



INDITION COMMERCE

Staff Scheduling

Setup Guide — getting Staff Scheduling ready on a website: switching it on, who can use it, how the time clock treats the schedule, telling staff, self-service, labor rules and the AI Schedule Assistant.



POWERED BY AI

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Everything an administrator does to put Staff Scheduling in your managers' and staff's hands: switching it on, giving people the right Time Clock roles, deciding what the time clock does when someone is early or not on the schedule, how staff are told about their shifts, what they can do for themselves, the labor rules you want warnings for, and the AI Schedule Assistant. Most websites are ready in under an hour.

 Wherever you see this mark, the setting is about an AI feature. It is switched on separately, in AI Settings.

1. Before you start

What you need

NEED	WHY
Time Clock, installed and switched on	Staff Scheduling is part of Time Clock: the people you schedule are the people who can clock in
Staff on Time Clock > Employees, with their locations	Everyone who can clock in at a location can be scheduled there
Staff Scheduling installed	From Admin > Modules; it installs switched off
The Time Clock roles given to your managers	They decide who builds schedules, who sees pay and who changes settings

What is optional

OPTION	WHAT IT ADDS
Positions and coverage targets	Colours, position warnings, coverage gaps and Fill Open Slots
Hourly pay rates on Time Clock > Employees	Projected labor cost on the board
In-Store Pickup store hours	Store hours above each day, in the PDF and in the coverage quick start
Text messaging (Messaging)	Schedule texts to staff
POS	Register sales by hour for the AI Schedule Assistant; POS sign-in can clock people in
Education	The week's classes for the AI Schedule Assistant
AI Settings	The AI Schedule Assistant

2. Switching it on

1. Make sure the time clock is on in **Time Clock > Settings**.
2. Open **Time Clock > Scheduling Settings**.
3. Switch **Staff Scheduling Enabled** to YES.
4. Choose **Save Settings**.

While it is off, nobody sees a schedule, the time clock never asks about it, and only Scheduling Settings appears in the Time Clock menu. Shifts already scheduled are kept. Once it is on, the menu gains **Schedule, Time Off & Swaps, Staff & Positions** and **Schedule vs. Actual**, and the rest of this screen opens up.

The **Getting Started** panel at the top of Scheduling Settings counts the people who can be scheduled and the positions you have, and lists the three steps to a first published week.

Every change on this screen is saved together with **Save Settings** at the bottom. The bar says "Unsaved changes" until you do, and the browser warns you before you leave with changes unsaved.

3. Who can use it

Staff Scheduling uses the Time Clock roles. Give them in **Manage Permissions**.

Roles

ROLE	CAN
Time Clock Manager	Build and publish schedules; manage staff, positions and coverage; decide time off, swaps and pick-ups; read Schedule vs. Actual
Time Clock Payroll	Read Schedule vs. Actual; see labor cost and budgets wherever they appear; set the weekly labor budget
Time Clock Admin	Everything above, and Scheduling Settings

Admins can do everything. Admins are never listed as staff to be scheduled.

Your staff need no admin role to see their own schedule: they sign in to **My Schedule** with the username and password they use for the admin or the register, or use the Time Clock app.

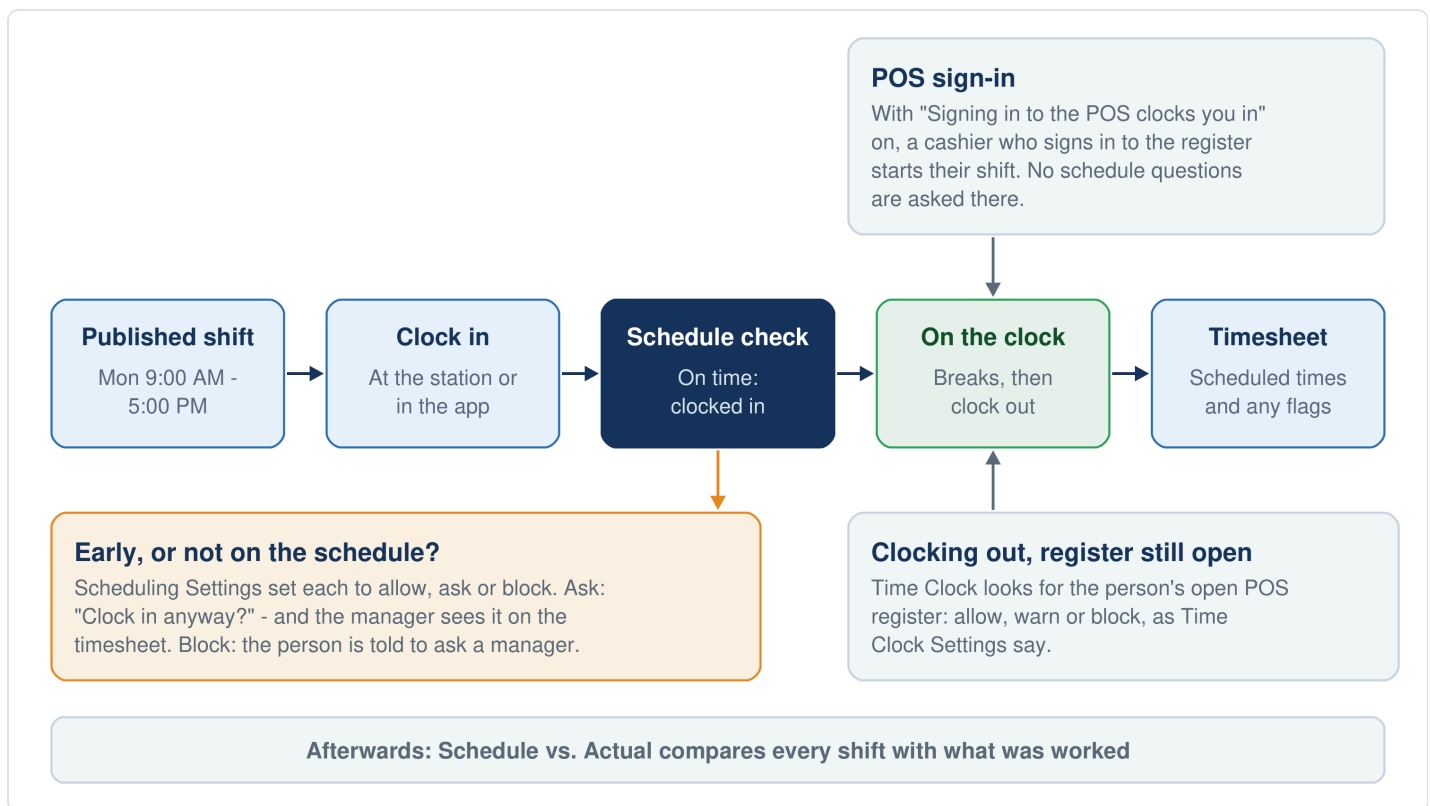
4. Clocking in

What the time clock does when someone clocks in at a station or in the app, compared with the published schedule. A POS sign-in and a manager's correction are never stopped.

Clocking In

SETTING	DEFAULT	WHAT IT DOES
Clock In This Early Without a Question (minutes)	15	How many minutes before their shift someone can clock in as normal (0 to 240)
Clocking In Earlier Than That	Ask them first	Let them clock in, Ask them first, and show it on their timesheet, or Do not let them clock in
Clocking In When Not on the Schedule	Ask them first	The same three choices, for someone with no shift at that time
Late After (minutes)	5	A clock-in this many minutes after the start shows as late on Timesheets and Schedule vs. Actual (0 to 60)

"Ask them first" shows, for example, "Your shift starts at 10:00 AM - that is 45m from now. Clock in anyway? Your manager will see you started early." Someone told no is asked to see a manager.



How the time clock and POS use the schedule. The questions are asked at the station and in the app; POS sign-in is never stopped.

Time Clock settings that work with POS

These live in **Time Clock > Settings**, not in Scheduling Settings, and work whether or not scheduling is on:

SETTING	DEFAULT	WHAT IT DOES
Signing In to the Register Clocks You In	Off	A cashier who signs in to POS and is not on the clock starts their shift at that register's location. Signing out of POS does not clock them out
Clocking out with a register still open	Warn them, then let them clock out	Or let them, or make them close the register first

The workweek start and the overtime rules also come from Time Clock > Settings. Scheduling never keeps its own copy, so the board's overtime warnings and cost always match payroll.

5. Late alerts

SETTING	DEFAULT	WHAT IT DOES
Tell Managers When Someone Has Not Clockedin	YES	An email when someone has not clocked in a while after their shift started, and when a shift ends with no clock-in at all. Each shift is reported once
Tell Them After (minutes)	15	Minutes after the shift starts with no clock-in (5 to 240)
Managers Who Are Told	Time Clock Manager	The roles and people who are emailed

Managers Who Are Told also decides who is emailed about time off requests, swaps and pick-ups waiting for approval, and changes to when staff can't work. Pick roles, people, or both. Someone assigned to locations on Time Clock > Employees hears only about their own locations.

The check runs every 5 minutes as the scheduled job "Staff Scheduling: Late and No-Show Alerts", in the Time Clock group. It also closes swap and pick-up requests whose shift has already started.

6. Telling staff

When you publish a week, or a published shift changes hands, each person whose shifts changed is told what changed for them — and nobody else is bothered. Everything also appears in their inbox on My Schedule and in the app.

SETTING	DEFAULT	WHAT IT DOES
Email Staff Their Schedule	YES	To the email address on their account

SETTING	DEFAULT	WHAT IT DOES
Text Staff Their Schedule	NO	A short text to the phone number on their account, through Messaging. Each text is charged by your provider
What Staff Can See	The whole published week at their locations	Or Only their own shifts

Texts need text messaging set up on your website (**Messaging**, phone settings). Until it is, the setting says so and nothing is texted. Each person can turn schedule texts off for themselves with **Allow schedule texts** on Staff & Positions.

Most stores post the whole week, like the schedule on the break-room wall. Swapping with a co-worker needs it: with **Only their own shifts**, staff can still give shifts away but not swap.

7. Staff self-service

SETTING	DEFAULT	WHAT IT DOES
Staff See Their Schedule Online	YES	My Schedule on the web and the schedule in the Time Clock app — which staff can then sign in to even if clocking in with a phone is off
Staff Can Ask for Time Off	YES	A manager approves or denies each request on Time Off & Swaps
Ask at Least This Many Days Ahead	7	Requests closer than this are turned away with "talk to your manager" (0 = any time, up to 90)
Staff Can Pick Up Open Shifts	YES	Anyone who can work the position at that location can claim a published open shift, and is told about new ones
A Manager Approves Each Pick-Up	YES	Off, a claimed open shift is theirs straight away
Staff Can Swap and Give Away Shifts	YES	They offer a shift to anyone who can take it, or ask a co-worker to trade
A Manager Approves Each Swap	YES	Off, a swap both people agreed to happens straight away
Staff Can Say When They Can't Work	YES	Their weekly can't-work and would-like times, from My Schedule or the app. It counts straight away, and their managers are emailed
Calendar Feed	YES	A private link to their own published shifts for Google, Apple or Outlook calendar

My Schedule is at your website's /timeclock/StaffSchedule/my/index address. Share it with your staff together with the Time Clock app.

8. Labor rules

All off unless you turn them on. The schedule warns about a broken rule on the shift and asks before saving it; it never stops you. Overtime warnings always follow Time Clock > Settings.

SETTING	DEFAULT	WHAT IT DOES
Rest Between Shifts, at least	Off, 10 hours	Warn when a closing shift is followed too soon by an opening one (8 to 12 hours)
Longest Day, at most	Off, 10 hours	Warn when someone is scheduled longer than this in a day (8 to 12 hours)
Longest Week, at most	Off, 40 hours	Warn when someone is scheduled longer than this in a workweek (30 to 48 hours)
Notice Period for Changes, changes count as late inside	Off, 14 days	Mark changes to a published shift that starts soon as late changes in its history (7, 10 or 14 days)

Staff under 18

SETTING	DEFAULT	WHAT IT DOES
Limits for Staff Under 18	Off	For people marked as under 18 on Staff & Positions
At Most in a Day	8 hours	3, 4, 6 or 8
At Most in a Week	40 hours	18, 24, 28, 30 or 40
Finish By	9:00 PM	7:00 PM to 11:00 PM

Check the limits your state sets, including for school weeks, and the predictable-scheduling rules in your city.

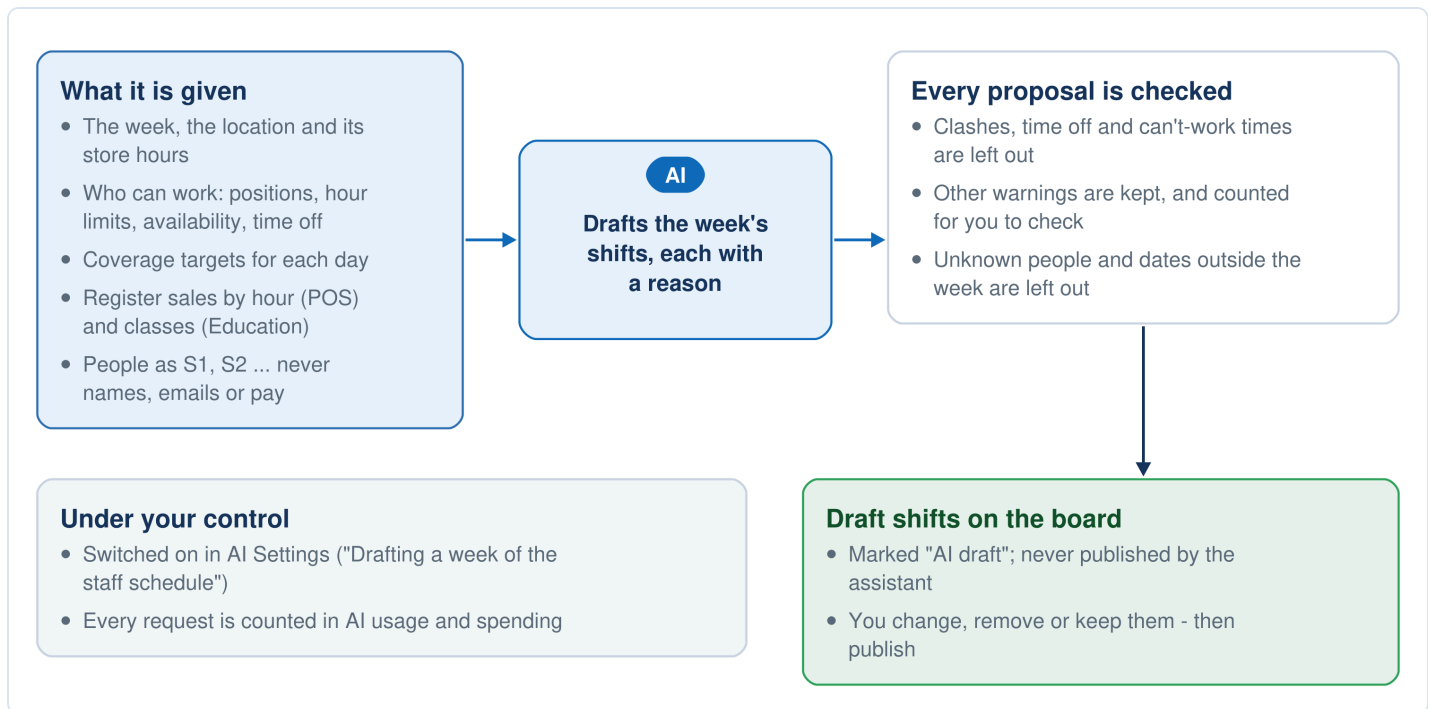
9. The AI Schedule Assistant

The AI Schedule Assistant drafts a location's week as draft shifts on the board. It is switched on and paid for in **AI Settings**, not here; the **AI Schedule Assistant** panel on Scheduling Settings shows whether it is ready, and what is missing if it is not.

1. In **AI Settings**, make sure AI is switched on for your website and a provider account is set up.
2. Under **Where staff can use AI**, in the **Staff Scheduling** group, switch on **Drafting a week of the staff schedule**.

3. Choose **Save Settings** in AI Settings.

4. In **Manage Permissions**, make sure the managers who will use it have **Use AI**.

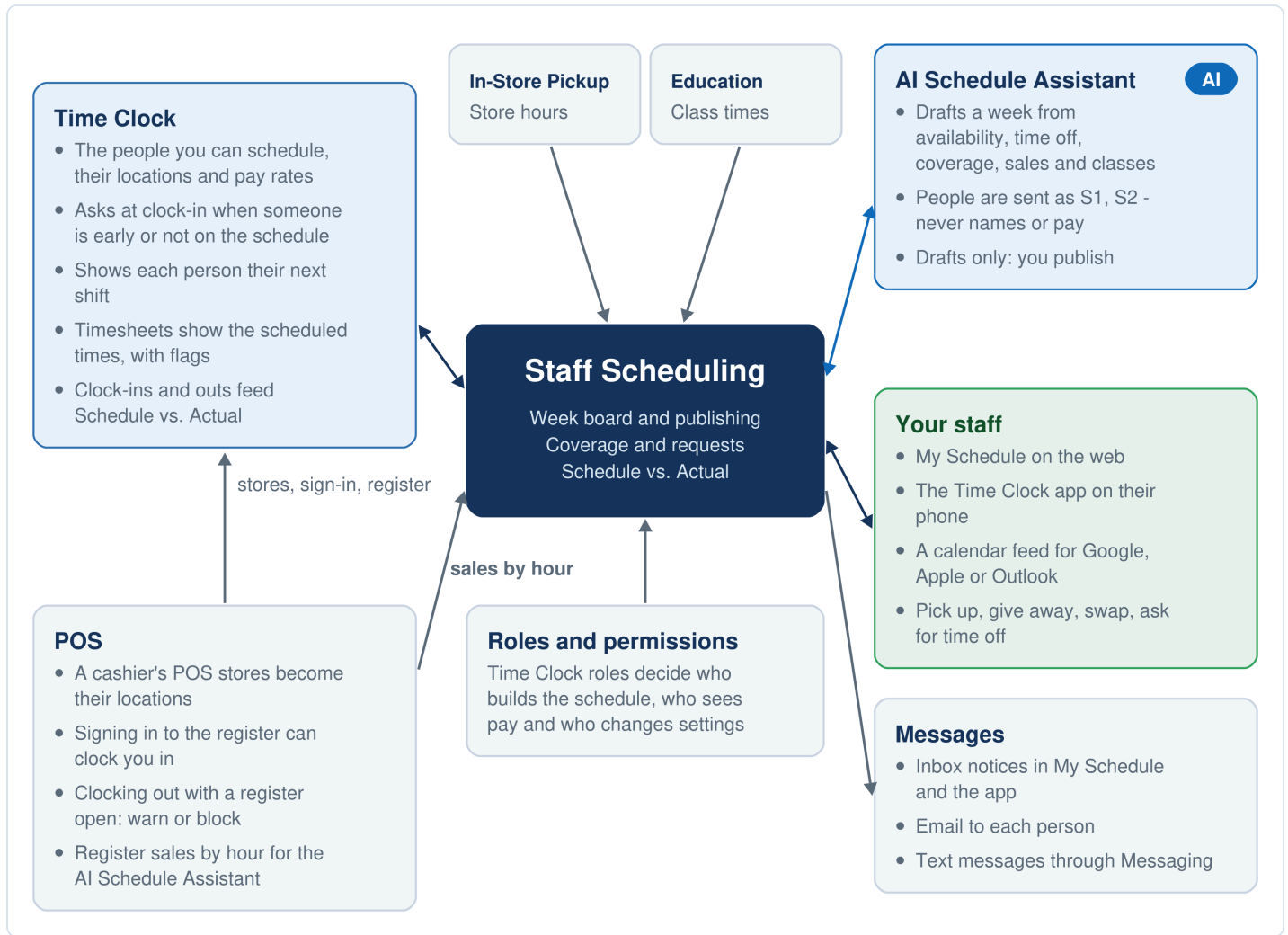


What the AI Schedule Assistant is sent, and what comes back. Staff are sent as S1, S2 and so on — never their names, email addresses, phone numbers or pay.

What it sends to your AI provider is the week, the store hours, your positions and coverage targets, typical register sales by hour, the week's classes, when overtime starts, and for each person a code with their positions, limits, availability, time off and shifts already scheduled. Every request goes through AI Settings, so it counts toward your website's AI usage and spending limits. Nothing it drafts is published until a manager publishes the week.

10. Check it works

1. Add a position on **Staff & Positions > Positions**, and give it to someone on the **Staff** tab.
2. Optionally, set up your week on **Staff & Positions > Coverage**.
3. On **Schedule**, add a shift for someone for tomorrow, and choose **Publish**.
4. Check that they received the email, and see the shift on My Schedule or in the Time Clock app.
5. At the station, confirm their next shift shows when they look up their status.
6. After the shift, open **Schedule vs. Actual** for the week.



Staff Scheduling and the rest of the system. Each connection is optional; without one, the schedule simply works without that information.