

# What's New



# Table of Contents

Software Updates .....	3
2020 Release Notes.....	4
2019 Release Notes.....	8
2018 Release Notes.....	18
New Feature Guides.....	22
New menu layout with side navigation .....	23
Grid View vs. List View.....	28
Enable PTO payout requests .....	33
The New TimeForge Dashboard (Today Page) .....	36
Request time off or set your availability .....	43
Create short term labor goals .....	49
Automated Meal and Rest Penalties .....	62
Show temperature field during clock-ins .....	66
Ad-hoc reports, including hourly sales reports .....	70

# Software Updates

# 2020 Release Notes

## Release Notes | June 2020

### Deployment version 2002.2:

- We fixed an issue that could prevent access to the Company Settings page for some accounts.
- Based on feedback from customers, we intelligently reduced the number of reports that display when you load a reports page. Now, we only show the top reports you use, and you can access the rest of the reports by opening a "Show More Reports" link.
- We resolved an issue where we were presenting the wrong error page when a restricted user was attempting to access the new settings page.
- We made some minor improvements to the user dashboard.
- We made minor improvements to the Forgot Password page.
- We added a subscribe link under the help button so that users can receive our Support Updates.
- We fixed an issue that could cause some pages to load slowly.
- We fixed an issue that would sometimes occur on the navigation menu for mobile devices.
- We fixed an issue that would cause the employee export to fail if the employee list was greater than 32,000 records.
- We made minor improvements to the Send Message page.
- We fixed an issue with payroll approval that could prevent export of CSV data on some browsers.

## Release Notes | April 2020

### Deployment versions 1911.1 and 2001.2:

- We fixed a problem in our web service API that was preventing updates to pay rates when the submitted rate was zero.
- We fixed an issue with the SPLH Template management feature that would sometimes create duplicate SPLH grids at the location level.
- We made some performance improvements to the corporate level Send Message page for large corporations.
- We improved audit logging for activities associated with bid shifts.
- We improved performance for the Sales/Labor Analytics page.
- We resolved an issue with holiday calendars and pay rules.
- We resolved an issue that could occur when applying certain overtime rules.
- We resolved an intermittent issue in our Applicant Tracking Platform where if a supervisor manually modified a job applicant's submitted forms, the location tab (for assigning the applicant to other stores) wouldn't display.
- We resolved an authentication issue with the TimeForge web service API.
- We made some adjustments to CPLH calculations on the schedule page.
- We added a feature that automatically assigns a Payroll ID to each employee.

- We fixed an issue with the management of employee termination dates through the TimeForge API.
- We updated the interface for improved management of scheduled reports.
- We fixed a minor issue with the navigation menu on certain mobile devices.
- We fixed an issue with the Setup Wizard that would sometimes prevent saving employee information.
- We improved how bid shifts are handled in the [TimeForge Employee mobile app](#).
- We fixed an issue that would prevent certain types of messages from appearing in the TimeForge Employee mobile app.
- We improved messages/notifications in the TimeForge Employee mobile app.
- We expanded the functionality of the TimeForge API.
- We added a "Three weeks out" option for predefined reporting periods.
- We updated the TimeForge Sales API to prevent the submission of zero values sales data.

## Release Notes | February 2020

- Based on customer feedback, we added the ability to set date ranges on your labor % targets, and this feature allows you to import labor targets by date range for multiple stores at once - great for multi-location organizations with weekly or quarterly labor % targets.
- We fixed an issue that would sometimes prevent scheduled breaks from saving.
- We improved the new Manager Dashboard widget called "Today's Schedule", based on customer feedback. The Print link has been updated to be more clear in its purpose; the pop-up module has been increased in size, the contents are more scrollable and more readable, and we fixed an issue with the position title display. We also adjusted the way the print configuration defaults.
- We fixed an issue that would prevent saving the My Profile settings page in rare situations.
- Based on customer feedback, we added a new Schedule widget to the manager dashboard. It's similar to the "Today's Schedule" widget, but restructures it in a better at-a-glance view.
- Based on customer feedback, we added a "Labor Yesterday" widget to the new Manager Dashboard.
- We made some minor UI improvements for managing scheduled reports.
- We improved support for archiving unused positions.
- Based on customer feedback, we added a new option to the breaks rules! Now, instead of choosing either (a) timeforge randomly create breaks that don't overlap, or (b) TimeForge create breaks a certain number of hours into the shift, you now have the option for blended break offset - allowing you to have TimeForge make breaks that don't overlap, but only within a certain range of time during the shift. This option will be a lifesaver for employers in California who struggle with the 5th hour rule.
- Based on customer feedback, we updated the Weekly Labor widget to include the ability to look at future weeks' labor.

## Release Version 1909.1 | January 2020

### New

- Based on customer feedback, we created a solution to multi-store staffing variances. You now can configure [Transfer Bid Shifts](#)! Contact our support team to learn more, but the basics are that you can now make a bid shift at your store available to eligible employees who work at geographically nearby stores, even if the other employees have never worked at your store before. So, if you are a little short-staffed, but the store on the other side of town is a little overstaffed, you can work together to keep employees and customers happy! This new feature allows staff to earn extra hours at nearby stores without waiting for store managers to coordinate schedules, availability, etc. TimeForge coordinates it all for you!
- Based on customer feedback, we have released a revolutionary new option in the sales forecasts. Now, instead of locking sales forecasts to avoid disruption in future schedule to sales metrics, you can allow [forecasts to iteratively update](#), with notifications about what changed in sales-to-labor recommendations, suggestions about where to cut or increase labor, and real-time alerts about changes in predicted sales volumes.
- We added the ability to control pay period unlocking by user or by role, via [Security Templates](#). With this new function, you can allow, for example, all "Store Managers" to roll back pay periods for adjustments, but not allow any "Regional Trainers" to roll back pay periods for adjustments. Previously, this was only a per-location setting, rather than per-user-type.

### Improvements and Fixes

- We improved some of the tracking and functions around exceptions for No Lunch and Late Lunch.
- We improved some of our revision tracking.
- We fixed an issue on our new [dashboard](#). Sometimes the widgets weren't sticking to the spot you dragged them to when rearranging your dashboard.
- We improved some back-end pieces to ensure schedules load really quickly.
- We resolved an issue where sometimes, viewing other employee schedules was not properly displaying information.
- We resolved an issue where the timezone wasn't always saving properly for some non-US countries.
- We resolved an issue where the iCal export was set to the wrong time zone, perpetually.
- We resolved an issue for the Employee Today page, where recurring weekly requests had not been displaying properly.
- We resolved an issue happening occasionally in our SAML integration configuration, where the settings weren't always saving.
- We resolved an issue where sometimes employee availability was not being honored when scheduling from a template.
- We improved the way that location data is handled if a location gets deleted.

- We made improvements to the task that calculates Holiday pay for employees who don't work on the holiday.

# 2019 Release Notes

## Release version 1908.2 | December 2019

### New

- We added new Messages and Notifications icons to all pages for easier access to TimeForge alerts.
- TimeForge can reference breaks rules, exception rules, and pay rules to automatically add 1 hour of regular pay to an employee's time card when they fail to take a scheduled meal period, or if their attended meal period is less than the allowed duration (ie 30 minutes). This hour will be coded with a meal penalty pay code (not straight time). Similar logic can be applied for rest periods as configured. This functionality does not reference waivers. This functionality is configurable by location or company-wide.
- We added new functionality to our Shift Differentials feature to allow for tailored time frames with fixed amount increases (like paying anyone who works from 7:00 pm to 7:00 am an extra \$3.00 per hour).

### Improvements and Fixes

- We fixed an issue that would cause slow sync times for integrations using web services.
- We fixed on issue that would sometimes prevent the employee list page from sorting. We also improved the load and sort time of the employee list page.
- We added a date filter to the Labor Target Widget in the [Today Page Dashboard](#) and made enhancements to several widgets on the Today Page Dashboard.
- We fixed an issue that would sometimes prevent a shift from being added or edited for an employee with an apostrophe in their name.
- We fixed an issue that would sometimes prevent saving information on the [Sales Category](#) page.
- We improved the handling of availability requests with empty fields when submitted through the mobile app.
- We fixed an issue on the Process Requests page that would sometimes prevent all employee requests from showing.
- We fixed a security settings issue on the Availability and Requests Page.
- We made performance improvements to the [Position](#) list page.
- We fixed an issue with the "Test Text" feature on the My Profile page.
- We added a feature to help prevent inadvertent bulk changes on pages with many check boxes.



- We resolved a behind-the-scenes issue where a setting was saving itself twice whenever it was adjusted.
- We improved the way our SPLH (Sales Per Labor Hour) grids can be updated, including a new upload function and a new copy function.

## Past Releases

### Release Version 1908.1 | October 2019

#### Improvements and Fixes

- We fixed an issue that would sometimes prevent sales projections from appearing on the schedule list page.
- We updated the logic for some automated employee emails to avoid sending password and password reset related messages for companies that are using single sign-on.
- We fixed a problem with the progress indicator on several pages.
- We fixed a problem with schedule templates that would sometimes save the incorrect date for overnight shifts.
- We fixed a UI issue that was preventing some breaks from appearing on the schedule page weekly view.
- We fixed an issue that would sometimes prevent a company logo or profile image from being successfully uploaded into TimeForge.
- We made an improvement to the blended labor metrics initiative adjusted some incongruous wording on the Daily and Weekly views of the schedule.
- We improved the way the clock in/out options work with one another.
- We fixed an issue that would sometimes prevent the My Schedule page from loading.
- We improved the way our FMS payroll export handles holiday pay.
- We improved the back end of the new dashboards so that their widgets can be better maneuvered to fit more flexibly.
- We added a new option for how attendance is allocated in relation to a store's open and close times.
- We added the ability to include Events in the schedule import. This will assist customers using the TimeForge Events module with integration of employee schedules with their in-house event planning suites.
- We resolved an issue in the AutoScheduler where, in some accounts, with some specific configurations, the AutoScheduler was not giving appropriate priority to some employee min/max fields.

## Release Version 1908.0 | September 2019

### Improvements and Fixes

- We implemented a CSV report that shows TimeForge forecasted and Manager scheduled hours and sales figures, by day, by department.
- Labor threshold values can now be associated with date ranges.
- We implemented the ability to forecast based on SPLH/CPLH at department level.
- We added a [new dashboard widget](#) for managers to quickly update the current labor threshold value.
- We wrapped up a project to allow blended labor-to-sales metrics for automated labor generation or for budget communication (or both). You no longer have to choose between productivity metrics (like sales-per-labor-hour) and budget metrics (like labor-to-sales percentage); with this new feature, you can blend the two metrics together into a unified labor hours number for managers to adhere to while scheduling.
- We fixed an issue that was preventing breaks from being regenerated on templates.
- We fixed a page load issue on the schedule templates list page. The issue occurred in Internet Explorer only.

## Release Versions 1907.1 and 1907.2 | September 2019

### Improvements and Fixes

- We fixed an issue that would sometimes prevent schedule templates from loading.
- We fixed an issue that would prevent the clock out button from working on Clocked-in Employees page.
- We refactored labor forecasting to improve performance.
- We made improvements to the new password reset functionality.
- We improved the Copy Templates dialog to prevent the accidental copying of too many templates.
- We improved the drag/drop functionality on the schedule Weekly View.
- We improved the load time of the templates page.
- We fixed an issue where splitting breaks was causing some unexpected behavior in some instances.
- We resolved an issue where special characters (!,\$#\\*, etc.) were causing some reports to throw errors sometimes.
- We fixed an issue with the Status Report by Employee report that would prevent the report from running with certain criteria selected.
- We fixed an issue that would sometimes prevent payroll approval.

## New

- We added a new feature to the employee [Transfers](#) tool, so that after an employee has been temporarily transferred to a new store from the schedule, they will automatically be removed from the temporary store assignment after they are no longer needed at the borrowing store.

## Release Version 1906.2 | July 2019

### Improvements and Fixes

- We resolved an issue where some users who were locked out of particular features due to their security permissions could still see those restricted features in the navigation. No security concern amounted, as they were unable to interact with these items or see restricted data, but it's best that restricted access just hide the feature entirely - as it now does.
- We resolved an intermittent issue where attendance records were duplicating.
- We improved the way that HR documents are saved when downloaded from an employee profile. Instead of changing the filename, we now preserve the original filename the document had during upload.
- We added a widget to the (beta) manager dashboard that displays the number of employees per day who were in overtime.
- We made the new manager dashboards able to be turned on or off at the user level, so that customers can play with them at select stores before opting on for the whole company. This feature can be enabled by visiting the My Profile page of the user. Note, this user level setting will only appear if Angular pages have been enabled for the company in the Company Settings at the corporate level. Currently, both settings are only visible to a TF admin.
- We resolved an issue that prevented customers paying more than \$999/month from updating their payment method.
- We resolved an issue with the FMS with Holiday payroll export that would sometimes prevent the department payroll id from exporting.
- We improved the way holiday hours calculate when an employee works multiple positions and a custom pay rule configuration is in place.
- We resolved an issue with holiday, overtime, and regular hours sometimes interacting strangely when configured a particular way with custom pay rules applied.
- We made a few improvements to the new settings page, which now uses Angular.
- We resolved an issue that prevented automatic redirects to new Angular pages.
- We resolved an issue where adjusting the width of the employee list page would sometimes hide the "Show Terminated Employees" option.
- We improved some facets of our new blended labor metrics tool, like how quickly the targets load. This tool will allow you to use both a productivity metric (like sales per labor hour) and a labor cost metric (like sales to labor percentage) when generating a schedule. Once this project is finished, you will no longer have to choose between productivity and budget numbers when communicating goals to your managers or building your schedules.

- We are now tracking adjustments to an employee's "Employee Type", and these changes can be seen from the Audit Log. This should help identify any changes in employee permissions and where those changes originate.
- We resolved an issue where the dates for "posted" and "last edit" were not displaying accurately when reviewing schedules in the Schedules page. Now the Posted and Last Edit dates display accurately.
- The import utility now supports importing sales category threshold values.

## New Mobile Release

- [TimeForge Manager App for iOS](#)
- [TimeForge Manager App for Android](#)
- [TimeForge Employee App for iOS](#)
- [TimeForge Employee App for Android](#)
- The apps have new branding/styling applied, and the Employee App now has [built-in requests for availability and time off](#).

## Release Version 1905.2 | June 2019

### Improvements and Fixes

- We fixed an issue where a custom OT pay rule wasn't calculating precisely.
- We built a new option when users need to reset their password, allowing a link to reset.
- We added a new widget to our new manager dashboard (beta) to allow weekly budget management.
- We improved our photo and image upload tools to allow reduced image reformatting to fixed our pre-defined dimensions; allowing upload and then adjustment.
- We updated the wording of a previously very confusing message that some users received after an error.
- We added some more easy to manage options to allow us to better support forecasting configuration for advanced forecasting customers.
- We improved the sorting, organization, look, and feel of our location, attendance, and break settings.
- We resolved an issue where terminated administrators were displaying on attendance reports.
- We helped a customer with an overtime calculation specific to their account configuration.
- We improved the employee PTO payout process and interface.
- We revisited some logic in our pay rules engine to ensure appropriate reasoning when multiple conflicting rules exist.
- We made a new FMS report.
- We fixed a report that wasn't deducting breaks from scheduled shifts.
- We resolved an issue where security settings were being ignored on a page that was rarely used.
- We resolved an issue with the links inside the gantt chart on the Today page.
- We resolved a long-standing issue where scheduled CSV reports from the corporate level were nonfunctional.

- We fixed an issue where splitting breaks was causing some unexpected behavior.
- We fixed an issue where no data was showing in the Weekly Budget widget if the Default Sales Category was set to Choose from the angular Sales Option page.

## Release Version 1904.2 | May 2019

### Improvements and Fixes

- We fixed an issue where sometimes, in some accounts, the dashboard that shows real-time sales wouldn't display.
- We finished up the time clock widget for employees to clock in/out with, so that once the Widgets are live, this can be used to replace the old Employee Today Page clock UI.
- We resolved an issue occurring in the mobile browser where the user would be clocked out if switching from desktop to mobile view.
- We finished up the Calendar widget for the Beta Dashboard feature.
- We fixed an issue where the scrollbar wasn't displaying when using mobile view in a browser.
- We improved the performance of a task that was taking a long time to run.
- We fixed an issue where the employee list page randomly wasn't loading.
- We fixed an intermittent issue where an employee's PTO hours weren't being decremented from their accrual record.
- We fixed an issue where the accounts using HR only were unable to add employee profiles.
- We finished up the Today's Schedule widget for the Beta Manager Dashboard.
- We helped a customer migrate to a new HRIS.
- After receiving customer feedback that many customers preferred to schedule only 1 week in advance, we added an option to our "no schedule is posted for the next 2 weeks" notification to allow a "no schedule is posted next week" option.
- We fixed an issue where adding a second location to an account caused the new Angular settings page to fail to display.

## Release Version 1904.1 | May 2019

### Improvements and Fixes

- We added some tracking for analytics so that we can use the data for prioritizing initiatives.
- We updated the way that the pay frequency field updates between TimeForge and Ready Pay Online.
- We resolved two issues that were introduced to the employee today page.
- We improved the way our new datepickers work, so that the previous and next month's dates are selectable without navigating.
- We updated one of the last pieces of our migration from Spring2 to Spring4, where the scheduled reports were being run based on triggers that were on old architecture.
- To ensure our implementation of Angular continues to go smoothly, we built out some functionality from our old (non-Angular) department page to the Angular version.

- As part of a labor automation project, we updated our threshold import tool to resolve an outstanding issue in how much data you were allowed to import.
- We fixed an issue with how forecasts were copied to projections.
- We improved how we notify managers when someone's pay rate gets updated. We were sending some false positives.
- We updated the wording of the settings in the Company Settings page to be more user-friendly and straightforward.
- We updated the wording of the settings in the Attendance Options pages to be more user-friendly and straightforward.
- We updated the wording of the settings in the Sales Options pages to be more user-friendly and straightforward.
- We investigated an attendance trigger that had not been migrated to Spring4 when we migrated the other triggers.
- We fixed an issue in the new Angular version of the department view.

## Release Version 1903.1 | April 2019

### Improvements and Fixes

- Improvements to new employee dashboard (currently in beta):
  - We added a widget to allow employees to see who else is scheduled.
  - We added a widget to allow employees to see other employees' availabilities.
  - We added a widget to allow employees to see available shifts for swap / pick up.
- Improvements to new manager dashboard (currently in beta):
  - We added a widget to allow managers to see a labor overview.
  - We allow add/remove widgets more cleanly now.
- We helped resolve an hourly costing of salaried managers issue that was specific to a single customer's preferences.
- We improved some SAML logic for customers using TimeForge SSO (single sign on).
- We resolved an intermittent issue where an employee's vacation hours were not exported on a particular pay file if they had vacation hours during the pay cycle but no hours worked.
- We made structural improvements to the TimeForge-Workday integration.
- We finished the first version of the ReadyPay Online integration of employee data.
- We improved a task that runs in the software which sends mail, like notifications, etc.
- We resolved a display issue where we were showing some "corporate-level" settings when users were adding new locations (and should only see "location-level" settings).
- We fixed a display issue where we were showing a comma where one wasn't necessary.
- We added a "week after next" to scheduled report date options, allowing customers who schedule 2 weeks in advance to schedule reports for their upcoming schedules.

## Release Version 1902.1 | March 2019

### Improvements and Fixes

- Fixed an issue that prevented users from saving [ShiftBuilder rules](#).
- Attachments downloaded from employee and job applicant profiles should now use their original file names. No more multiples of viewApplicantDocument.pdf and viewEmployeeCertificationDocument.pdf!
- We removed the Mobile Carrier dropdown menu under the employee profile, as it is no longer needed to send test text messages to users.
- The location list on the corporate level Today Page should now consistently show all locations.
- Fixed UI/responsiveness issues on the Corporate Hierarchy page. Widening the page should now also widen the tables.
- Fixed an issue where [PTO requests](#) would fail to appear on the PTO approval screen for certain types of employees that have worked at multiple locations.
- Fixed an issue with partial day PTO duration calculations that would sometimes occur when approving a request.
- Fixed an issue where the Sales Report page would fail to load completely.
- Fixed an issue with TimeClock mode that would allow users to click the clock in/out button multiple times, which could cause attendance calculation errors.

## Release Version 1901.1 | February 2019

### Improvements and Fixes

- We pushed out the Colorado Overtime feature to support Colorado's daily 12 hour = 1.5x rule.
- We updated the pay rules engine to work more nicely with holiday calendars.
- As part of our larger initiative to start supporting automated California meal and rest penalties, we added the meal penalty field to the Manage Attendance page. It had previously only been in Edit Attendance. This is our third baby step toward automated California meal penalty calculations! The rest of the features will be delivered before EOY.
- As part of our larger initiative of simplifying pay calculations, we added our standard OT rules to be available options within our pay rules options.
- We helped a customer update their sales per labor hour grids for automated labor generation based on budget goals.
- We improved the way selecting groups of recipients by position works. Now, managers can send messages to any position groups that are in their departments, instead of only selecting other "Managers" from the position list.
- We resolved a security flaw where if two users were conspiring, they could work together to enhance one another's permissions.



- We improved the tool that allows grouped user selection when choosing the data for running a report. A customer pointed out that it was hard to see that you could filter by position, so we made it more discoverable.
- We did some custom development to update a compliance report we previously built for a customer.
- Part of our larger front end update, we migrated our department page to use Angular.
- We fixed an issue where the "All Staff Members" checkbox wasn't working properly.
- When an invoice got updated, the PDF with the invoice details wasn't regenerating, so it was still displaying old data. The PDF now gets updated.
- We improved an issue in report calculations where breaks were not being deducted from total durations.
- We improved a security restriction that was too restrictive, so that now users with "Edit" permission to "Employees" can resend email verification for employee access.
- We fixed an issue with how hour totals were calculated and displayed, as Weekly and Daily views were off.
- We fixed an issue where the sales interval report wasn't working.
- We fixed a calculation oversight.
- We got rid of a setting option that was obsolete because of our new navigation.
- We improved several spelling and grammar mistakes throughout the application.
- We added the employees averages report to the corporate level.
- We added a filter page in our sign-up process to reduce the number of employees who create their own accounts instead of having their manager add them to the business.

## Release Version 1812.1 | January 2019

### New

- New CBS integration allows TimeForge to sync sales data from CBS.

### Improvements and Fixes

- Some payment plans have been updated. Affected customers were personally notified and will see the change reflected on their next invoice. Details can be found on the [Payment Options](#) page under the Set Up tab.
- Invoice format is now more transparent about how we bill and what dates are included.
- We fixed an issue that was causing the Availability and Requests page to show incorrect date ranges.
- Edit Attendance page now allows easy adjustments without having to worry about attendance with no department assigned.
- Improved performance when loading schedule messages.
- We removed the limit on the number of employees that could be exported from the [Employee list](#).
- The [Employee list](#) should now correctly sort by date, whether hire date, birthday date, date applied, etc.



- Supervisors who have access to view employees' wages should now be able to view their own scheduled costs in the daily/weekly/monthly schedule views.
- Fixed an issue with the employee mobile clock-in and switch position feature that was causing duplicate clock-ins.
- Employees removed from a position should no longer lose attendance hours associated with that position.
- Files attached to Messages should now show filenames.
- Changes to the department threshold grid should now save correctly.
- Minor improvements to edit shift dialogue box from weekly/monthly view.
- Ongoing fixes and improvements to TimeForge UI.

# 2018 Release Notes

## Release Version 1810.1 | November 2018

### New

- Your opinion is important to us! We've added a new survey to our off-boarding process in order to learn more about what we can do to serve you better.

### Improvements and Fixes

- New TimeForge account holders now get to enjoy our free trial for a full 30 days when signing up instead of 10!
- Holiday hour calculations should now correctly account for multiple shifts. We also fixed an issue causing incorrect values to display on the Manage Attendance page for employees working overtime.
- We've improved our Today Page, Schedules, Schedule Templates, and Edit Attendance pages to be more printer-friendly. These areas of TimeForge should no longer print their navigation menus, thus leaving more room on the page for the info you care about.
- Viewing and sorting your employee list from the corporate level is now better and easier than ever. While in list view, you can sort your employees by multiple columns.
- Third-party account numbers are now added to the invoices we generate.
- Our Sales Import feature now prints more descriptive errors if there's a problem with your import files.

## Release Version 1809.1 | October 2018

### New

- Several pages that uses lists (for example, the Department and Position lists at the Corporate level) now include "Check All" checkboxes to select all items at once.
- The Today Page for Managers now shows a row for the number of Open Shifts. Dates with open shifts will appear as links, allowing managers to quickly navigate to the schedule(s) for that date for easy review.
- TimeForge now uses a sleeker and more modern style sheet across the application.

### Improvements and Fixes

- If a new employee's account is enabled by email, their email address now becomes their default login/username.

- TimeForge now reports the name of the invalid department when attempting to import sales data for a department that does not exist or has been disabled for sales imports.
- When running Attendance reports, terminated employees should now display if the 'All Staff Members' box is checked.
- The size of the text field for shift notes in Daily View has been increased to make it easier to write shift notes.
- When distributing sales based on manager projections for the upcoming week, TimeForge should now properly backfill actual sales from the previous week in its calculations.
- Fixed an issue that was causing some terminated employees to showing incorrect termination dates.
- Fixed an issue that prevented saving a new department with employees and positions assigned to it. We also fixed an issue that was sometimes preventing managers from scheduling by department in monthly view.
- We have removed some outdated help links and tutorials that were slowing down some pages, such as when adding a new schedule. All of our guides are now available here in our Knowledge Base!

## Release Version 1808.1 | September 2018

### Improvements and Fixes

- We've been rolling out numerous tweaks to improve users' experiences when viewing tables, swapping shifts, selecting TimeClock mode, editing attendance, and more! These fixes are intended to clean up any artifacts left over from the old menu and layout.
- New customers are now required to set more complex passwords for their account (between 6 and 20 characters, by default).
- Existing customers with multiple locations can enable password complexity enforcement by visiting the **Security** tab of their Company Settings page. This feature can be used to improve account security and can help ensure standard compliance across an entire corporation.
- We've improved the performance of the Company Settings page, which should now load and save noticeably faster.
- Tooltips on many setup pages now correctly line up with the text.
- We've been rolling out more updates to bring the articles in our Knowledge Base up to speed. See [Getting Started > Common Tasks](#).

## Release Version 1806.2 | July 2018

### New

- You may have noticed that we've updated TimeForge with a fresh new menu and layout! In case you missed our announcements, you can read all about the changes [here](#).

## Improvements and Fixes

- We've removed the confusing "Send Form to Employee" button from the employee profile under the Human Resources tab. This button actually sent an ACA form and was not tied to any other onboarding documents. (You can continue to send ACA forms from the ACA tab under Location settings.)
- We've added an "Overlapping Requests" link to the Requests page to indicate when there are overlapping requests on the schedule. Clicking the link will reveal details about the overlapping requests for that date.
- Fixed a cache issue that prevented re-syncing of Sales data in rare cases.
- The "Resend Email Verification" button on the employee profile should now work reliably at the Corporate level.
- Locations marked as Closed on certain days should now show as closed for those days when viewed at the Corporate level, too (rather than having hours from 12AM-12AM).
- When reviewing SMS Messages and Viewed Messages, the message windows should now display the correct captions for each. (Previously, they were both titled Emailed Messages.)

## Release Version 1805.2 | June 2018

### New

- **ShiftBuilder Rule: Min/max with time.** Allows you to specify the period of time for which the rule should apply, e.g. 8AM to 3PM. (The original min/max rule still uses the store's open and close times.)
- **Report: Payroll Summary.** Provides a summed total of hours for every pay type for every employee. Designed specifically to match the "TimeForge Payroll" export, for validation purposes.

## Improvements and Fixes

- Managers can no longer alter space-time (create a negative shift duration) by shortening a shift so that it ends during a break.
- The [internal number and password](#) fields now only accept alphanumeric characters, much to the relief of TimeClocks, which get upset by squiggly lines and symbols.
- When you change which fields/columns are shown in the [Employee List](#), those changes are now saved for all eternity. Or at least until you change them again.
- Job Posting descriptions greater than 10,000 characters can now be saved as templates. (We increased the arbitrary limit that was causing headaches for some HR personnel.)
- We fixed an issue that occasionally caused a security warning to pop up while trying to upload an employee certification.
- Modifications made to [employee breaks](#) should now include who made the change and when. Additionally, every single attendance modification should now come with a timestamp.

- The location-based Availability tab no longer appears on the employee profile page when that page is viewed at the [Corporate level](#).
- Managers will now receive a notification, in the form of a schedule message, when they schedule an employee to work on a day for which the employee has an approved "Does not want to work" or "Unavailable to work" request.
- Managers can no longer accidentally confuse themselves by creating multiple [schedule templates](#) with the same name.

# New Feature Guides

# New menu layout with side navigation

We're excited to introduce our fresh new layout! This quick guide will show you how to use the new side menu and top menu features, which are designed to give you more vertical space and make it easier than ever to navigate TimeForge.

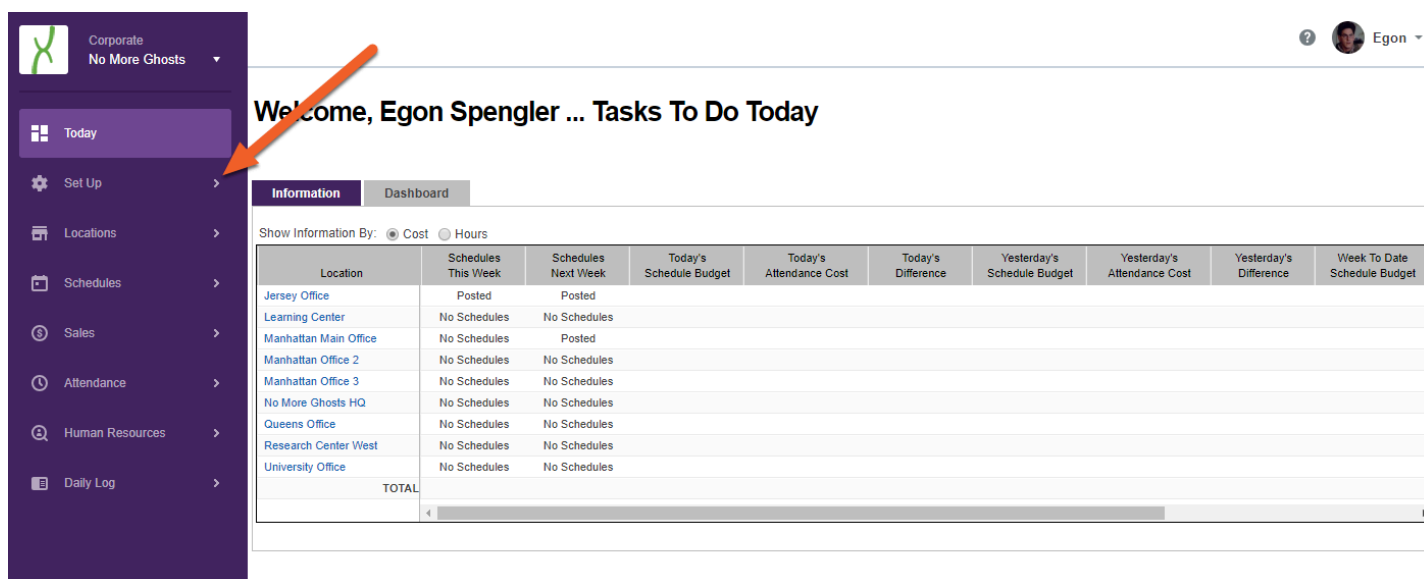
The new layout is so intuitive and easy to use, you'll be an expert in no time.

## Using the new side menu

### Click on a "tab" to open up a list of sub-pages

Let's get started! We've logged into TimeForge and are currently viewing the Corporate Today page.

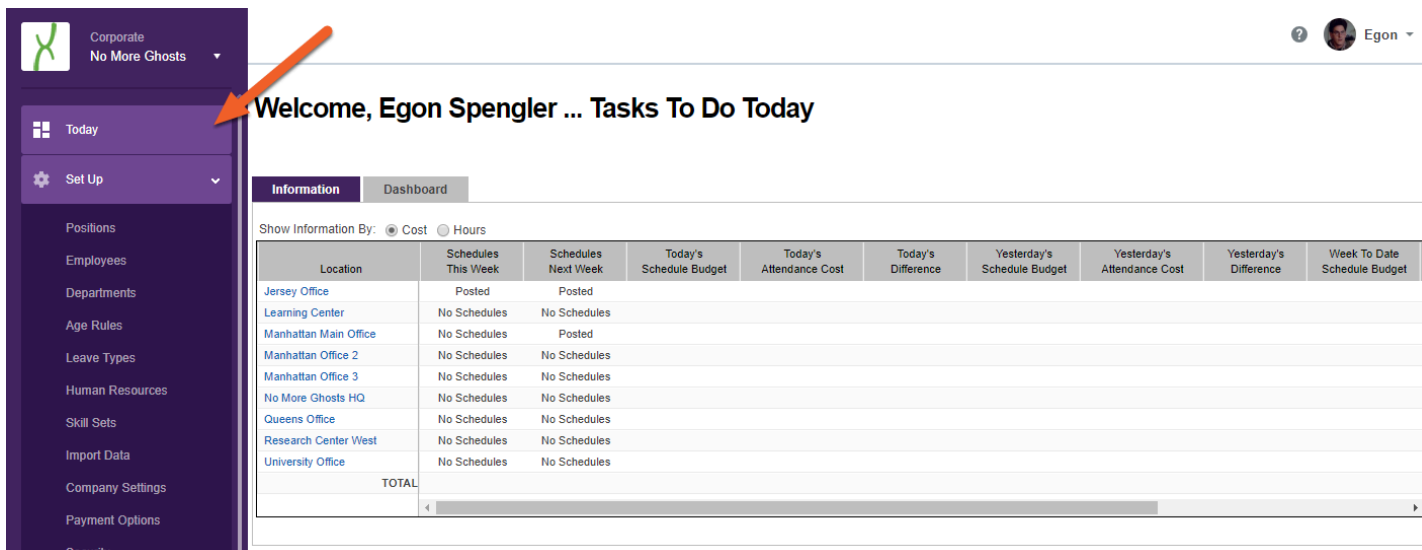
The > next to a tab name means it can be opened to show its contents. For example, let's open the **Set Up** tab:



The screenshot shows the TimeForge interface. On the left is a dark purple side navigation menu with the following items: Today, Set Up, Locations, Schedules, Sales, Attendance, Human Resources, and Daily Log. Each item has a right-pointing chevron (>) next to it. The 'Set Up' item is highlighted with an orange arrow. The top of the page shows the user's name 'Egon' and a profile picture. The main content area has a header 'Welcome, Egon Spengler ... Tasks To Do Today' and two tabs: 'Information' (selected) and 'Dashboard'. Below the tabs is a table with the following data:

Location	Schedules This Week	Schedules Next Week	Today's Schedule Budget	Today's Attendance Cost	Today's Difference	Yesterday's Schedule Budget	Yesterday's Attendance Cost	Yesterday's Difference	Week To Date Schedule Budget
Jersey Office	Posted	Posted							
Learning Center	No Schedules	No Schedules							
Manhattan Main Office	No Schedules	Posted							
Manhattan Office 2	No Schedules	No Schedules							
Manhattan Office 3	No Schedules	No Schedules							
No More Ghosts HQ	No Schedules	No Schedules							
Queens Office	No Schedules	No Schedules							
Research Center West	No Schedules	No Schedules							
University Office	No Schedules	No Schedules							
TOTAL									

Your current tab will always be highlighted in the list. Any open tabs will also be highlighted. In this example, our current tab is the Today tab, and our open tab is the Set Up tab.



Corporate  
No More Ghosts

Today

Set Up

Positions

Employees

Departments

Age Rules

Leave Types

Human Resources

Skill Sets

Import Data

Company Settings

Payment Options

Security

Welcome, Egon Spengler ... Tasks To Do Today

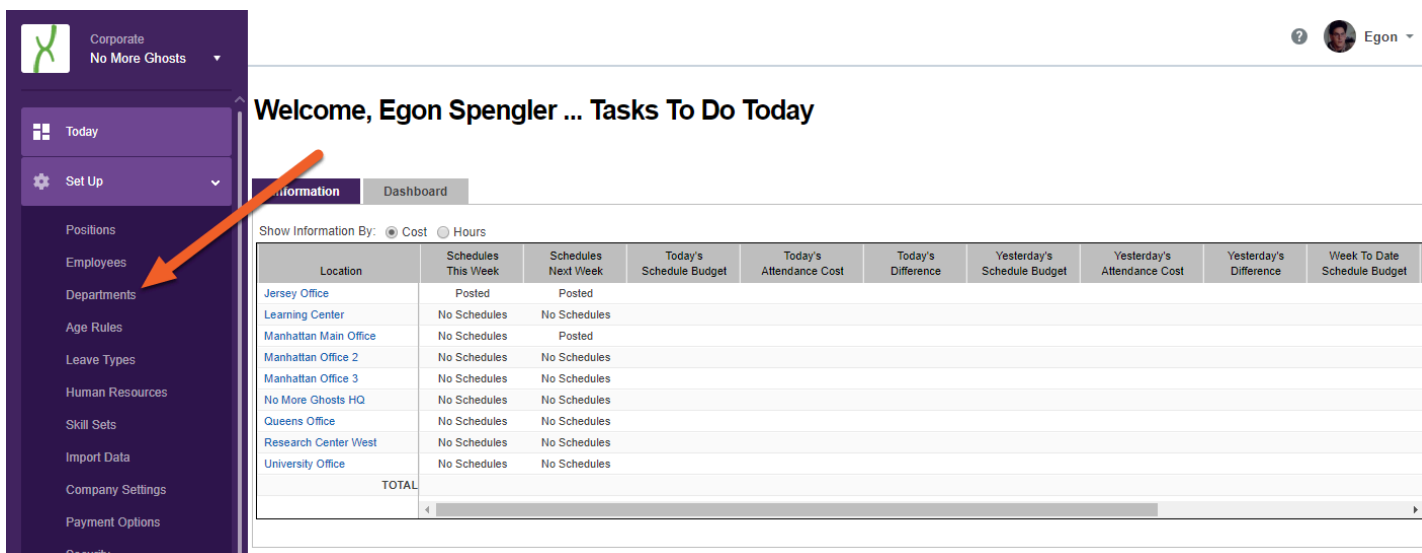
Information Dashboard

Show Information By: ☒ Cost ☐ Hours

Location	Schedules This Week	Schedules Next Week	Today's Schedule Budget	Today's Attendance Cost	Today's Difference	Yesterday's Schedule Budget	Yesterday's Attendance Cost	Yesterday's Difference	Week To Date Schedule Budget
Jersey Office	Posted	Posted							
Learning Center	No Schedules	No Schedules							
Manhattan Main Office	No Schedules	Posted							
Manhattan Office 2	No Schedules	No Schedules							
Manhattan Office 3	No Schedules	No Schedules							
No More Ghosts HQ	No Schedules	No Schedules							
Queens Office	No Schedules	No Schedules							
Research Center West	No Schedules	No Schedules							
University Office	No Schedules	No Schedules							
TOTAL									

## Click on a page name to view that page

Let's click on the **Departments** link under Set Up to view our Departments page:



Corporate  
No More Ghosts

Today

Set Up

Positions

Employees

Departments

Age Rules

Leave Types

Human Resources

Skill Sets

Import Data

Company Settings

Payment Options

Security

Welcome, Egon Spengler ... Tasks To Do Today

Information Dashboard

Show Information By: ☒ Cost ☐ Hours

Location	Schedules This Week	Schedules Next Week	Today's Schedule Budget	Today's Attendance Cost	Today's Difference	Yesterday's Schedule Budget	Yesterday's Attendance Cost	Yesterday's Difference	Week To Date Schedule Budget
Jersey Office	Posted	Posted							
Learning Center	No Schedules	No Schedules							
Manhattan Main Office	No Schedules	Posted							
Manhattan Office 2	No Schedules	No Schedules							
Manhattan Office 3	No Schedules	No Schedules							
No More Ghosts HQ	No Schedules	No Schedules							
Queens Office	No Schedules	No Schedules							
Research Center West	No Schedules	No Schedules							
University Office	No Schedules	No Schedules							
TOTAL									

Notice how the current page name has a **dot** beside it, and the text is **bright white**. This ensures that you always know what page you're on in a sub-menu.



The screenshot shows the TimeForge interface. On the left is a dark purple navigation menu with a 'Corporate No More Ghosts' header. The 'Set Up' section is expanded, showing options like Positions, Employees, **Departments** (highlighted with an orange box), Age Rules, Leave Types, Human Resources, Skill Sets, Import Data, Company Settings, Payment Options, Security, Pay Rules, and Custom Fields. Below this are 'Locations' and 'Schedules'. The main content area is titled 'Departments' and includes a description: 'Departments can be used to organize labor groups, sales, and employees for easier management within your business.' There is a '+ Add Department' button, a search bar, and a toggle for grid/list view. A list of 12 departments is shown, each with an 'Edit' button, 'Parent Department', 'Can Schedule' status, and 'last edit' timestamp. The departments are: Accounting and Finance, Administration, Customer Service, Human Resources, Information Technology, Legal, Marketing, Operations, and Payroll.

## Hide or expand the left side navigation menu

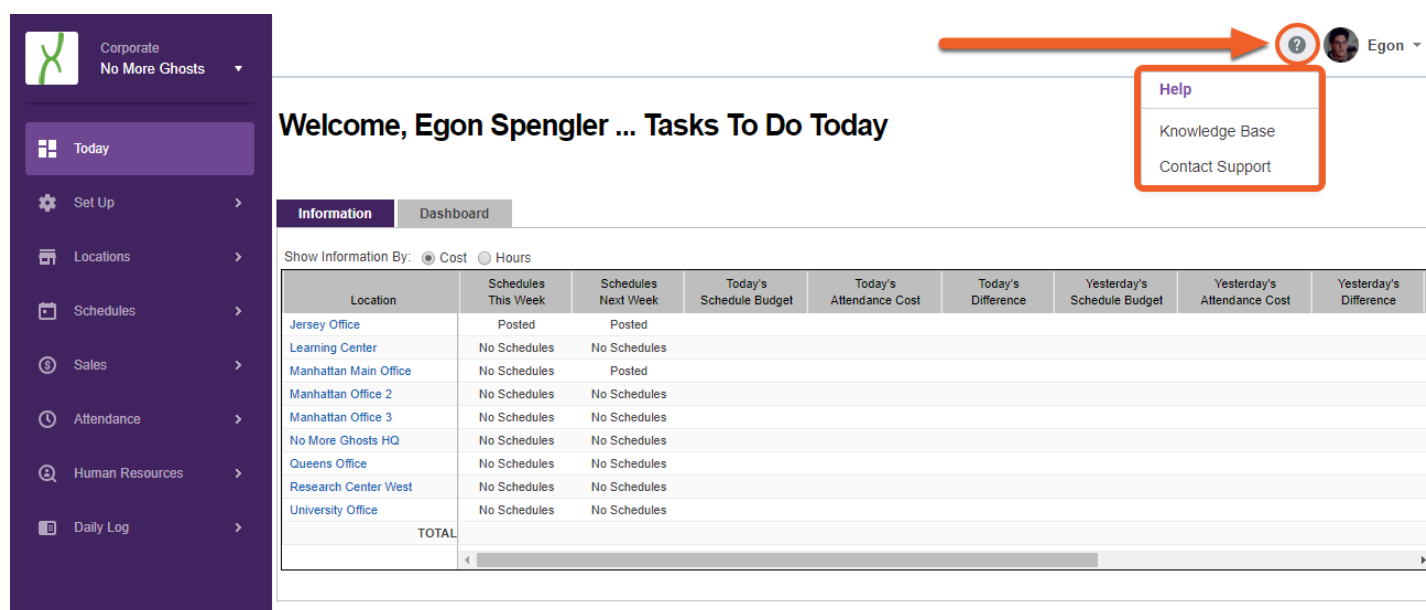
If you're on a small screen, such as a smartphone or tablet, the left side navigation menu will hide by default but will always be accessible using the three-bar menu.

This screenshot shows the TimeForge interface on a small screen. A red circle highlights the three-bar menu icon in the top left corner, with a red arrow pointing to it. The main content area is titled 'Departments' and includes the same description and '+ Add Department' button as the desktop version. The search bar and toggle are also present. The list of departments is shown, but only two are visible: 'Accounting and Finance' and 'Administration'. The interface is designed to be accessible on small screens by hiding the full navigation menu and using the three-bar icon to toggle its visibility.

## Using the top menu

### Click the ? to get help from any page

**Contact Support** will open up a new support ticket. **Knowledge Base** will open up our new knowledge base, which is where this guide resides.




The screenshot shows the TimeForge dashboard interface. On the left is a dark purple sidebar with navigation links: Corporate No More Ghosts, Today, Set Up, Locations, Schedules, Sales, Attendance, Human Resources, and Daily Log. The main content area has a header with a welcome message 'Welcome, Egon Spengler ... Tasks To Do Today' and a user profile 'Egon' with a dropdown arrow. A red circle highlights a question mark icon next to the user profile, and a red arrow points to it from the left. A red box highlights the dropdown menu that appears, containing the links: Help, Knowledge Base, and Contact Support. Below the header, there are tabs for 'Information' and 'Dashboard'. The 'Information' tab is active, showing a table with columns: Location, Schedules This Week, Schedules Next Week, Today's Schedule Budget, Today's Attendance Cost, Today's Difference, Yesterday's Schedule Budget, Yesterday's Attendance Cost, and Yesterday's Difference. The table lists various locations like Jersey Office, Learning Center, Manhattan Main Office, etc., with their respective schedule and cost data.

Location	Schedules This Week	Schedules Next Week	Today's Schedule Budget	Today's Attendance Cost	Today's Difference	Yesterday's Schedule Budget	Yesterday's Attendance Cost	Yesterday's Difference
Jersey Office	Posted	Posted						
Learning Center	No Schedules	No Schedules						
Manhattan Main Office	No Schedules	Posted						
Manhattan Office 2	No Schedules	No Schedules						
Manhattan Office 3	No Schedules	No Schedules						
No More Ghosts HQ	No Schedules	No Schedules						
Queens Office	No Schedules	No Schedules						
Research Center West	No Schedules	No Schedules						
University Office	No Schedules	No Schedules						
TOTAL								

### Click your name/picture to open up the profile menu

Clicking on your name or picture will open up your personal menu. **My Profile** will take you to your profile page, where you can change your contact info, password, or alerts settings. **Log Out** will log you out.



Corporate  
No More Ghosts

Today

Set Up

Locations

Schedules

Sales

Attendance

Human Resources

Daily Log

Welcome, Egon Spengler ... Tasks To Do Today

Information

Dashboard

Show Information By: ☒ Cost ☐ Hours

Location	Schedules This Week	Schedules Next Week	Today's Schedule Budget	Today's Attendance Cost	Today's Difference	Yesterday's Schedule Budget	Yesterday's Attendance Cost	Yesterday's Difference
Jersey Office	Posted	Posted						
Learning Center	No Schedules	No Schedules						
Manhattan Main Office	No Schedules	Posted						
Manhattan Office 2	No Schedules	No Schedules						
Manhattan Office 3	No Schedules	No Schedules						
No More Ghosts HQ	No Schedules	No Schedules						
Queens Office	No Schedules	No Schedules						
Research Center West	No Schedules	No Schedules						
University Office	No Schedules	No Schedules						
TOTAL								

Egon

Egon Spengler

My Profile

Log Out

That's all there is to it!

# Grid View vs. List View



TimeForge gives you the ability to choose how you want to see employees, schedules, locations, departments, and other lists by switching between a grid with cards and a more traditional table list. Each card in the grid view gives you a focused snapshot of an individual item on your list, while the list view gives you a detailed, customizable list that makes it easier to see everything at once.

This guide will teach you how to easily toggle between the two views, how to filter your lists to see only what you want to see, and how to export your filtered lists for your records.

## Grid View













For new accounts, TimeForge uses the Grid View by default. This view groups your data into simple cards. These cards make it easy to focus on the information you need by providing an overview of each item in the list. Because it's more graphically-oriented, this view is great for small businesses, smaller stores, and new accounts.

## Example Employee Roster displayed in Grid View

**Employees** | Review staff members within your organization, including yourself and all management staff. [Message All Employees](#) [+ Add Employee](#)   


Show :

**Employees with departments assigned**  
Showing 9 of 9 | Sort By

 <b>Dana Barrett</b> 555-555-5500 dana@nomoreghosts.com 	 <b>Egon Spengler</b> egon@nomoreghosts.com  This is you	 <b>Janine Melnitz</b> jmelnitz@nomoreghosts.c... 	 <b>Louis Tully</b> ltully@nomoreghosts.com 
 Payroll Id: 82050 Weekly Hours: 10.0 / 40.0	 Payroll Id: 00001 Weekly Hours: 10.0 / 40.0	 Payroll Id: 63636 Weekly Hours: 20.0 / 40.0	 Payroll Id: 28502 Weekly Hours: 10.0 / 40.0
Positions: Business Analyst	Positions: Paranormal Investigator, Paranormal Researcher	Positions: Administrative Assistant, Customer Support	Positions: Ghost Grabber
Hire Date: 04/11/2014 Birthday: --	Hire Date: 01/13/2011 Birthday: --	Hire Date: 06/11/2015 Birthday: --	Hire Date: 06/21/2018 Birthday: --
<input type="button" value="Message"/> <input type="button" value="Terminate"/>	<input type="button" value="Message"/>	<input type="button" value="Message"/> <input type="button" value="Switch User"/> <input type="button" value="Terminate"/>	<input type="button" value="Message"/> <input type="button" value="Terminate"/>
last edit: Jun 27, 2018 - 11:33 AM	last edit: Jun 27, 2018 - 11:33 AM	last edit: Jun 27, 2018 - 11:34 AM	last edit: Jun 27, 2018 - 11:34 AM

## How do I edit the information in Grid View?

Simply click anywhere on a card!



**Dana Barrett**  
 555-555-5500  
 dana@nomoreghosts.com

Edit

S

Payroll Id  
 82050

Weekly Hours  
 10.0 / 40.0

Positions  
 Business Analyst

Hire Date

04/11/2014

Birthday

--

Message


last edit: Jun 27, 2018 - 11:33 AM

Terminate

## Employee Information: Dana Barrett

Employee
 Information
 Locations
 Human Resources
 Availability
 Schedules
 Attendance
 Activities

Employee Information



Upload
 Remove

First Name  
 Dana

Middle Name  
 Barrett

Last Name  
 Barrett

Nickname  
 Female

Gender/Sex  
 Female

Marital Status  
 Single

Drivers License Number  
 10023

Address  
 550 Central Park We

City  
 New York

State / Province  
 New York

Zip / Postal Code  
 10023

Country  
 United States

Phone  
 555-555-5500

Cell Number  
 555-555-5500

Home Phone  
 555-555-5500

Nationality  
 Local

EEOC Ethnicity  
 White (Not Hispanic or Latino)

Social Security Number  
 02050

Payroll ID  
 82050

Hire Date  
 04/11/2014

Termination Date  
 --

Temporary Duty Date  
 --

Email  
 dana@nomoreghost

Military Service  
 No

Smoker  
 No

Eligible for Rehire  
 Yes

Ineligible Reason  
 --

LinkedIn Page  
 --

Facebook Page  
 --

Emergency Contact Name  
 --

Emergency Contact Phone  
 --

## List View





More compact than the Grid View, the List View operates like a traditional list with some nifty upgrades. In this view, you can customize which fields or columns are displayed, as well as export your data, making it a cinch to create your own reports and records.

## Example Employee Roster in List View

Employees
 Review staff members within your organization, including yourself and all management staff.
 Message All Employees
 Add Employee
 Search

Show : All Positions
 Show
 Show terminated employees

Employees with departments assigned
 Showing 1 - 9 of 9
 100





Employee Type	Picture	First Name	Last Name	Email	Phone	Payroll ID	Weekly Hours	Employee Positions	Fields	Reset	Export
S		Dana	Barrett	dana@nomoreghosts.com	555-555-5500	82050	10.0 / 40.0	Business Analyst	Edit	Terminate	Message
M		Egon	Spengler	egon@nomoreghosts.com		00001	10.0 / 40.0	Paranormal Investigator Paranormal Researcher	Message	This is you	
E		Janine	Melnitz	jmelnitz@nomoreghosts.com		63636	20.0 / 40.0	Administrative Assistant Customer Support	Edit	Terminate	Message
E		Louis	Tully	ltully@nomoreghosts.com		28502	10.0 / 40.0	Ghost Grabber	Edit	Terminate	Message

## How do I customize my list?

First, make sure you are [using the List View](#). Then, click the **Fields** button to the upper right of your list.

Employees with departments assigned

Showing 1 - 9 of 9 | 100 ▾

Employee Type	Picture	First Name	Last Name	Email	Phone	Payroll ID	Weekly Hours	Employee Positions	Fields	Reset	Export
S		Dana	Barrett	dana@nomoreghosts.com	555-555-5500	82050	10.0 / 40.0	Business Analyst	Edit	Terminate Message	
M		Egon	Spengler	egon@nomoreghosts.com		00001	10.0 / 40.0	Paranormal Investigator Paranormal Researcher	Message	Edit	This is you
E		Janine	Melnitz	jmelnitz@nomoreghosts.com		63636	20.0 / 40.0	Administrative Assistant Customer Support	Message	Edit	Terminate Switch User
E		Louis	Tully	ltully@nomoreghosts.com		28502	10.0 / 40.0	Ghost Grabber	Message	Edit	Terminate




Select the fields you want to add. Selected fields appear beveled, like toggled buttons (e.g. First Name, Last Name below). There are lots of options, so be sure to scroll down to view them all!


**Weekly Hours** Fields Reset Export

10.0 / 40.0	Employee Type	Marital Status
	Picture	Drivers License Number
10.0 / 40.0	First Name	Address
	Middle Name	Nationality
20.0 / 40.0	Last Name	Ethnicity
	Email	Military Service
10.0 / 40.0	Phone	Smoker
- / 40.0	Payroll ID	Home Location
	Weekly Hours	Home Department
- / -	Daily Hours	Security Template
	Monthly Hours	Corporate User
- / -	Weekly Shifts	Admin User
	Daily Shifts	Copy Schedule
- / -	Monthly Shifts	PTO Track
	Birthday	Minor
- / -	Designation	Employee Type Name
	Overtime	Internal Number

When you're done, simply click anywhere else in the window to return to your list and view your changes.





In the example below, we've disabled some default fields and added whether or not the employee is clocked in and what their default position is:

Employee Type	Picture	First Name	Last Name	Currently Clocked In	Default Position	Fields	Reset	Export
S		Dana	Barrett	Yes	Business Analyst	Edit	Terminate	
M		Egon	Spengler	No		Edit		This is you
E		Janine	Melnitz	No	Customer Support	Edit	Terminate	
E		Louis	Tully	Yes	Ghost Grabber	Edit	Terminate	

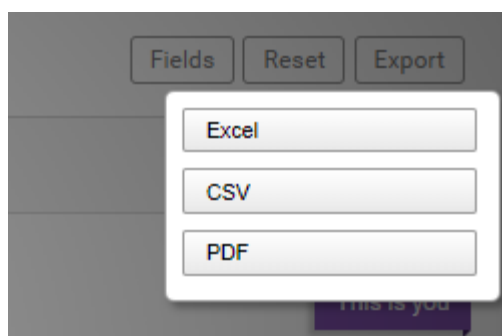
 Having too many columns in your list can be cumbersome and make your list difficult to read. Your list may not display correctly and may not export as intended. It's best to keep your list to a manageable number of columns (less than 10).

## How do I export my list?

First, follow the steps above to customize your list and get it just the way you want it. Then, select the **Export** button.

Employee Type	Picture	First Name	Last Name	Currently Clocked In	Default Position	Fields	Reset	Export
S		Dana	Barrett	Yes	Business Analyst	Edit	Terminate	
M		Egon	Spengler	No		Edit		This is you
E		Janine	Melnitz	No	Customer Support	Edit	Terminate	
E		Louis	Tully	Yes	Ghost Grabber	Edit	Terminate	


Next, select a file format. You can export your list as an Excel spreadsheet, a CSV file, or PDF.



Once you make a selection, the file will save to your computer. You can then print it, email it, analyze it -- whatever you want to do!


## Switching between Grid View and List View

Switching between views is incredibly easy! In the upper right corner, you'll see a toggle button. Simply click the left side to view your information as a grid, or click the right side to view your information as a list.

**Employees** | Review staff members within your organization, including yourself and all management staff. [Message All Employees](#) [+ Add Employee](#)  

Show :  [Show](#) [Show terminated employees](#)

**Employees with departments assigned**  
Showing 9 of 9 | Sort By



**Dana Barrett**  
555-555-5500  
dana@nomoreghosts.com


**S** Payroll Id: 82050 Weekly Hours: 10.0 / 40.0

Positions: **Business Analyst**

Hire Date: 04/11/2014 Birthday: --

Message [Terminate](#)

last edit: Jun 27, 2018 - 11:33 AM



**Egon Spengler**  
egon@nomoreghosts.com


**M** Payroll Id: 00001 Weekly Hours: 10.0 / 40.0

Positions: **Paranormal Investigator**  
**Paranormal Researcher**

Hire Date: 01/13/2011 Birthday: --

Message [Terminate](#)

last edit: Jun 27, 2018 - 11:33 AM



**Janine Melnitz**  
jmelnitz@nomoreghosts.c...


**E** Payroll Id: 63636 Weekly Hours: 20.0 / 40.0

Positions: **Administrative Assistant**  
**Customer Support**

Hire Date: 06/11/2015 Birthday: --

Message [Switch User](#) [Terminate](#)

last edit: Jun 27, 2018 - 11:34 AM



**Louis Tully**  
ltully@nomoreghosts.com


**E** Payroll Id: 28502 Weekly Hours: 10.0 / 40.0

Positions: **Ghost Grabber**

Hire Date: 06/21/2018 Birthday: --





Message [Terminate](#)

last edit: Jun 27, 2018 - 11:34 AM

**Employees** | Review staff members within your organization, including yourself and all management staff. [Message All Employees](#) [+ Add Employee](#)  

Show :  [Show](#) [Show terminated employees](#)

**Employees with departments assigned**  
Showing 1 - 9 of 9 |

Employee Type	Picture	First Name	Last Name	Email	Phone	Payroll ID	Weekly Hours	Employee Positions	
<b>S</b>		Dana	Barrett	dana@nomoreghosts.com	555-555-5500	82050	10.0 / 40.0	<b>Business Analyst</b>	<a href="#">Edit</a> <a href="#">Terminate</a> <a href="#">Message</a>
<b>M</b>		Egon	Spengler	egon@nomoreghosts.com		00001	10.0 / 40.0	<b>Paranormal Investigator</b> <b>Paranormal Researcher</b>	<a href="#">Message</a> <a href="#">This is you</a>
<b>E</b>		Janine	Melnitz	jmelnitz@nomoreghosts.com		63636	20.0 / 40.0	<b>Administrative Assistant</b> <b>Customer Support</b>	<a href="#">Edit</a> <a href="#">Terminate</a> <a href="#">Message</a> <a href="#">Switch User</a>
<b>E</b>		Louis	Tully	ltully@nomoreghosts.com		28502	10.0 / 40.0	<b>Ghost Grabber</b>	<a href="#">Edit</a> <a href="#">Terminate</a> <a href="#">Message</a>

You can swap back and forth to see what you like best. Your settings are unique to your account, and each area of TimeForge (your employee roster, your list of locations, etc.) will remember whether you prefer to see that set of information as a grid or list.



# Enable PTO payout requests

TimeForge now allows you to turn on PTO payouts for Leave Types of your choosing. When turned on for a Leave Type, employees and managers can make requests to "cash out" all or part of their PTO balance for that Leave Type.

PTO payouts must be enabled on a per-location basis for non-hidden Leave Types in order for employees to make requests and can only be enabled for Leave Types that track accrual. If your company does not allow negative accruals in TimeForge, then the employee must have a positive accrual balance to request a PTO payout.

## Allow PTO payouts for a specific type of leave

From the Corporate level, navigate to **Leave Types** under the Set Up tab, then select the Leave Type you'd like to enable PTO payouts for.

Under the Leave Type options, **check the box** that reads "This Leave Type can be used for Payouts." Click **Save** to save your changes.

This will enable PTO payouts for this Leave Type but only if the employee works at a location for which PTO payouts have been enabled. To enable PTO payouts for your location, proceed to the next step.

### Leave Type Information

Leave Type

Employees

Approval Managers

Assignment Managers

Description \*

Vacation

Hide this Leave Type from Employees

I want to calculate Sick / Vacation / PTO time for this Leave Type

**This Leave Type can be used for Payouts**

This Leave Type is location-based

Sick / Vacation / PTO Information

Accrual Period \*

Annual

Reset hours every year?

No

Use Effective or Hire Date instead.

Year begins on

January

Day

1

Hours accrued during period \*

40.0

Maximum number of hours:

Maximum number of hours to accrue in the period:

Cannot accrue PTO for

days from hire date

Cannot use PTO for

90

days from hire date

Can accrue PTO after

worked hours

Can use PTO after

accrued hours

Do not allow negative accruals

Use only regular time to accrue hours

Steps

Start Days	End Days	Carried Amount	Carried Percentage	Hours accrued during period	Maximum number of hours

Save

Cancel

## Enable PTO payouts for a location

To enable PTO payouts for a location, navigate to your Location settings and find the option that reads "Would you like to allow employees to create payout requests for eligible leave types?" Select **Yes**, then scroll down and click **Save** to save your changes.

TimeForge Configuration

TimeForge can distinguish between new and experienced employees using Skill Levels.  
Would you like to enable skill level tracking for individual employees? **Yes** ?

Would you like to enter your own skill level scales for individual employees? **No** ?

TimeForge can require that employee requests must be approved by management.  
Should employee requests be approved by management? **Yes** ?

Should "wants to work"/"available to work" employee requests be approved automatically? **No** ?

Only show Available and Unavailable as Request Options? **No** ?

TimeForge can require that employees make requests several days in advance of the actual request date.  
How many days in advance should employee requests be made? **7** ?

TimeForge can require that employees make requests no more than several days in advance of the actual request date.  
What is the maximum number of days in advance that employee requests should be made? **1** ?

TimeForge can require that employee shift swapping must be approved by management.  
Should employee shift swapping be approved by management? **Yes** ?

TimeForge can require that employees give up shifts several days in advance of the actual request date.  
How many days in advance should staff members give up shifts? **0** ?

TimeForge can distinguish between skill levels when doing shift swapping.  
Would you like to enable this feature? **Yes** ?

When terminating an employee who has upcoming shifts, you can change them to **Do not change** ?

TimeForge can require that schedule warnings must be approved by the staff member posting the schedule.  
Should schedule warnings be approved by management prior to posting? **No** ?

Allow transfers from this location? **Yes** ?

Only allow home location managers to schedule transferred employees? **No** ?

Lock employee when he is not in his home location? **No** ?

**Would you like to allow employees to create payout requests for eligible leave types? **Yes** ?**

Do you want to allow staff to change their profile picture? **No** ?

Do you want to allow staff to change their email? **Yes** ?

## Request a PTO payout

In order to receive a PTO payout, the employee (or their manager) must make a request under **Availability and Requests** and select "Payout" as the request type. They need to select the Leave Type to be paid out, as well as the number of hours.

Create New Availability Request

×

Employee

Peter Venkman

Request

Payout

?

Leave Type

Vacation

?

Amount of hours to payout

20

?

Current PTO balance: 40.00hrs

Request Date

06/27/2018

?

Manager's comment

?

Next

Cancel

The submitted request will appear on the availability and requests page:

	Sunday 6/24/2018 Do Not Allow Requests	Monday 6/25/2018 Do Not Allow Requests	Tuesday 6/26/2018 Do Not Allow Requests	Wednesday 6/27/2018 Do Not Allow Requests payout	Thursday 6/28/2018 Do Not Allow Requests	Friday 6/29/2018 Do Not Allow Requests	Saturday 6/30/2018 Do Not Allow Requests
12:00 AM							
1:00 AM							
2:00 AM							
3:00 AM							
4:00 AM							
5:00 AM							

A PTO payout request must be approved by an Approval Manager before the balance can be distributed via payroll. The "used" PTO amount will be reflected on the next payroll export.

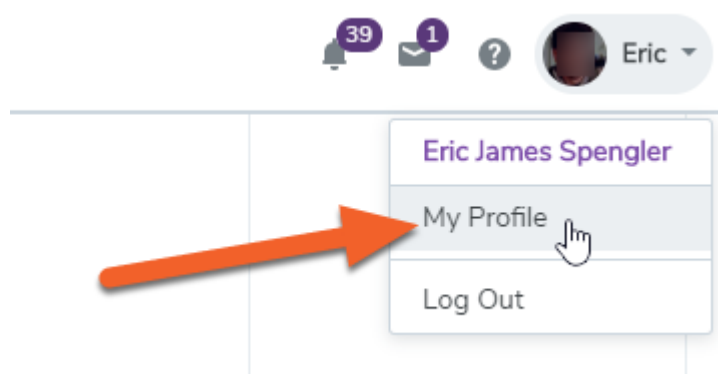
# The New TimeForge Dashboard (Today Page)

The new TimeForge dashboard makes it easy to view at-a-glance information, such as upcoming schedules, pending availability requests, clocked-in staff, shift swaps, daily log entries, and reports – all in one location on your Today page!

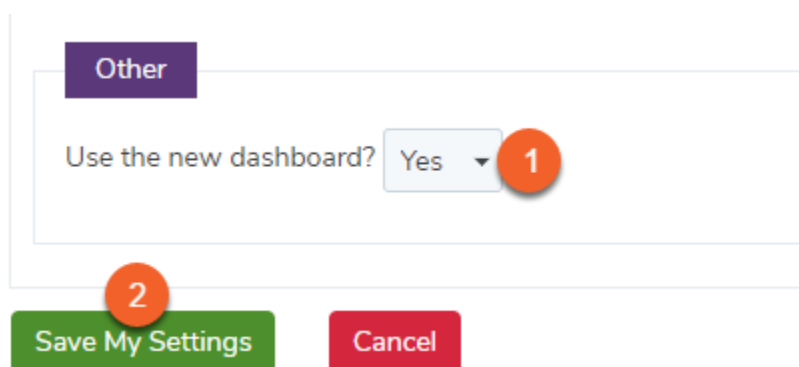
This guide will give you a brief tour of the new dashboard and its features.

## Help me enable the new dashboard!

If you don't see the link to **Use new dashboard**, just navigate to your profile:



Select **Yes** to use the new dashboard, then **Save**:



That's all there is to it!

## Welcome to your new Today Page!

With the new dashboard enabled, your Today page will feature tabs for Personal information, a full-page Calendar with filtering options, and, if you're a manager, a special Location dashboard.

**Dashboard**

Location Personal Calendar

**Today's Schedule (3 staff)** View today's schedule ...

Employee	Status	Shift	Department
Leonard V. Tully	Clocked-in:8:00am	9:00am - 5:00pm	Business Analyst   Operations
Donna J. Barrett	Clocked-in:6:00am	9:00am - 5:00pm	Business Analyst   Operations
Patrick Venkman	Not clocked in	9:30am - 5:30pm	Business Analyst   Operations

**Daily Log Entries** View all entries ...

Monday, Sep 09

Eric | Customer Concerns a few seconds ago  
"Doctor" Venkman got into a disagreement with a fellow employee in front of a customer and received a written citation.  
discipline

Eric | Training 1 minute ago  
All hands fire drill today.  
drill

**Pending Requests (1)** View all requests ...

RS Ralph Stanz made an **Does not want to work Request** Tue, Jan 22  
Tue, 1/29/19  
All day

**Labor Overview** ...

Today  
(Mon, Sep 9)

Scheduled Cost	Scheduled Hours
\$ 350.61	22.00 hrs

As an **employee**, you can:

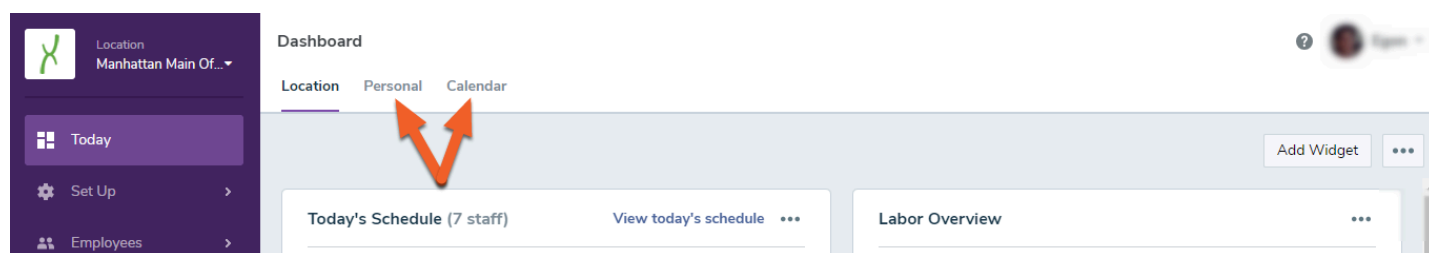
1. Arrange your dashboard how you want. Add, remove, resize, and arrange widgets to suit your needs.
2. View your calendar to visualize your scheduled shifts for the month.

As a **manager**, you can:

1. Arrange your dashboard how you want. Add, remove, resize, and arrange widgets to suit your needs.
  2. Easily view the information you want for your business, and quickly switch to your personal dashboard to view what is important to you, like your messages.
- **Dashboard:** The place to view your data visually.
  - **Widgets:** A dedicated component for showing focused information, like weather.
  - **Location tab:** Dashboard showing widgets dedicated to the business at the current location, like today's sales.
  - **Personal tab:** Dashboard showing widgets dedicated to the user, like my attendance.
  - **Calendar tab:** Large calendar showing information dedicated to the user, like scheduled shifts.

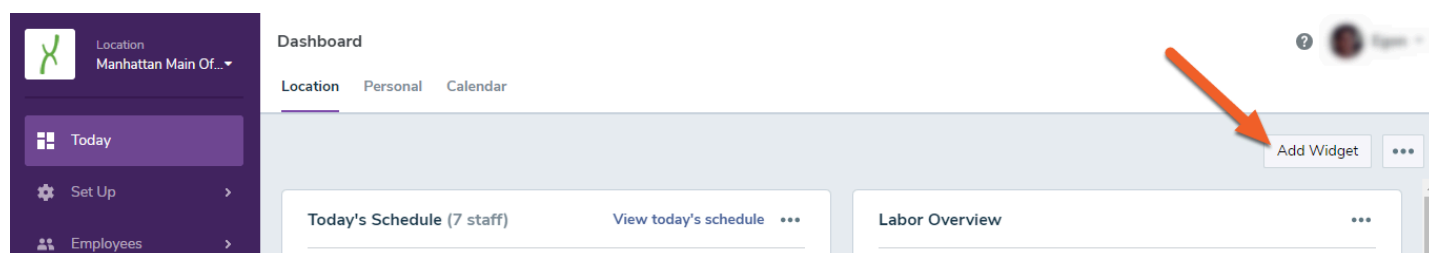
## Switch between dashboard tabs

To switch between dashboard tabs, simply click on a tab header at the top of the page! Your current tab will always be highlighted compared to the others.

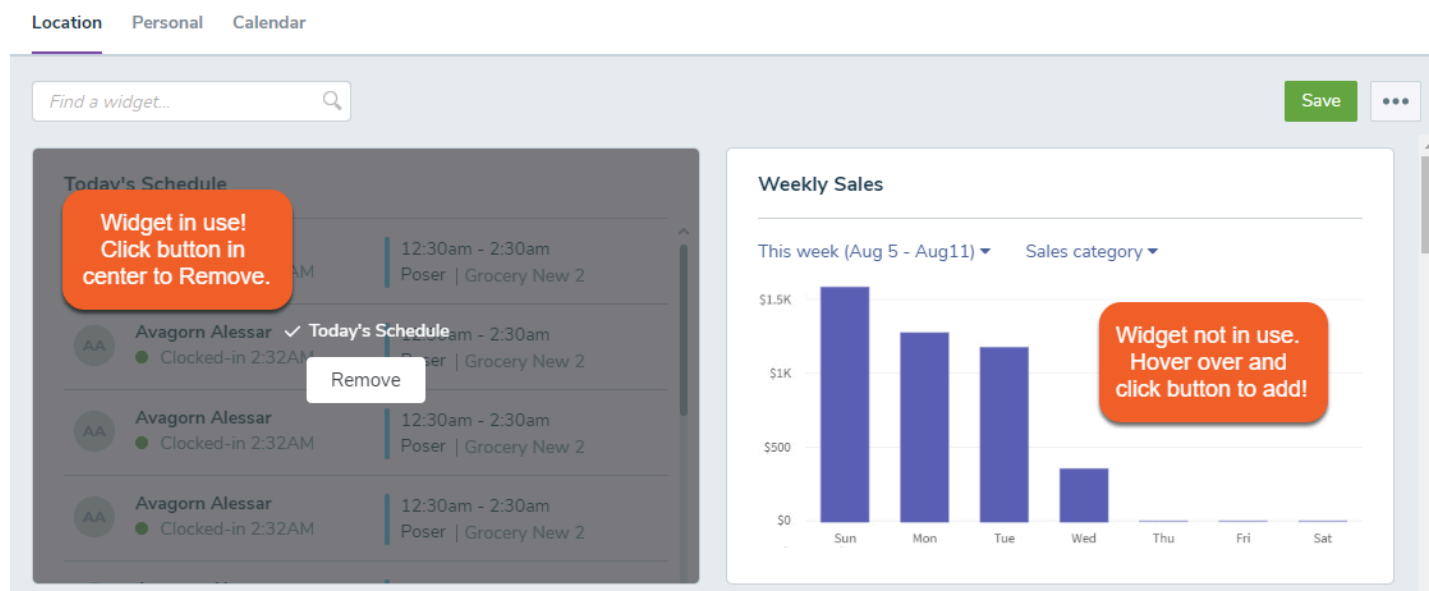


## Add, remove, or reset widgets

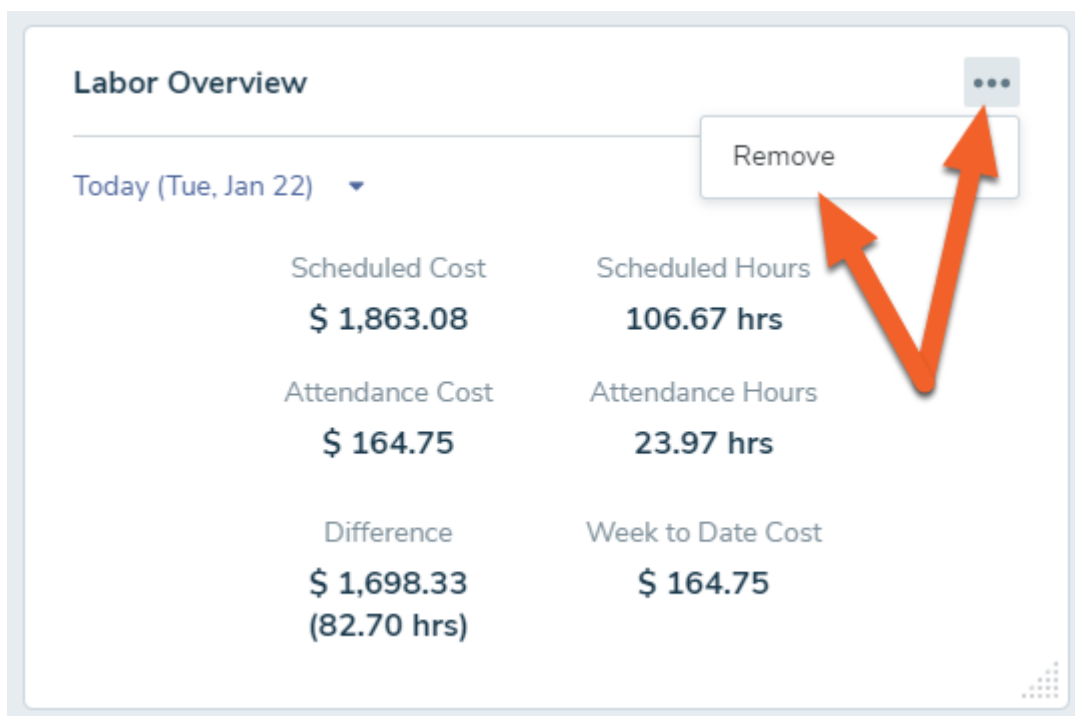
To add a new widget, click the **Add Widget** button in the upper right.



You'll see all the available widgets. All the ones you're already using will be grayed out with a checkmark and a Remove button. Hover over any other widget to see a button to add it to your dashboard, then click the **Save** button in the upper right to save your changes and return to your dashboard.



To remove a single widget, click the more menu (...) in the upper right corner of that widget, then select **Remove**. You can always re-add a widget if you change your mind!



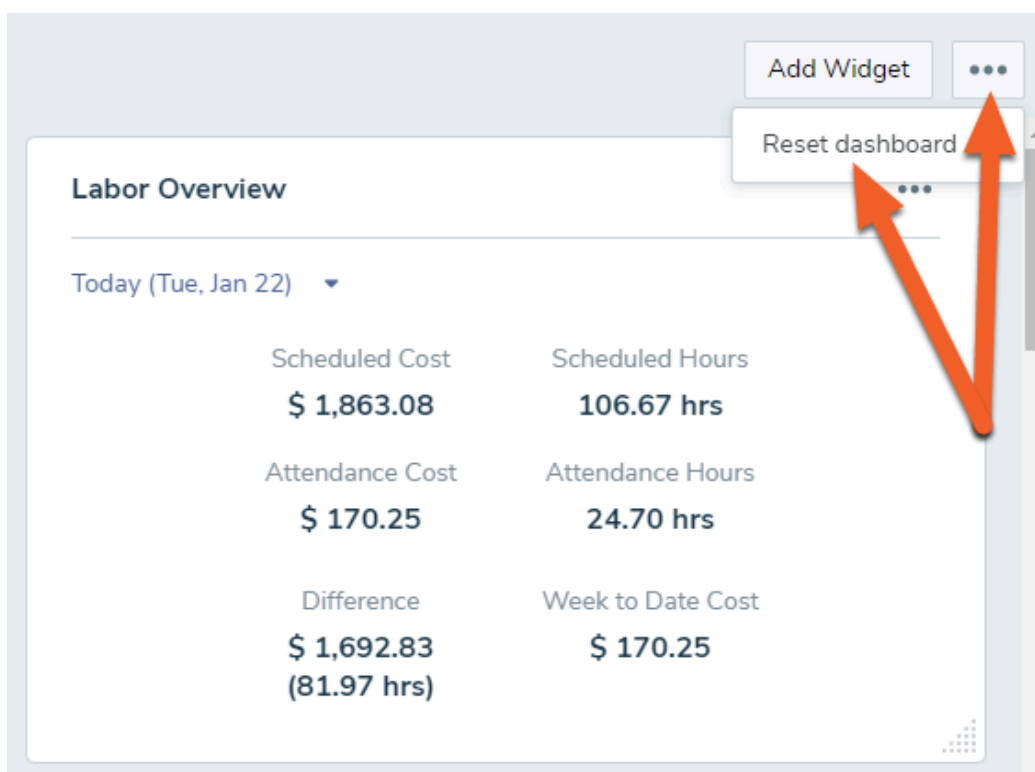
**Labor Overview**

Today (Tue, Jan 22) ▾

Scheduled Cost	Scheduled Hours
<b>\$ 1,863.08</b>	<b>106.67 hrs</b>
Attendance Cost	Attendance Hours
<b>\$ 164.75</b>	<b>23.97 hrs</b>
Difference	Week to Date Cost
<b>\$ 1,698.33</b> (82.70 hrs)	<b>\$ 164.75</b>

Remove

You can reset your dashboard to the default configuration anytime. Simply click the more menu (...) in the upper right and select **Reset Dashboard**.



**Labor Overview**

Today (Tue, Jan 22) ▾

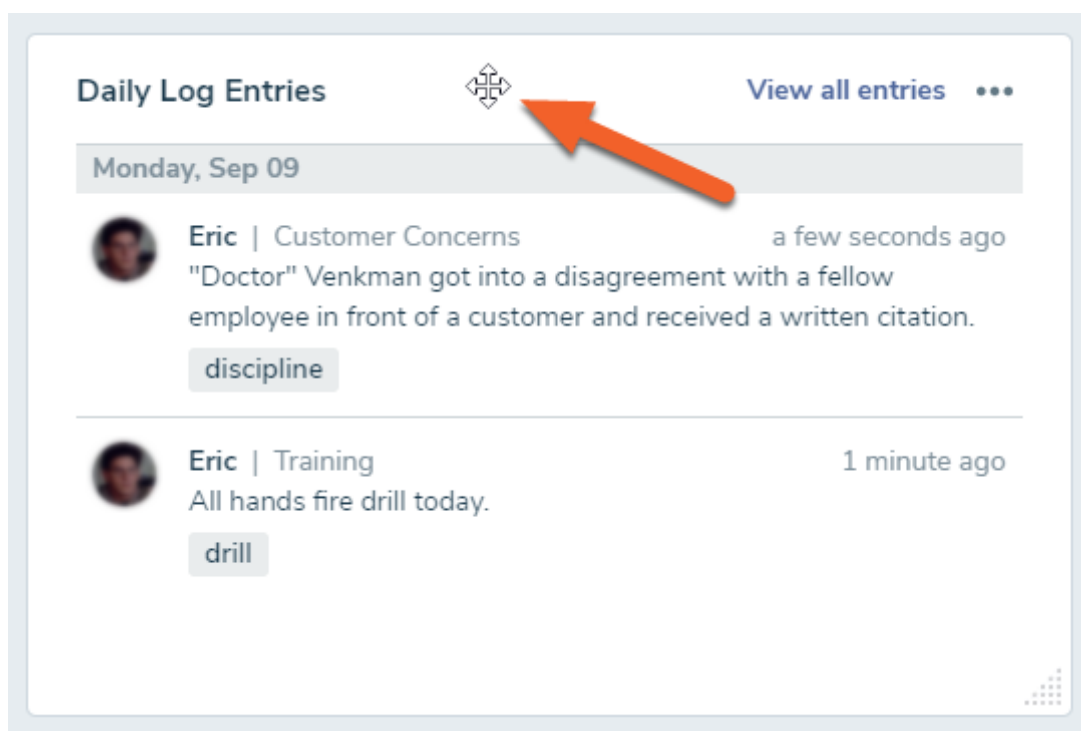
Scheduled Cost	Scheduled Hours
<b>\$ 1,863.08</b>	<b>106.67 hrs</b>
Attendance Cost	Attendance Hours
<b>\$ 170.25</b>	<b>24.70 hrs</b>
Difference	Week to Date Cost
<b>\$ 1,692.83</b> (81.97 hrs)	<b>\$ 170.25</b>

Add Widget

Reset dashboard

## Rearrange widgets

To rearrange, click the top of the widget, then drag and drop.



## Personal Dashboard

The following widgets are available to employees using the Personal dashboard:

- **My Requests:** View a list of my availability and requests.
- **Messages:** View my messages.
- **Available Shifts:** View any available shifts for pickup.
- **HR Activities:** View any assigned HR Activities.
- **Others Availability:** View the availability of other employees.
- **Others Scheduled:** View the schedules of other employees.
- **HR Documents:** View any assigned HR Documents.
- **TimeClock:** Clock into or out of a position/department.

## Location Dashboard

The following widgets are available to managers through the Location dashboard:

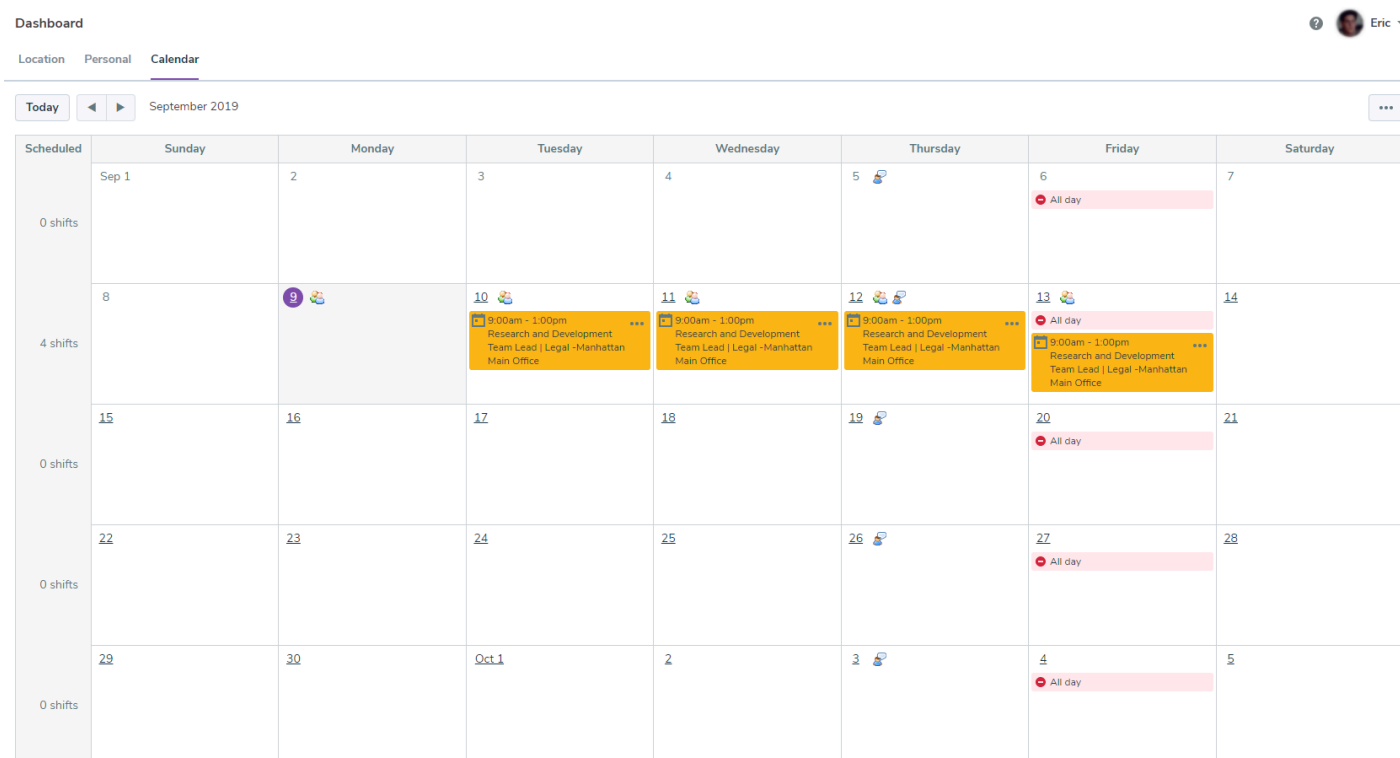
- **Today's Schedule:** View who is scheduled for the day.
- **Weekly Sales:** View sales over a week period.
- **Birthdays:** View upcoming employee birthdays.
- **Daily Log Entries:** View recent Daily Log Entries.
- **Favorite Reports:** View links to your Favorite Reports.
- **Labor Overview:** View an overview of labor, such as scheduled hours and attendance hours.
- **Last Sync:** View last connector sync times.
- **On Leave:** View who is currently on leave.
- **Applicants:** View a list of new applicants.



- **Clocked in Staff:** View is currently clocked in.
- **Pending Requests:** View requests that pending and need manager approval.
- **Pending Shifts:** View shifts swaps, opens shifts, and bid shifts that are pending manager approval.
- **Unconfirmed Shifts:** View scheduled shifts that have not been confirmed by employees.
- **Weekly Labor:** View a chart of labor information by week, like hours scheduled and cost.
- **Weather:** View weather for today and tomorrow.



## Calendar

The Calendar tab shows important schedule information.



## Click the More (...) menu in the upper right for filtering options

Click each filter option to toggle it on (checkmark) or off (no checkmark). Options include attendance, schedule, availability and requests, HR types, and daily log entries!



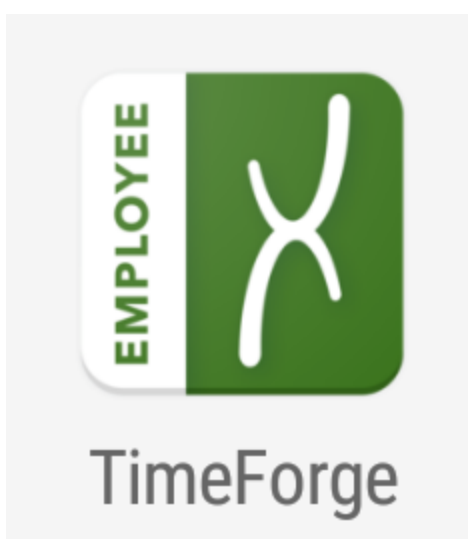
Thursday	Friday	
31	Feb 1 <div>All day</div>	
7	8 <div>All day</div>	9
14	15 <div></div>	16

- Show attendance
- ✓ Show schedule
- ✓ Show availability and requests
- ✓ Show HR types
- ✓ Show daily logs

# Request time off or set your availability

The TimeForge Employee Mobile App now offers the ability to submit [availability requests](#) directly from your smart phone! This makes it easier than ever for employees to indicate their availability.

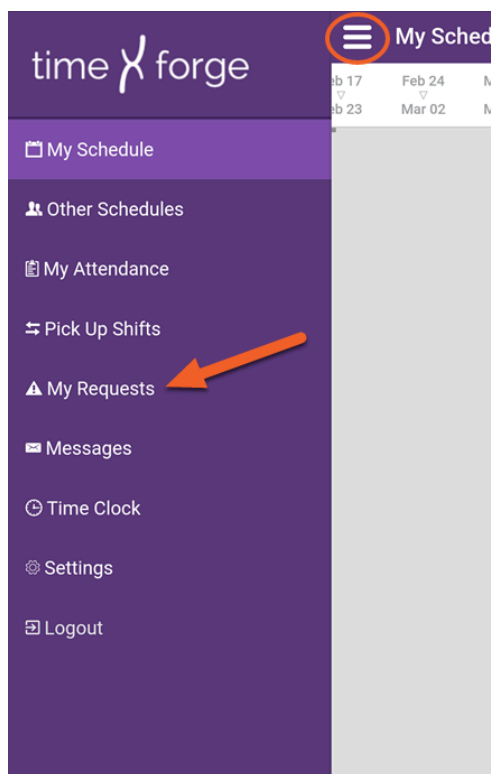
In order to make use of this feature, you'll need to have the latest version of the Employee Mobile App installed on your device. This app is free and is available for both iOS and Android. To download, simply visit the [Apple store](#) or Google Play store and search for "TimeForge Employee App."



## Open the My Requests page

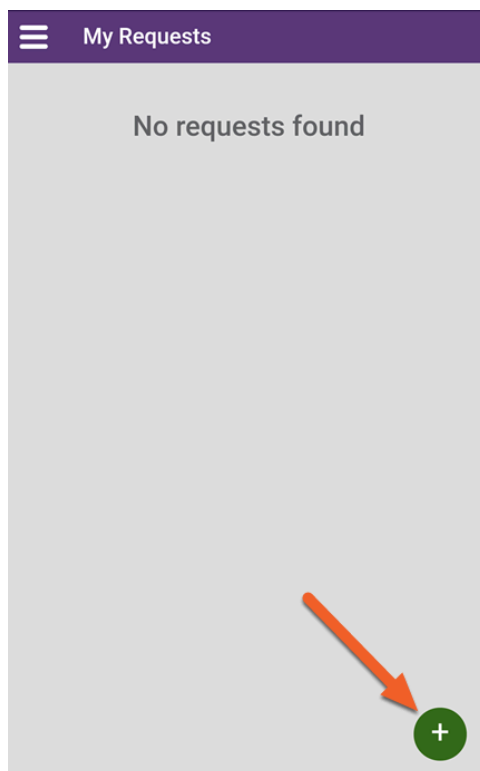
To begin, click on the **menu button** (three horizontal lines) in the upper left corner. This will open up the TimeForge menu.

Then, select **My Requests** from the list.



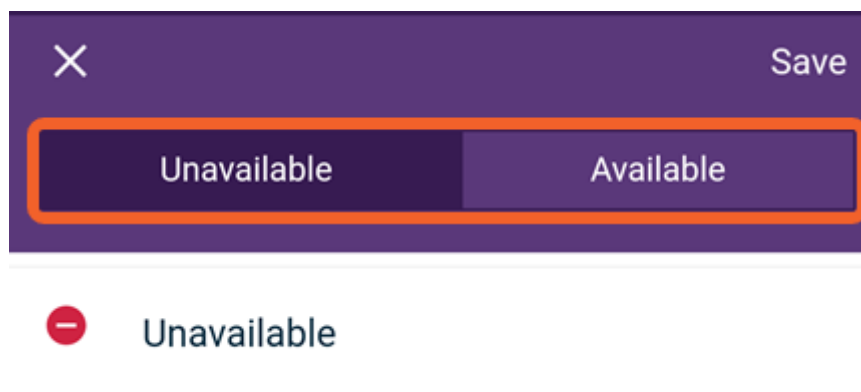
## Click the + plus sign in the lower right

Click the plus sign to start a new time off or availability request.



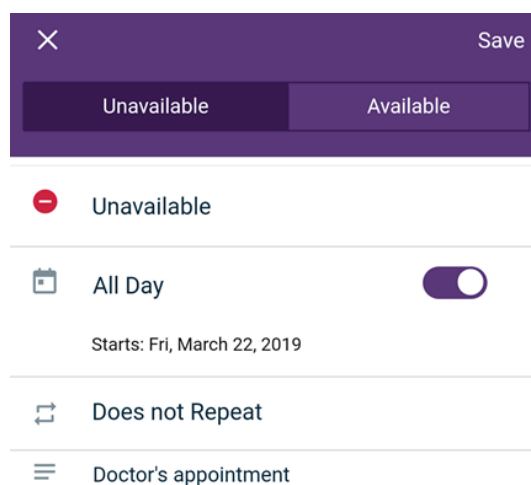
## Select Available or Unavailable, then fill out the request

At the top of the screen, you'll see two options: Unavailable and Available. If this is a request for time off, select **Unavailable**. Otherwise, select **Available**.



Then, select the options for date, time, whether the request should be recurring (repeat), and any comments you'd like to provide to your manager.

Here's an example of a request to take a full day off from work:



And here's an example of a request to let your manager know that you're available all day every Monday:

×

Save

Unavailable

Available

👤

 Available

📅

 All Day 

🔴

Starts: Mon, March 25, 2019

🔄

 Repeat Weekly

🔄

 Every 1 Week

S

M

T

W

T

F

S

📅

 Never Ends 

🔴

☰

 Add Comments

## Click Save in the upper right

Click **Save** to submit your request to a Supervisor or Manager for approval.

×

Save

Unavailable

Available

👤

 Available

📅

 All Day 

🔴

Starts: Mon, March 25, 2019

🔄

 Repeat Weekly

🔄

 Every 1 Week

S

M

T

W

T

F

S


📅

 Never Ends 

🔴

☰

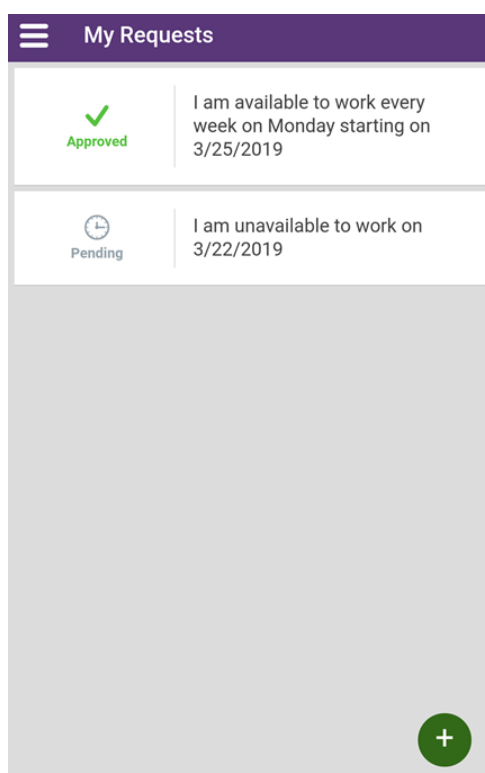
 Add Comments

 If you are a Supervisor or Manager with permissions to approve your own requests, your request will be immediately approved when you press Save.

## View or edit your existing requests

When you hit save, you'll be returned to your list of existing availability and time off requests. Each one will be clearly marked to show its status.

For example, this person has an approved availability request but their time off request is still being considered:



Clicking on a request in your list will provide you with additional options to **edit** or **delete** the request.

← Request Detail

Pending

I am unavailable to work on 3/22/2019

Edit

Delete



# Create short term labor goals

TimeForge allows managers to configure their sales per labor hour (SPLH), costs per labor hour (CPLH) calculations, and labor targets in order to meet their store's labor goals while remaining within their labor budget.

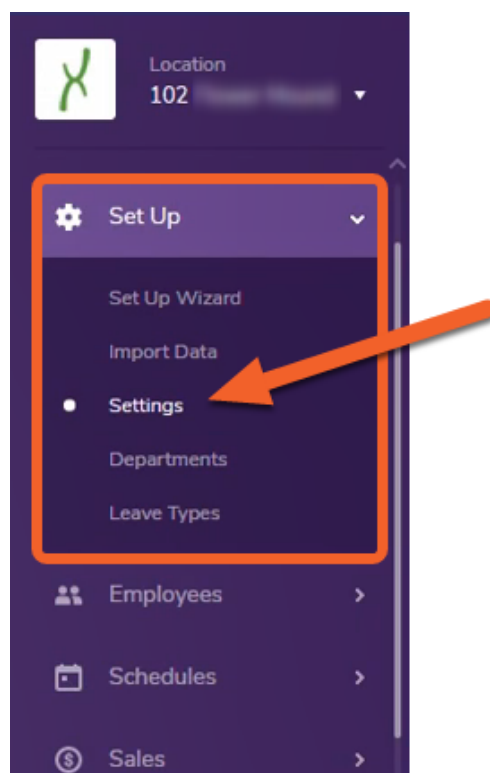
This guide will show you how to set up your location correctly so that you can make use of this feature and will then walk you through creating a schedule that meets your labor goals and budget.

## Make sure the location is configured properly

The first thing you'll want to do is make sure your location is configured with the CPLH calculations and labor target percentages that will be used to calculate labor target hours.

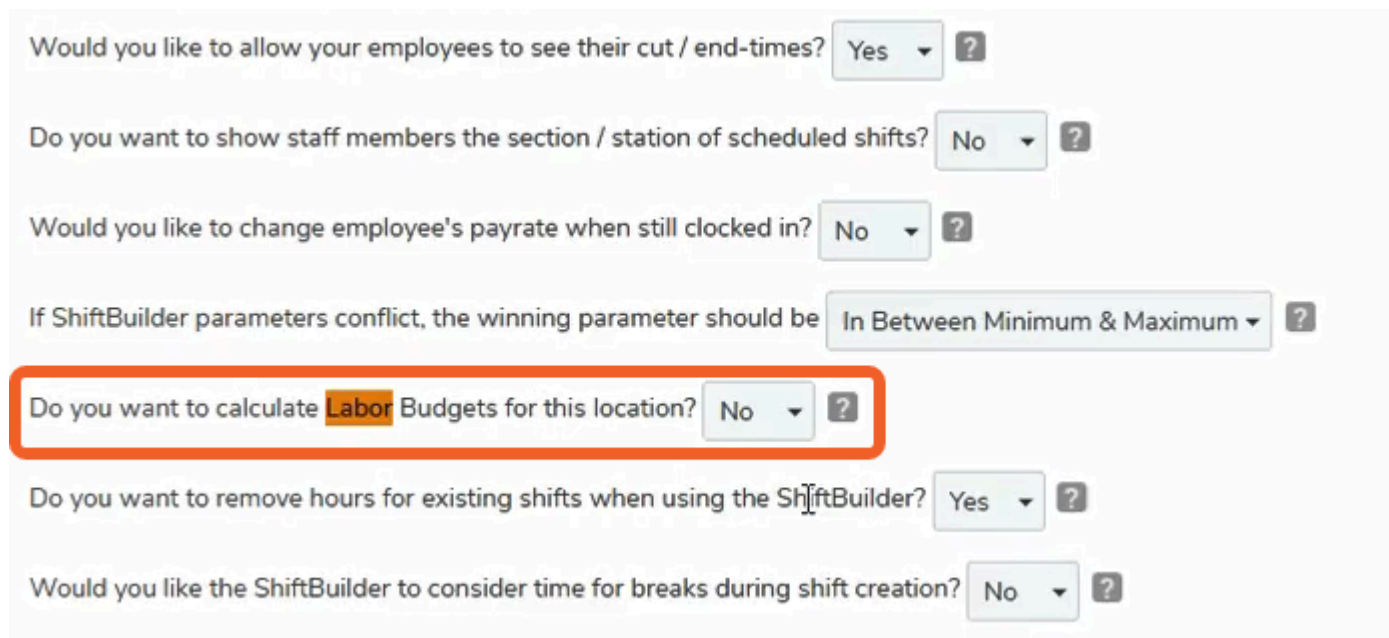
## Go to the location Settings page under the Set Up tab

With a location selected, open the **Set Up tab** and click **Settings**.



## Enable the settings for Labor Budgets

On the Settings page, find the setting that reads, "Do you want to calculate Labor Budgets for this location?"



Would you like to allow your employees to see their cut / end-times? Yes ▾ ?

Do you want to show staff members the section / station of scheduled shifts? No ▾ ?

Would you like to change employee's payrate when still clocked in? No ▾ ?

If ShiftBuilder parameters conflict, the winning parameter should be In Between Minimum & Maximum ▾ ?

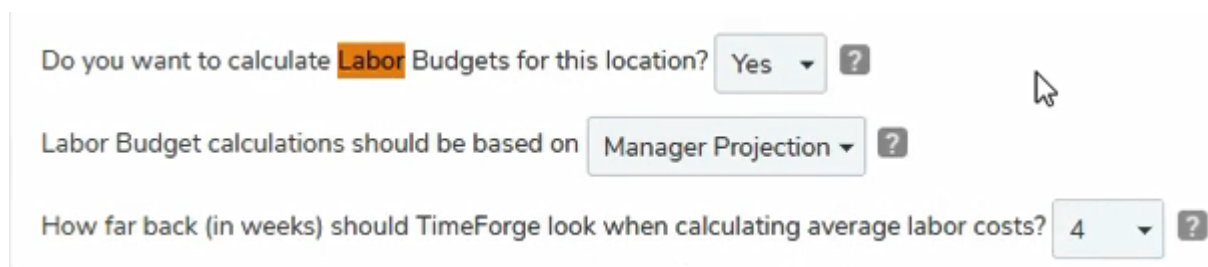
Do you want to calculate **Labor** Budgets for this location? No ▾ ?

Do you want to remove hours for existing shifts when using the ShiftBuilder? Yes ▾ ?

Would you like the ShiftBuilder to consider time for breaks during shift creation? No ▾ ?

💡 Hit **CTRL-F** on your keyboard to open up your browser's quick find box. Type in the word **labor** to find the settings that have to do with labor. Typically, your browser will highlight the matches (as shown in the above image).

Select "Yes" for this setting to enable it (if it is not already enabled). This will cause two related settings to appear underneath:



Do you want to calculate **Labor** Budgets for this location? Yes ▾ ?

Labor Budget calculations should be based on Manager Projection ▾ ?

How far back (in weeks) should TimeForge look when calculating average labor costs? 4 ▾ ?

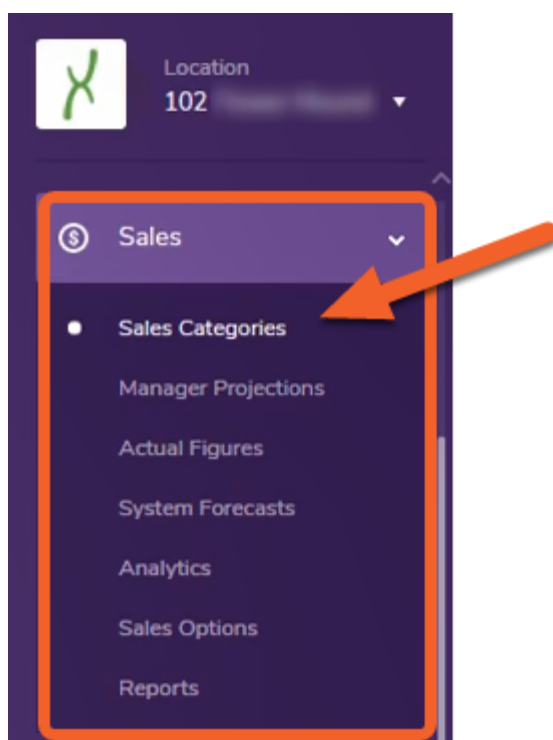
Labor Budget calculations should be based on the **Manager Projection**, and TimeForge should look back **4 weeks** when calculating average labor costs.

(If your location does not have sales data from the past four weeks that can be used to make accurate calculations, you can set this number higher to look back even further in time.)

## Scroll down and Save your changes



## Go to the Sales Category page under the Sales tab



## Open up the SALES category

Click the SALES card to open up the settings page for that category.

SALES	
Type	Projection Level
Currency	Department
Compare To	Direct Comparison
Labor Costs	Percentage Comparison
Desired Threshold (Sales Category / Schedule)	
10.20	
Last Edit: Sep 24, 2018 - 10:28 AM	
<button>Import Sales</button>	

## Check to make sure your Sales category settings are correct

You should be comparing your sales values to **Labor Costs**, and when comparing sales metrics, you should be looking at **Shift by Sales %**. Your desired labor target should be set to whatever your goal is for that location. In the example below, it is set to 10.2.

Do you want to compare your sales values to cost, hours, or number of shifts?

Compare To **Labor Costs** ?

Most retail and restaurant groups use "Calculate by Numbers". However, if you want to multiply your labor thresholds by the sales values to establish a budget, please choose "Calculate by Hours".

Calculation Type **Calculate by Numbers** ?

Desired threshold for Sales versus Schedule

Desired Threshold (Sales Category / Schedule) **10.2** ?

When comparing sales metrics, would you like to use labor costs, hours, or shifts as a percentage (labor percentage), or would you like to view sales divided by labor to provide a sales-per-employee metric?

Threshold Formula Type **Cost|Hours|Shift by Sales %** ?

Displays the raw projections, forecasts, or actual sales. If only the sales values need to be shown, please de-select the Calculation Type.

Show Sales Value on Schedule **Yes** ?

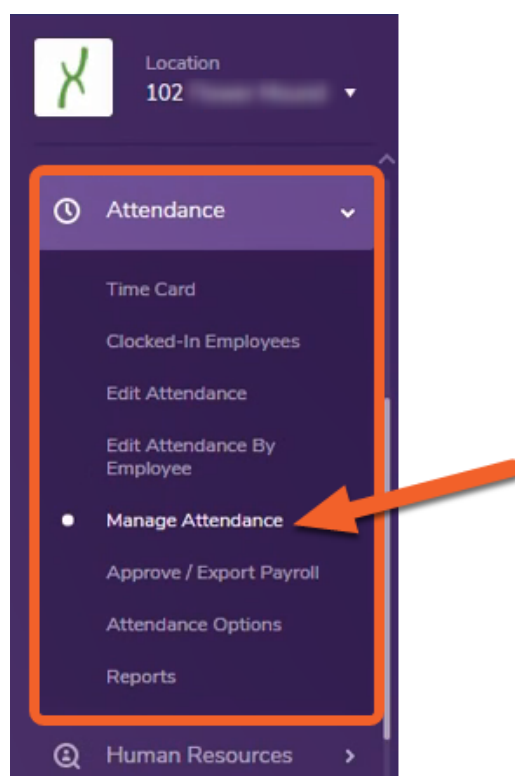
Should Manager Projections automatically update to match System Forecasts? **Yes** ?

Do you want to disable backfill? **No** ?

## Make sure there are data to reference

Now that the location is set up correctly, we should make sure there are data for TimeForge to reference when making calculations.

## Go to the Manage Attendance page under the Attendance tab



## Look for your most recent attendance data

If you don't have recent attendance, you can use the back button or the date selector to locate your most recent attendance data.

Hide Scheduled Hours															
 		Mon,08 Jul	Tue,09 Jul	Wed,10 Jul	Thu,11 Jul	Fri,12 Jul	Sat,13 Jul	Sun,14 Jul	 						
		S	A	S	A	S	A	S	A	S	A	S	A		
		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

In this example, we don't have any attendance in the past few weeks, so we need to go back and update our location settings for labor to look further back than four weeks. You can set TimeForge to look back as many as 13 weeks (shown below).

(In most cases, for active stores, there should be recent attendance data, and this step should not be necessary.)

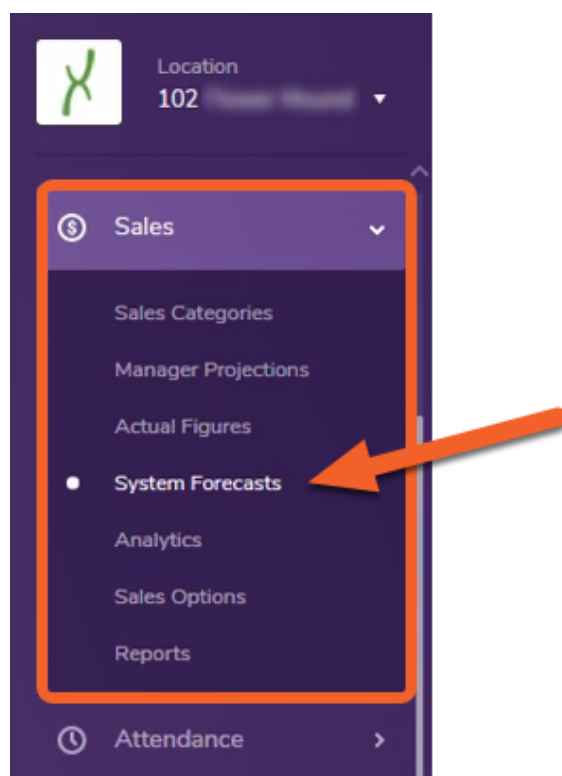
Do you want to calculate Labor Budgets for this location? Yes ▾ ?

Labor Budget calculations should be based on Manager Projection ▾ ?

How far back (in weeks) should TimeForge look when calculating average labor costs? 13 ▾ ?

Next, we need to make sure we have sales data.

## Go to the System Forecasts page under the Sales tab



## Make sure there are forecasted sales for this week and next

If you see sales forecasts for the current week and next, you should have all the data you need for calculations when scheduling.

Sales Category: SALES Department: All Departments Date: 7/22/2019 Show

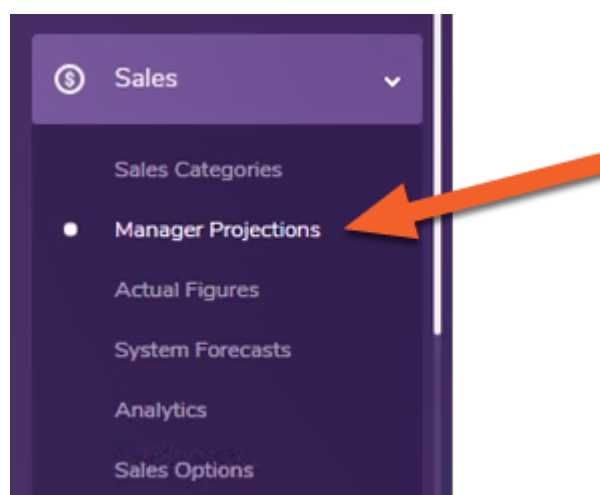
☒ Include Roll-up department sales? July 22 - July 28

Showing System Forecasts for SALES-All Departments

	MON 07/22/2019	TUE 07/23/2019	WED 07/24/2019	THU 07/25/2019	FRI 07/26/2019	SAT 07/27/2019	SUN 07/28/2019	TOTAL
TOTAL	45,560.95	41,002.56	52,225.01	40,107.57	44,188.95	55,281.43	58,818.35	337,184.81
12:00am								0.00

## Go to the Manager Projections page

With the Sales tab still open, select **Manager Projections** from the left side menu.



Again, as with the forecasts, we want to make sure we have Manager Projections through this week and next, in order to accurately create our next schedule to meet our labor and budget targets.

Sales Category: SALES Department: All Departments Date: 7/22/2019 Show

☒ Include Roll-up department sales? July 22 - July 28

Showing System Forecasts for SALES-All Departments

	MON 07/22/2019	TUE 07/23/2019	WED 07/24/2019	THU 07/25/2019	FRI 07/26/2019	SAT 07/27/2019	SUN 07/28/2019	TOTAL
TOTAL	45,560.95	41,002.56	52,225.01	40,107.57	44,188.95	55,281.43	58,818.35	337,184.81

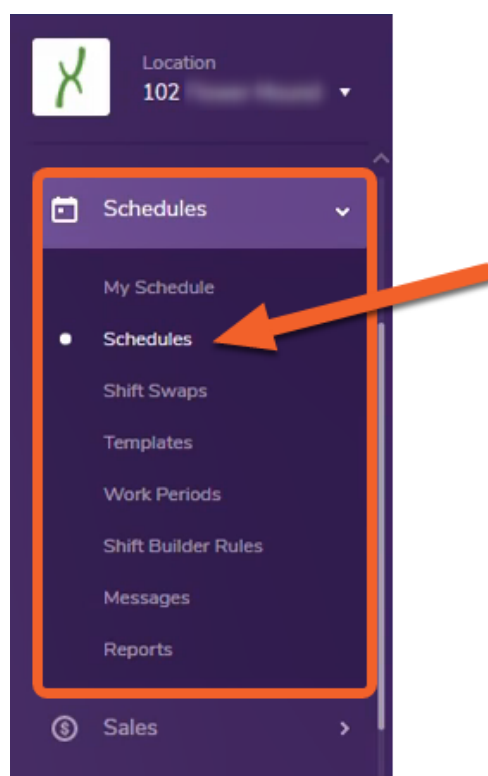
We can also use the **Calculate Weekly** button to add projections for additional weeks.

Total weekly sales SALES-All Departments								<input type="text" value="300000"/>	<input type="button" value="Calculate Weekly"/>
	MON 07/29/2019	TUE 07/30/2019	WED 07/31/2019	THU 08/01/2019	FRI 08/02/2019	SAT 08/03/2019	SUN 08/04/2019	TOTAL	
TOTAL	<input type="text" value="45,204.36"/>	<input type="text" value="41,722.62"/>	<input type="text" value="51,706.11"/>	<input type="text" value="40,452.07"/>	<input type="text" value="1,308.75"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	180,393.91	
12:00am								0.00	

## Try out the new settings by creating a schedule

We are now ready to try out our new CPLH and labor target settings! Let's head over to the Schedules page to create a schedule.

### Open the Schedules page under the Schedules tab



## Add a schedule as you normally would

Click the **+ Add Schedule** button in the top right corner of the page, then fill out the form as usual.








## Add or Edit A Schedule

You can select the dates that you wish to schedule here.



Start Date \*      End Date \*

07/22/2019  ?      07/28/2019  ?


Description \*

Front End - Schedule from 07/22/2019 to 07/28/2019. 

Department \*

Front End  

Sales Category

SALES  ?      Add Sales Category


Set up schedules for other departments with the above date range.

Set up another department schedule

☐ Build this schedule using System Generated Forecasts. [Preview](#)

Add This Schedule

Cancel

 Make sure to select the right Sales Category. We configured SALES in this walkthrough, so that's what we should be using!

After handling any employee requests for time off, select your **weekly template** and then hit the **Assign Employees** button at the bottom of the page.

## Schedule Information: Front End - Schedule from 07/22/2019 to 07/28/2019

Would you like to use a weekly template?

Copy 1 of Copy of Front end - From  ? 

07/25/2019, Thursday	Thursday-Week 1
07/26/2019, Friday	Friday-Week 1
07/27/2019, Saturday	Saturday-Week 1
07/28/2019, Sunday	Sunday-Week 1

**Assign Employees**



TimeForge will proceed to autoschedule your employees using your chosen template. Selecting the name of the schedule will show you a pop-up list of additional actions.

## Schedule

Monthly View | **Weekly View** | Daily View

Front End - Schedule from 07/22/2019 to 07/28/2019

Dates: Mon 07/22/19 - Sun 07/28/19


Filters: Front End

Filter Shifts

Schedule by: ☒ Employee ☐ Position ☐ Time

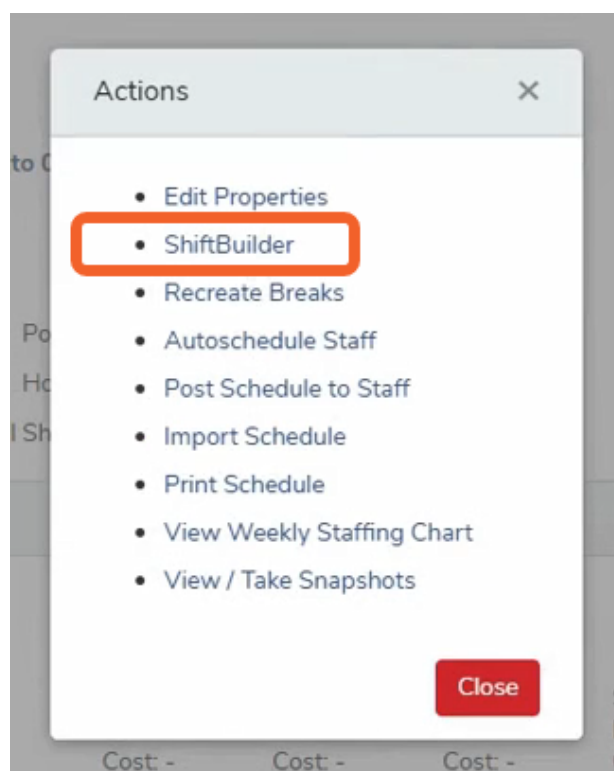
Show: ☒ Times ☐ Hours ☐ Cost

☐ Collapse Groups ☒ Show Special Shifts ☒ Group Summaries

07/22/2019  **Update**

July 22 - July 28

Choosing **ShiftBuilder** will allow you to generate the schedule based on your shift rules.



Shift Builder for Monday 07/22/19

Enter the number of staff members you need at any given time, and let the ShiftBuilder create your schedule!

**Generate based on Shift Rules**

⚠ There are some negative sales in Manager Projection and System Forecast. So, Total sales may be different from the sales view.

Sales Category: SALES

These hours do not meet the minimum required for this position by the ShiftBuilder rules.

	Sales Forecast	Manager Projection
Total Sales	337214.9	337214.9
Remaining Hours	0	1
Cashier	201	149
Courtesy Clerk	98	149
Head Cashier	145	149
Total Hours	444	447


Cancel

So for example, if the Sales Forecast for the schedule is 337214.9 (as shown above), TimeForge will allocate 444 total labor hours based on the SPLH. It then distributes those hours across positions based on how attendance is typically allocated.

If a value is in red, it means the allocated hours don't meet the minimum required for that position, as defined by the shift builder rules. Thus, in the example above, if we schedule the 98 hours, we can expect to be short staffed in courtesy clerks.

The values in these boxes can be adjusted, but for this example, we're going to go ahead and scroll down and **Distribute by Forecasts**.

Total Hours	444	447
SPLH	759	754



Distribute by Forecasts
Distribute by Projections

TimeForge will generate labor coverage among staff members based on the forecasted hours. Let's scroll down to the bottom to view the summary.

[illegible]

Here we can see some interesting information about our labor allocation. Let's look at the first column, which is for Monday 07/22 (the last column in the grid represents the entire week):

SPLH Hours	1 67.00 hr / 60.53 hr	61.25 hr / 54.47 hr	69.50 hr / 69.38 hr	59.50 hr / 53.34 hr	61.00 hr / 58.70 hr	72.50 hr / 73.44 hr	79.25 hr / 78.14 hr	470.00 hr / 448.00 hr
Target % Hours	2 96.44 hr	87.79 hr	111.54 hr	86.15 hr	94.48 hr	117.81 hr	124.02 hr	718.23 hr
Difference from Sch	29.44 hr	26.54 hr	42.04 hr	26.65 hr	33.48 hr	45.31 hr	44.77 hr	248.23 hr
Variable Hours	67.00 hr	61.25 hr	69.50 hr	59.50 hr	61.00 hr	72.50 hr	79.25 hr	470.00 hr
Non-Variable Hours	-	-	-	-	-	-	-	-
Paid Breaks	-	-	-	-	-	-	-	-
Unpaid Breaks	1.00 hr	-	-	-	-	-	-	1.00 hr
Manager Projections for SALES	0.12% / 45,558.39							0.12% / 45,558.39
Cost of Sales	0.12% /							0.12% /

1. Next to **SPLH Hours**, the top number is what's on the schedule based on what the shift builder just generated. The bottom number is the number of hours that TimeForge thinks we need based on SPLH and the distribution of sales.
2. Next to **Target % Hours**, based on our labor target for this store (we used 10.2%), our SPLH is estimating that we should be using 96.44 hours this day. The difference between that number,

and what we have scheduled, is shown below it in red (29.44 in this example). This means we have 29.44 hours we could allocate before we exceed our labor budget for that day.

# Automated Meal and Rest Penalties

California mandates that employees who work a certain number of hours without a rest period or without a meal period are eligible to be paid extra, but there are different thresholds and rules that dictate what counts as a meal or rest penalty, respectively. Fortunately, TimeForge makes it easy to automate the tracking and compensation of both meal and rest penalties.

Note - this isn't just important for California. Other states have adopted non-standard meal and rest policies too.

This article will show you how to configure TimeForge to automate meal and rest penalties so that your business can remain compliant.

## How does it work?

TimeForge can reference breaks rules, exception rules, and pay rules to automatically add regular pay (usually set to 1 hour) to an employee's time card when they fail to take a scheduled meal period, or if their attended meal period is less than the allowed duration (i.e. 30 minutes). This hour is coded with a [meal penalty](#) pay code (not straight time). Similar logic can be applied for rest periods (e.g. 10 minutes) as configured. This functionality does not reference waivers. This functionality is configurable by location or company-wide.

Manual overrides to system-generated meal penalties are possible for managers and supervisors with the appropriate security templates.

## Prerequisites / Requirements

The following must be set or enabled in TimeForge:

- Scheduling and Attendance platforms in use (the logic to automatically assess meal penalties and rest break penalties relies on both)
- Meal penalties set to count as regular time
- Meal break and rest break exceptions configured under Attendance Options
- No lunch and Late lunch exceptions configured under Attendance Options
- Breaks can not be taken automatically by TimeForge (the employee must clock in/out of breaks)

Let's start by configuring TimeForge to automatically identify and apply penalties when meal and rest exceptions occur.

*If you need assistance getting meal penalties enabled, our [support desk](#) is also always ready to help.*

## Configuration settings

Under the location's **Attendance Options**, scroll down to Calculations and select **Yes** to *include meal penalties as regular time*. This will ensure that employees are compensated for a missed lunch in the form of a regular paid hour.

### Calculations

Calculate overtime on a per location basis

Calculates overtime hours per location, rather than combining multiple locations together.

No

Include meal penalties as regular time

Adds meal penalties as regular hours and cost.

Yes

Count meal penalties towards overtime

Adds meal penalties to the overtime calculations.

No

Next, scroll down to **Exceptions** and select **Yes** to enable meal penalties and rest break penalties.

Selecting Yes will provide configuration options for each. These options should be configured as per your state's laws regarding missed breaks and meals and the maximum number of penalties that can be applied in a day. Always be sure to consult your legal team for guidance on applicable state and local guidelines or wage orders.

### Exceptions

Tardy

Records a "Tardy" exception when an employee clocks in later than scheduled.

No

Extremely tardy

Records an "Extremely tardy" exception when an employee clocks in much later than scheduled.

No

No Rest Break

Records an "No Rest Break" exception when an employee clocks in much later than scheduled.

No

Meal Penalties

Apply meal penalties to Hourly employees based on No Lunch/Late Lunch exceptions.

Yes

Duration of meal penalties

1 hrs

Maximum meal penalties

Maximum amount of meal penalties that can be applied in a day

1 hrs

Rest Break Penalties

Apply rest break penalties to Hourly employees based on "No Rest Break" exceptions

Yes

Duration of Rest Break Penalties

1 hrs

Maximum Rest Break Penalties

Maximum amount of Rest Break Penalties that can be applied in a day

1 hrs

Maximum amount of meal penalty and rest break penalties

Maximum amount of meal penalty and rest break penalties that can be applied in a day.

2 hrs

Just below the Exceptions settings, you'll see a few additional options for late lunch and no lunch. Make sure these are set correctly, as well:

**Late lunch**

Records a "Late lunch" exception when employees take a late lunch break.

Yes

**No lunch**

Records a "No lunch" exception when employees don't take their lunch break.

Yes

**Minimum duration of a lunch break**

Sets the minimum duration an employee must be on break for it to count as a lunch break.

30

min

**First "No lunch" exception**

Sets the range an employee without lunch has to work before a first "No lunch" exception is recorded.

4

hrs

6

hrs

**Second "No lunch" exception**

Sets the range an employee without lunch has to work before a second "No lunch" exception is recorded.

8

hrs

12

hrs

All penalties are assessed in real-time and when correctly configured to enforce unpaid break duration on meal periods to 30 minutes, should almost completely eliminate meal penalties due to short meals.

## View meal penalties and exceptions under Manage Attendance


When a manager or supervisor navigates to Manage Attendance and views an employee's attendance entry, they can see (near the bottom of the record) whether any exceptions or penalties have been applied to that shift:

The screenshot displays the 'Manage Attendance' interface for a shift on Tuesday, June 2nd. The shift is for a 'Grocery Clerk' in the 'Grocery' department, with a cost of 68.00 and a duration of 8.00. The 'Exceptions' section is highlighted with a red box, showing 'NL' (No Lunch) and 'SX' (Short Meal) exceptions. The 'Meal Penalty' is listed as 2.00. The 'Standard Rules' table shows Regular pay at 68.00 and OT at 0.00.

Desc	Duration	Cost
Regular	8.0	68.00
OT	0.0	0.00
Double OT	0.0	0.00
Paid Break	0.0	0.00
Holiday	0.0	0.00



So in this case, two regular hours have been counted toward meal penalties for this employee's shift.

 Hovering over the exception icons will provide a description of each. Manual overrides can be applied by clicking the plus sign button in the lower right.

# Show temperature field during clock-ins

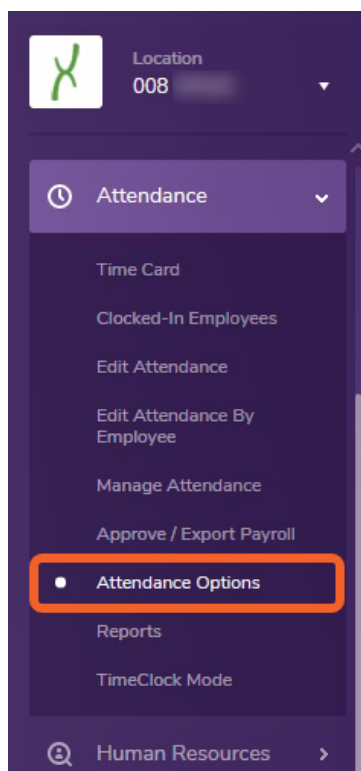
TimeForge allows managers to enable temperature tracking at their location. When an employee logs into TimeForge to clock-in for their shift, they will be prompted to enter their temperature.

This setting only works for browser-based clock-ins at this time.

## Enable temperature field

### Navigate to Attendance > Attendance Options

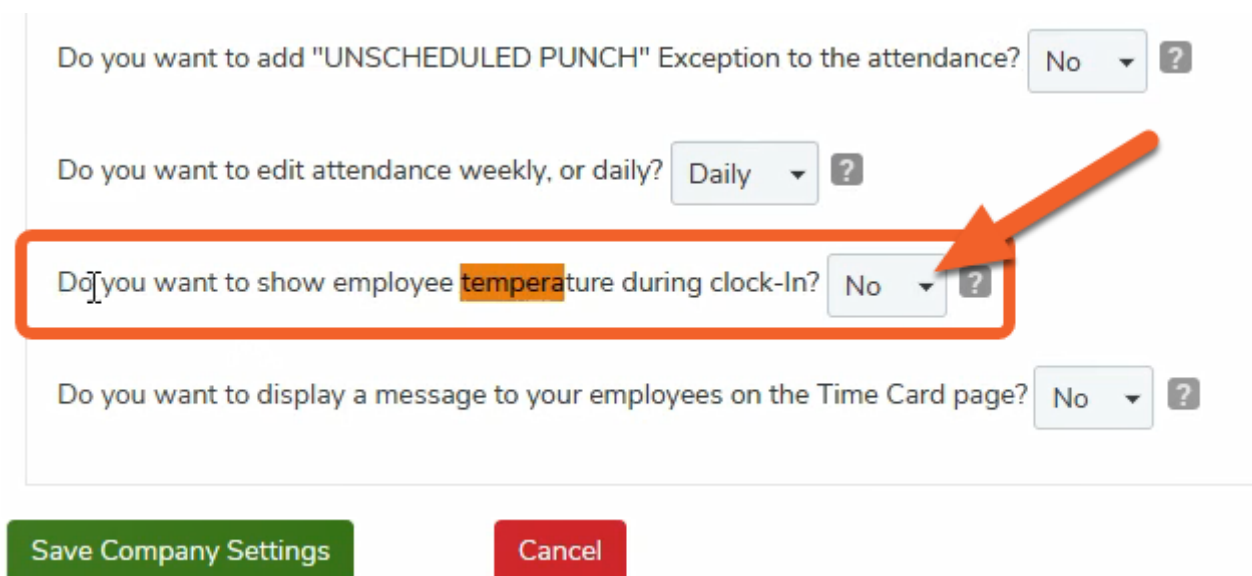
At the location level, open the **Attendance tab** and select **Attendance Options** from the menu.



### Locate the temperature setting and select Yes

A quick way to locate this setting is to hit CTRL+F on your keyboard to open a "Find" box, then enter 'temperature'.

Select **Yes** from the dropdown box.



Do you want to add "UNSCHEDULED PUNCH" Exception to the attendance? No ?

Do you want to edit attendance weekly, or daily? Daily ?

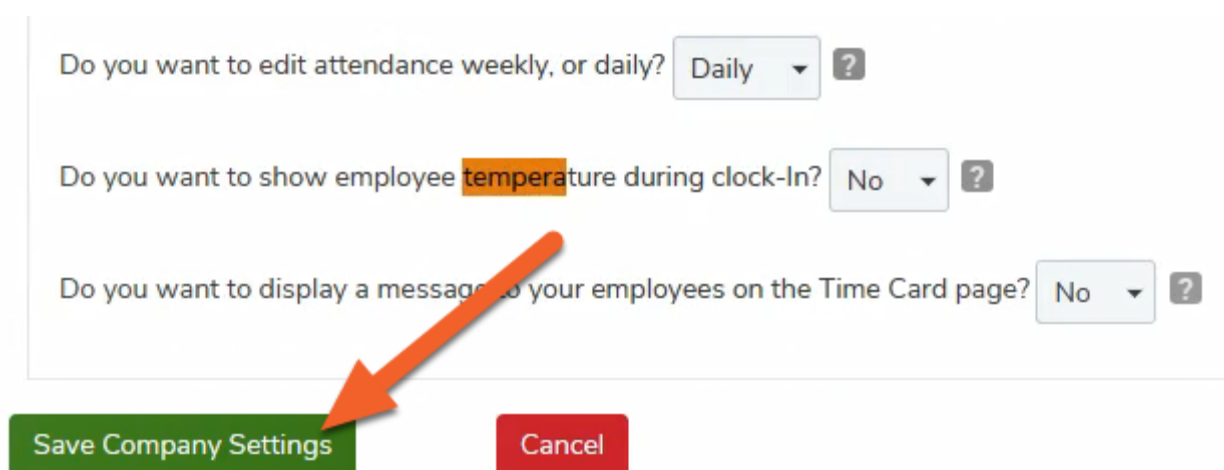
Do you want to show employee temperature during clock-In? No ?

Do you want to display a message to your employees on the Time Card page? No ?

Save Company Settings Cancel

## Click Save

Don't forget to click the **Save** button to save your changes. If you have multiple departments, you may be prompted to choose whether to copy your settings to those departments as well.



Do you want to edit attendance weekly, or daily? Daily ?

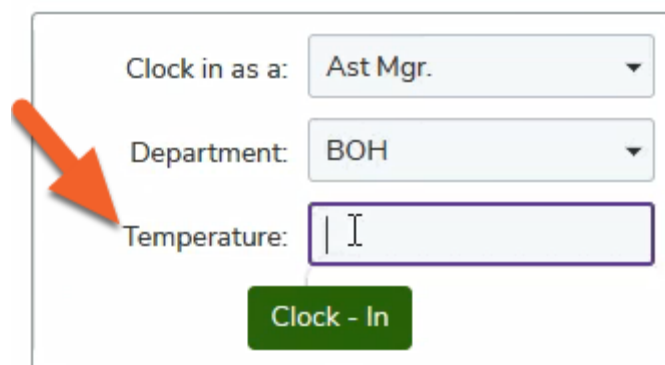
Do you want to show employee temperature during clock-In? No ?

Do you want to display a message to your employees on the Time Card page? No ?

Save Company Settings Cancel

## Enter temperature during clock in

To see the new setting in action, navigate to your Today Page or Personal dashboard. You should now see a Temperature field listed above the Clock-In button:



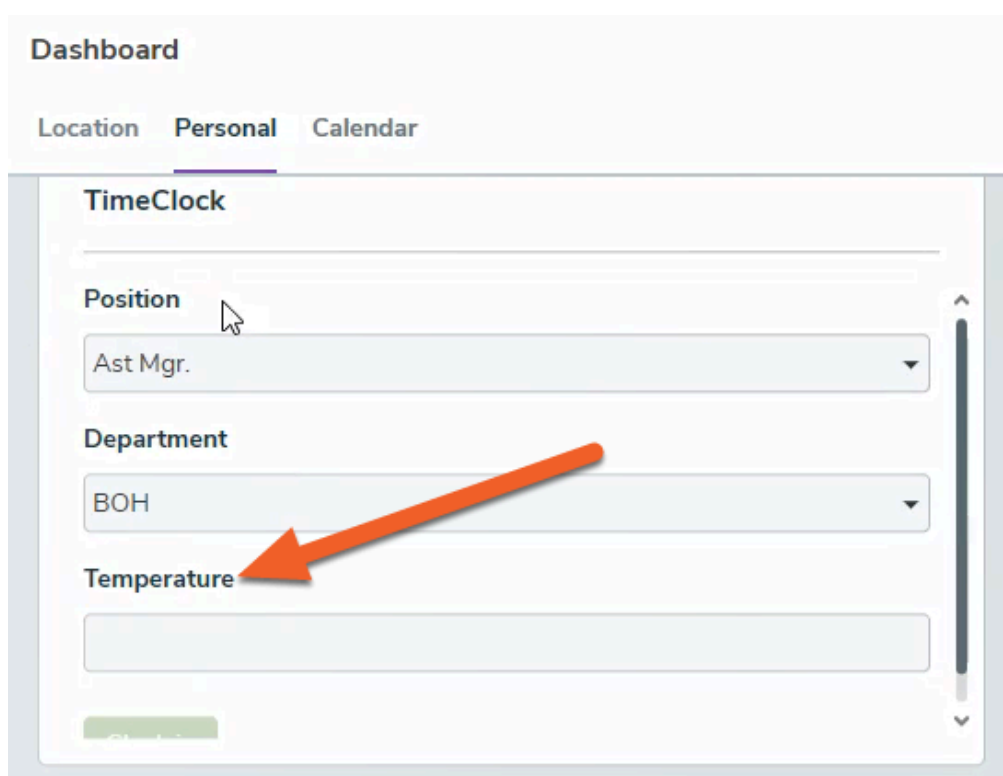
Clock in as a: Ast Mgr. ▼

Department: BOH ▼

Temperature: | I

Clock - In

If you're using the new TimeForge dashboard, the field will be shown for the TimeClock widget:



**Dashboard**

Location **Personal** Calendar

**TimeClock**

Position  
Ast Mgr. ▼

Department  
BOH ▼

Temperature

Clock - In

The temperature field will also be shown when editing your attendance:

Enter Attendance Information

Please enter your attendance information.

Position:

Ast Mgr.

Department:

BOH

Date:

Start Time:

End Time:

Notes:

Temperature:

Save

Cancel

# Ad-hoc reports, including hourly sales reports

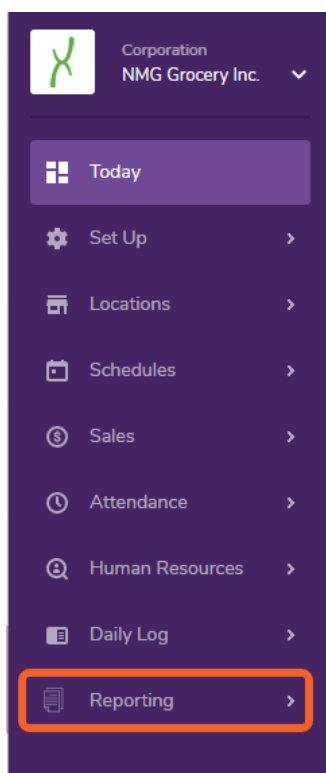
Under the new Reporting tab, managers now have access to ad-hoc reporting: a simple yet powerful tool that allows you to build and run your own reports in just a few easy steps!

One of the biggest benefits to ad-hoc reporting is that *you can now run hourly sales reports*. TimeForge will show you the entire week's sales, with the option to view manager projections, actual figures, or system forecasts.

Keep reading to learn how!

## Open the Reporting tab

Ad-hoc reports are under the new **Reporting tab** in the left side navigation menu:



## Select Ad-hoc Reporting

Select **Ad-hoc Reporting** to open up the new reporting tool.

The tool is designed to walk you through two simple steps:

1. Choosing the report type (Sales, Employee, Schedules, etc.)

## 2. Choosing what data to include in your chosen report

The screenshot displays the 'Ad-hoc Reporting' interface for 'Corporation NMG Grocery Inc.' at the 'Corporate Level'. A sidebar on the left contains navigation options: Today, Set Up, Locations, Schedules, Sales, Attendance, Human Resources, and Daily Log. The 'Reporting' section is expanded, showing 'Ad-hoc Reporting' as the selected option. The main content area features a progress bar with two steps: '1 CHOOSE REPORT TYPE' (highlighted with a red box) and '2 CHOOSE FILTERS'. Below the progress bar, a section titled 'Select one of the Report Type' offers several options: 'Employees', 'Schedules', 'Attendance', 'Sales', 'Employees & Schedules', 'Employees & Attendance', 'Schedules & Attendance', 'Schedules & Sales', and 'Employees & Schedules & Attendance'. A blue 'Next' button is positioned at the bottom of the selection area. The top right corner shows notification icons for 39 alerts and 1 message, along with a user profile for 'Eric'.

Let's give it a try by running an hourly sales report!

## Hourly Sales Report

### Choose a report type

Start building your ad-hoc report by choosing the type. For this example, we'll choose **Sales**.

1 CHOOSE REPORT TYPE

2 CHOOSE FILTERS

Select one of the Report Type

Employees Schedules Attendance **Sales**

Employees & Schedules Employees & Attendance Schedules & Attendance

Schedules & Sales Employees & Schedules & Attendance

Next

## Choose what data to use

For a Sales report, you can choose:

1. what **location(s)** to include,
2. whether to run the report for a particular (or all) **departments**,
3. for what **sales category**, and
4. for what **date**:



1

CHOOSE REPORT TYPE

2

CHOOSE FILTERS

Location

1 NMG Grocery, Inc. x v


Department

2 All Departments x v

Sales Category

3 Gross Sales x v

Date

4 07/29/2020 

Back

Generate Report

The report will show you data for an entire week, starting from the date selected.

## View your hourly sales!

You can use the buttons at the top of the report to toggle between **Manager Projections**, **Actual Figures**, and **System Forecasts**.

Manager Projections Actual Figures System Forecasts **Export** Change Filters Change Report

	07/27/2020	07/28/2020	07/29/2020	07/30/2020	07/31/2020	08/01/2020	08/02/2020	Total
Total	8,281.59	7,095.81	13,498.38	0	0	0	0	28,875.78
12:00 AM								0
1:00 AM								0
2:00 AM								0
3:00 AM								0
4:00 AM								0
5:00 AM	523.63	601.79	964.17					2,089.59
6:00 AM	624.98	385.44	964.17					1,974.59
7:00 AM	455	346.33	964.17					1,765.5
8:00 AM	653	659	964.17					2,276.17
9:00 AM	738	633.79	964.17					2,335.96
10:00 AM	690	689	964.17					2,343.17
11:00 AM	654.76	346.57	964.17					1,965.5
12:00 PM	674.66	601.79	964.17					2,240.62
1:00 PM	856.43	366.77	964.17					2,187.37

💡 The **Change Report** button will take you back to step 1, so you can select a new report type (e.g. Employee, Schedules, Attendance, etc.). The **Change Filters** button will take you back to step 2, so you can select which data to include in the report for the type selected.

## Export your report in a format you like!

Click the **Export** button to export your report as an Excel file, CSV, or PDF:

Manager Projections Actual Figures System Forecasts **Export** Change Filters Change Report

Excel  
CSV  
PDF

	07/27/2020	07/28/2020	07/29/2020	07/30/2020
Total	8,281.59	7,095.81	13,498.38	0
12:00 AM				

📘 Ad-hoc reports are in beta, so you can expect additional features and functionality coming your way in the future. In the meantime, [we'd love to hear your feedback!](#)