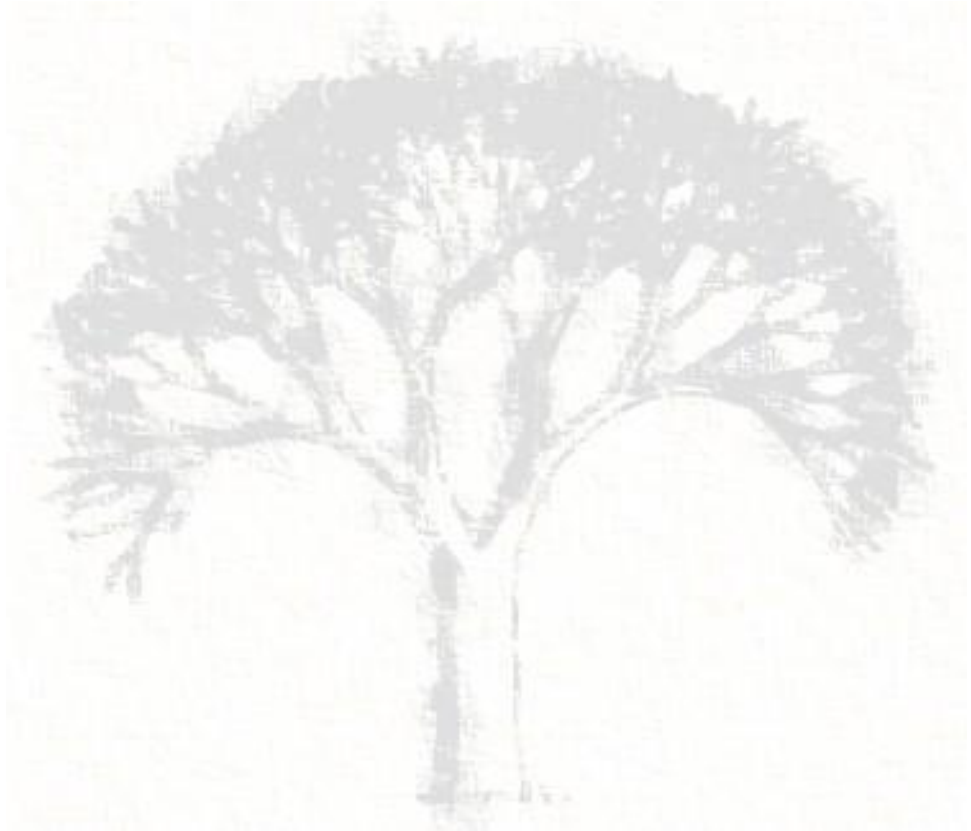
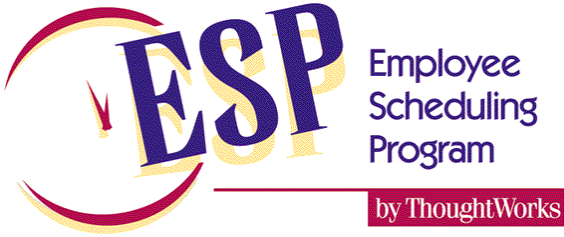




Weekly checklists



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Scheduling checklists

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There are three checklists that can be used with ESP:

1. the first checklist outlines the steps you need to follow when setting up your files for the first time,
2. the second lists the procedures you should follow each week for scheduling one location, and
3. the third lists the procedures you should follow for scheduling a multi-location setup (primary location with one or more SPOD(s)).

Where appropriate, each step is followed by a code indicating the menu choice(s) used to enter the required information. The code gives you the *Main menu* and sub-menu choice(s) necessary. For example, to enter the *Manning chart*, you would choose *Main menu* choice D, followed by sub-choice B, this would be shown as:

(D – B)

Similarly, the code (D – C) means *Main menu* Choice D, followed by sub-choice C (the *Hours of Operation* screen).

Initial setup of your scheduling data – what you need to have on hand

Before you start, make sure that you assemble the information below:

- ✓ The job categories and codes you will be using, whether or not the jobs are unit producing, and the average rating you wish scheduled for each job. You must also decide the order you wish the jobs to appear on the line bar schedule. For example, you may wish your Counter shifts to be printed first, followed by your Grill shifts, and so on.
- ✓ The open and close hours each day for your locations, the latest time a shift may begin in the evening, and the number and type of opening and closing staff you require.
- ✓ Copies of your manning charts and the days and times that they will be used. You may define up to ten different manning charts, each for a different set of days and times.
- ✓ If your location works on the team concept, a copy of the weekly availabilities for each team.
- ✓ All information on your employees, including:
 - ✓ full availability
 - ✓ minimum and maximum hours they can work per week
 - ✓ maximum number of days and closing shifts they can work
 - ✓ full/part time status
 - ✓ legal holiday availability
 - ✓ wage information
 - ✓ qualified jobs and performance ratings
 - ✓ any fixed shifts they work
- ✓ Hourly sales history for the last few weeks.
- ✓ Any fixed shifts not reserved for a particular employee. These are shifts that you would normally schedule, but wish the computer to choose the employee to work. For example, you may have a delivery on Wednesday from 1:00 PM to 4:00 PM, for which you require 2 people. You may specify this as a fixed shift, and allow the computer to choose from among all the employees who are qualified to work receiving the delivery.
- ✓ The shift lengths you wish produced most often. For example, if you consider a 3.5 hour shift to be the optimal length, and a 4 hour shift to be the next best length, you will use this to decide the lengths of shifts that ESP will produce. You will also need the number and length of breaks an employee receives for each length of shift.
- ✓ Finally, you must have on hand miscellaneous information that we call Schedule preferences. This information includes the starting day of your schedule (usually Monday), holiday pay percentage, the minimum number of hours allowed between shifts, and work restrictions on employees classified as minors.

Each of the above areas is covered in detail below and includes the procedure required to perform the operation.

Initial set-up checklist

Operation	Complete <input checked="" type="checkbox"/>
Enter job codes and required ratings (D-F)	<input type="checkbox"/>
Enter opening and closing information (D-C).....	<input type="checkbox"/>
Define manning charts (D-B)	<input type="checkbox"/>
Enter shift lengths, breaks, busy times (D-D)	<input type="checkbox"/>
Define your employee template (C-F)	<input type="checkbox"/>
Enter your employees (C-A)	<input type="checkbox"/>
Enter last few weeks of sales information (B-A)	<input type="checkbox"/>
Enter fixed shifts (D-A)	<input type="checkbox"/>
Enter labor class definitions (D-H)	<input type="checkbox"/>
Enter schedule preferences (D-I)	<input type="checkbox"/>
Set up exception ratings ¹ (D-G)	<input type="checkbox"/>
Enter your labor chart ¹ (D-E)	<input type="checkbox"/>
Enter team information ¹ (C-H)	<input type="checkbox"/>

¹ Step is optional

Weekly checklists – what you need to have on hand when scheduling one location or a multi-location setup

Before you begin each week you should assemble and organize the following information:

- ✓ Hourly sales information for every day of the last week.
- ✓ A list of employees that have left your employ during the last scheduling period.
- ✓ Information on any new employees that have been hired since the last scheduling period.
- ✓ Any changes in your employees' information that will affect next week's schedule. This may be availability changes (due to crew requests), changes in job qualifications, ratings, minimum/ maximum hours, and so on.
- ✓ It is a good idea to keep a binder of some form that your employees may use to record their time off requests. This will allow you to quickly make changes to their availabilities when it comes time to do the schedule.
- ✓ Any fixed shifts you will be using this week, including manager schedules, deliveries, and so on.

Scheduling one location only

Operation	Complete <input checked="" type="checkbox"/>
Enter last week's sales ² (B-A)	<input type="checkbox"/>
Generate projected sales (B-D-A OR B-D-C).....	<input type="checkbox"/>
Remove any employees that have left (C-D)	<input type="checkbox"/>
Add any new employees (C-A)	<input type="checkbox"/>
Remove last week's temporary changes ³ (C-E).....	<input type="checkbox"/>
Perform crew requests for this week ⁴ (C-C THEN C-B).....	<input type="checkbox"/>
Review and adjust fixed shifts ⁵ (C-B OR C-C; D-A)	<input type="checkbox"/>
Perform scheduling (A-A)	<input type="checkbox"/>
Edit the schedule as necessary (A-B)	<input type="checkbox"/>
Print the final schedule (A-C)	<input type="checkbox"/>
Make your weekly backup using SCBACKUP	<input type="checkbox"/>

² If your sales are automatically transferred from your POS, continue to the next step

³ The date used when removing temporary changes should be set to the first day of the new schedule

⁴ Permanent changes **must** be done before temporary changes. For temporary changes, the dates entered should be for the entire scheduling week. Do any long range temporary changes last

⁵ Also consider any unusual circumstances, such as holidays, that will affect the schedule

Scheduling a multi-location setup

Operation	Complete <input checked="" type="checkbox"/>
Enter last week's sales for Primary site ⁶ (B-A)	<input type="checkbox"/>
Generate projected sales from Primary site (B-D-A OR B-D-C)	<input type="checkbox"/>
Enter last week's sales for SPOD site(s) ⁶ (B-A)	<input type="checkbox"/>
Generate projected sales from SPOD site(s) (B-D-A OR B-D-C)	<input type="checkbox"/>
Remove any employees that have left (C-D)	<input type="checkbox"/>
Add new employees; setup appropriate availability for all sites (C-A)	<input type="checkbox"/>
Remove last week's temporary changes ⁷ (C-E)	<input type="checkbox"/>
Perform crew requests for this week ⁸ (C-C THEN C-B)	<input type="checkbox"/>
Review and adjust fixed shifts ⁹ (C-B OR C-C; D-A)	<input type="checkbox"/>
Perform scheduling (A-A)	<input type="checkbox"/>
Edit the schedule for both locations as necessary (A-B)	<input type="checkbox"/>
Print final reports for each location (A-C)	<input type="checkbox"/>
Make your weekly backup using SCBACKUP	<input type="checkbox"/>

⁶ If your sales are automatically transferred from your POS, continue to the next step

⁷ The date used when removing temporary changes should be set to the first day of the new schedule

⁸ Permanent changes **must** be done before temporary changes. For temporary changes, the dates entered should be for the entire scheduling week. Do any long range temporary changes last

⁹ Also consider any unusual circumstances, such as holidays, that will affect the schedule