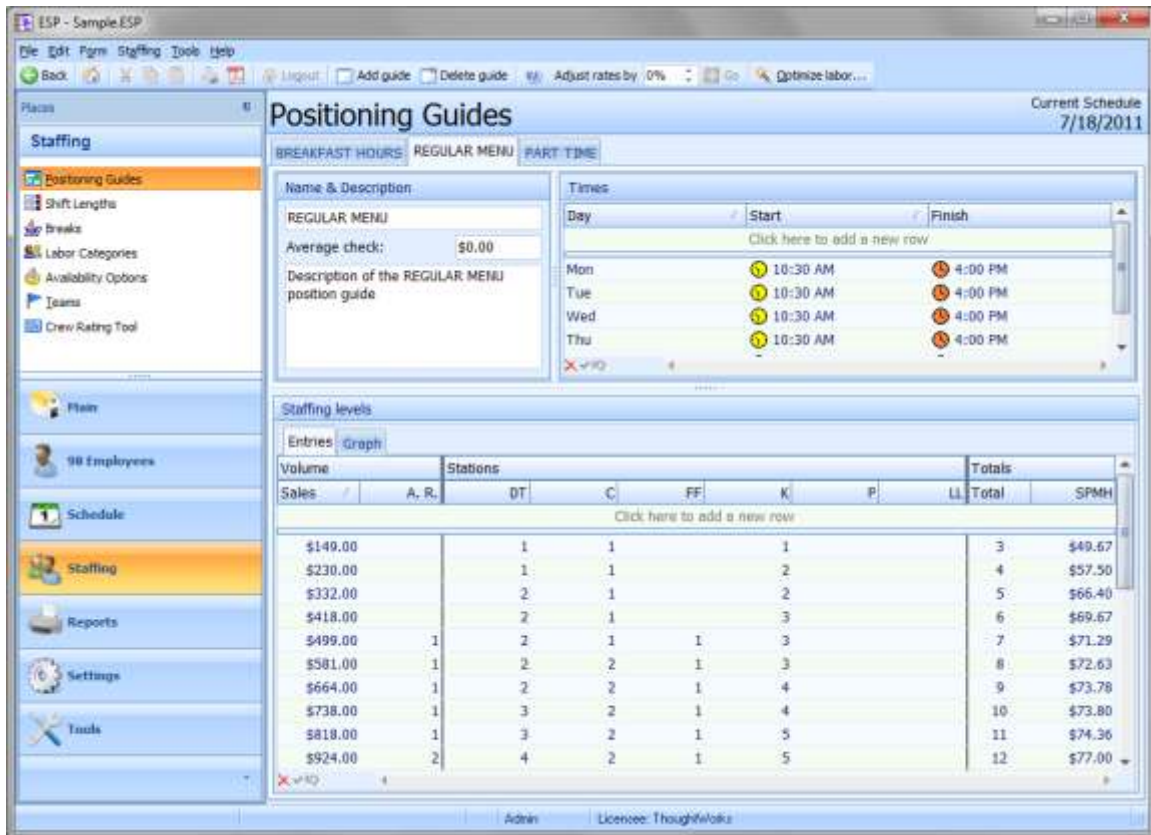
A positioning guide specifies how many crew members you require for a given hourly sales (or transaction) volume. For example, a restaurant that is expecting a sales volume of \$500 for an hour may need 3 Counter people, 2 Kitchen people, a Lot and Lobby person, and perhaps a Drive-thru person. For a \$600 hour, a correspondingly higher number of crew would be required. You design the positioning guides by specifying these volume levels and crew requirements.

You may set up as many or as few positioning guides as needed. The number of guides you need will depend on your operation. Here are some common charts that you might need if you are scheduling for a restaurant.

- ✓ **Breakfast:** The breakfast menu is often more labor intensive for a given sales volume, and therefore the positioning requirements are different from regular menu hours. If this is the case, it is best to design a specific Breakfast guide for the morning hours.
- ✓ **Regular menu:** Labor requirements for a given sales volume are probably different than those required at breakfast and designing a separate guide for this time of day allows you to accommodate these differences.
- ✓ **Day time versus after school:** Some restaurants use full-time employees to work during school hours. These employees are often more experienced and have higher productivity than part-time student employees used after school and on weekends, which means you may require fewer full-time staff to cover a given sales rate. Design a separate positioning guide to accommodate these different productivity levels.
- ✓ **Weekends:** Most restaurants experience a significantly different average check and different type of customer on weekends than on weekdays. If so, design a different positioning guide for use on weekends.
- ✓ **Discount promotions:** Special price discount promotions may change your labor requirements. You may need a unique positioning guide to accommodate this situation.

Not all of these examples may apply to your operation, but the concept is the same: Use positioning guides to specify different levels of crew requirements for a given hourly sales volume.

Let's take a look at a typical positioning guide.



All the positioning guides that you have defined are listed in the tabs along the top of the form. You can see in this example, that we have designed a guide for *Breakfast Hours*, *Regular Menu*, and *Part Time*.

Name and Description

In the *Name and Description* section, specify the name, description and expected *Average check* for this guide.

Times

Each positioning guide applies to a particular portion of the day, with the applicable days and times specified in the *Times* section. You should only have one chart active at any given time. For example, the *Regular menu* guide we have designed above applies from 10:30 AM to 4:00 PM every day. Depending on your screen size, the times may not all be visible. Use the scroll bars on the right side of the *Times* box to view all your entries.

Staffing Levels

The staffing levels define the number of crew and their placement for any given volume rate. You may use either sales or transactions when defining staffing levels. To change your preferred entry type from sales to transactions, go to the PREFERENCES form found in the *Settings* group on the PLACES panel. See the *Settings* chapter for more details.

Enter the sales or transaction value in the leftmost field, followed by the number of crew you require at each station for that volume level. An effective positioning guide increases by one crew member for each new row. Note that the only stations that appear on these positioning guides are the stations that are designated as variable labor hours on the STATIONS form.

The total columns on the right indicate the total number of crew for the row, and their productivity in *Sales Per Man Hour* (SPMH), or *Transactions Per Hour* (TC/H), depending on whether you are using sales or transactions in the form.

- ◆ On a well-designed positioning guide, SPMH or TC/H will be equal to or higher than the previous row, indicating ever-increasing productivity as you add more crew.

Each new row should add just one more person than the previous row. If you add two or more you may be reducing productivity and wasting labor. As well, you should never have two rows with the same total number of crew. The row with the lower volume should be deleted.

The productivity graph

To view a visual representation of your positioning guides and get a clear picture of your productivity levels, select the *Graph* tab in the *Staffing levels* section. If your positioning guide is well-designed, then productivity (either SPMH or TC/H) will always increase as you get busier. This is indicated by a line gently sloping upwards to the right as your total number of crew increases.

Here is a sample *Productivity Graph*.



The horizontal scale of the graph represents the total number of employees. The vertical scale is the productivity in SPMH or TC/H. As you move to the right (add more employees) the line goes up indicating increasing productivity.

The two differently-colored lines on the graph represent a comparison between your chart and an optimal chart. The yellow line represents the productivity from your current positioning guide. The blue line represents the ideal values that ESP recommends based on evening out the peaks and valleys from the entries you have made. If the lines diverge significantly, or the yellow line fluctuates erratically, you may wish to redesign your guide, or use the *Labor optimizer*.

Using the labor optimizer

In our sample above, the yellow line (your chart) starts by increasing steadily but then becomes erratic and fluctuates above and below the optimal line. This indicates that productivity is not consistent and the positioning of employees could be improved. The solution is to specify a new volume amount for each row so that you schedule each succeeding employee at a volume level that maintains your productivity. Calculating these volume rates can be time consuming. The labor optimizer can do the work for you. Click on the *Labor Optimizer* button on the toolbar, and ESP will immediately replace your entered volume rates with the optimal ones on the blue curve.




Notice the original guide on the left in the figure below. After using the *Labor Optimizer*, the guide has been significantly improved. You can click on the *Entries* tab to view the actual volume and chart levels.



Before using the labor optimizer

After using the labor optimizer


 *The optimal line is calculated by using your existing entries and smoothing out the bumps between them. Even after using the labor optimizer, your Positioning Guide may need further fine-tuning.*

The Allowed Reduction (A.R.) field

Many operations have dramatic volume increases and decreases during particular times of day. For example, in a restaurant, you may have lunch and dinner rushes where your volume rates increase rapidly for a short period of time. When this period of increased volume is short, for example 1 to 1½ hours in length, it can be difficult to schedule the optimal number of crew. If you typically use shifts of 4 to 8 hours in length, it is difficult, or impossible to cover a short, sharp 1½ hour rush period, and still maintain the requested amount of crew both before and after the rush.

You may decide that it is acceptable to schedule slightly fewer crew than needed during the rush period to avoid wasting a large amount of labor in the hours before and after. For example, if you typically need 6 people working in the hours before and after the rush, but you have a brief lunch rush that has a volume rate that would normally require 12 people, you might choose to schedule 10 or 11 people during the rush instead. During the rush, the employees are expected to work a bit harder to still maintain high levels of customer service.

The A.R. (*Allowed Reduction*) column in the positioning guide allows you to specify when and where you are willing to reduce your requested labor for rush periods. The Allowed Reduction represents the number of people you are willing to cut for the given volume amount. For example, if your guide calls for 12 people at a given volume rate and you specify an Allowed Reduction of 2; you are indicating that ESP may schedule as few as 10 people if it cannot effectively fit the normal 12 crew on the schedule without significant labor waste.

 *The Allowed Reduction is used only when it is not possible to schedule the full requirement of labor due to the volume peak being too short. If you have sustained high volume for long periods of time, the Allowed Reduction will not have any effect, since ESP will easily schedule the full complement of employees without wasting any labor.*

There is no right or wrong setting for the allowed reduction. It depends on your volume patterns, the experience of your employees, and the type and length of your rush. As a general guideline, however, consider the following:

- ✓ **For chart entries of 0 to 5 employees set the AR to 0:** For very small rushes, when you only require five or fewer employees, you most likely do not wish to give up any of these employees to save labor.
- ✓ **For chart entries of 6 to 11 employees set the AR to 1:** For moderate volume peaks, it may be acceptable to be short one crew person.
- ✓ **For chart entries of 12 to 18 employees set the AR to 2:** For these higher volume peaks where you have a large number of crew, you can easily run short 2 or more crew members for a short period of time
- ✓ **For all chart entries higher than 18 employees set the AR to 3:** Similar to above, with correspondingly higher crew levels, you may be able to handle 3 fewer employees than requested to cover short rushes.

Setting up new positioning guides

When you set up a new positioning guide, you can use one of your existing guides as a template to get you started. Clicking the *Add Guide* option on the toolbar allows you to create a new blank guide, or use an existing positioning guide as a template. If you choose to use an existing guide as a template, ESP will copy all of the volume entries from the original guide, leaving the days and times blank. You can then modify the entries as needed, and fill in the days/times that apply to the new chart.

Shift lengths

Use the *Shift Lengths* form to specify the lengths of shifts you wish to use during particular days and times. Most locations will only need two or three SHIFT LENGTHS forms to produce a good schedule.

Day	Start	Finish
Mon	5:00 AM	7:00 PM
Tue	5:00 AM	7:00 PM
Wed	5:00 AM	7:00 PM
Thu	5:00 AM	7:00 PM
Fri	5:00 AM	7:00 PM
Sat	5:00 AM	7:00 PM
Sun	5:00 AM	7:00 PM
Hol	5:00 AM	7:00 PM

Length	Priority
7.00	5
7.50	2
8.00	1

Each *Shift length* form is divided into three sections: *Description*, *Times*, and *Shift lengths permitted*.

Description

Enter a name for the form in the top box and a longer, more descriptive statement about the form in the comments box.

Times and shift lengths permitted

ESP allows you to use different lengths of shifts throughout the day and week. Many operations prefer to schedule longer shifts for their day staff and shorter shifts for their part-time staff.

For each chart, enter the days and times that the chart is to be used in the *Times* section and the shift lengths that you want scheduled during that time in the *Shift lengths permitted* section. Shift lengths can range from 1 hours to 24 hours and can be entered in quarter hour increments. Give each shift length a priority from 1 to 10: give the shift you want used most often a priority of 1, the next most preferred shift length a priority of 2, and so on. If two shift lengths are equally desirable you can assign them both the same priority.

Refer to the sample chart above. This chart is in effect from 5:00 AM until 7:00 PM every day of the week. The highest priority has been placed on an 8-hour shift length; the 7.5-hour shift length

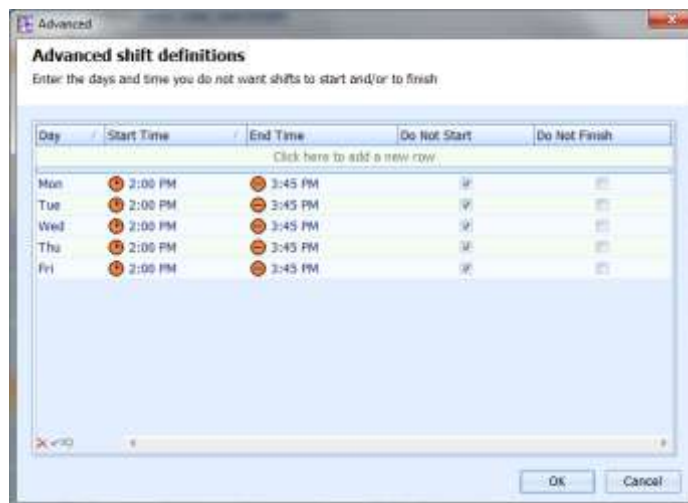
has been given a priority of 2. You will notice that no lengths are rated 3 or 4, but the 7-hour shift length has been rated 5. No other shift lengths will be produced during this time.

You can have multiple *Shift length* forms active at the same time; in fact this may be necessary to allow ESP to cover your peak hours without wasting labor. Using the *Openers* example above, this chart is in effect until 7:00 PM each day and allows long 7- to 8-hour shift lengths. But, if you have a short lunch rush around noon, and if the above form was the only active form, ESP would have to schedule additional 7- and 8-hour shift lengths to cover the 1 or 2 rush hours. This could cause you to waste labor. To accommodate this situation, design a separate chart that is active between 11:00 AM and 3:00 PM, which requests shorter 3- to 4-hour shift lengths. This allows ESP to schedule shorter shifts to cover the lunch rush. Allowing short shifts only during specific times of the day gives ESP the ability to cover peak hours without wasting labor while ensuring that you are not under-scheduled when you need people most.

Advanced shift design


You can fine-tune your control over shift design by using the *Advanced* options, accessible by clicking the *Advanced* button at the bottom of the screen. Use the *Advanced* options to control when shifts may start and stop during busy times.

Consider this situation. On weekdays, a restaurant has mostly full-time adults working during the day, with a changeover crew of students arriving at 4:00 PM. Since most students are not able to arrive before 4:00 PM, you wish to avoid having these part-time shifts start before that time. The solution: Use the Advanced options to specify that you will not allow any shifts to *start* from 2:00 PM to 3:45 PM on weekdays. This still allows shifts to end during those times, since many of your lunch shifts need to finish earlier than 4:00 PM. But no new shifts will start during these hours, forcing ESP to start dinner shifts at 4:00 PM or later. To handle this situation, set up the *Advanced* form as follows:



We have specified that shifts may not start in the time range from 2:00 PM to 3:45 PM. Start and end times are considered *inclusive*, which means that they are included in the restricted time. So, in the example above, shifts would be allowed to start at 4:00 PM.

Since only the *Do not start* column is checked ESP is free to allow shifts to end between those hours. However, no new shifts may begin.

 *Fixed shifts will always be scheduled as specified even if they start or stop during the restricted times.*

Breaks

Use the BREAKS form to specify the breaks that your employees are entitled to and whether or not the breaks are paid.

BREAKS are associated with *Labor categories*, since employees in one labor category may be entitled to different breaks than those in other labor categories. For example, managers may be entitled to paid breaks while your regular employees' breaks are unpaid. Likewise in some areas, younger employees are entitled to more or longer breaks due to their age.

Name	Start Length	Finish Length	Break Length	Paid
Click here to add a new row				
Short break	4.00	4.75	15	☑
Meal break	5.00	8.00	30	☐
Extra break	7.00	8.00	20	☐

Enter the following information for each break:

- ✓ **Name:** The name for the break. This can be up to 25 characters and is used to specify the break on the *Break report*.
- ✓ **Start length:** The shortest shift length that is applicable to this break length.
- ✓ **Finish length:** The longest shift length that is applicable to this break length.
- ✓ **Break length:** The length of the break, in minutes.
- ✓ **Paid:** Indicates whether the break is paid or unpaid.

You can enter as many different types of breaks as needed for each labor category. The sample BREAKS form above shows that an employee who works a shift that is less than 4 hours in length is not entitled to any breaks. Employees assigned to shifts that are from 4 to 4.75 hours in length are entitled to a 15-minute paid break. Employees assigned to shifts that are 5 hours to 8 hours in length are entitled to a 30-minute unpaid break. Finally, employees assigned to shifts that are 7 hours to 8 hours in length are also entitled to an additional 20-minute unpaid break.

Advanced breaks

In some jurisdictions, the breaks are given to employees based on the time of day and not on the length of their shift. To accommodate this situation, you may use the *Advanced* form, accessible by clicking on the *Advanced* button at the bottom of the BREAKS form.

For example, if you are required to give all employees who work early in the morning a 15-minute paid break, irrespective of shift length, you may use the *Advanced* form as shown below.

Name	Start Time	Finish Time	Start Length	Break Length	Break Length	Paid
Breakfast	7:00 AM	11:00 AM	1:00	8:00	15	

In the above example, the *Breakfast* break applies to all shifts between 1 hour and 8 hours in length but only if they fall between the hours of 7:00 AM and 11:00 AM. All advanced breaks are calculated *in addition* to any breaks defined on the main BREAKS form.

Labor categories

The LABOR CATEGORIES forms allow you to specify local labor regulations governing your employees.

ESP - Sample.ESP

File Edit Form Tools Help

Back Login Add labor category Delete labor category

Places

- Staffing
- Positioning Guides
- Shift Lengths
- Breaks
- Labor Categories**
- Availability Options
- Teams
- Crew Rating Tool

Plan

98 Employees

Schedule

Staffing

Reports

Settings

Tools

Labor Categories

Current Schedule: 7/18/2011

Adults Managers Minors

Name & Description

Adults

ADULTS OVER 18

Day Definitions Assignment Limits Additional

Weekdays

Check the days that are week days for this labor category.

Sunday Monday Tuesday Wednesday

Thursday Friday Saturday

Holidays are counted as

Weekend Weekday Actual day

School days

If school day restrictions will be used for this labor category, check the days that count as school days.

Sunday Monday Tuesday Wednesday

Thursday Friday Saturday Holiday

Restrictions also apply the night before starting at 6:00 PM

Admin License: Thoughtworks

Each LABOR CATEGORY form is divided into two sections: *Name and Description*, and *Entries*.

Name and description

Enter a name and description for the *Labor category* at the top of this section. The name entry also appears on the form's tab.

Entries

The entries area is divided into three tabbed screens: *Day definitions*, *Assignment limits*, and *Additional*.

Day definitions

Using the checkboxes, define which days are to be considered *weekdays*, which are to be considered *school days*, and how to count *Holiday days*.

The *Weekday* definition is used to count how many weekday and weekend day shifts a person is assigned. The *School day* definition is used by ESP to determine the days that should have school restrictions applied to them.

Weekdays

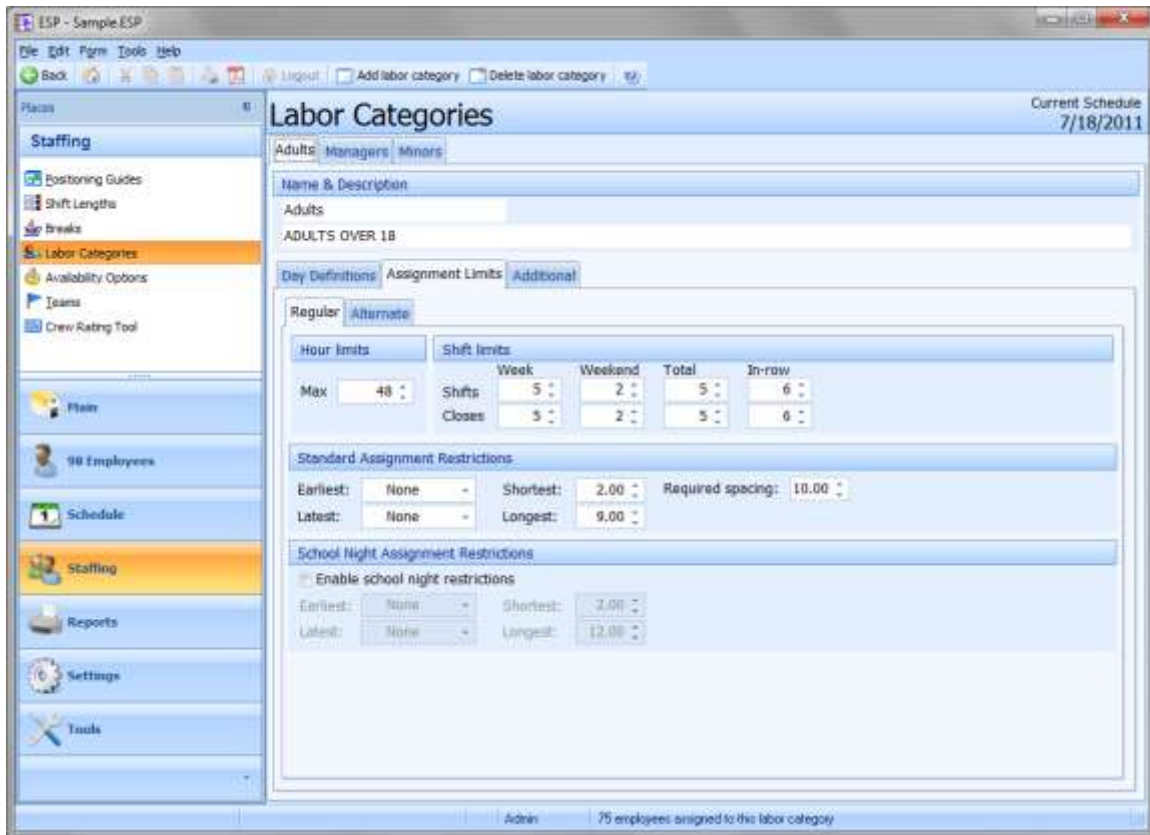
Check the box beside each day that you consider a weekday. Traditionally, Monday to Friday are considered weekdays and Saturday and Sunday are considered weekend days; however, you may change this if you wish. All days left unchecked will be considered weekend days.

This section also controls how ESP counts closing shifts. For example, in the sample form above Friday is defined as a weekday, and Saturday is defined as a weekend. ESP counts a closing shift on the night before a weekend day as a weekend closing shift. Therefore, the Friday night closing shift will be counted as a weekend close shift.

You may also define how ESP should schedule a day that falls on a holiday. You may count the holiday day as a weekend day, a weekday, or as the actual day that the holiday falls on.

School days

Under the *school days* section, check the days that ESP should consider school days for this labor category. In our example form above, we have not checked any of the days, since adults do not normally have restrictions associated with school days. For students, design a separate labor category, with the *Day definitions* set up similar to the one shown below:



The main difference between the two forms is that the one for students has defined Monday through Friday as school days.

The *Restrictions also apply the night before starting at* checkbox allows you to specify restrictions that apply the night before a school day and the time that the restrictions begin. For example, if you specify that restrictions apply at 4:00 PM and school days are defined as Monday to Friday, the restrictions would apply to Sunday through Thursday evenings from 4:00 pm onwards. Although Sunday is not defined as a school day, in many jurisdictions minors are restricted from working late or long shifts on the night *before* a school day. As noted above these restrictions would not apply to Friday evening because the next day, Saturday, is not defined as a school day.

Assignment Limits

Use this screen to define limits and restrictions that apply to shifts assigned to employees in this labor category. These limits are found on both the labor category forms and each employee's individual information form. When there is a conflict between the two, the lower limit will always apply.

You may have two separate availability sets for employees: *Regular* and *Alternate*. This allows you to set different limits on the two types of availability that you can design for each employee. This is particularly useful for students who typically have more restrictions during the school year than they do during the summer and extended school breaks. Generally set up limits under the *Regular* tab that apply during the school year and limits under the *Alternate* tab that apply during to summer and other extended school breaks.

This screen is divided into three sections: *Hour and Shift limits*, *Standard assignment restrictions* and *School night assignment restrictions*.

Hours and shifts limits

The *Maximum hours* field specifies the maximum number of hours an employee in this labor category is permitted to work per week.

The sample form above has the *Maximum hours* field set to 48 hours. This allows some flexibility in assigning employees. It also allows room for breaks, which may be treated as part of weekly hours. You should always set this to the highest value permissible by law or to the highest that any employee in this category will work. If you must restrict the number of hours an individual employee may work, enter the lower number on his or her information form.

The top row of the *Shift limits* area is labeled *Shifts* to indicate the maximum number of shifts allowed in each category: weekday, weekend, total, and in-a-row. ESP will never exceed these limits so be reasonable in your entries. Remember you can always set lower limits for individual employees to ensure their needs are met.

The bottom row specifies how many of those shifts are allowed to be a *Close shift*. In many jurisdictions employees are promised that the number of late night, or close shifts they are assigned will be limited each week. If this applies, define these maximums here. Otherwise assign the *Close shift* entries the same amounts as the *Shift* entries.

When entering the *Close shifts* entries, remember that the number of *Close shifts* is a subset of the total number of *Shifts*; it must be equal to, or less than, the corresponding entry in the *Shifts* row.

Standard Assignment Restrictions

The fields in the *Standard assignment restrictions* section apply to non-school day shifts.

Enter the *Earliest* and *Latest* time that employees in this labor category are permitted to work when it is not a school day. If there is no law dictating an earliest or latest time then you should set these to *NONE* as shown in the sample form above. Remember, the times you fill in here will apply to any employee in this labor category; they will not be scheduled earlier or later than the times you enter even if they are available.

Enter the *Shortest* and *Longest* shift length permitted by law if applicable. If there is no maximum by law, set the longest shift allowed to the longest possible shift length you would reasonably use. Remember you must include the break in the shift length. For example, if your employees are entitled to a 30-minute unpaid break, and you wish that they receive eight hours of paid work, their shift will have to be 8.50 hours long. In this case, the longest shift length should be set to 8.50 hours.

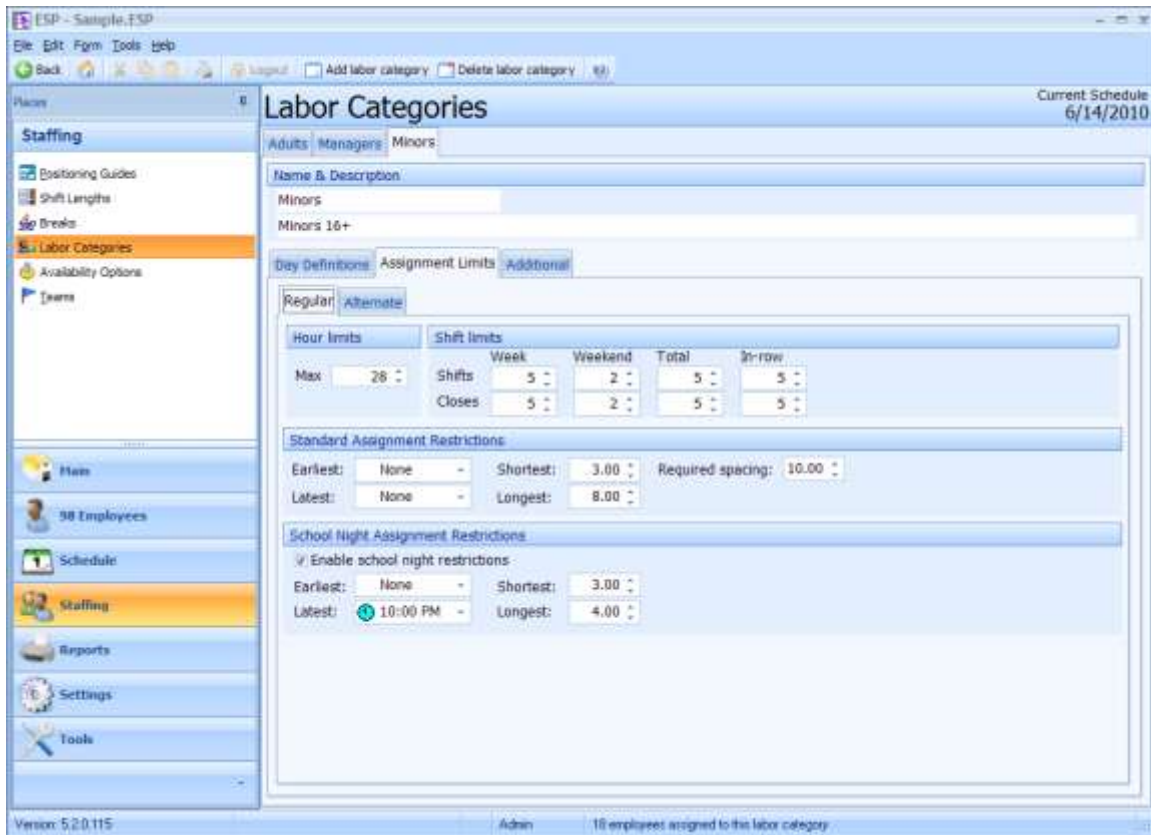
The *Required spacing* field specifies how many non-work hours are required between two shifts. For example if you enter 10 hours in this field, and an employee works until midnight one day, the earliest they would be scheduled the next day is 10:00 AM.

School Night Restrictions

Some jurisdictions have different shift restrictions that apply to students on school nights. Usually these restrictions specify that on school days students must finish work earlier and/or work shorter shifts lengths than on non-school days. If this applies, check the box for *Enable school night restrictions* and enter the restrictions that apply to these employees on school nights. ESP will then apply the standard limits to non-school day shifts and school night restrictions to any days that are defined as school days in the *Day definitions* section.

Example limits for students/minors

The limits entries for a minor or student labor category could be designed similarly to the one shown below.



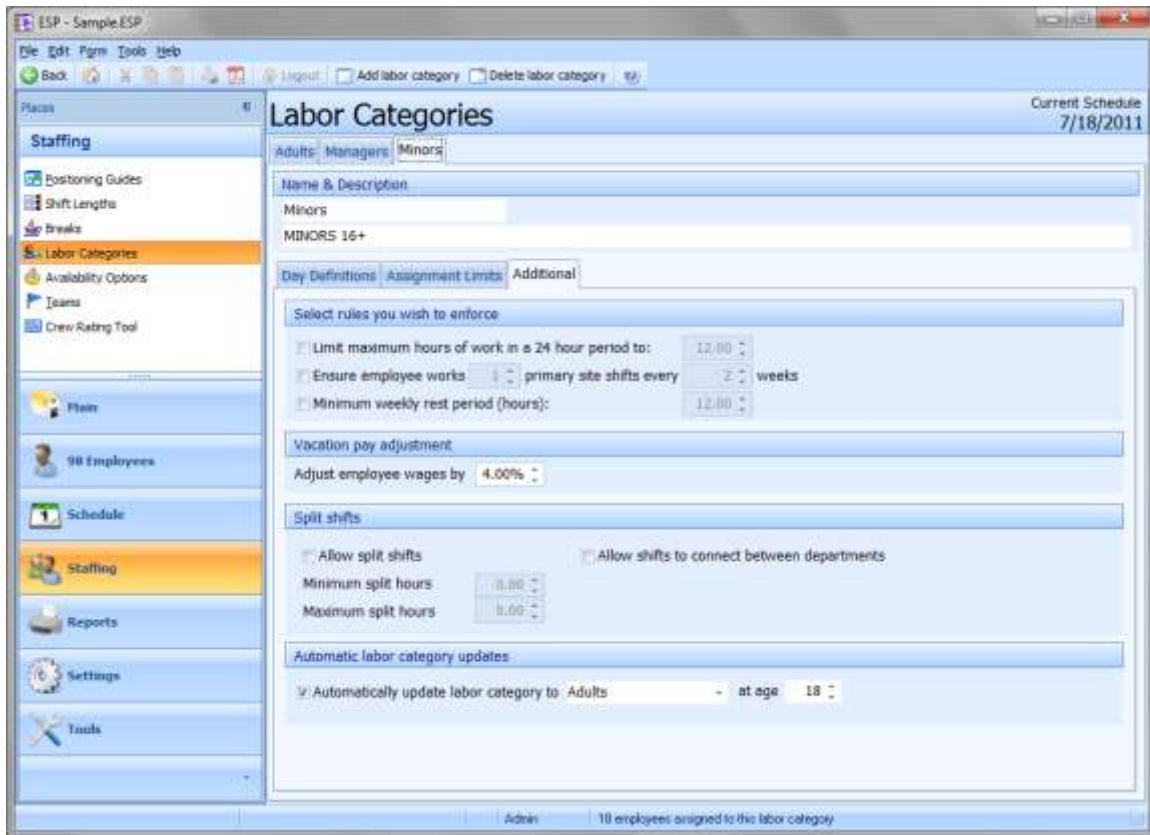
In the example, *Maximum hours* has been set to 28 hours per week since this represents minors. Shift limits specify a maximum of 5 weekday and 2 weekend shifts and closes. No more than a total of 5 shifts or closes will be scheduled, and no more than 5 shifts or closes in a row (including shifts from previous weeks) will be assigned.

In the *Standard assignment restrictions* section we have limited the latest an employee may work to 12:00 AM (midnight). The earliest an employee may work has been set to *NONE* meaning no restriction, while the longest shift length allowed is 8 hours.

Under the *School Night Assignment Restrictions* section, the limits are stricter. The latest an employee in this labor category may work on school nights is 10:00 PM and the longest shift length allowed on school nights is 4 hours.

Additional

The *Additional* section, below, is used to specify additional preferences and restrictions that apply in a limited number of jurisdictions.



The screen is divided into three sections: Select rules you wish to enforce, the Vacation pay adjustment, and whether or not you allow employees to work 2 or more split shifts in a day.

Select rules you wish to enforce

Only check the box beside the rules that you want to enforce due to labor restrictions in your area. If a particular entry does not apply, leave it blank.

- ✓ **Limit maximum hours of work in a 24-hour period to:** In some jurisdictions employees are not allowed to work more than a certain number of hours in any continuous 24-hour period. If you have such a restriction, specify the number of hours here.
- ✓ **Ensure employee works ___ primary site shifts every ___ weeks:** For multi-location scheduling, if you require that employees work in the home location a minimum number of times per week, enter the requirement here.
- ✓ **Minimum weekly rest period (hours):** Some jurisdictions require that each employee be given a fixed number of consecutive hours off every week, regardless of how many shifts they have. For example, if you enter 32 here, ESP will ensure that all employees in this labor category have at least one period of 32 consecutive hours each week where they are not scheduled to work. (Note: Using this option significantly slows down generating the schedule)

Vacation pay adjustment

If you pay your employees a fixed percentage of their wages as vacation pay, enter the amount here. Since the vacation pay adjustment is calculated based on labor category, you may assign different amounts to each labor category of employee.


The Vacation pay adjustment is included when calculating your labor costs for the week. If you do not have paid vacations, or if your paid vacations are not calculated as part of your labor cost, leave this field blank.

Split shifts

A split shift refers to the practice of having an employee work a shift, then have some time off, and come back to work another shift in the same day. For example someone might come in to work in the morning and work for 3-4 hours, then come back to work over dinner for another 3-4 hours. That would be a split shift.

If you permit split shifts then you must first check the *Allow Split Shifts* box. Next you specify what the minimum number of hours there must be between the two shifts, and then the maximum number of hours. For example you might require that when a split shift occurs, there must be at least 3 hours before the second shift can start, but a maximum of 6 hours.

The option Allow connecting shifts is referring to multi-department locations only. This option allows you to tell ESP that an employee can work a shift at both departments in the same day provided they are NOT split.

 *Note: ESP does not create any split shifts automatically. This option is only to allow you the manually create a split shift while you are editing the schedule.*

Automatic labor category updates

If you wish, you can have ESP automatically update an employee's labor category when they reach a particular age. For example you might wish to have minors under the age of 18 automatically updated the adult labor category when they reach the age of 18.

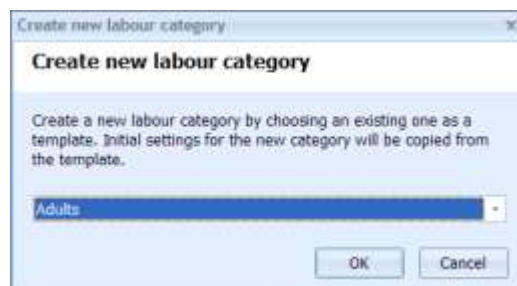
If you select this option then every time you click on START A NEW SCHEDULE from the home page, ESP will scan the employees and, where appropriate, update their labor category to the new category if they have reached the age specified. The employee will only be updated if they are qualified for the new labor category for the entire scheduling week.

Example: Tom is aged 17 but will turn 18 on Tuesday. This means he will change from being a minor to an adult. But since the schedule starts on Monday he will still be a minor for one day on this schedule. Therefore Tom will NOT be updated this week. The rules for minors will still apply to his entire schedule. However next week, Tom will be an adult for the entire schedule so his labor category will be updated as soon as you start the next schedule.

Automatic updates will only be used for labor categories that have this option selected. If the option is not selected then employees that belong to this labor category will not be updated automatically.

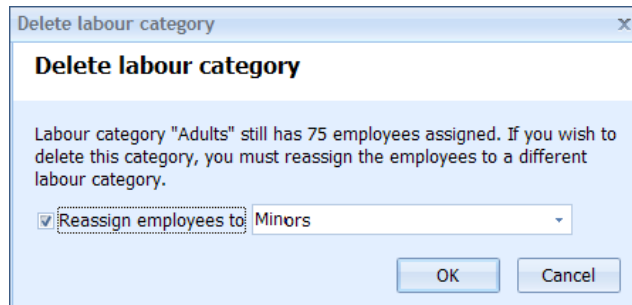
Adding and deleting labor categories

To add a new labor category, click on the *Add labor category* option on the toolbar. A dialogue box will open, as shown below.



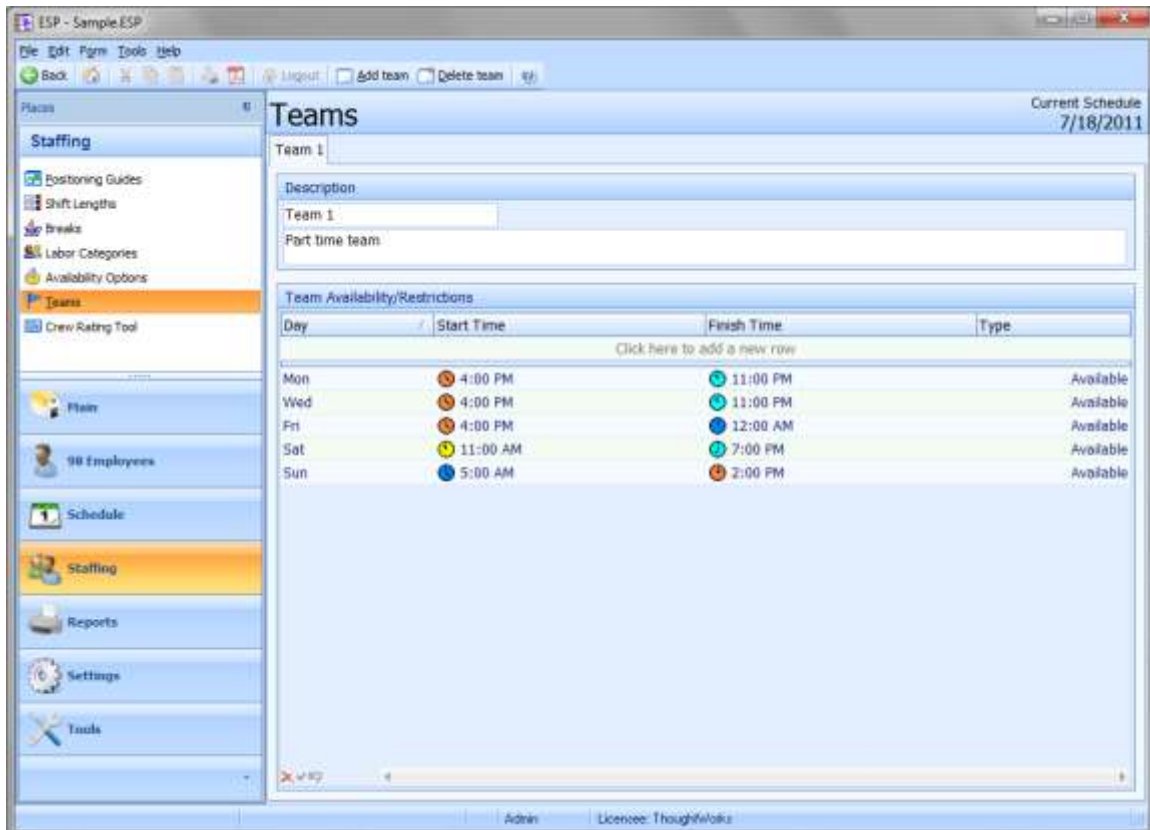
Select an existing LABOR CATEGORY form for ESP to use as a template for the new category. Using an existing labor category as a template speeds the entry of a new category, since you only need to change certain values. When creating a labor category, a new break form is also created using the template values. Once you have finished designing the labor category, check the new corresponding break form for changes.

To delete a labor category that is no longer needed, click on the *Delete labor category* button on the toolbar. If the labor category has employees assigned to it, you must re-assign them to a different labor category before completing the deletion process.



Teams

Some operations divide their crew into Teams: groups of employees that share the same availability. The TEAMS form allows you to set up an availability that will be applied to a group of employees. Each employee is assigned as a member of a team and will be available any time their team is available. The teams have set days and times that they work, but these set days/times are usually rotated each week. For example:



- ✓ Team 1 might work Monday and Thursday evening, and the opening shift on Saturday.
- ✓ Team 2 might work Wednesday and Friday until closing time, and then Saturday and Sunday afternoon shifts.

The following week you might reverse these times to ensure all employees get fair rotation of their shifts

All of this can be accomplished by using the team availability charts. The first step is to define the times that you want each team to be available to work. The second step is to assign each employee to a team. Care must be taken to distribute employees to the teams evenly and fairly, taking into account their station qualifications and skill level.

Defining the times teams can work

Click on the tab for the team number you wish to define, or click *Add Team* on the toolbar to set up a new team. You can use the *Description* area at the top of the form to name and describe the team.

In the bottom half of the form, enter the days and times of the team's availability. All the available times entered on this chart are automatically **added** to each employee who is a member of this team, and displayed under the employee's *Team availability* tab. If the employee also has some additional available times of their own, the two sets of availabilities are combined.

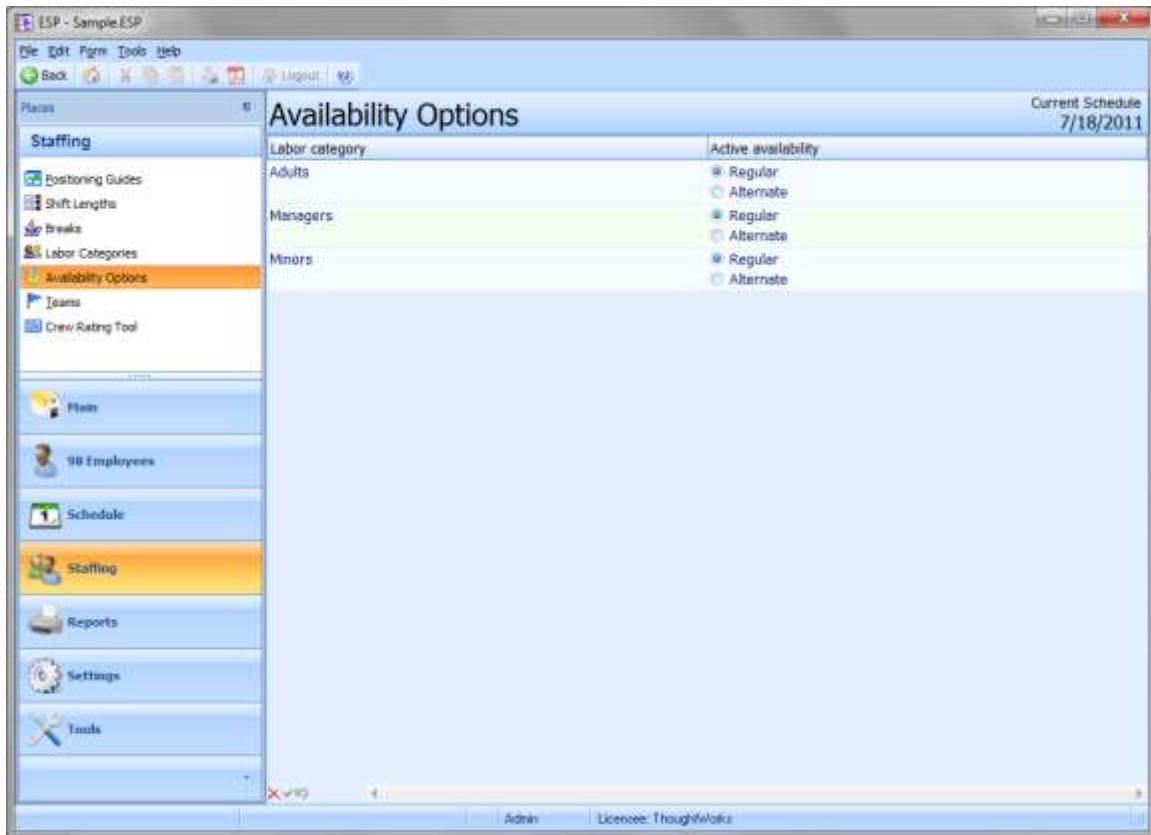
In the *Type* column, you specify whether this is an availability or not-available for the team. In most cases, you will set the type as *Available*, unless you are trying to guarantee all members of a team a particular day off.

When you generate your schedule, ESP will take any personal availability the employee has, combine it with his or her team availability, and then remove any personal time-off requests from the combined availability. Note: time-off requests always override availability.

Availability options

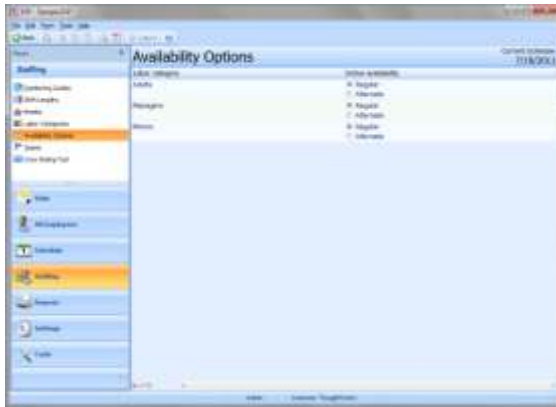
The availability options give you the ability to quickly switch between the regular and alternate availability for groups of employees.

Every employee can have two distinct availabilities, their *Regular* availability which is used most often, and an *Alternate* availability, for use during holidays and other special times of year. For example, you may wish to set up two sets of availability for your school-age employees. During the school year you would use the *Regular* availability, and during the summer when there is no school you would use the *Alternate* availability. You could also use the *Alternate* availability during the Spring Break or other holiday weeks. Keeping both availabilities on file saves you from having to update your employees' availabilities multiple times throughout the year as seasons change. Instead of manually switching each individual employee's availability at these times, you can specify the availability set that applies to an entire labor category at once.

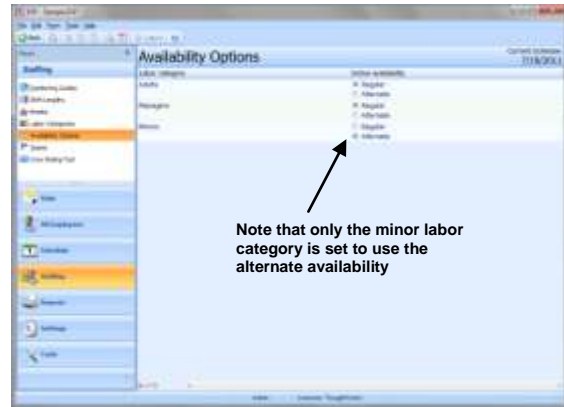


For each defined labor category, use the AVAILABILITY OPTIONS form to specify the availability set to use for the upcoming schedule. When you view employee information, ESP will automatically display the correct availability. Only change the availability for affected labor categories. For example, if you have a labor category defined for students, you can switch them to use their *Alternate* availability in the summer, while continuing to use the *Regular* availability for your adult employees.

In the following example we use the *Regular* availability during the school year (on the left) and the *Alternate* availability during non-school times. We have specified that only the *Minor* labor category will use their *Alternate* availability, leaving our adult full-time employees with *Regular* availability.



This is the availability options chart during the school year




This is the availability options chart during the summer when school is out

You can use the alternate availability at any time. It may come in useful during:

- ✓ Spring school break
- ✓ End of the school year
- ✓ Start of the new school year
- ✓ Christmas break
- ✓ Other Festival or Holiday breaks

In most jurisdictions, college and university students have a different school year than high-school students. You may wish to design a separate labor category for college-age employees so that you can switch their availability options at the appropriate time without affecting the other employees. It is a good idea to review the availability options every week before you generate your schedule to ensure that you are using the proper availability for all your employees.

 *If you change the availability options after you have already generated the shifts for the week, your employees' availability on the current schedule will be updated. This may result in many of the shifts becoming invalid due to the change in availability. You should avoid changing the availability options after generating the shifts.*

Crew Rating Tool

The crew rating tool helps you manage and update the skill level ratings for your employees. This helps you to ensure that ESP is able provide a balanced blend of your most and least experienced employees throughout the week.

To use this tool you simply select any station from the drop down list. Then select either the Only Qualified, or Only Unqualified option and click GO. ESP will then display a list of employees who meet the criteria you have specified. Beside their name is their Badge number, the station being displayed, and the date that their rating for this station was last updated. Next it shows their current rating on this station and in the final column you may enter a new rating if needed. If you

enter a new rating, the effective date will be the first day of the current schedule and not today's actual date. This is because any change you make will affect the entire schedule for the week.



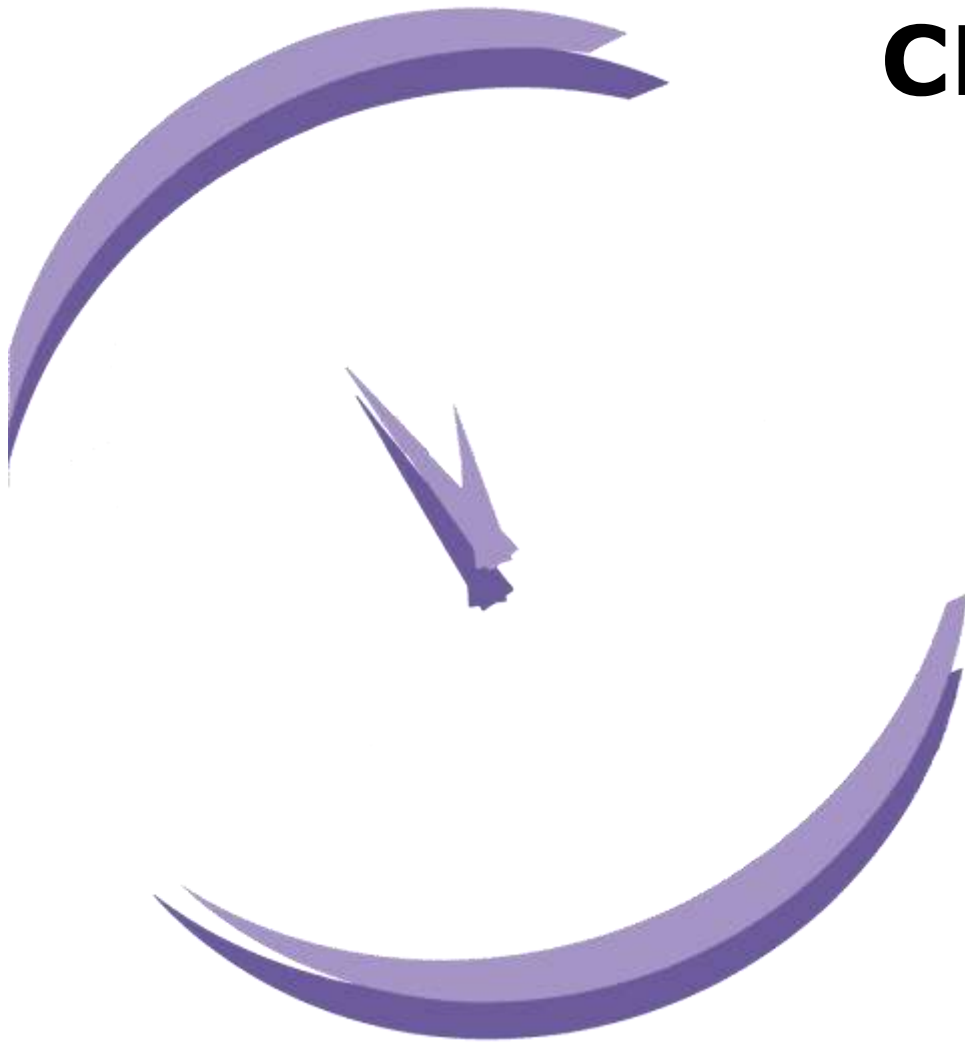
The bottom section of this form gives you a summary for the currently selected station. It shows how many employees you have in total, as well as how many are qualified (and unqualified) to work the currently selected station. It also gives the percent who are qualified and the average of all the ratings.

Finally, it provides a summary of how many people are qualified at each skill level from 1 to 4, and Coach and Trainee.

CHAPTER

7

Reports



Reports

ESP produces a comprehensive set of reports that help you control your labor costs, while maintaining excellent customer service. The reports, described in detail below, are divided into three categories:

1. **Schedule reports:** Reports that relate to the current schedule.
2. **Employee reports:** Reports that help you effectively manage your employees.
3. **E-mail reports:** Reports that you may send to employees by e-mail.

Within each report group the individual reports are shown on separate tabs. Use the report name tabs at the top of the screen to move between reports.

Toolbar options

You can print one or all pages of the current report using the *Print* button on the toolbar, or by selecting FILE | PRINT REPORT from the menu. You can also print your reports to a PDF file by clicking the PDF icon on the toolbar. This allows you to send PDF copies of reports by e-mail.

When viewing a multi-page report, use the *Next page* and *Previous page* buttons on the toolbar to navigate through the report. You may also view a specific page of the report by choosing the page number from the *Go to page* drop-down list. To enlarge or shrink the report, use the *Zoom In*, *Zoom Out*, and *Zoom Page* options.

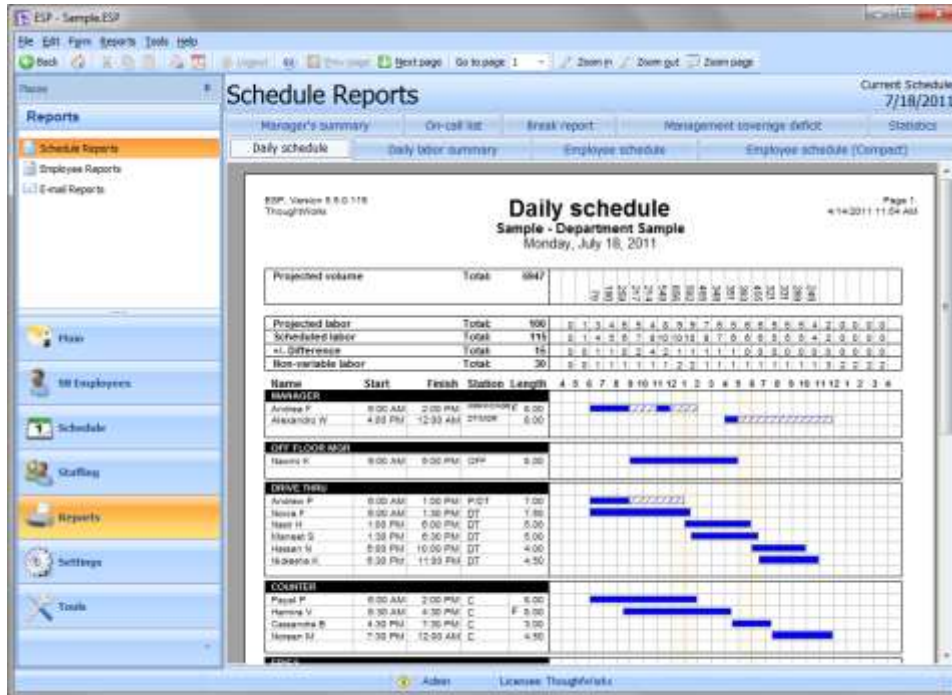
Schedule reports

The reports found in the *Schedule reports* section of the *Reports* group relate directly to the schedule you are viewing and include:

- ✓ **Daily schedule:** A graphical display of each day of your weekly schedule.
- ✓ **Daily labor summary:** A daily report that displays the projected labor and volume for each hour, which the manager may use as a worksheet to monitor daily labor.
- ✓ **Employee schedule:** A list of all the shift assignments for each employee, sorted alphabetically by employee name.
- ✓ **Employee schedule (compact):** The same information as the Employee schedule report above but in a more compact, calendar-like format.
- ✓ **Manager's summary:** A summary view of shifts for each employee that includes a comparison of hours and shifts scheduled.
- ✓ **On-call list:** A daily list of employees who are available to work, allowing you to easily fill unassigned or no-show shifts.
- ✓ **Break report:** A daily report of the breaks due to each employee.
- ✓ **Statistics report:** Statistical information about the schedule, including sales volume, daily and weekly totals for hours, labor cost, labor percentage, sales per man hour, and more.

Daily schedule

The *Daily schedule* report displays a graphical schedule for each day of the upcoming week. This report, as shown below, can be used to see an overview of shift coverage, expected volume, crew profile and changeover times.



How to read this report

Each page of the line-bar report represents a single day's schedule, with the day and date appearing at the top of the page under the report title. Each day covers a range of times starting at 4:00 AM and finishing at 4:00 AM the following day, which allows opening and closing shifts to easily appear on the appropriate day's schedule.

The report is divided into different areas with the largest area displaying the *Shifts* scheduled for the day. Each shift is displayed in text on the left side and on a graphical line bar on the right side of the page.

The *Total* section at the top of the report displays information on the labor scheduled and can help you determine times of the day when you may be over-scheduled or under-scheduled. The *Projected labor* line displays the labor projected for each hour based on the projected volume from the *Positioning guide* that is in effect at that hour. The *Actual labor* line reports the actual labor scheduled for each hour. Both the *Projected labor* and *Actual labor* lines report only variable labor – the *Stations* defined in THE POSITIONING GUIDES. The *+/- Difference* row shows the difference between the projected and actual labor scheduled for each hour. Finally, the *Non-variable labor* row indicates the number of non-variable labor hours that were scheduled for each hour. Any non-variable labor hours will have been scheduled by fixed shifts.

The shift section of the report is grouped by station, in the same order as defined in the STATION form.

- ✓ The left side of the page displays the shift in text: the name of the person scheduled; the shift's start and finish times, station(s) that the person is working and the length of shift.

- ✓ The right side of the page displays the shift in a graphical format: Unscheduled shifts appear as unfilled rectangles. If you don't have a color printer, shading will help you distinguish the different shift types.

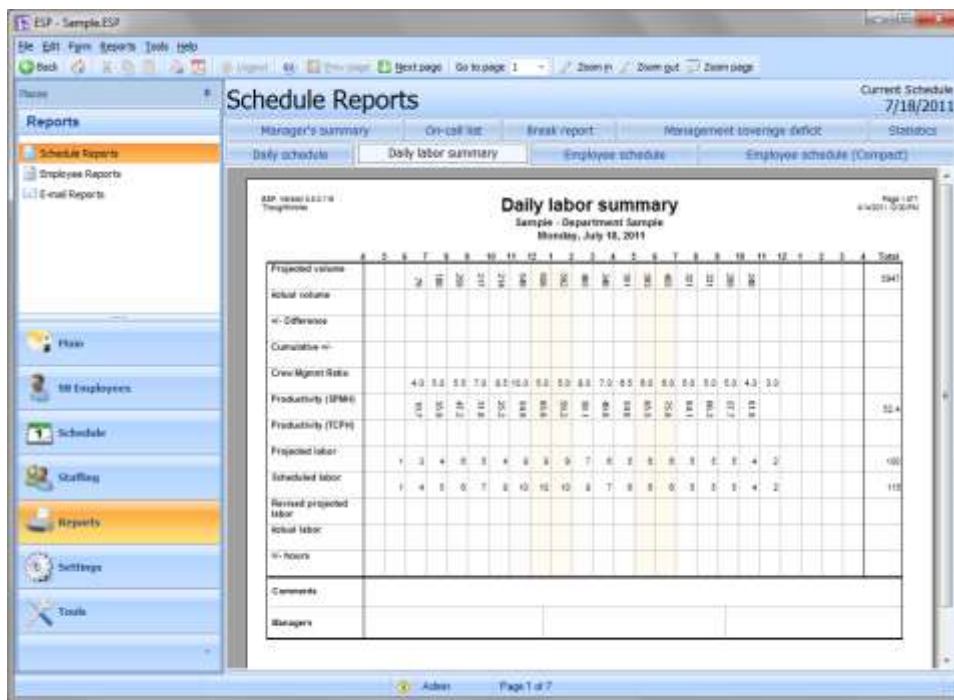
Shifts may be made up of more than one station. Multi-station shifts are shown with all of the stations the employee is working, and are displayed under the station that contains the most number of hours in the shift. The station that the employee is working the majority of the time is displayed as a solid line; other stations within the same shift are displayed as alternating pattern and solid. For example, if John H were working from 9:00 AM to 3:00 PM, with the first four hours on Counter, followed by two hours on Kitchen, his shift would appear on the line bar under the Counter section as follows:

John H 9:00 AM 3:00 PM C/K 

At the bottom of this report is a summary of all wage and salary hours along with the total number of hours scheduled broken down into variable and non-variable labor.

Daily labor summary

The *Daily labor summary* displays the projected volume and labor for each hour and can be used as a worksheet to help monitor labor and sales throughout the day.



	6	7	8	9	10	11	12	1	2	3	4	5	6	7	8	9	10	11	12	1	2	3	4	Total	
Projected volume																								3941	
Actual volume																									
+/- Difference																									
Cumulative +/-																									
Crew Mgmt Ratio		4.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	
Productivity (SPM)		1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	52.4	
Productivity (TCPH)																									
Projected labor		1	2	4	5	5	4	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	100	
Scheduled labor		1	4	5	0	7	8	10	10	8	7	8	8	0	3	5	4	2						110	
Revised projected labor																									
actual labor																									
+/- hours																									
Comments																									
Managers																									

The following information is on this report:

- ✓ **Projected volume:** displays the volume for each hour that was projected for the day.
- ✓ **Actual volume:** provides a place for you to write in the actual volume for each hour.
- ✓ **+/- difference:** provides a place for you to write the difference between the projected volume and the actual volume for each hour.

- ✓ **Cumulative +/-:** provides a place for you to write in the cumulative +/- difference at each hour.
- ✓ **Crew:Mgmt ratio:** displays the projected ratio of employee to manager projected for each hour.
- ✓ **Productivity (SPMH/TCPH):** displays the productivity for each hour that was projected for the day.
- ✓ **Projected labor:** displays the labor for each hour that was projected for this day,
- ✓ **Actual labor:** provides a place for you to write in the actual labor for each hour.
- ✓ **+/- hours:** provides a place for you to write the difference between the projected labor and the actual labor for each hour.
- ✓ **Comments:** provides a place for you to enter comments about that day that may have affected the projected to actual volume and labor.
- ✓ **Managers:** provides a place for you to write in the Managers who were on duty during that day.

Employee schedule

The *Employee schedule* report lists all the shift assignments for each employee, ordered alphabetically by name. There are two views for this report: Standard or Regular, and Compact.

Standard employee schedule

The standard *Employee schedule* report is ideal for posting on a bulletin board so employees can easily find their shifts for the coming week. Only employees scheduled to work will appear on this format of the report.

The screenshot shows the 'Employee schedule' report for Monday, July 18, 2011. The report is titled 'Employee schedule' and 'Sample - Department Sample'. It lists the following employees and their shifts:

Employee	Days	Times	Position	Length
Clinton P	Monday (7/18/2011)	12:00 PM - 4:30 PM	K	4.5
	Wednesday (7/20/2011)	8:00 PM - 11:00 PM	DT	3.0
	Thursday (7/21/2011)	2:30 PM - 7:00 PM	TRK	4.5
Crystal D	Saturday (7/23/2011)	1:30 PM - 8:00 PM	P	6.5
	Sunday (7/24/2011)	4:00 PM - 8:00 PM	DT	4.0
Dante D	Tuesday (7/19/2011)	5:00 PM - 8:00 PM	FF	3.0
	Friday (7/22/2011)	8:00 PM - 1:00 AM	C	7.0
	Saturday (7/23/2011)	1:30 PM - 4:30 PM	DT	3.0
Darrl D	Saturday (7/23/2011)	5:30 PM - 9:30 PM	K	4.0
	Sunday (7/24/2011)	1:00 PM - 5:30 PM	DT	4.5
Deirdre C	Friday (7/22/2011)	11:00 AM - 7:00 PM	C	8.0
	Saturday (7/23/2011)	9:00 AM - 12:00 PM	DT	3.0
Deiko R	Monday (7/18/2011)	10:30 AM - 3:00 PM	FF	4.5
	Wednesday (7/20/2011)	11:00 AM - 5:00 PM	C	6.0
	Sunday (7/24/2011)	9:00 AM - 12:00 PM	DT	3.0
Dorell B	Saturday (7/23/2011)	12:00 PM - 4:00 PM	C	4.0
	Sunday (7/24/2011)	12:30 PM - 7:00 PM	P	6.5
Dwight F	Thursday (7/21/2011)	10:00 AM - 12:00 PM	MGR	2.0
		12:00 PM - 4:00 PM	K	4.0
		4:00 PM - 8:00 PM	DT	2.0

The following information is listed on this report:

- ✓ The **Employee** column lists all employees scheduled as well as any shifts that were left unscheduled. Employees not working during the schedule week do not appear on this list.
- ✓ The **Days** column lists all the days that the employee is scheduled to work.
- ✓ The **Location** column lists the location or department where the employee will work. If you are only scheduling one location, this column will not appear.
- ✓ The **Times** column lists the time that each shift begins and ends.
- ✓ The **Station** column lists the station(s) where the employee will work.
- ✓ The **Length** column lists the length of the shift in hours.

Employee schedule (compact)

The compact version of the *Employee schedule* report is perfect for those locations that prefer a more calendar-like report, or who wish to cut the report into individual slips to hand out to employees with their paychecks. This report lists **all** employees, including those who are not scheduled to work.

The same information appears on this view as the standard report but is displayed in table format. The days and dates of the schedule week listed as column headings along the top row, with the employees listed alphabetically down the left side. Each employee's shifts are listed horizontally under the appropriate day heading. Due to space constraints, multi-station shifts are *not* broken down into stations on this report.

The screenshot shows the 'Employee schedule (Compact)' report for the week of Monday, July 18, 2011. The report is displayed in a table format with columns for days of the week and rows for individual employees. The interface includes a menu on the left with options like Reports, Staffing, and Settings, and a top navigation bar with tabs for Manager's summary, On-call list, Break report, Management coverage deficit, and Statistics.

Employee	Mon 7/18/2011	Tue 7/19/2011	Wed 7/20/2011	Thu 7/21/2011	Fri 7/22/2011	Sat 7/23/2011	Sun 7/24/2011
Adrian B			7:30 AM - 2:00 PM DT		1:30 PM - 7:30 PM K		
Ahmed K				7:00 PM - 11:00 PM K		8:00 AM - 2:00 PM MSR	4:30 PM - 12:00 AM MSR
Alexandro W	4:00 PM - 12:00 AM MSR	4:30 PM - 12:00 AM MSR			4:50 PM - 12:00 AM MSR	2:00 PM - 1:00 AM MSR	
Amanda B		8:30 AM - 1:30 PM K	8:00 AM - 4:00 PM K				
Aronessa G						8:00 AM - 4:00 PM SC	12:00 PM - 4:00 PM SC
Amy K	11:00 PM - 7:00 AM M					11:00 PM - 7:00 AM M	
Andre L	11:00 AM - 7:00 PM K						5:30 PM - 10:00 PM DT
Andres F	8:00 AM - 2:00 PM MSR			8:00 AM - 4:00 PM DT	4:00 PM - 12:00 AM K	11:00 AM - 7:00 PM K	
Andrew P	8:00 AM - 1:00 PM			1:00 PM - 8:00 PM			

Manager's summary

The *Manager's summary* provides a comprehensive overview of each employee's activity for the schedule week. This may be used to check that each employee is receiving a fair number of hours and that each employee receives his/her minimum hours.

How to read this report

The following information is included on this report:

- ✓ The **Employee** name column includes all employees listed alphabetically, including employees who are not scheduled to work any hours during the week.
- ✓ The **Daily hours** section lists the number of hours the employee is scheduled to work under each day heading. A dash appears under a day that the employee is not scheduled to work any hours. If the employee was not available all week, then the words "Not available" will appear across the row.
- ✓ The **Total hours** column displays the number of hours the employee has been scheduled for the week. The words Not Scheduled will appear under this column for any employee not assigned to work during the week. If the reason they were not assigned is because they asked for the week off, then the words "Not available" will also appear across the daily hours row.
- ✓ The **Total shifts** column displays the number of shifts the employee has been scheduled for the week.
- ✓ The **Min/Max** hours allowed column displays the minimum and maximum number of hours the employee is allowed to work during the scheduling week.
- ✓ **+/- Min:** This column will show how many hours the employees is above or below their required minimum hours for the week.

Employee name	Min	Tue	Wed	Thu	Fri	Sat	Sun	Total Hours	Total Paid	Total Min/Max	+/- Min	Job notation	
Adam B	-	-	7	-	8	-	-	15	11.81	2	0.40	+11.81	DTW
Alfred H	-	-	-	4	8	8	-	20	18.18	3	0.40	+18.18	XWSP
Alfonso M	8	8	-	-	8	8	-	32	28.07	4	0.40	+28.07	C/DN/MGR
Amelia B	-	-	7	8	-	-	-	15	13.18	2	0.40	+13.18	K
Andrew S	-	-	-	-	-	8	4	12	11.11	2	0.40	+11.11	C/WP
Amy K	8	-	-	-	-	8	-	16	14.18	2	0.40	+14.18	M
Anna L	8	-	-	-	-	-	4.5	12.5	11.81	2	0.40	+11.81	DTW
Andree F	8	-	-	8	8	8	-	40	36.82	5	0.40	+36.82	C/DN/MGR
Andrew P	7	-	-	5	-	-	-	12	10.87	2	0.40	+10.87	C/DW
Angela E	-	-	7.5	-	4.5	-	-	12	11.11	2	0.40	+11.11	C/D
Anna C	8	8	8	8	8	-	-	40	36.07	4	0.40	+36.07	C/DN/MGR
Julius K	-	-	-	-	-	-	-	13	11.81	2	0.40	+11.81	K
Ashley L	-	-	-	-	-	4.5	4.5	9	8.18	1	0.40	+8.18	FP
Benjamin F	-	-	-	-	7	8	8	17	18.11	3	0.40	+18.11	KWSP
Benedicta	-	7.5	-	-	-	-	-	4	11.8	2	0.40	+11.8	C/D
Bob D	-	-	-	-	-	-	8	15	11.81	2	0.40	+11.81	K
Carlton R	-	-	-	-	-	8	-	8	8.18	2	0.40	+8.18	K
Cassandra E	8	8	8	-	-	-	-	16	14	3	0.40	+14	C/DW
Debra A	8	-	-	4	8	-	-	14	11	3	0.40	+11	XWSP
Christina G	-	-	-	8	-	-	3	11	10.83	2	0.40	+10.83	DN/MGR
Christophe	-	8	-	8	-	-	4	12	11.2	3	0.40	+11.2	C/DW
Clint S	-	-	-	-	3	8	-	11	7	2	0.40	+7	K
Conor P	4.5	-	3	4.5	-	-	-	12	12	3	0.40	+12	DTW/TK
Cynthia G	-	-	-	-	8.5	4	10.5	19	18	2	0.40	+18	DTW
Daniel G	-	-	-	-	7	8	-	15	12.11	3	0.40	+12.11	C/DW/P
Daryl D	-	-	-	-	4	8	8	16	14.18	2	0.40	+14.18	DTW
Debra G	-	-	-	-	8	8	-	16	14.11	2	0.40	+14.11	C/D
Diana R	4.5	-	-	-	-	3	10.5	18	15	3	0.40	+15	C/DW/P
Dwain B	-	-	-	-	-	4	8.5	12.5	10	2	0.40	+10	C/P
Dwight F	-	-	8	8	8	-	-	24	21.8	3	0.40	+21.8	C/DN/MGR
Emily C	-	-	-	-	4.5	-	-	4.5	11.87	2	0.40	+11.87	DW

- ✓ The **Job Rotation** column displays the different stations that the employee was scheduled to work during the week. This can help the scheduling manager manage their training and ensure they are meeting their goals for cross training.

On-call list

The *On-call list* is a daily report of all employees who are available to work. Use this report to quickly identify an employee to replace a sick or no-show worker.

Time available	Name	Assigned shift	Hours	Shifts	Labor cost	Age	Phone
11:00 AM-11:00 PM	Diana L	--None--	11/40	2/5	Adults		
12:00 PM-8:30 PM	Daryl D	--None--	9/40	2/5	Adults		
12:00 PM-8:30 PM	Kenan B	--None--	13/40	2/5	Adults		
12:00 PM-11:00 PM	Patricia C	--None--	10/40	2/5	Adults		
2:00 PM-8:30 PM	Cindy S	--None--	7/40	2/5	Adults		
3:00 PM-11:00 PM	Nancy T	--None--	24/40	3/5	Adults		
3:00 PM-11:00 PM	Tiffany T	--None--	11/40	2/5	Adults		
4:00 PM-11:00 PM	Step C	--None--	13/40	2/5	Adults		
4:30 PM-9:30 PM	Wanda K	--None--	12/40	2/5	Minors		
4:30 PM-10:30 PM	Rachel K	--None--	3/40	1/5	Minors		
4:30 PM-8:30 PM	Yvonne C	--None--	11/40	2/5	Adults		
5:00 PM-9:30 PM	Francisco F	--None--	5/40	1/5	Adults		
5:00 PM-9:30 PM	Worica S	--None--	10/40	2/5	Minors		
5:00 PM-10:00 PM	Debra C	--None--	11/40	2/5	Adults		
5:00 PM-10:00 PM	Simon D	--None--	13/40	2/5	Minors		
5:00 PM-10:00 PM	John A	--None--	3/40	1/5	Minors		
5:00 PM-11:00 PM	Gregory M	--None--	12/40	2/5	Adults		
5:00 PM-11:00 PM	Laure C	--None--	12/40	2/5	Minors		
6:00 PM-11:00 PM	Jammy J	--None--	10/40	2/5	Adults		
6:00 PM-12:30 AM	Kathleen G	--None--	4/40	1/5	Adults		
7:00 PM-11:00 PM	Shea L	--None--	4/40	1/5	Adults		
7:00 PM-12:30 AM	Karlan B	--None--	9/40	2/5	Adults		
8:00 AM-2:30 AM	Kathleen B	8:00 AM 1:00 PM H	18/40	2/5	Adults		
8:00 AM-2:30 AM	Andrew F	8:00 AM 1:00 PM DT	12/40	2/5	Adults		
8:30 AM-12:00 AM	Noval F	8:00 AM 1:30 PM DT	12/40	2/5	Adults		
Mon 4:00 AM-Tue 4:00 AM	Andrez P	5:00 AM 2:00 PM HGR	40/40	5/5	Adults		
8:00 AM-2:30 AM	Prayer P	8:00 AM 2:00 PM C	19/40	2/5	Adults		
8:00 AM-10:00 PM	Sim B	7:00 AM 2:00 PM H	10/40	2/5	Adults		
8:30 AM-4:30 PM	Wanda K	8:30 AM 4:30 PM C	40/40	5/5	Adults		
Mon 4:00 AM-Tue 4:00 AM	Nancy T	1:00 AM 3:00 PM C/F	12/40	2/5	Adults		
3:00 AM-2:30 AM	Nancy G	10:00 AM 4:00 PM LL	14/40	2/5	Minors		
4:00 PM-7:30 PM	Derek R	10:50 AM 3:00 PM RP	14/40	3/5	Adults		

How to read this report

The On-call list identifies all employees that are available to work for a specific day, in order of their available times. Employees who have not received any shifts for the day are listed first, followed by those with assigned shifts. Employees with assigned shifts are included should you wish to cover an unscheduled shift by extending an existing employee's shift.

Each line on the report includes the following information:

- ✓ The **Times available** column indicates the employee's availability for the current day.
- ✓ The **Name** column lists the name of the employee whose availability is displayed.
- ✓ The **Assigned shift** column indicates any shifts the employee may already be working on this day, including start and finish times and station(s) worked. If the employee is not scheduled to work this day -None- will be shown here.
- ✓ The **Hours** column indicates the number of hours the employee is scheduled to work along with his/her maximum hours allowed per week. For example, an employee who is scheduled to work 12 hours out of a maximum of 40 would have the entry 12/40 in the Hours column.

- ✓ The **Shifts** column indicates the number of shifts the employee is scheduled to work along with his/her maximum shifts allowed per week. For example, an employee who is scheduled to work 3 shifts out of a maximum of 5 would have the entry 3/5 in the Shifts column.

Break report

The *Break report* is a daily list of the breaks due to each employee working on a specific day. This report can be used to ensure that all employees receive their appropriate breaks.

ESP - Sample.ESP
 File Edit View Reports Tools Help
 Back Forward Stop Refresh Print Page Go to page: 1 Zoom in Zoom out Zoom page
 Reports
 Schedule Reports
 Employee Reports
 E-mail Reports
 Home
 All Employees
 Schedule
 Staffing
 Reports
 Settings
 Tools
 Schedule Reports
 Daily schedule Daily labor summary Employee schedule Employee schedule (Campod)
 Manager's summary On-call list Break report Management coverage deficit Statistics
 ESP, Version 5.5.0.118
 ThoughtWorks
 Break report
 Sample - Department Sample
 Page 1 of 13
 4/14/2011 12:08 PM
 Monday, July 18, 2011

Employee	Shift	Breaks	Taken
Nathalia G	5:00 AM - 1:00 PM	K	Extra break
	5:00 AM - 1:00 PM	K	Meal break
Andrew P	6:00 AM - 1:00 PM	DT	Extra break
	6:00 AM - 1:00 PM	DT	Meal break
Nivia F	5:00 AM - 1:30 PM	DT	Extra break
	6:00 AM - 1:30 PM	DT	Meal break
Andrea F	6:00 AM - 2:00 PM	MGR	Extra break
	6:00 AM - 2:00 PM	MGR	Meal break
Payal P	8:00 AM - 2:00 PM	C	Extra break
	8:00 AM - 2:00 PM	C	Meal break
Sima S	7:00 AM - 2:00 PM	K	Extra break
	7:00 AM - 2:00 PM	K	Meal break
Hamika V	8:30 AM - 4:30 PM	C	Extra break
	8:30 AM - 4:30 PM	C	Meal break
Nasim K	9:00 AM - 5:00 PM	OFF	Extra break
	9:00 AM - 5:00 PM	OFF	Meal break
Milly G	10:00 AM - 4:00 PM	LL	5-BH
	10:00 AM - 4:00 PM	LL	30 minutes
Diana R	10:30 AM - 3:00 PM	FF	Short break
	10:30 AM - 3:00 PM	FF	15 minutes
Andre L	11:00 AM - 7:00 PM	K	Extra break
	11:00 AM - 7:00 PM	K	Meal break
Clinton P	12:00 PM - 4:30 PM	K	Short break
	12:00 PM - 4:30 PM	K	15 minutes

 Page 1 of 13
 Address Page 1 of 13

How to read this report

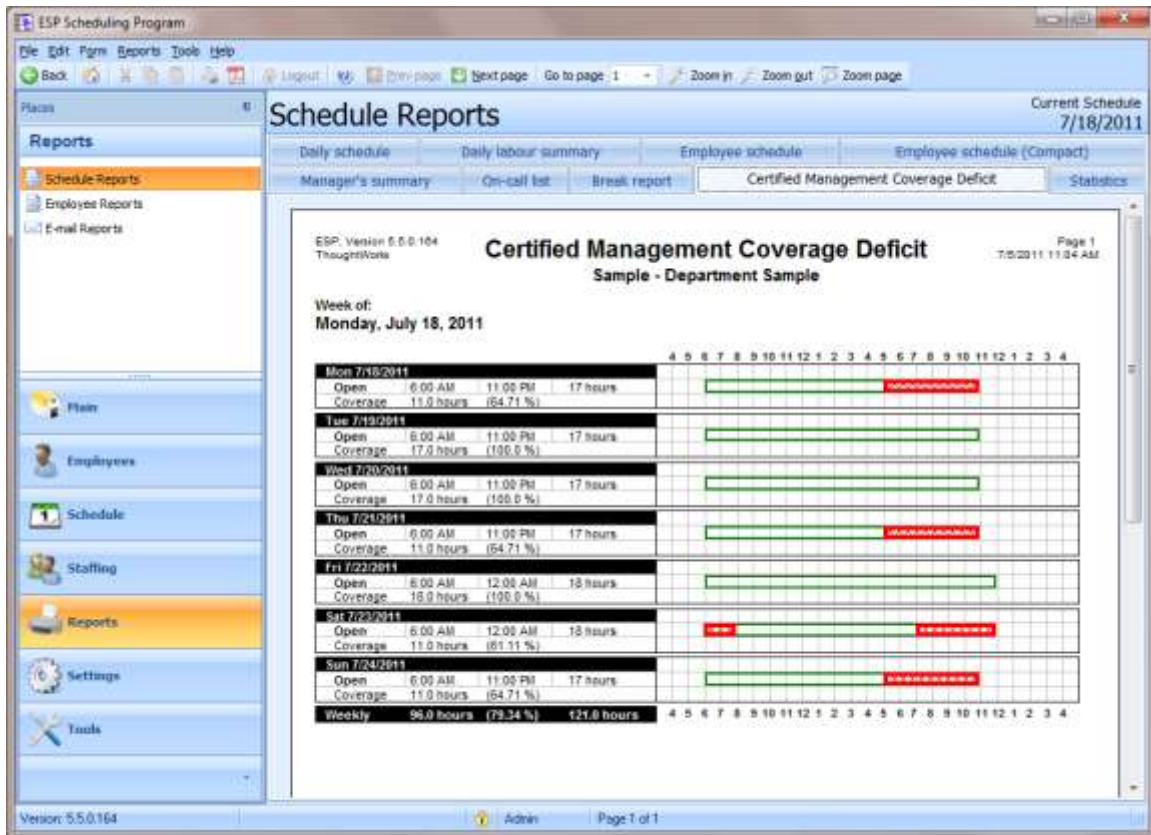
The *Break report* lists all the shifts scheduled for the day, sorted chronologically, and includes the information you need to ensure all employees receive the breaks that they are entitled to. Each shift listed includes the following information:

- ✓ **Employee:** the name of the employee.
- ✓ **Shift:** the shift's start and end times as well as the station(s) at which the employee is scheduled to work.
- ✓ **Breaks:** the name of the break.
- ✓ **Taken:** a check box to mark off each break after it is taken.

If the employee is entitled to more than one break for a given shift, each break is listed on a separate line.

Management coverage deficit

The management coverage deficit is a quick report that graphically show you the hours when the restaurant is open, that no certified shift manager is working.



How to read this report

Beside each day the grid shows the full 24 hours. The hours that you are open for business are within the green box. Any hours where there is no certified shift manager working will be shown in red instead of green.

Below each day is a summary of the number of hours that you are open, along with the number and percent of hours that are properly covered by a certified shift manager.

Certified shift managers are normally defined as managers who are experienced enough that they may work a shift alone without any other managers present. You indicate which of your employees are certified shift managers in their personal profile on the General information tab.

Statistics

The *Statistics* report provides summary information for the current schedule.

Summary	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Weekly
Total	\$5,847	\$6,691	\$7,504	\$7,278	\$8,665	\$9,955	\$7,885	\$54,113
Variable hours	118.50	128.50	131.00	118.50	171.50	186.50	144.50	979.00
Non-var hours	30.00	21.00	24.00	30.50	18.50	38.00	29.00	191.00
Paid breaks	11.75	11.00	12.25	2.00	1.75	2.00	2.25	12.00
Unpaid breaks	11.34	12.13	12.13	11.47	15.95	15.29	12.30	90.81
Wage hours	134.16	137.37	142.87	137.53	174.05	182.21	161.20	1,079.39
Average Wage	\$10.05	\$10.07	\$10.17	\$10.14	\$10.00	\$9.95	\$10.07	\$10.04
Labor cost	\$1,349	\$1,384	\$1,453	\$1,395	\$1,740	\$1,895	\$1,622	\$10,838
Labor % 622.68	%20.68	%20.68	%19.14	%19.17	%19.41	%19.03	%21.11	%20.03
SPMH	\$44.33	\$48.71	\$53.15	\$52.91	\$51.51	\$51.79	\$47.68	\$50.53
TCPH								
Variable salaried	0.00	0.75	3.00	13.00	2.00	15.00	3.00	39.75
Non-variable sal	0.00	15.25	13.00	10.00	22.00	9.00	14.00	92.25
Total salaries	0.00	15.00	16.00	32.00	24.00	24.00	16.00	128.00
Mgt hrs unassigned	12.00	3.75	11.00	10.00	31.50	30.00	26.00	133.25
Mor hrs unassigned	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Unassigned	0	0	0	0	0	0	0	0
Extra	3	1	2	0	2	2	2	12
Total shifts	26	28	29	29	34	39	34	219

How to read this report

The report includes the following information:

- ✓ Daily and weekly projected volume (only partially shown on the report above).
- ✓ Hours, broken down into salaried, wage, variable and non-variable categories.
- ✓ Labor cost and labor percent.
- ✓ Sales per man hour (SPMH) and Transactions per man hour (TCPH).
- ✓ Breaks (both paid and unpaid) for each day and for the week.
- ✓ Number of shifts left *Unassigned*.

In calculating the amounts for each day, ESP uses an internal boundary time of 4:00 AM to decide to which day the shift belong. Any shift crossing this time is divided between the two days for calculation purposes. For example, if you have a shift on Monday from 11:00 PM to 6:00 AM, five hours of the shift, 11:00 PM – 4:00 AM, are counted as part of Monday and two hours, 4:00 AM – 6:00 AM, are counted as part of Tuesday.

Employee Reports

The *Employee reports* section includes the following reports to help you effectively manage your employees:

- ✓ **Training summary:** A summary of the number of crew trained on each station, along with their performance ratings.

- ✓ **Service awards:** A monthly list of all employees detailing their years of service.
- ✓ **Employee birthdays:** A list of upcoming employee birthdays.
- ✓ **Employee phone list:** An alphabetical list of employees with their contact numbers.
- ✓ **Employee list:** This report prints one employee per page, containing all their information, including their availability information.

Training summary

The *Training summary* report displays a summary of the number of crew trained on each station, along with their performance/rating level. This report can be used to help determine your hiring and training needs.

ESP - Sample.ESP
 File Edit View Reports Tools Help
 Back Forward Stop page Go to page: 1 Zoom in Zoom out Zoom page
 Reports
 Schedule Reports
 Employee Reports
 E-mail Reports
 Home
 All Employees
 Schedule
 Staffing
 Reports
 Settings
 Tools
 Current Schedule: 7/18/2011
 Employee Reports
 Training summary Service awards Employee birthdays Employee phone list Employee list
 ESP, Version 5.5.0.118
 ThoughtWorks
Training summary
 Sample - Department Sample
 Page 1 of 1
 4/14/2011 12:00 PM
 Week of
Monday, July 18, 2011
 Qualified employees: 98
 Total employees: 98

Station	Avg Station Rating	1	%	2	%	3	%	4	%	Trained	%	Coach	%	Total Employees	%
C - COUNTER	2.48	5	8%	25	38%	34	52%	1	2%	0	0%	0	0%	65 / 98	66%
CO - CLOSE OPER	2	1	10%	8	83%	1	10%	0	0%	0	0%	0	0%	10 / 98	10%
CT - CREW TRAIN	2.5	0	0%	3	75%	0	0%	1	25%	0	0%	0	0%	4 / 98	4%
DT - DRIVE THRU	2.31	3	8%	30	59%	17	33%	0	0%	1	2%	0	0%	51 / 98	52%
FF - FRIES	2.37	3	5%	34	54%	26	41%	0	0%	0	0%	0	0%	63 / 98	64%
K - KITCHEN	2.29	3	8%	28	55%	19	37%	0	0%	0	0%	1	2%	51 / 98	52%
LL - LOT AND LOB	2.35	3	8%	29	52%	21	42%	0	0%	0	0%	0	0%	50 / 98	51%
M - MAINTENANCE	2.13	1	7%	11	73%	3	20%	0	0%	0	0%	0	0%	15 / 98	15%
MGR - MANAGER	2	1	13%	0	75%	1	13%	0	0%	0	0%	0	0%	8 / 98	8%
OFF - OFF FLOOR	2.1	1	10%	7	70%	2	20%	0	0%	0	0%	0	0%	10 / 98	10%
P - PRODUCTION	2.14	0	0%	12	89%	2	14%	0	0%	0	0%	0	0%	14 / 98	14%
SU - SUTUP/SALAD	1.8	0	40%	5	40%	3	20%	0	0%	0	0%	0	0%	15 / 98	15%
TR - TRAINING	2.17	11	15%	33	53%	23	32%	0	0%	0	0%	0	0%	72 / 98	73%
TRK - DELIVERY T	2.15	1	4%	21	78%	5	19%	0	0%	0	0%	0	0%	27 / 98	27%
XM - EXTRA MHNT	2	0	0%	1	100%	0	0%	0	0%	0	0%	0	0%	1 / 98	1%

 Add License ThoughtWorks

How to read this report

The following information is found on this report:

- ✓ **Stations:** The Stations defined at your location.
- ✓ **Ratings:** The number and percentage of crew trained at each rating level for the indicated station.
- ✓ **Total:** Comparison of the total number of employees qualified to work the station to the total number of employees employed.
- ✓ **% Employees:** The percentage of the total employees who are qualified to work the station. This gives you a clear picture of your cross-training needs.

Service awards

The *Service Awards* report details your employees' years of service. You can use this report to help assign service or merit awards.

Schedule Name	Hire date	Years of service
April 2011		
Andrew P	4/4/2003	8 years
Crystal D	4/4/2003	8 years
Cecil A	4/13/2003	8 years
Alexandis W	4/14/2002	9 years
Seldos E	4/14/2002	9 years
Nilesom D	4/15/1999	12 years
Laune C	4/20/2004	7 years
Nickasha K	4/20/2004	7 years
Roy N	4/20/2004	7 years
Sharma L	4/20/2004	7 years
Shenna V	4/28/2004	7 years
May 2011		
Gregory M	5/5/2002	8 years
Payal P	5/10/2004	7 years
Christophe	5/11/2003	8 years
Nira Z	5/16/2004	7 years
Rammond C	5/16/2002	9 years
Winston B	5/17/2004	7 years
Amy K	5/23/2004	7 years
Ahmad K	5/30/2002	9 years
June 2011		

How to read the report

The report is divided into months beginning with the current month with each employee listed under the month that he/she was hired.

The information on this report includes:

- ✓ **First Name/Last Name**
- ✓ **Hire date:** The employee's hire date.
- ✓ **Years of service:** The number of years of service that the employee has been employed as of their next anniversary. Significant anniversaries (5, 10 years, etc.), appear in bold so that they are easily identifiable.

Employee birthdays

The *Employee birthdays* report allows you to see at a glance if any employee is celebrating his/her birthday during the coming months. This can help identify employees whose information needs to be updated due to their age, such as changing from a minor to an adult labor category.

ESP - Sample.ESP

File Edit Pgmn Reports Tools Help

Back Home Logout Print page Text page Go to page: 1 Zoom in Zoom out Zoom page

Placas

Reports

- Schedule Reports
- Employee Reports
- E-mail Reports

Plan

98 Employees

Schedule

Staffing

Reports

Settings

Tools

Employee Reports

Training summary Service awards Employee birthdays Employee phone list Employee list

Current Schedule 7/18/2011

ESP, Version 5.5.0.130
ThoughtWorks

Employee phone list

Page 1 of 3
4/15/2011 8:50 AM

Sample - Department Sample

Schedule Name	First Name	Last Name	Phone Number(s)
Adrian B	Adrian	Beck	(905) 555-1212
Ahmed K	Ahmed	K	(905) 555-1212
Alexandro W	Alexandro	W	(905) 555-1212
Amedka B	Amedka	B	(905) 555-1212
Amorosa G	Amorosa	G	(905) 555-1212
Amy K	Amy	K	(905) 555-1212
Andre L	Andre	L	(905) 555-1212
Andrea F	Andrea	F	(905) 555-1212
Andrew P	Andrew	P	(905) 555-1212
Angella E	Angella	E	(905) 555-1212
Anne C	Anne	C	(905) 555-1212
Arthur H	Arthur	H	(905) 555-1212
Ashley L	Ashley	L	(905) 555-1212
Benjamin F	Benjamin	F	(905) 555-1212
Bernadette	Bernadette		(905) 555-1212
Bola O	Bola	O	(905) 555-1212
Carlton R	Carlton	R	(905) 555-1212
Cassandra B	Cassandra	B	(905) 555-1212
Cecil A	Cecil	A	(905) 555-1212
Christina D	Christina	D	(905) 555-1212
Christophe	Christophe		(905) 555-1212
Cindy S	Cindy	S	(905) 555-1212
Clinton P	Clinton	P	(905) 555-1212
Crystal D	Crystal	D	(905) 555-1212

Admin Page 1 of 3

How to read this report

The report is divided into months beginning with the current schedule month. Employees are listed under the month in which their birthday falls. If an employee's birth date has not been entered on the *General* screen of his/her information form, the person's name will appear first on the report under the heading *No birth date entered*.

The information on this report includes:

- ✓ **First Name/Last Name**
- ✓ **Birthday:** The employee's birth date.
- ✓ **Age on birthday:** The age that the employee will turn on their next birthday. Significant ages such as 16, 18, and 21 are displayed in bold.

Employee phone list

The *Employee phone list* is a simple report that lists your employee's contact information. This report can be used to contact an employee to replace a sick or no-show worker. It can also identify information that is missing from your employees' profiles.

How to read this report

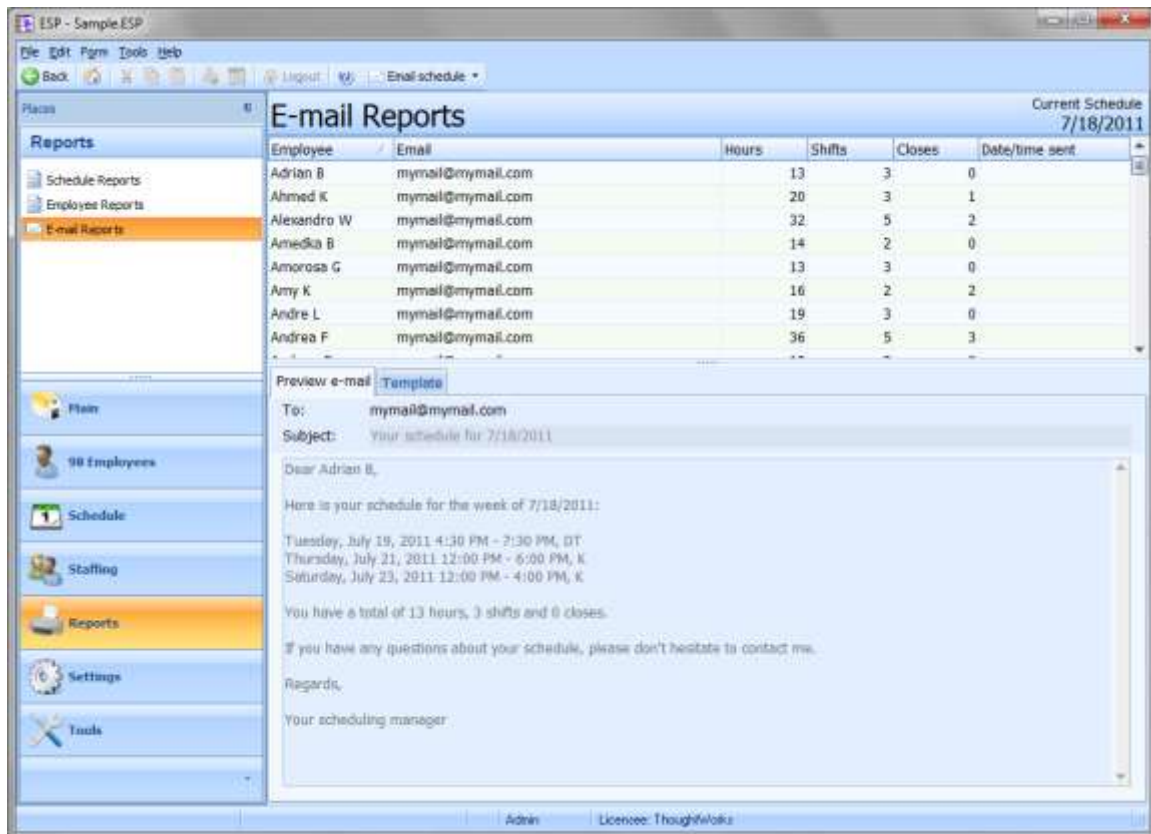
This report is an alphabetical list of your employees and includes the following information:

- ✓ **Schedule Name/First Name/Last Name:** Sorted by last schedule name, then by first name

- ✓ **Phone numbers:** The employee's primary and secondary phone numbers. If an employee's phone number has not been entered on the General section of his/her information form the phone number will be blank.

E-mail reports

The *E-mail reports* choice allows you to send employees their weekly work assignments by e-mail. To use this feature, you must first set up your e-mail preferences in the TOOLS | OPTIONS section of the HOME form. You must also ensure that you have entered an e-mail address for each of your employees.



The e-mail report is not printable and the standard report toolbar does not appear. Instead, the toolbar includes the choice to e-mail the entire schedule, or e-mail the schedule to selected employees.

The form is divided into two sections:

1. The **Employee** section at top includes a row for each employee with their name, e-mail address, and total number of hours, shifts, and closes scheduled for the week. All employees appear in this section. However, those without e-mail addresses are displayed in gray and will not have their schedules e-mailed to them.
2. The bottom section is divided into two tabbed screens:
 - a. The **Preview e-mail** screen allows you to view the employee's message before it is sent. The message will change as you scroll through the list of names to display

information for the active employee. When the e-mail field for the active employee is blank the message *No e-mail for this recipient* will be displayed in this area.

- b. The **Template** screen allows you to design an e-mail template, ready to be filled in with shift information for the appropriate employee. This message will be the same for all employees, with each employee's individual shifts substituted for the template fields.

Setting up the e-mail template

You may enter any information you wish into the e-mail template. Standard text that you enter will be included in the message sent to all employees.

The screenshot shows the 'E-mail Reports' screen in the ESP software. The top right corner indicates 'Current Schedule 7/18/2011'. The main area displays a table with columns for Employee, Email, Hours, Shifts, Closes, and Date/time sent. Below the table, there is a 'Preview e-mail' section with a 'Template' tab. The preview shows a sample email body with placeholders for employee information and schedule details.

Employee	Email	Hours	Shifts	Closes	Date/time sent
Adrian B	mymail@mymail.com	13	3	0	
Ahmed K	mymail@mymail.com	20	3	1	
Alexandro W	mymail@mymail.com	32	5	2	
Amedka B	mymail@mymail.com	14	2	0	
Amorosa G	mymail@mymail.com	13	3	0	
Amy K	mymail@mymail.com	16	2	2	
Andre L	mymail@mymail.com	19	3	0	
Andrea F	mymail@mymail.com	36	5	3	

Preview e-mail: Template

To: <e-mail address>
Subject: Your schedule for %week

Dear %name,

Here is your schedule for the week of %week:

%schedule

You have a total of %hours hours, %shifts shifts and %closes closes.

If you have any questions about your schedule, please don't hesitate to contact me.

Regards,
Your scheduling manager

ESP also defines a series of codes that allow you to specify detailed schedule information. These codes will be substituted with the correct information for each employee when the e-mail report is previewed or sent. The codes that you can insert are all prefixed with a percent sign (%), and include:

- ✓ **%week** represents the date of the scheduling week.
- ✓ **%schedule** represents the full weekly schedule for this employee.
- ✓ **%hours** represent the total number of hours assigned to the employee.
- ✓ **%shifts** represents total number of shifts assigned to the employee.
- ✓ **%closes** represents the number of closes assigned to the employee.

- ✓ **%locale:** this symbol must be followed by a valid locale code. It overrides the current default date and time settings and uses the date/time settings for the locale specified. Some valid locale codes are:

- 1033: English (US)
- 4105: English (Canada)
- 3084: French (Canada)
- 1043: Dutch (Netherlands)
- 1049: Russian
- 3082: Spanish

Only dates and times that appear after the locale code will be affected. Dates and times that appear before the locale code will be the default setting from Windows.

You can see a typical e-mail template in the sample below. When you click on the *Preview e-mail* tab, ESP will display the completed message for the selected employee, with the field codes substituted with the appropriate schedule information.

Notice that the subject line on our template uses the code *%week* to substitute the date of the schedule in the subject line that appears in your employees e-mail. In the body of the template message you can fill in anything you wish and it will be included in the message each employee receives. It could be reminders of important upcoming events, or general greetings. Remember that in each case where you see the percent symbol followed by a word, the correct schedule information will be substituted there.

Toolbar options

The *E-mail schedules* toolbar option provides two choices for sending messages: *E-mail all* or *E-mail selected*. *E-mail all* will send the message to **all** employees who have an entry in their e-mail address field. The *E-mail selected* option will send the message to the selected employee(s) only. This feature is useful if you want to send a customized message to one or more employees.

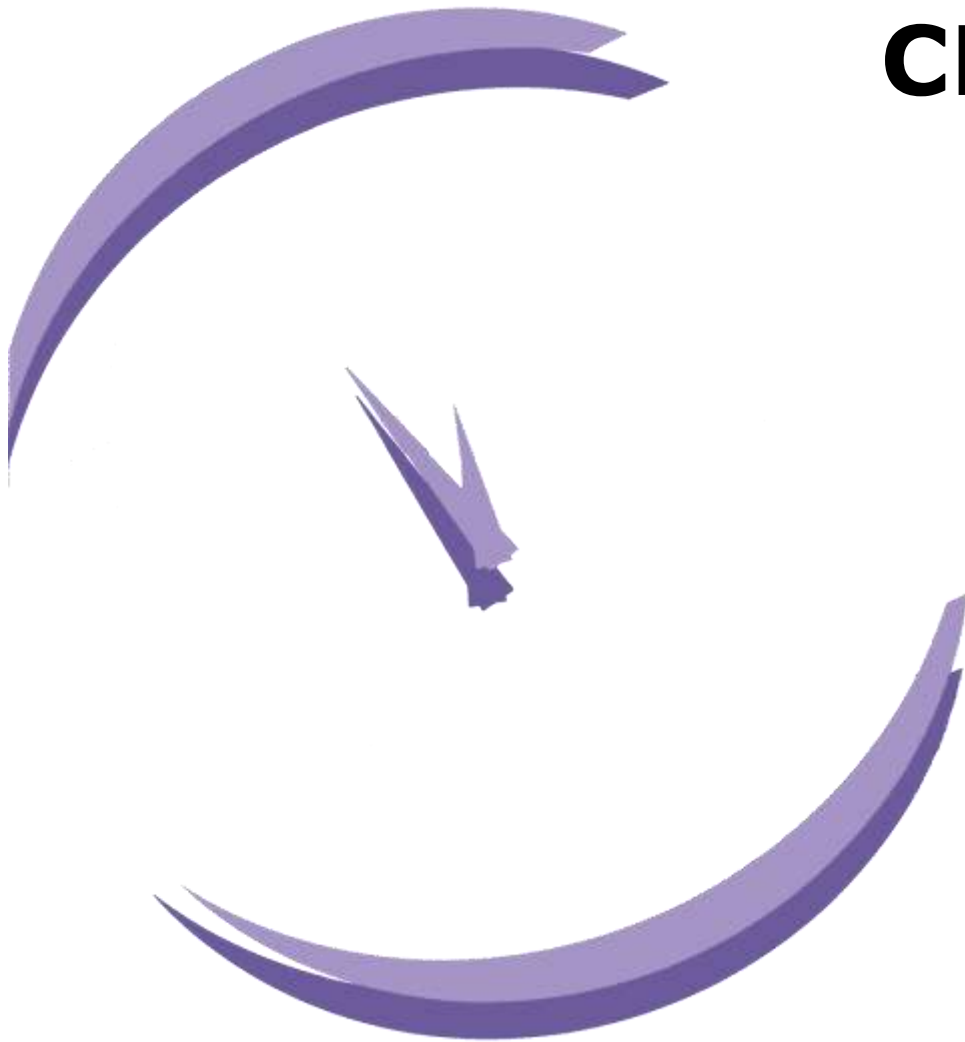


When you click on Send Email the above dialogue appears. If you select the *Include the following message in each email*, the text message you type will be added to every email. Once you have sent the email, the message cannot be changed, even if you send the email a second time.

CHAPTER

8

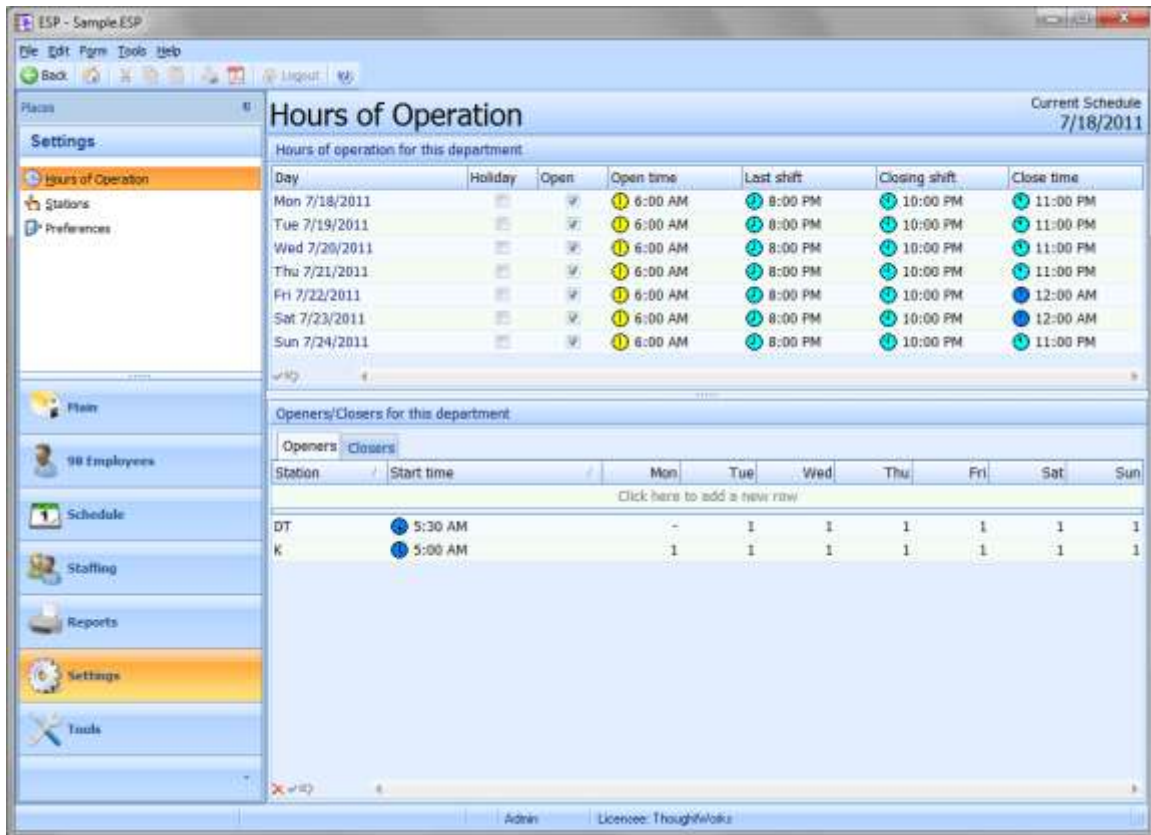
Settings



Settings

The *Settings* group contains information you enter when originally setting up ESP for your operation. Occasionally, you may need to update entries in the *Settings* group; however, in general, you need to define these entries only once.

When you click on SETTINGS on the left places menu, the first item in that menu group is opened automatically. In this case since the Hours of Operation is the first item, it will be displayed when you click on Settings..



In the *Settings* group, there are three key entry forms:

- ✓ Hours of operation
- ✓ Stations
- ✓ Preferences

Hours of operation

Use the HOURS OF OPERATION form, shown to specify details about the opening and closing hours in your operation.

The form is divided into two sections: *Hours of operation*, and *Openers/Closers*.

Hours of operation

The *Hours of operation* section contains the following columns:

- ✓ **Day:** The days and dates for the scheduling week that you are viewing. This information may not be changed.
- ✓ **Holiday:** A checkmark indicates that the day is a holiday, and that ESP should use employees' holiday availability when assigning shifts. In general, this option should only be used if there is one holiday in the schedule week. For weeks when the holiday lasts more than one day use the *Alternate availability* feature instead.
- ✓ **Open:** A checkmark indicates that the location is open on that day.
- ✓ **Open time:** The time that your operation opens its doors to the public. If you are open 24 hours a day, enter an open time of 4:00 AM.
- ✓ **Last shift:** The latest time of day that a shift is allowed to begin. Note that this refers to shifts generated by ESP, not fixed overnight shifts, which can start at any time.
- ✓ **Closing shift:** The time that an employee must work *past* before their shift is counted as a close shift. This helps control the number of times employees work late at night. A shift is counted as a close shift if the employees shift ends **at** or **later than** the indicated time. If you do not place any limits on how many times your employees are allowed to work late at night, set this to the same time as your close time below.
- ✓ **Close time:** The time of day that you close your doors to the public. If you are open 24 hours a day, enter 4:00 AM here.

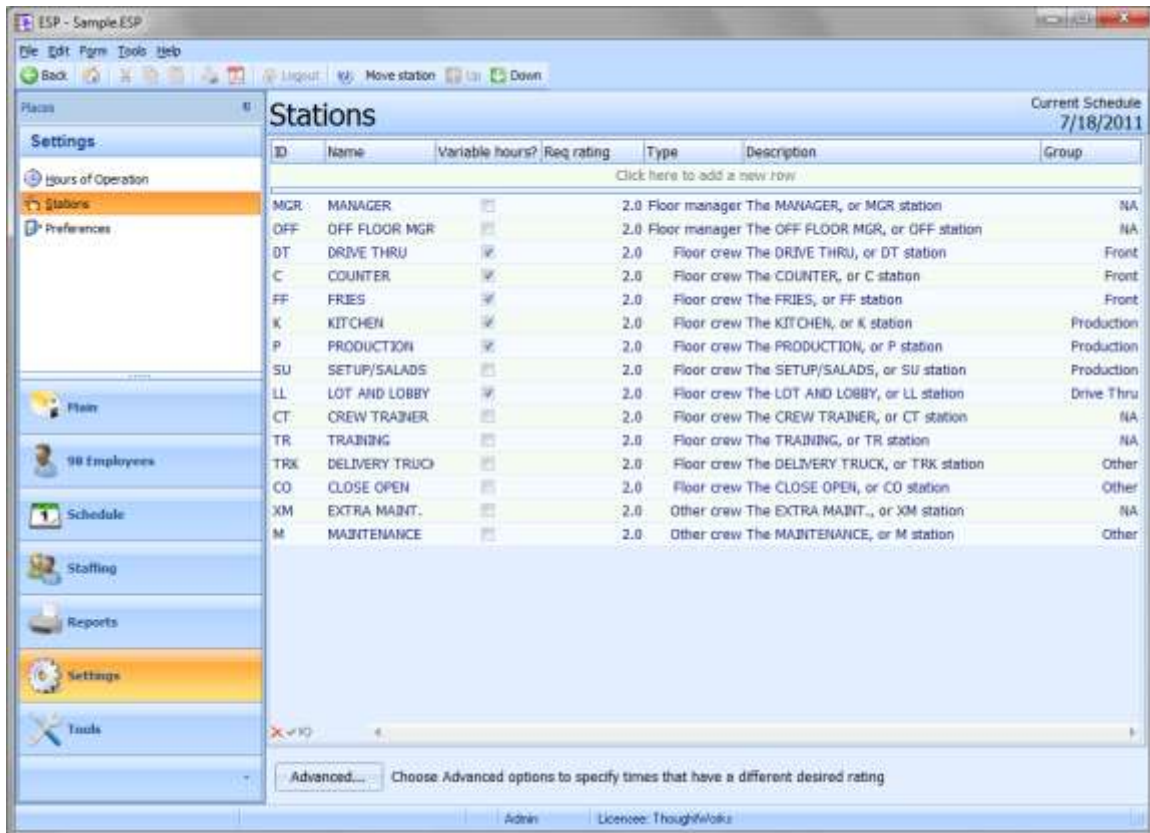
Openers/Closers

Use the *Openers/Closers* section to specify the number of people you require to come in before your location opens and the number of people you require to stay after you close. For example, you may open to the public at 6:00 AM but require a number of openers to come in early to set up their stations.

For each entry, specify the station the employee will be assigned to, the *Start time* for openers or *End time* for closers, and under each day, specify the number of crew you require at each station. The example, above, shows how you would set up the *Openers* section to schedule an employee on Drive-thru each day of the week one half-hour before you open and an employee on Kitchen each day of the week one hour before you open.

Stations

The STATIONS form defines the stations that you use in your location. Stations are the job categories that you will be using, which often include Cashier, Kitchen, Lobby person, Hostess, and so on. You may enter as many or as few stations as you wish.



Above is a sample STATIONS form. To remove a station, click anywhere in the station's row and then click on the *Delete* button at the bottom of the screen. To add a new station simply click anywhere in the top row labeled *Click here to add a new row* and fill in the required information. Save the stations by moving off the row or by clicking on the *Post* button at the bottom of the screen. The following information is required for each station:

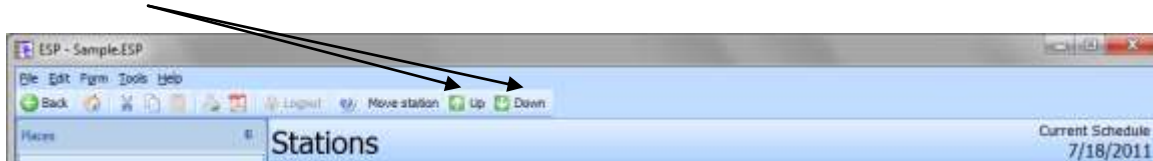
- ✓ **ID:** A short-form name for the station, used when entering it on other forms. You are limited to no more than four characters, and the name must be unique.
- ✓ **Name:** A longer, more descriptive name for the station.
- ✓ **Variable Hours:** A *Station* which is considered variable labor should have a checkmark in this box; an empty checkbox indicates that the station is to be considered non-variable labor. Accordingly, the stations that you schedule based on volume should be checked as variable. Further, stations that are scheduled only using fixed shifts, for example, management shifts, maintenance, or delivery, are considered non-variable labor and should be left unchecked. Designating whether a job is variable labor or not does not affect the final schedule; it only affects how labor is reported and subtotaled on the STATISTICS report.
- ✓ **Required Rating:** The overall skill level required for this station at any given time. Each employee is given a rating on each station. When scheduling, ESP attempts to assign employees so that the average of all scheduled employees is as close to the required rating as possible. Enter any number from 1.0 to 4.0 in increments of 0.1. In general an entry of 2.0 or 2.5 will produce a schedule with a good balance of experienced and less-experienced employees.

- ✓ **Type:** Defines the station as either a crew position or a management position. You are given five options: *Floor crew*; *Floor manager*; *Other crew*; *Other manager*; and *Unknown*. This entry is used to determine the crew-to-management ratio on some reports and helps you determine times of the day when you may be able to cut or add labor based upon the presence of management personnel.
- ✓ **Description:** A longer description of this station, if desired.
- ✓ **Group:** This is used to define groups of stations that are similar in nature. When you activate the management scheduling feature, excess managers will be evenly distributed between the groups (except the “other” and “NA” groups)

Sorting your stations

The order that stations appear on this form is reflected on most schedule reports. To rearrange the stations so that they appear in your preferred order, use the *Move station* buttons on the toolbar. Simply select the station you wish to move and click the *Up* or *Down* buttons to move it into the row you wish.

The move UP and move DOWN buttons



Advanced ratings

In addition to an average required rating for a station, you may specify a different rating to be used at specific times. Clicking on the *Advanced* button displays the *Advanced* station form, as shown below.

For example, if you wish to schedule your strongest people on Drive-Thru during the busy weekend lunch hours, and the strongest Kitchen people during the weekend breakfast hours, you would set up the *Advanced* form as follows:

Day	Start	Finish	Station	Desired Rating
Sat	6:00 AM	11:00 AM	K	1.5
Sat	10:00 AM	2:00 PM	DT	1.5
Sun	6:00 AM	11:00 AM	K	1.5
Sun	10:00 AM	2:00 PM	DT	1.5

In the example above, we have specified that on Saturday and Sunday between 6:00 AM and 11:00 AM the Kitchen station rating should be 1.5 (as opposed to 2.0 specified on the main STATIONS form). In addition, we have specified a 1.5 rating for Drive-Thru on Saturday and

Sunday from 10:00 AM to 2:00 PM. ESP will take these entries into account when assigning crew at these times.

Note that ESP does its best to assign shifts according to your ratings preferences, but it will never leave a shift unassigned. Ratings are requested averages, not minimums. If necessary, ESP will produce a full schedule of assigned shifts, even if it is unable to accommodate your rating requests.

Preferences

The *Preferences* form allows you to customize ESP's operation to accommodate differences in location, manpower, manager preferences, and computer equipment.

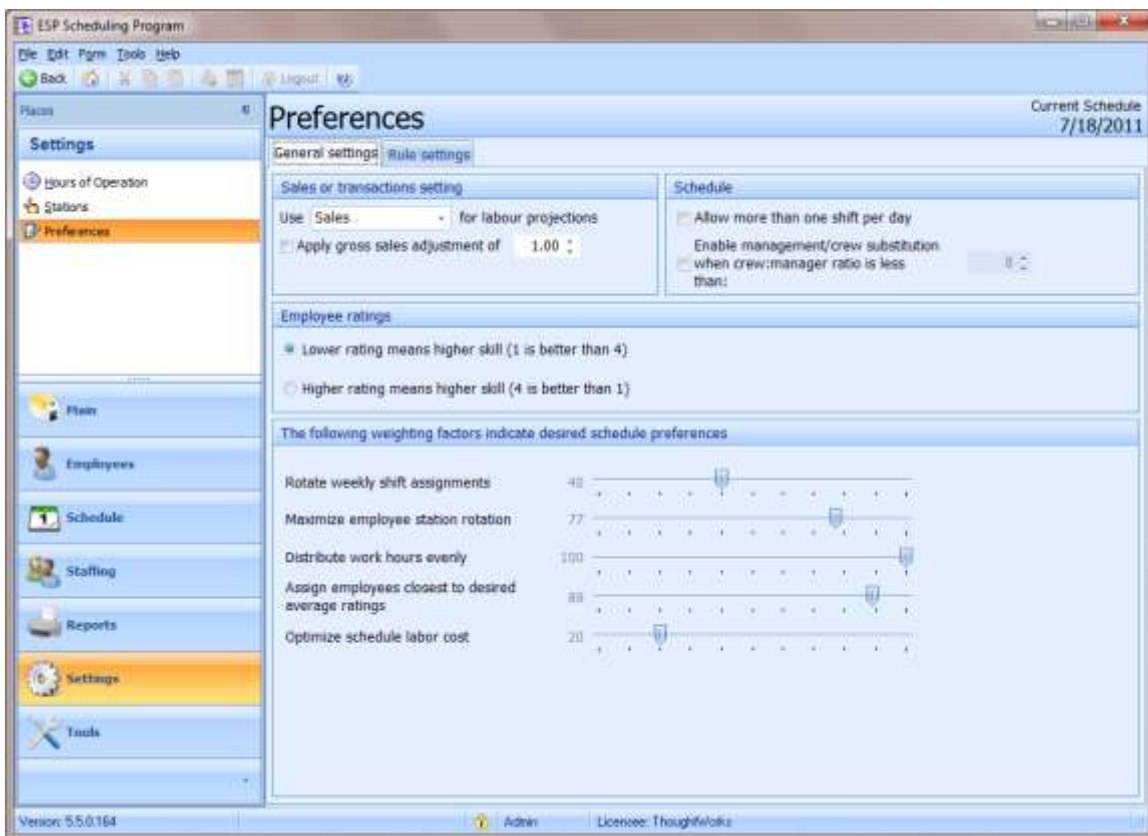
The PREFERENCES form is divided into two tabbed sections: *General Settings*, and *Rule Settings*.

Sales or transactions

Use the *Sales or transactions* setting to specify if you wish to base your staffing requirements on sales or transaction counts. Select the appropriate setting from the drop-down list.



You cannot switch from sales to transactions or vice versa unless you have data for both on file. If your volume data is imported automatically from your POS, you may have both on file. If you are manually entering volume history, it is unlikely you have entered volume amounts in both sales and transactions.




Sales adjustment

In some jurisdictions the sales information imported into ESP from the cash management system, contains value added tax. In this case, you may prefer to have this tax removed when calculating your labor cost on the statistics report. If this applies to you then you would enter the adjusting factor in this field. For example, if your value added tax rate is 5% and your gross sales includes this tax, then you would enter 1.05 as the sales adjustment factor. ESP will then divide your gross sales by this number before calculating your labor percent on your statistics report.

Schedule

This setting defines whether or not you will allow employees to have two shifts in the same day. The two shifts must still be separated by the minimum spacing defined in the labor category. For example if the labor category says shifts must be 10 hours apart, then it might be possible for an employee to work 6:00am – 10:00am and then come back 10 hours later and work 8:00pm to midnight. This setting determines if you will allow this or not.

 *This setting primarily affects how ESP handles overnight shifts. For example an overnight employee might work from midnight 12:00am to 8:00am one day, and then 11:00pm to 7:00am the next day. Technically both those shifts appear on the same day since Midnight and 11:00pm are in the same 24 hour day. If this setting is not checked, then this shift would not be allowed.*

The management/crew substitution specifies how many employees a manager can supervise. If you activate this feature ESP will calculate how many employees are working and how many managers are required using this ratio. If there are excess managers scheduled they will be reassigned to work productive employee positions. The positions they are assigned to work will depend upon their station qualifications. If there are more than one manager being reassigned, they will be evenly distributed between the groups you configured on the stations form.

Managers will be reassigned for as little or as long as needed. The shortest period of time would be 15 minutes. When deciding which manager to reassign, ESP will look at the managers rating on the floor manager position and choose the lowest rated (least experienced) manager first.

Employee Ratings

The *Ratings* section allows you to specify how you use the station ratings. If you consider a 1 rated employee to be the best and a 4 to be the least experienced then you should select the first option, “Low rating number used for better employee rating”. If you consider a 4 rated employee to be the best then you would select the second option instead.

Weighting factors

In the *Weighting factors* section you can customize how shifts are assigned to your employees.

For each option, rate its importance from zero to one hundred by using the sliding scales. A setting of zero indicates that you do not consider this option important; a setting of one hundred indicates that it is critically important.

The weighting factors are:

- ✓ **Rotate weekly shift assignments:** Specifies how important it is that your employees get scheduled at different times and days each week. A low number will result in a more stable series of shifts for each employee. A higher number will result in greater shift variability.
- ✓ **Maximize employee station rotation:** Specifies how important it is that employees who are qualified to work a variety of stations be assigned to work these different stations during the week. Some operations may prefer rotating stations for their employees to keep morale and

interest high. Others may wish to reduce station rotation and concentrate on scheduling properly-rated and experienced employees.

- ✓ **Distribute work hours evenly:** Specifies how important it is that ESP attempts to provide all employees with a similar number of hours.
- ✓ **Assign employees closest to desired average rating:** Specifies how important it is that ESP achieves the required rating for each *Station* when assigning shifts.
- ✓ **Optimize schedule labor cost:** Specifies how important it is that ESP take into account employees hourly labor cost when assigning shifts.

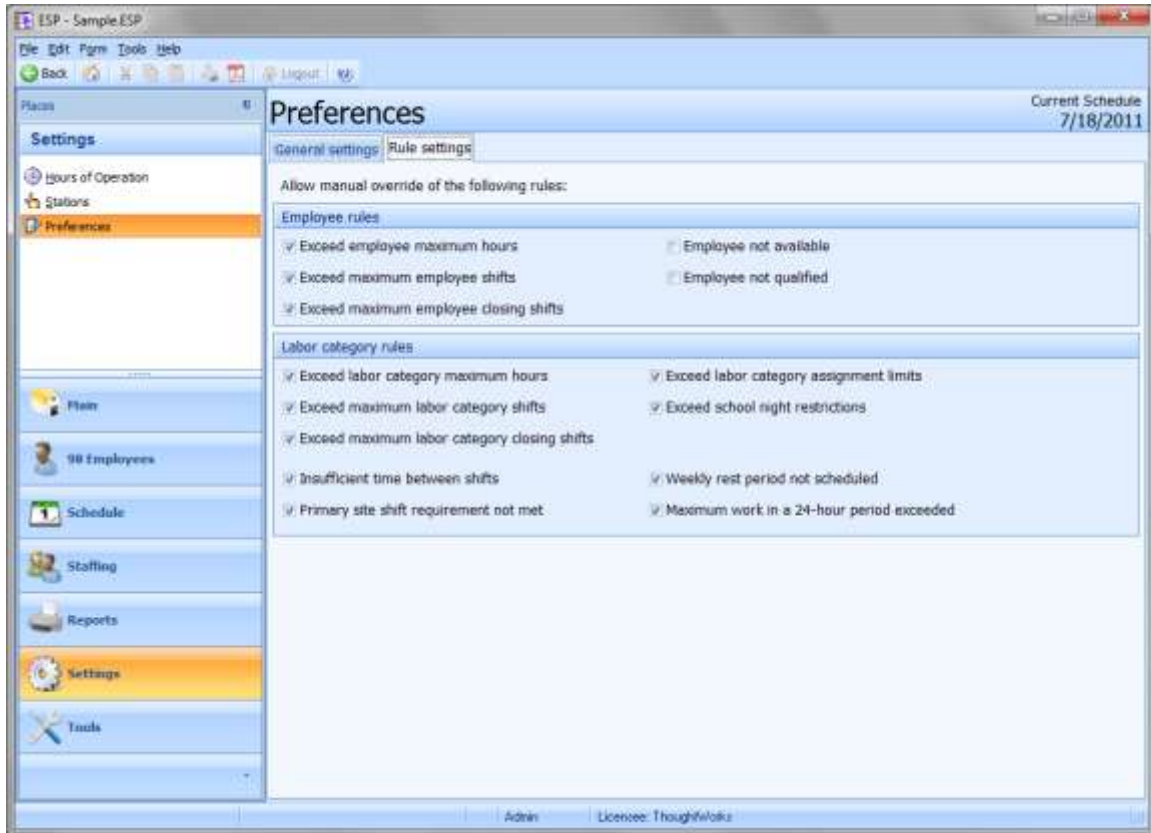
Rule settings

When ESP creates a new schedule it adheres to all the rules and restrictions you have defined. Under no circumstances will it create a shift that violates any of these. However, there may be times when you wish to allow yourself to temporarily or manually override these rules and restrictions while editing a schedule.

Manual overrides generally fall into two categories:

1. Overrides that are permitted because they do not violate any laws in your jurisdiction. The on-screen status of a shift that has an error that is permitted is classified as an **Error**.
2. Overrides that are forbidden by law. Overriding some violations is considered a violation of your local labor regulations and doing so could result in fines or other legal action. The on-screen status of a shift that has an error that is not permitted will show both **Error** and **Violation**.

The *Rules settings* section allows you to specify the rules that you are permitted to override manually and the rules that may *not* be overridden under any circumstances.



A check mark in the box beside the rule allows manual override. Leave the box unchecked if you do **not** want the rule to be overridden. Any attempt to create a shift that breaks one of the non-checked rules results in a violation, with the offending shift being displayed in dark red. Printing of the schedule is disabled until you correct the problem.

The rules are divided into two sections:

1. Employee rules
2. Labor category rules

Employee rules

Includes rules that can be found in each employee's individual file:

- ✓ **Over employee maximum hours:** controls whether or not you may assign employees over their maximum hours.
- ✓ **Over maximum employee shifts:** controls whether or not you may assign employees over their total shift limit.
- ✓ **Over maximum employee closing shifts:** controls whether or not you may assign employees over their closing shifts limit.
- ✓ **Employee not available:** controls whether or not you may assign employees to a shift when they are not available.

- ✓ **Employee not qualified:** controls whether or not you may assign employees to a *Station* for which they are not qualified.

Labor category rules

Includes rules that can be found in the labor categories forms:

- ✓ **Over labor category maximum hours:** controls whether or not you may assign an employee past the maximum hours defined on their LABOR CATEGORY form.
- ✓ **Over maximum labor category shifts:** controls whether or not you may assign an employee over the total shift limit defined on their LABOR CATEGORY form.
- ✓ **Over maximum labor category closing shifts:** controls whether or not you may assign an employee over the closing shifts defined on their LABOR CATEGORY form.
- ✓ **Insufficient time between shifts:** controls whether or not you may assign an employee to a shift that is closer to their last shift than defined on the LABOR CATEGORY form.
- ✓ **Primary site shift requirement not met:** this option is for those locations that schedule using our multi-department (location) feature. If this box is *not* checked the manager will not be able to edit someone to work exclusively at the secondary location; each person *must* work the required number of shifts at the main location as defined in their LABOR CATEGORY form.
- ✓ **Exceed labor category assignment limits:** controls whether or not you may assign an employee over or under the restrictions defined on their LABOR CATEGORY form.
- ✓ **Exceed school night restrictions:** controls whether or not you may assign an employee over the school night restrictions defined on their LABOR CATEGORY form.
- ✓ **Weekly rest period not scheduled:** if your jurisdiction requires that each employee be given a consecutive number of hours off each week, this option will control whether or not you may assign an employee in violation of this. If this does not apply to your location then leave this option set to zero on all the LABOR CATEGORY form.
- ✓ **Maximum work in a 24-hour period:** if your jurisdiction requires that employees may not work more than a certain number of hours in any 24-hour period, this option will control whether or not you may assign an employee over the number as defined on their LABOR CATEGORY form.



Although checking these rules gives the scheduling manager greater flexibility when assigning shifts, for maximum employee satisfaction these should all be left unchecked. It is best to define your employees' information accurately and specify appropriate limits on their assignments, rather than resort to breaking rules when editing the final schedule.



CHAPTER 9

Advanced set up

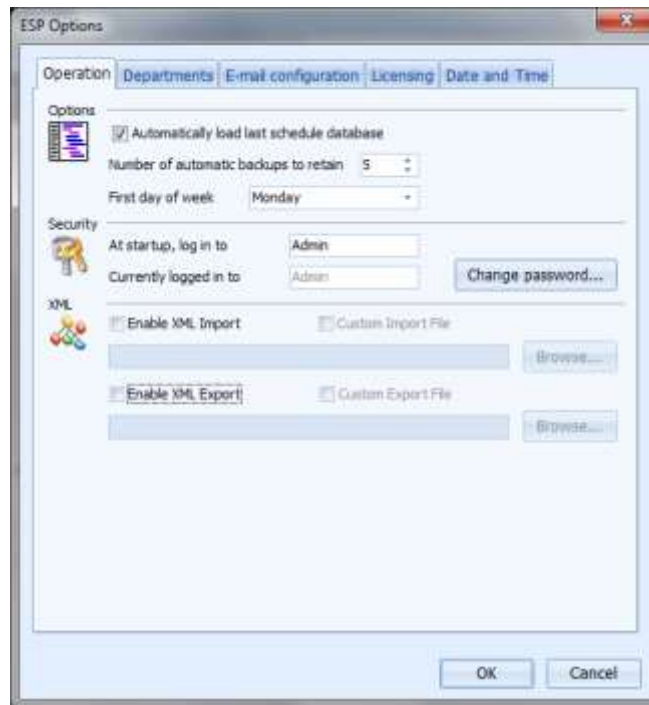
Advanced set up

The features in this chapter are accessed by selecting **TOOLS | OPTIONS** from the menu of the HOME form. This will open the ESP OPTIONS window, which has a number of tabbed sections.

1. **Operation:** General operation settings for ESP, including Security, and importing/exporting scheduling information to/from other software.
2. **Departments:** Used to define departments for multi-site scheduling. You will only change the department information if you schedule a shared pool of employees in multiple locations.
3. **E-mail configuration:** Used to set up the information required to e-mail your employees their weekly shift assignments.
4. **Licensing:** Used to license the software to your computer.

Operation

The options on the OPERATION tab are shown below:



1. Options

- ✓ **Automatically load last schedule database:** Specifies that ESP should automatically open the database that was last used on startup. If you schedule more than one data set, you will probably prefer to uncheck this option so that you can choose the data set you wish to open each time you start ESP.
- ✓ **Number of automatic backups to retain:** ESP retains a number of automatic backups as you work with the software. Select the number of backups you wish to retain by setting this option appropriately. This setting defaults to 5; meaning ESP will save the data file from the last five times that you exited the program. Each backup is the same size as your data file so

you can change this to allow any number of backups between 3 and 10, depending on the disk space available on your hard drive. If you choose 3 or more backups ESP will also ensure that at least one of them is one week old or more. This is to ensure that if your database is damaged, and you open then close it repeatedly, you don't overwrite all your backups with the damaged database. At least one of the backups will be from the previous week which hopefully did not contain any damage.

- ✓ **First day of the week:** This option allows you to set the order that days are displayed in lists. By default this is set to Monday. To change the first day that is displayed in lists select the appropriate day from the drop down list.

2. Security

ESP controls access to various forms and fields by using a combination of user names and passwords. The user names are pre-defined and may not be changed. Examples are **Admin**, **Supervisor** and **Manager**, You may change the password associated with these user names.

There are several other usernames available as well. Each of them will have different restrictions and are used only in some jurisdictions. Contact The ThoughtWorks for full details.

3. XML

ESP provides the ability to automatically transfer information to/from external sources. ESP uses XML as a data interchange language, and allows you to import sales, employee and other information from POS systems, personnel software and so on. Additionally, ESP exports all schedule information in XML format so that you may use the information in time clocks, custom reports and so on.

If you wish to use the XML import and export features, you can read the full interface specification from our website at: <http://www.thoughtworksinc.com/esp/volinterface.htm>

Please contact us if you require additional information, or assistance using our XML interface.

Departments

The DEPARTMENT screen lists the departments that you have defined for this location.

Although most users will only define one department, this option allows you to add secondary departments to a main location for the purpose of scheduling multiple locations from a pool of employees. Once a department has been defined it may not be removed, since this could affect your scheduling history. However, you can make a department inactive to prevent scheduling for a given department in the future.

E-mail configuration

The E-MAIL CONFIGURATION screen is used to define the information ESP requires to e-mail weekly shift assignments to your employees. You have several options:

- ✓ **Use MAPI (Outlook, etc.) for e-mail reports:** choose this option if you send e-mail using your own e-mail software, such as Microsoft Outlook. All messages sent will be put in your e-mail software's Outbox, and retained in your *Sent items* folder. The external e-mail software must be MAPI-compliant. This includes most e-mail programs.
- ✓ **Use Lotus Notes for e-mail reports:** Use this option if you are using Lotus Notes to send your e-mail.

- ✓ **Use SMTP mail for e-mail reports:** If you do not wish to use your own e-mail client for e-mailing reports, choose this option to send e-mail through SMTP. You may require a network administrator's assistance to fill in the appropriate fields. Copies of the e-mail sent to your employees will not be saved in your *Sent items* folder.

Licensing

This section is for licensing your software. You should not change any of the information on this screen unless you are entering the license code provided by The ThoughtWorks.

Date and time

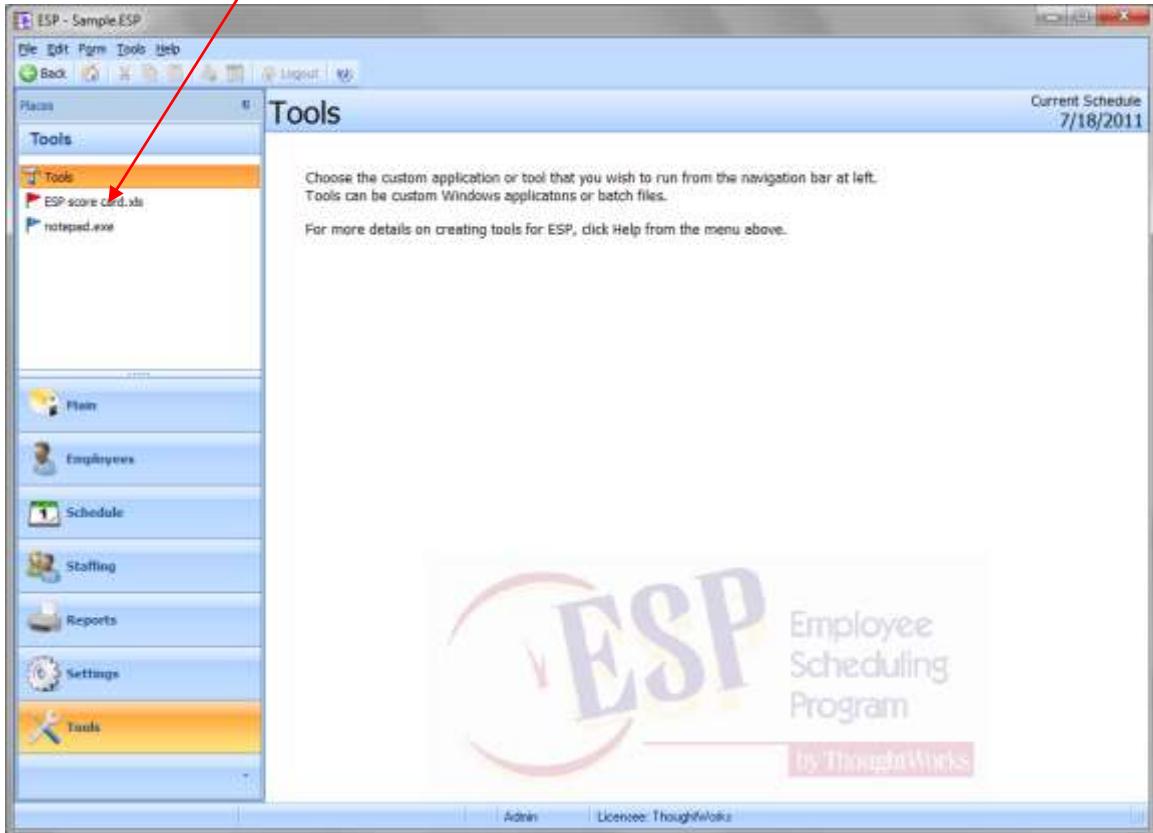
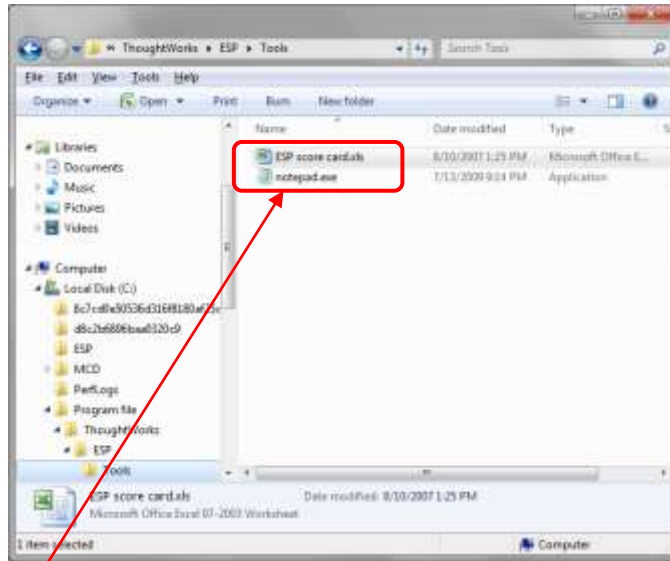
ESP uses the regional settings from your computer to determine how to display dates and times. In some cases this may not be what you want. You can override this by using the date and time tab. You can choose to override these settings only for the information that appears on the screen, and/or for the dates and times that are printed on reports. Select the region whose date and time displays corresponds to how you wish it to display.

Tools section of the Places panel

ESP allows you to run your own custom applications within ESP. These applications can be displayed in a special TOOLS section on the Places panel. For example, you may have an application that produces custom reports or statistics not normally produced by ESP, and which requires access to the ESP database. ESP can automatically display this custom application under the Tools section of the Places panel. When run, ESP provides your application with the path to the current ESP database.

Under normal operation, the Tools section is not visible. However, you may create a Tools folder beneath the main ESP application folder (normally C:\Program Files\ThoughtWorks\ESP). Any applications, shortcuts or links placed in this folder will be automatically displayed in the TOOLS section of the Places panel.

For example in the image below, the Windows NOTEPAD application has been added to the Tools folder, as well as a link to our ESP score card excel spreadsheet.



Command line parameters

The following command line parameters may be used with ESP to control how the application behaves.

/USERID

Purpose: To automatically open ESP using the USERID specified. May be used with a batch file or script to ensure that ESP always opens with a specific *userid* and the associated privileges for that *userid*.

Format: WINSCHED /USERID=*userid*

Logs in using the specified *userid*. If the *userid* specified is password protected the user will be required to enter the correct password. Contact ThoughtWorks for a list of valid *userids*

/PDF

Purpose: To force the creation all ESP reports as Adobe Acrobat PDF documents.

Format: WINSCHED "C:\SCHEDULE\DATABASE.ESP" /PDF

You must specify the location of the ESP database on the command line. The path must be enclosed in quotation marks. Reports will be saved in the standard documents folder (Usually My Documents for Windows XP or Documents for Windows Vista/7). If the /REPORTS option is also specified then the reports will be save in the folder specified by that parameter.

/REPORTS

Purpose: This is used to specify the folder where PDF versions of the reports will be saved.

Format: WINSCHED /REPORTS="c:\folder for documents"

The path must be enclosed in quotation marks. All reports will be saved in the folder specified. If the folder name is not valid, PDF files will be saved in the standard documents folder.

/DOSCOVERT

Purpose: To automate the upgrade from ESP 4 for DOS to ESP 5 for Windows, and convert the data to the new database format. This parameter only works if there is a licensed version of ESP 4 for DOS on the computer. If ESP 4 exists but is not properly licensed you can only import the DOS data manually by opening ESP 5 for Windows and using the NEW/IMPORT function. Contact ThoughtWorks for additional details.

Format: WINSCHED /DOSCONVERT @CONFIGFILE

Where CONFIGFILE is replaced with the fully qualified file name for the xml configuration file. This reads the DOS SCHEDULE.CFG file in the root folder to find the DOS data. The resulting Windows data file is placed where the config file specifies, but with the department name of the DOS data.

/CREATE

Purpose: To create a new blank database for a new location.

Format: WINSCHED /CREATE @CONFIGFILE

Where CONFIGFILE is replaced with the fully qualified file name for the xml configuration file. This looks for a file called MCD.ESP in a folder called TEMPLATES below the current WINSCHED.EXE folder. It then creates a blank database in the folder specified in the config file.

/LANG

Purpose: Force ESP to open using the specified language.

Format: WINSCHED /LANG=language

The only supported options for language are FRENCH or ENGLISH. If this parameter is not used ESP will open using the same language used the last time it was opened. If this is the first time ESP has been opened it will use the system language of the operating system if possible.

/AUTOEXIT

Purpose: Forces ESP to automatically exit after opening. This is useful for batch processing. For example you may wish to use the /PDF parameter for force the creation of all reports in PDF format, but then have ESP exit immediately.

Format: WINSCHED /AUTOEXIT

There are no other parameters to use with this option.

/EMPEXPORT

Purpose: Forces ESP to export all employees in our standard XML format. See the following link on our website for our XML technical specifications.

<http://www.thoughtworksinc.com/esp/volinterface.htm>

/KeepVSWeeks{=nnn}

Purpose: Purges volume history information that is older than the number of weeks specified by nnn (eg: /KeepVSWeeks=52 keeps only the most current 52 weeks of history, purging all other)

/KeepSCDWeeks[=nnn]

Purpose: Purges schedules that are older than the number of weeks specified by nnn. (eg: KeepSCDWeeks=52 keeps the current 52 weeks of schedules and purges the rest)

/KeepEmpWeeks[=nnn]

Purpose: Purges employees who have a termination date older than the number of weeks specified by nnn (eg: KeepEmpWeeks=52 purges all employees who have a termination date more than 52 weeks ago)

NOTE: You cannot purge employees who have shifts on any schedule that is still on file. ESP will automatically ignore those employees. For example if you have 5 years of schedules on file, you cannot delete all employees who have a termination date up to 3 years ago. This would mean ESP still has 2 years of schedules where those employees were active. ESP would skip those employees if you attempted to do this. The nnn parameter for KeepEmpWeeks must be older than the oldest schedule you still have on file. You should always purge schedules first, this will allow you to purge more employees.