

ESP features

Volume projection features

- ESP analyzes volume in great detail, from whole hours down to as detailed as every 15 minutes.
- Build volume projections based on historical volume taking multiple factors into account such as:
 - Special events
 - Weather
 - Seasonal changes in sales
 - Promotional events
 - Other factors that influence sales briefly
- Eliminates high and low values for each time period (15, 30, 60 minutes) so that the factors above are eliminated, leaving an average that is more accurate.
- Allows for manual adjustments to individual times, or entire day/week in a single entry.
- Maintains all historical data for as long as needed. Old data can be purged at any time.

Positioning features

- After making the volume projection, ESP projects labour requirements for multiple tasks (stations) up to the detail level chosen by the user (15, 30 or 60 minutes).
- Shifts are then created to fulfill exactly the labour requirement for each station based on the shift lengths requested by the user, thus eliminating excess labour.
- Since volume changes daily and weekly, the shifts are automatically adjusted daily and weekly to ensure optimal labour use.
- Volume can be measured by sales, customer counts, item counts, or any other unit that can be measured in the detail needed (15, 30, 60 minutes).
- Multiple department capability allows for multiple points of sale within the same business operation.

Employee features

- Employees are assigned to the shifts that are created based on their availability, qualification for the stations needed, and other factors specified by the user, such as balancing of hours, skill level, rotation to different stations or shifts, and wage.
- Fixed shifts (core shifts ESP will not change) can be assigned either to no particular employee, or to a specific employee.
- Variable shifts are scheduled around the fixed shifts so no labour is wasted.
- Employee requests for days off, vacation or changes to their available work hours are easily accommodated.
- Two complete availabilities for each employee make it easy to switch during seasonal changes (i.e. students out of school for the summer)

Templates

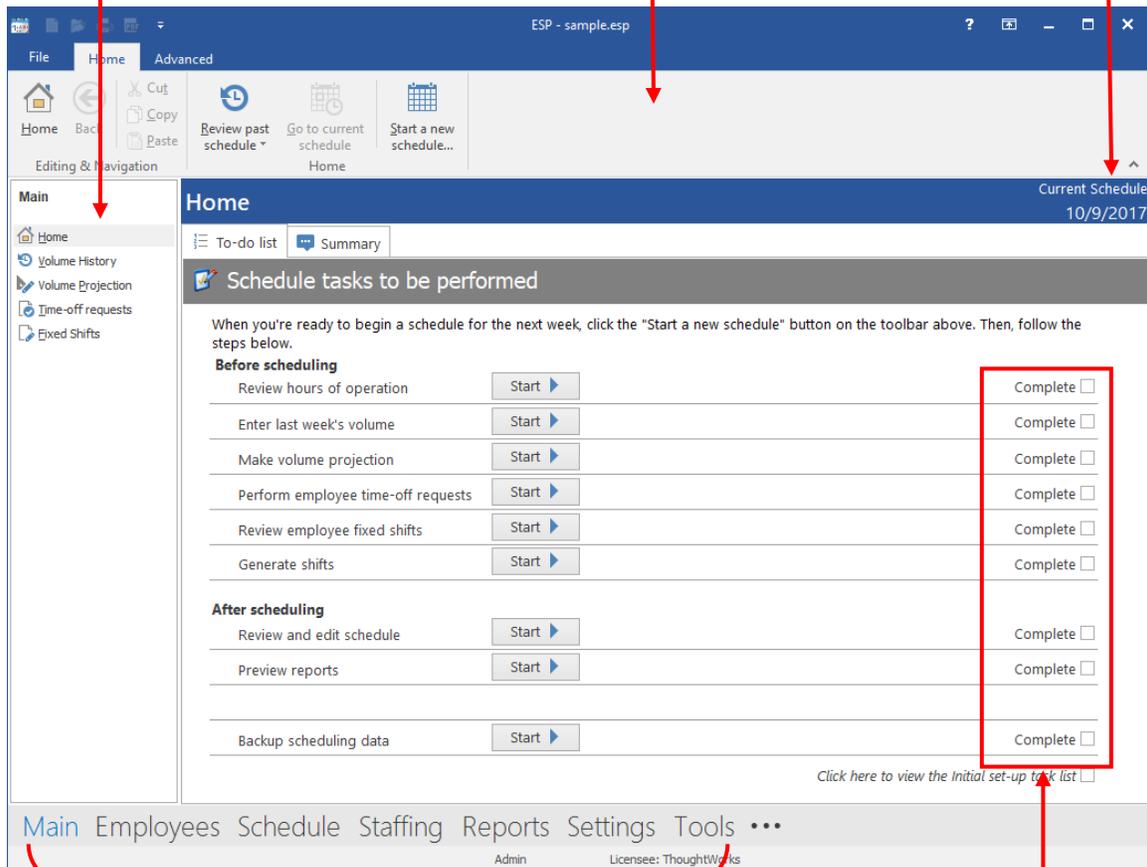
- Templates for new installations can be created using the MDB file and populating it with bare minimum data, then placing it in the templates folder with the file extension “.ESP”

The ESP Home page

This is the main "Places" panel that lets you navigate to anywhere you want. Click the item you wish to open.

The Ribbon contains all the most important tools you need. It changes with each form to offer you only the correct tools.

The date of the current schedule is always displayed here.



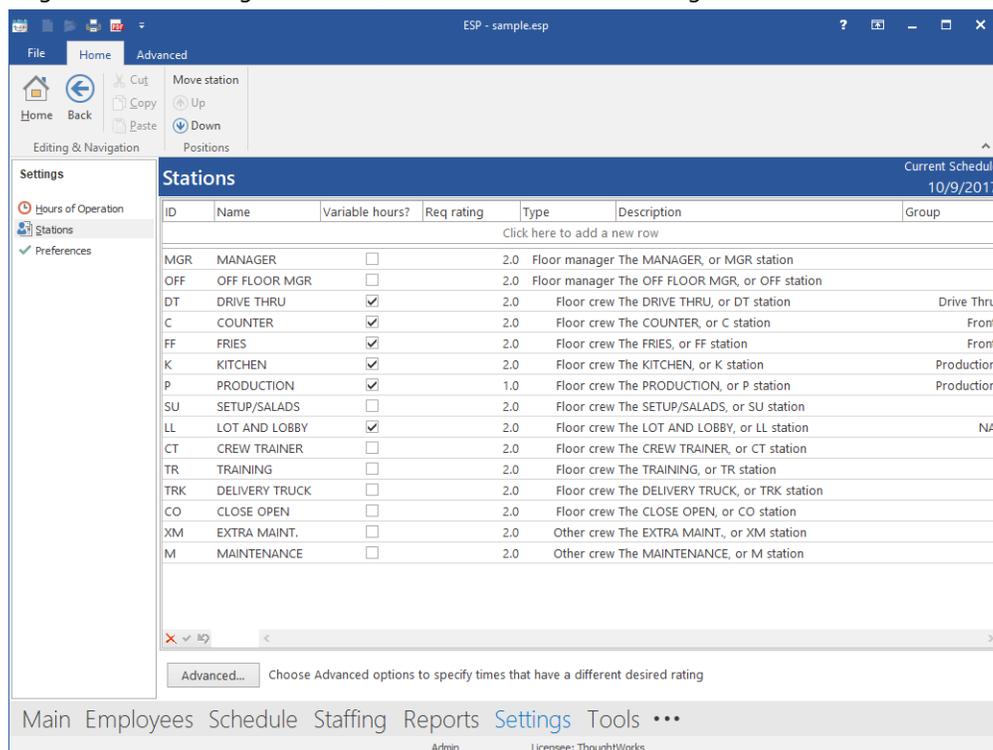
The screenshot shows the ESP Home page interface. At the top, there is a ribbon with tabs for 'File', 'Home', and 'Advanced'. The 'Home' tab is active, showing a ribbon with buttons for 'Home', 'Back', 'Cut', 'Copy', 'Paste', 'Review past schedule', 'Go to current schedule', and 'Start a new schedule...'. Below the ribbon is a 'Main' navigation panel on the left with a list of items: 'Home', 'Volume History', 'Volume Projection', 'Time-off requests', and 'Fixed Shifts'. The main content area is titled 'Home' and contains a 'To-do list' and 'Summary' section. Below this is a 'Schedule tasks to be performed' section with a checklist of tasks. The tasks are grouped into 'Before scheduling' and 'After scheduling'. Each task has a 'Start' button and a 'Complete' checkbox. A red box highlights the 'Complete' checkboxes for the tasks: 'Review hours of operation', 'Enter last week's volume', 'Make volume projection', 'Perform employee time-off requests', 'Review employee fixed shifts', 'Generate shifts', 'Review and edit schedule', 'Preview reports', and 'Backup scheduling data'. At the bottom of the page, there is a navigation bar with tabs for 'Main', 'Employees', 'Schedule', 'Staffing', 'Reports', 'Settings', and 'Tools'. The 'Main' tab is selected. The bottom right corner shows 'Admin' and 'Licensee: ThoughtWorks'.

The task groups are how you navigate through the various forms and charts. When you click on a group the options in that group appear on the left panel.

The checklist helps you ensure you complete everything in the correct sequence. Use it to keep yourself organized.

Stations

- The ID column should be something simple and easy to remember
- The required rating allows you to affect the quality of the crew that are scheduled. However it is only effective if your employee ratings are accurate and up to date. Generally a rating of 2.0 works well for most stations. In the schedule preferences chart you can specify how ratings work. Is 1 better than 4, or is 4 better than 1
- You can use two special ratings: The **Coach** rating allows you to designate those employees who are exceptionally good. ESP will try to schedule poor employees at the same time as a Coach, to help them improve. The **Trainee** rating allows you to designate employees who are not experienced. ESP will try to make sure that Trainees are scheduled at the same time as a coach to help them improve. Trainee's will never be scheduled to work alone at their station.
- Type: This allows you to tell ESP what type of position it is. **Floor crew** are counted as regular crew people. **Other crew** are counted as people who will not be helping run the business and serve the customers. (Maintenance people for example) **Floor manager** is a manager who is helping supervise the crew people, and will be counted in the crew to manager ratio in the statistics. **Other manager** is not counted as part of the crew/management ratio. They are doing administrative tasks. **Shift manager** may only be assigned to one position. The shift manager is the person responsible for the entire operation when they are working.
- Use the Move Station UP / DOWN arrows on the Ribbon to organize your stations in the order you want them to appear on your schedule
- Group: Assign what general type of work this station involves. This feature is used to determine where managers should be assigned to work, when there are excess managers scheduled.



| ID | Name | Variable hours? | Req rating | Type | Description | Group |
|-----|----------------|-------------------------------------|------------|---------------|------------------------------------|------------|
| MGR | MANAGER | <input type="checkbox"/> | 2.0 | Floor manager | The MANAGER, or MGR station | |
| OFF | OFF FLOOR MGR | <input type="checkbox"/> | 2.0 | Floor manager | The OFF FLOOR MGR, or OFF station | |
| DT | DRIVE THRU | <input checked="" type="checkbox"/> | 2.0 | Floor crew | The DRIVE THRU, or DT station | Drive Thru |
| C | COUNTER | <input checked="" type="checkbox"/> | 2.0 | Floor crew | The COUNTER, or C station | Front |
| FF | FRIES | <input checked="" type="checkbox"/> | 2.0 | Floor crew | The FRIES, or FF station | Front |
| K | KITCHEN | <input checked="" type="checkbox"/> | 2.0 | Floor crew | The KITCHEN, or K station | Production |
| P | PRODUCTION | <input checked="" type="checkbox"/> | 1.0 | Floor crew | The PRODUCTION, or P station | Production |
| SU | SETUP/SALADS | <input type="checkbox"/> | 2.0 | Floor crew | The SETUP/SALADS, or SU station | |
| LL | LOT AND LOBBY | <input checked="" type="checkbox"/> | 2.0 | Floor crew | The LOT AND LOBBY, or LL station | NA |
| CT | CREW TRAINER | <input type="checkbox"/> | 2.0 | Floor crew | The CREW TRAINER, or CT station | |
| TR | TRAINING | <input type="checkbox"/> | 2.0 | Floor crew | The TRAINING, or TR station | |
| TRK | DELIVERY TRUCK | <input type="checkbox"/> | 2.0 | Floor crew | The DELIVERY TRUCK, or TRK station | |
| CO | CLOSE OPEN | <input type="checkbox"/> | 2.0 | Floor crew | The CLOSE OPEN, or CO station | |
| XM | EXTRA MAINT. | <input type="checkbox"/> | 2.0 | Other crew | The EXTRA MAINT., or XM station | |
| M | MAINTENANCE | <input type="checkbox"/> | 2.0 | Other crew | The MAINTENANCE, or M station | |

Stations – Advanced

- Use the Advanced button at the bottom of the Stations chart to override the rating for important high volume sales periods.
- Shown below is an example. In this example we have asked that the average rating of employees working in the kitchen be improved to 1.5 instead of 2.0 during the important weekend breakfast period. We have also improved the rating in Drive-Thru to 1.5 during the important weekend lunch period.
- Don't set up too many rating overrides. If you don't have enough experienced employees then ESP cannot satisfy your request. ESP will not leave a shift unassigned just because it cannot find a person with a good enough rating. It will fill the shift with who is available even if their rating does not meet your preference on this chart.

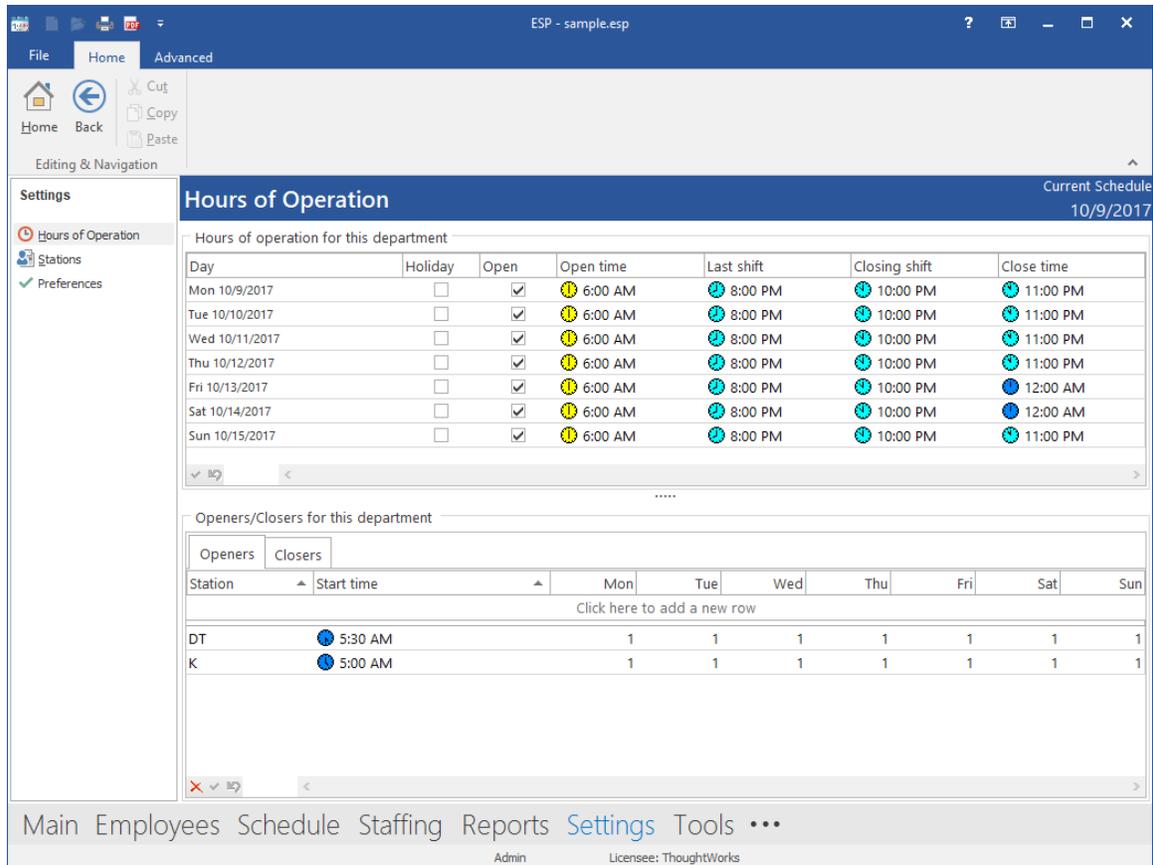
Advanced ✕

Advanced options for station ratings
Use this form to specify desired ratings for specific times and stations.

| Day | Start | Finish | Station | Desired Rating |
|-----------------------------|------------|------------|---------|----------------|
| Click here to add a new row | | | | |
| Sat | 🕒 6:00 AM | 🕒 11:00 AM | K | 1.5 |
| Sat | 🕒 10:00 AM | 🕒 2:00 PM | DT | 1.5 |
| Sun | 🕒 6:00 AM | 🕒 11:00 AM | K | 1.5 |
| Sun | 🕒 10:00 AM | 🕒 2:00 PM | DT | 1.5 |

Hours of operation

- The opening and closing times should be set to the times you open and close to the public. If you are open 24 hours then both **must** be set to 4:00am (this is not configurable)
- If your Drive-Thru is open longer than your lobby you set the close time to the time your Drive-Thru closes.
- The last shift is the latest time of day that you will allow a shift to begin. Shifts that are overnight are not affected by this setting since they are all fixed.
- In some jurisdictions young employees who are students may only work late at night a limited number of times per week. What is the definition of "late"? In the "close shift" column you enter your definition of "late". ESP will count how many times per week each employee works past this time.
- Use the Openers and Closers tabs to specify how many employees are required to come in before you open for business to help set up and how many employees are required after closing time to help clean up. You may only use variable labour stations in this section. Leave this blank if you are open 24 hours.



ESP - sample.esp

File Home Advanced

Home Back Cut Copy Paste

Editing & Navigation

Settings

- Hours of Operation
- Stations
- Preferences

Hours of Operation

Current Schedule 10/9/2017

Hours of operation for this department

| Day | Holiday | Open | Open time | Last shift | Closing shift | Close time |
|----------------|--------------------------|-------------------------------------|-----------|------------|---------------|------------|
| Mon 10/9/2017 | <input type="checkbox"/> | <input checked="" type="checkbox"/> | 6:00 AM | 8:00 PM | 10:00 PM | 11:00 PM |
| Tue 10/10/2017 | <input type="checkbox"/> | <input checked="" type="checkbox"/> | 6:00 AM | 8:00 PM | 10:00 PM | 11:00 PM |
| Wed 10/11/2017 | <input type="checkbox"/> | <input checked="" type="checkbox"/> | 6:00 AM | 8:00 PM | 10:00 PM | 11:00 PM |
| Thu 10/12/2017 | <input type="checkbox"/> | <input checked="" type="checkbox"/> | 6:00 AM | 8:00 PM | 10:00 PM | 11:00 PM |
| Fri 10/13/2017 | <input type="checkbox"/> | <input checked="" type="checkbox"/> | 6:00 AM | 8:00 PM | 10:00 PM | 12:00 AM |
| Sat 10/14/2017 | <input type="checkbox"/> | <input checked="" type="checkbox"/> | 6:00 AM | 8:00 PM | 10:00 PM | 12:00 AM |
| Sun 10/15/2017 | <input type="checkbox"/> | <input checked="" type="checkbox"/> | 6:00 AM | 8:00 PM | 10:00 PM | 11:00 PM |

Openers/Closers for this department

Openers Closers

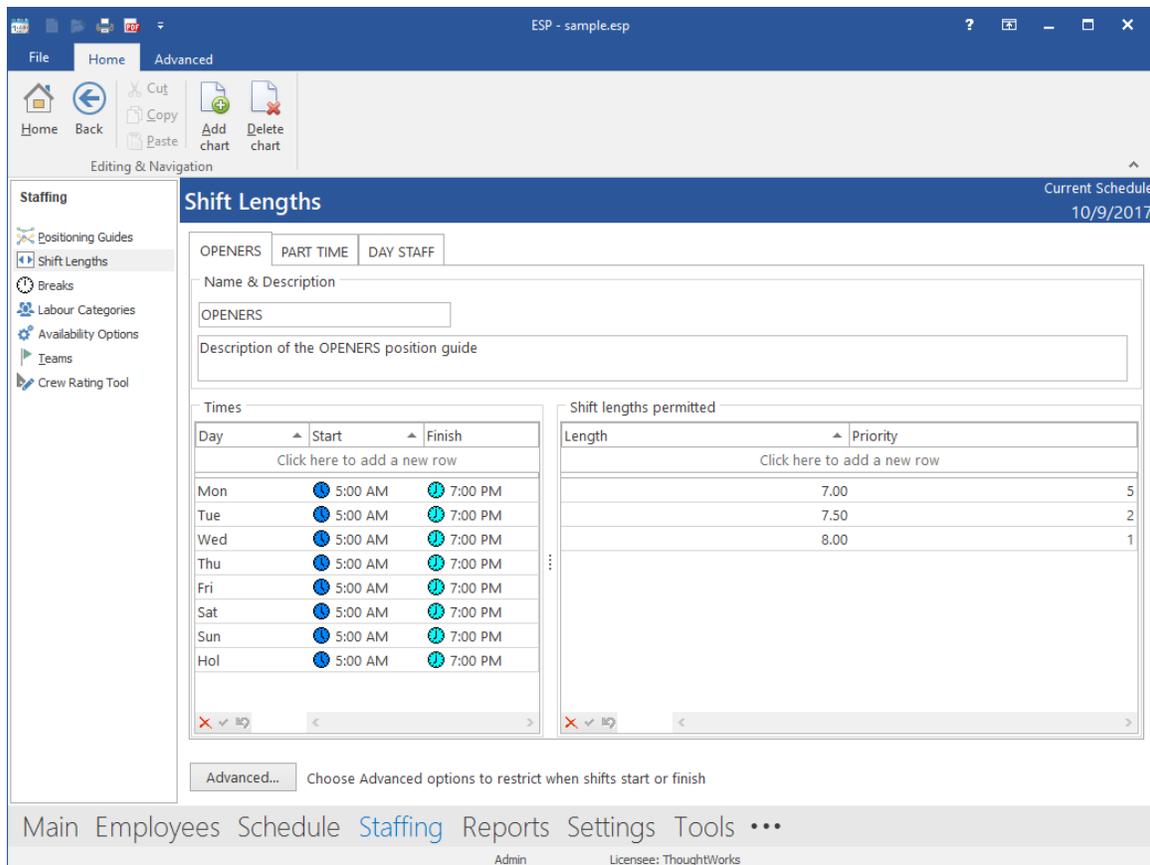
| Station | Start time | Mon | Tue | Wed | Thu | Fri | Sat | Sun |
|-----------------------------|------------|-----|-----|-----|-----|-----|-----|-----|
| Click here to add a new row | | | | | | | | |
| DT | 5:30 AM | 1 | 1 | 1 | 1 | 1 | 1 | 1 |
| K | 5:00 AM | 1 | 1 | 1 | 1 | 1 | 1 | 1 |

Main Employees Schedule Staffing Reports Settings Tools

Admin Licensee: ThoughtWorks

Shift lengths

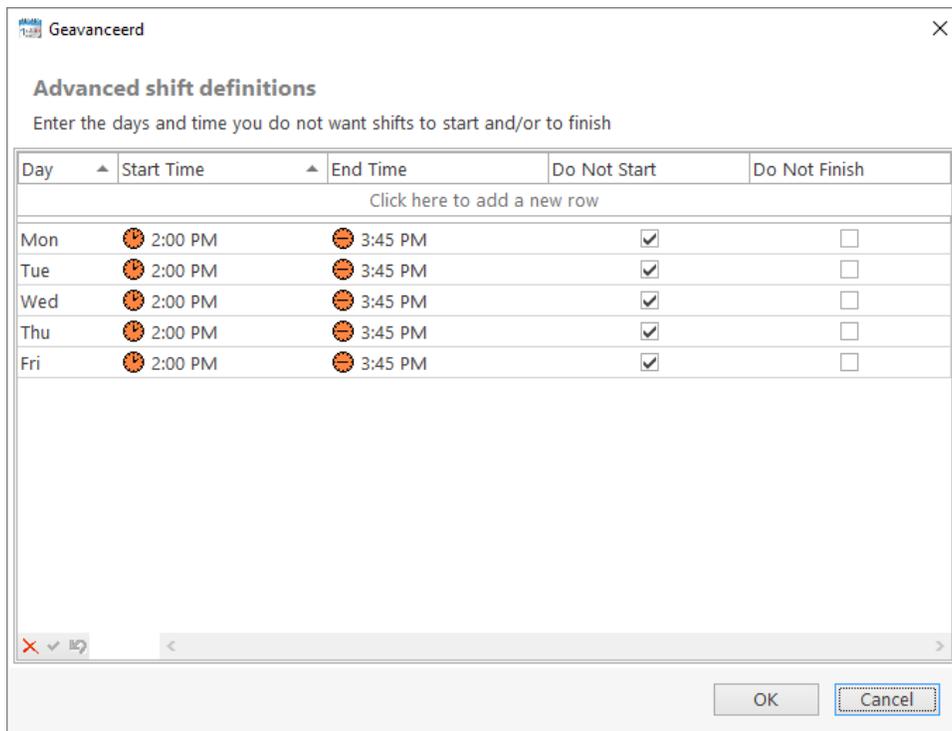
- Use this chart to define what shift lengths you want to use. Remember that the shift length must fit within the times you set up. For example if you want to use 8 hour shifts, then the chart cannot be in effect only from 6:00am to 9:00am because that is only a 3 hour period.
- Use multiple overlapping charts to ensure you get the exact shift lengths you desire. In particular it is often necessary to have one chart in effect early in the morning until shortly after lunch that allows only longer shifts for your opening crew, then another chart that starts mid-morning (e.g. 10:00am) that allows shorter shifts for your lunch/dinner staff.
- Assign each shift length that you wish to use, a rating from 1 to 10. A rating of 1 means that this shift length is a very good choice. A rating of 10 means it is a very poor choice but it is still permitted. Any shift lengths that you do not wish to use should not be entered at all.
- If the shift lengths for a number of days and times are the same, combine them onto one chart. Do not use a different chart for each day if the shift lengths you use are the same.
- Any time there are no shift lengths specified, ESP will not generate any shifts unless they are fixed shifts.



The screenshot shows the 'Shift Lengths' configuration window in the ESP software. The window title is 'ESP - sample.esp'. The interface includes a navigation menu on the left with options like 'Positioning Guides', 'Shift Lengths', 'Breaks', 'Labour Categories', 'Availability Options', 'Teams', and 'Crew Rating Tool'. The main content area has tabs for 'OPENERS', 'PART TIME', and 'DAY STAFF'. The 'OPENERS' tab is active, showing a form for 'Name & Description' with the text 'OPENERS' and a description field. Below this are two tables: 'Times' and 'Shift lengths permitted'. The 'Times' table lists days from Monday to Sunday and Holydays, with start and finish times of 5:00 AM and 7:00 PM. The 'Shift lengths permitted' table lists shift lengths (7.00, 7.50, 8.00) and their corresponding priorities (5, 2, 1). At the bottom, there is a navigation bar with links for 'Main Employees Schedule', 'Staffing', 'Reports', 'Settings', and 'Tools'. The user is logged in as 'Admin' and the license is 'ThoughtWorks'.

Shift lengths – Advanced

- Use the Advanced button on the shift lengths form to specify if there are times of the day when you will not allow shifts to start or times when shifts may not end.
- In the example shown we have specified that no shifts are permitted to start between 2:00pm and 3:45pm because students who work in the evening can't get to work before 4:00pm. Since we only selected the "Do not start" option, shifts may end during this period.
- Use this chart with caution; too many restrictions will cause bad schedules and over scheduling. It is usually best to leave this chart blank and allow ESP to generate the shifts as they are needed.



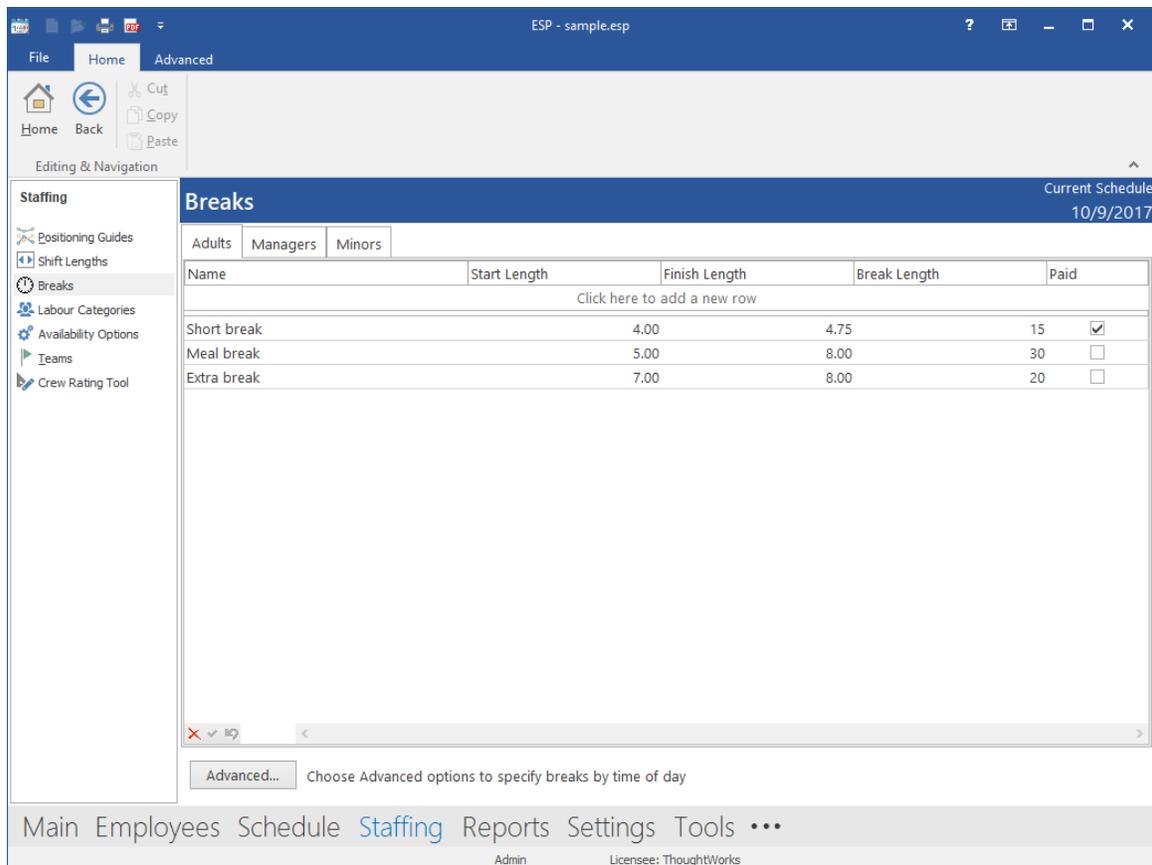
Advanced shift definitions
Enter the days and time you do not want shifts to start and/or to finish

| Day | Start Time | End Time | Do Not Start | Do Not Finish |
|-----------------------------|------------|----------|-------------------------------------|--------------------------|
| Click here to add a new row | | | | |
| Mon | 2:00 PM | 3:45 PM | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Tue | 2:00 PM | 3:45 PM | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Wed | 2:00 PM | 3:45 PM | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Thu | 2:00 PM | 3:45 PM | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Fri | 2:00 PM | 3:45 PM | <input checked="" type="checkbox"/> | <input type="checkbox"/> |

OK Cancel

Breaks

- This chart is used to define what breaks your employees are entitled to.
- You must set up breaks for each of the labour categories that you have defined
- For each break you define you must specify the shortest and longest shift length that is entitled to have this break.
- Use the check box on the right side to specify if the employee is being paid during their break.
- The example below defines the following breaks
 - Shifts less than 4 hours do not get any break.
 - Shifts from 4.0 hours up to 4.75 hours will get a 15 minute paid break.
 - Shifts from 5.0 hours to 8.0 hours get a 30 minute unpaid break
 - Shifts from 7.0 hours to 8.0 hours get an additional 20 minute unpaid break
- No breaks have been define for shift lengths longer than 8 hours so if you scheduled a shift longer than 8 hours they would get no breaks. Be sure to cover all possible shift lengths that you would use.

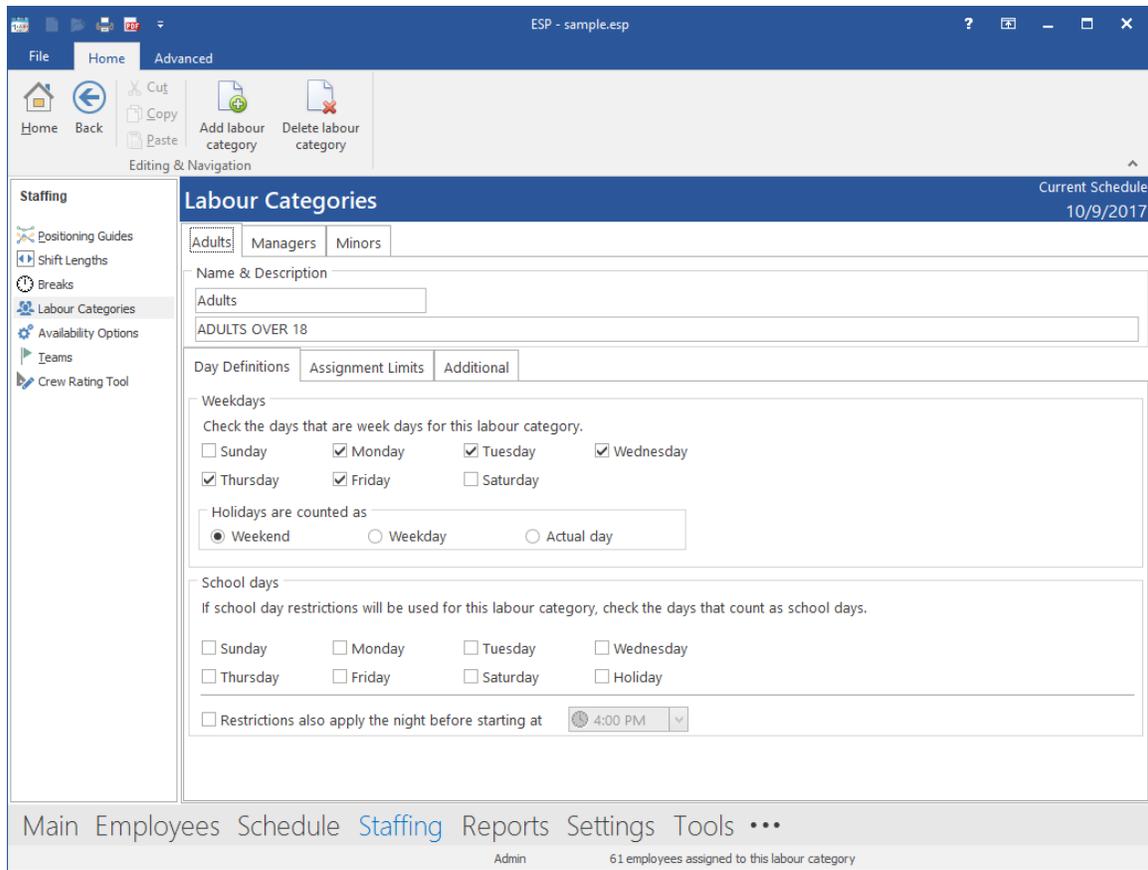


The screenshot shows the 'Breaks' configuration screen in the ESP software. The interface includes a navigation menu on the left with options like 'Positioning Guides', 'Shift Lengths', 'Breaks', 'Labour Categories', 'Availability Options', 'Teams', and 'Crew Rating Tool'. The main content area displays a table with columns for 'Name', 'Start Length', 'Finish Length', 'Break Length', and 'Paid'. The table lists three break types: 'Short break', 'Meal break', and 'Extra break'. The 'Short break' is marked as 'Paid' with a checked checkbox. Below the table, there is an 'Advanced...' button and a note: 'Choose Advanced options to specify breaks by time of day'. The footer contains navigation links: 'Main Employees Schedule Staffing Reports Settings Tools ...' and user information: 'Admin Licensee: ThoughtWorks'.

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

Labour categories

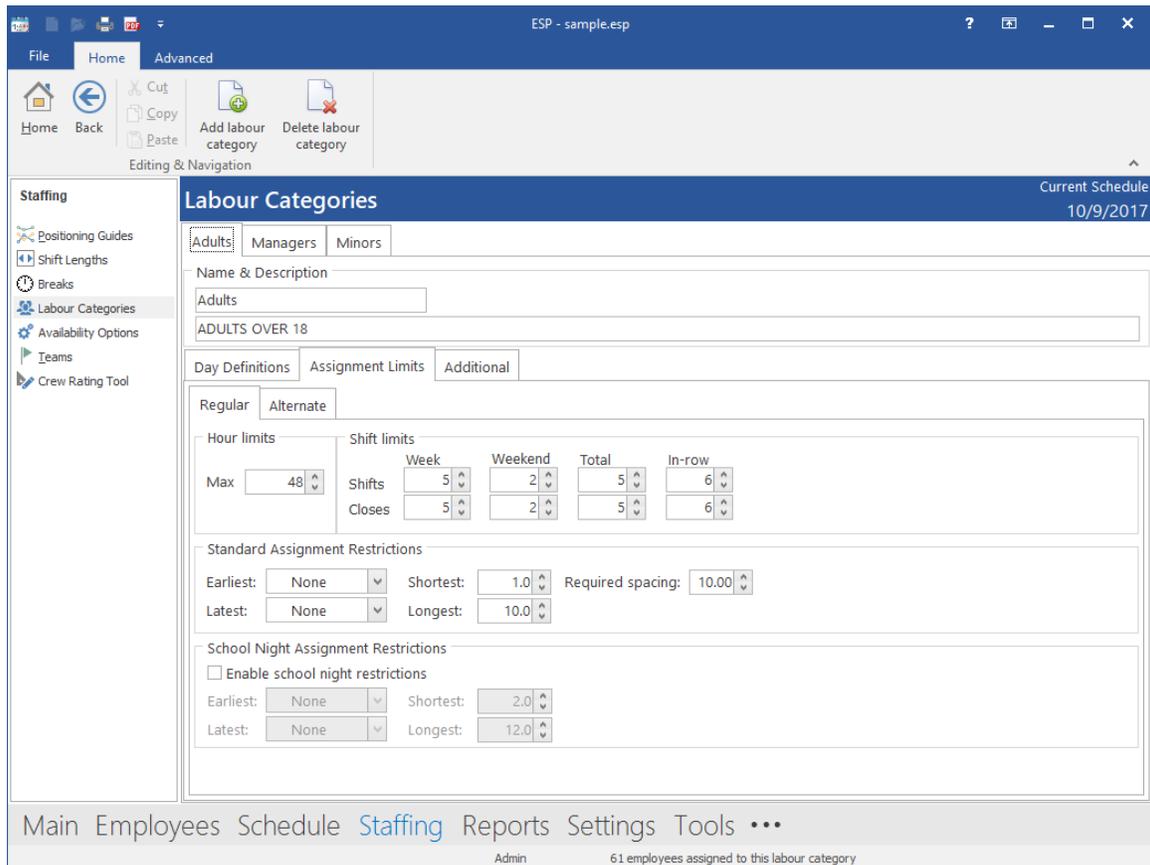
- This chart allows you to set up all your labour categories. The bottom status line tells you how many employees are assigned to the current category.
- There are three sections to this chart:
 - Day definitions
 - Assignment limits
 - Additional
- **Day definitions** allows you to define what days are weekdays or weekends, it also allows you to specify what days are school days if this labour category is going to be used for students.
- **Assignment limits** allows you to set up limits to the number of hours and days that these employees may work. Be generous in your limits. You do not want to make too many restrictions that will make it harder to complete your schedule.
- **Additional allows** some special options that only apply in some countries.
- *Note: When ESP assigns the shifts it compares the assignment limits in the labour category, to the assignment limits in the individual employees file. When the two are different ESP will always use the lower of the two limits.*



The screenshot shows the 'Labour Categories' configuration page in the ESP software. The interface includes a top navigation bar with 'File', 'Home', and 'Advanced' tabs. Below this is a ribbon with options like 'Home', 'Back', 'Cut', 'Copy', 'Paste', 'Add labour category', and 'Delete labour category'. A left sidebar contains a 'Staffing' menu with options like 'Positioning Guides', 'Shift Lengths', 'Breaks', 'Labour Categories', 'Availability Options', 'Teams', and 'Crew Rating Tool'. The main content area is titled 'Labour Categories' and shows the configuration for the 'Adults' category. It includes fields for 'Name & Description' (Adults, ADULTS OVER 18), 'Day Definitions' (Weekdays: Monday, Tuesday, Wednesday, Thursday, Friday; Holidays: Weekend selected), and 'School days' (none selected). A status bar at the bottom indicates '61 employees assigned to this labour category'.

Labour categories – Assignment limits

- The LIMITS tab allows you to set limits on how many hours and how many shifts employees may work. You can also set limits on how early and how late they may work.
- It is important to remember that these limits will be applied to ALL employees who belong to this labour category. If the limits in an employee's personal profile are different from their labour category, then the lower of the two limits will always apply.
- The labour category restrictions are designed to be used to enforce legal limits applied by your government in your country or region, OR limits enforced by your company. Therefore you must be sure not to make entries are more restrictive than needed. Otherwise ESP will not be able to find employees to fill shifts.

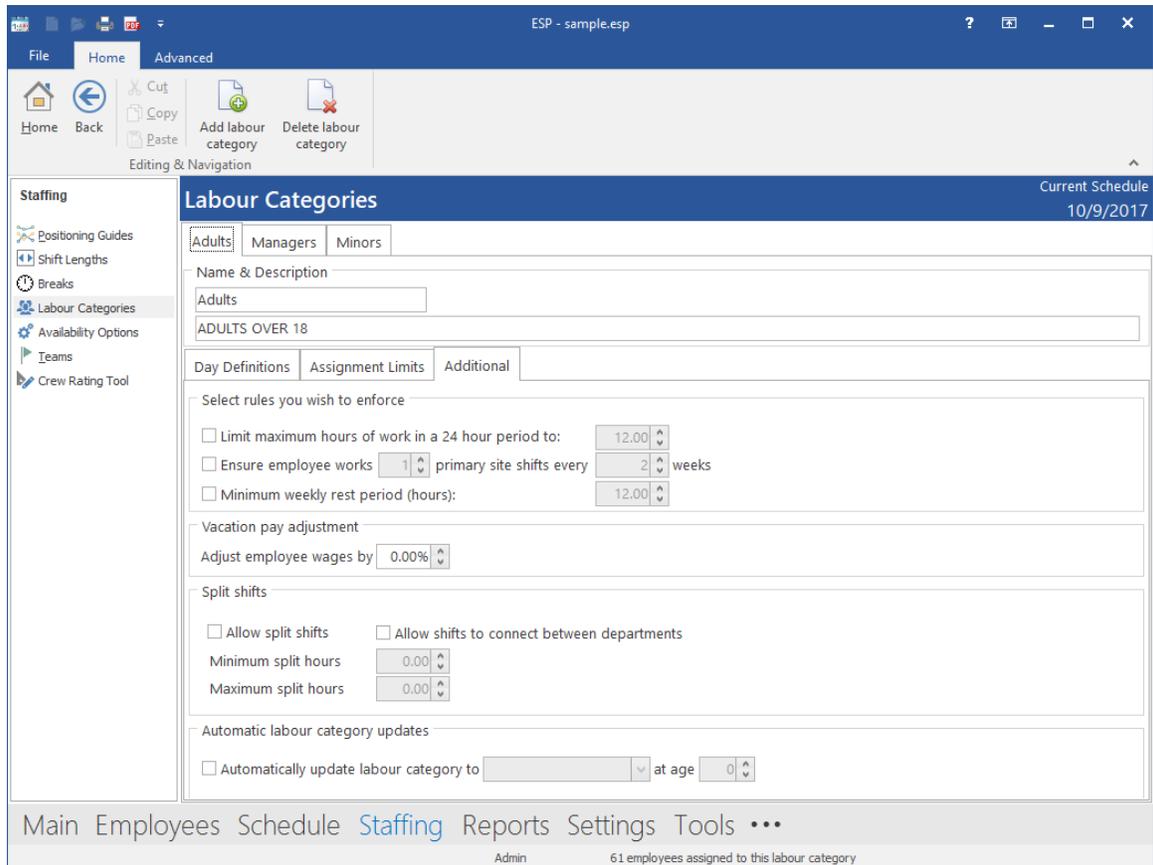


The screenshot shows the 'Labour Categories' configuration page in the ESP software. The interface includes a top navigation bar with 'File', 'Home', and 'Advanced' tabs. Below this is a ribbon with 'Editing & Navigation' options like 'Home', 'Back', 'Cut', 'Copy', 'Paste', 'Add labour category', and 'Delete labour category'. A left sidebar contains 'Staffing' options: Positioning Guides, Shift Lengths, Breaks, Labour Categories (selected), Availability Options, Teams, and Crew Rating Tool. The main content area is titled 'Labour Categories' and shows the configuration for the 'Adults' category. It includes tabs for 'Day Definitions', 'Assignment Limits', and 'Additional'. The 'Assignment Limits' tab is active, showing 'Regular' and 'Alternate' options. Under 'Hour limits', the 'Max' is set to 48. Under 'Shift limits', there are tables for 'Week', 'Weekend', 'Total', and 'In-row' with values for 'Shifts' and 'Closes'. Below this are 'Standard Assignment Restrictions' with fields for 'Earliest', 'Latest', 'Shortest', 'Longest', and 'Required spacing'. At the bottom, there are 'School Night Assignment Restrictions' with a checkbox to 'Enable school night restrictions' and corresponding 'Earliest', 'Latest', 'Shortest', and 'Longest' fields. The bottom status bar shows 'Main Employees Schedule Staffing Reports Settings Tools ...' and 'Admin 61 employees assigned to this labour category'.

Labour categories – Additional

The ADDITIONAL tab allows you to create additional rules that you wish to apply to each of the labour categories. Each of these additional rules will apply only in a few countries so you should not implement additional rules that do not apply.

- The first section deals with some additional rules about rest periods and maximum hours in a day. These options are rarely needed.
- The second section is where you tell ESP if it should add an additional amount to the labour cost it calculates to take into account paid vacations for employees.
- The third section is where you can specify if you allow split shifts. Split shifts means two shifts in one day which are separated by several hours. (example: 08:00-13:00 and again from 16:00-19:00) You must specify the minimum and maximum hours allowed between the two shifts.
- The last section is where you can ask ESP to automatically move an employee to a different labour category when they reach a specific age. (For example minors become adults at age 18)



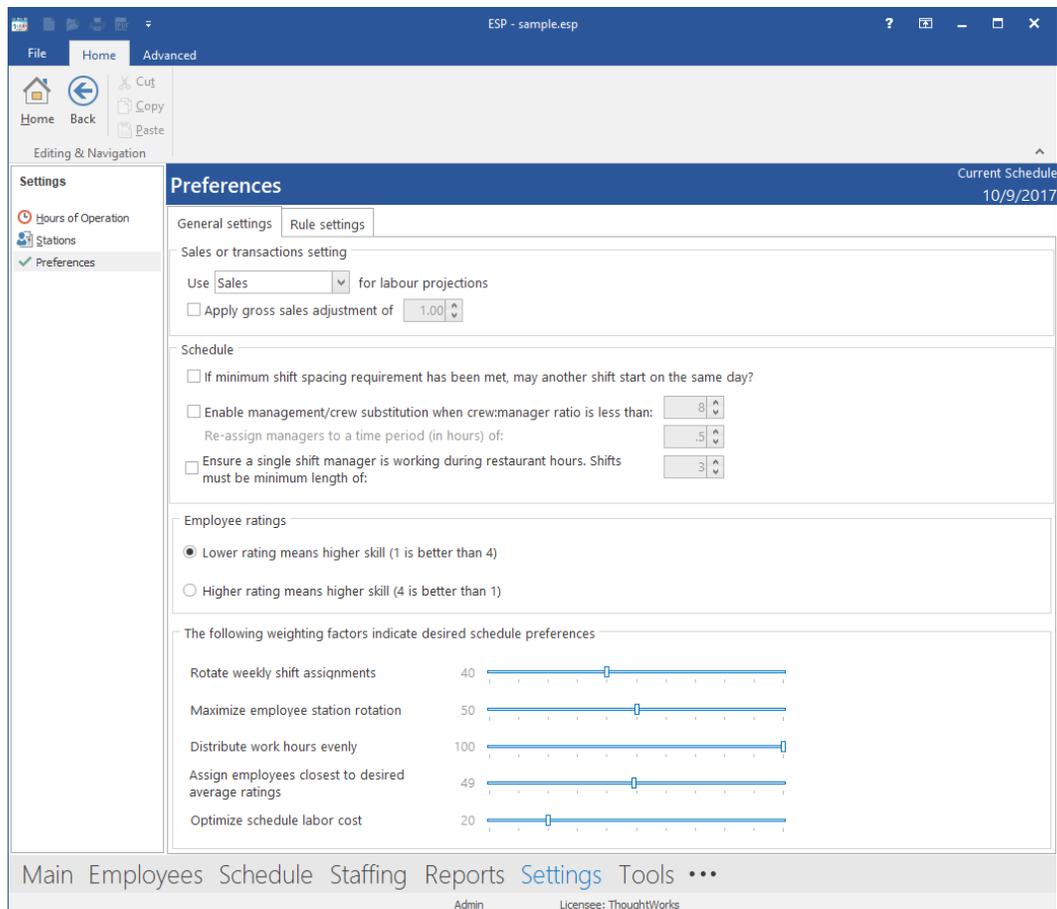
The screenshot shows the 'Labour Categories' configuration page in the ESP software. The interface includes a top navigation bar with 'File', 'Home', and 'Advanced' tabs. Below this is a toolbar with icons for 'Home', 'Back', 'Cut', 'Copy', 'Paste', 'Add labour category', and 'Delete labour category'. The main content area is titled 'Labour Categories' and has tabs for 'Adults', 'Managers', and 'Minors'. The 'Adults' tab is selected, and the 'Additional' sub-tab is active. The configuration options include:

- Name & Description:** 'Adults' and 'ADULTS OVER 18'.
- Day Definitions:** 'Assignment Limits' and 'Additional' tabs.
- Select rules you wish to enforce:**
 - Limit maximum hours of work in a 24 hour period to: 12.00
 - Ensure employee works 1 primary site shifts every 2 weeks
 - Minimum weekly rest period (hours): 12.00
- Vacation pay adjustment:** Adjust employee wages by 0.00%
- Split shifts:**
 - Allow split shifts
 - Allow shifts to connect between departments
 - Minimum split hours: 0.00
 - Maximum split hours: 0.00
- Automatic labour category updates:**
 - Automatically update labour category to [dropdown] at age 0

The bottom of the interface shows a navigation bar with 'Main Employees Schedule', 'Staffing', 'Reports', 'Settings', and 'Tools'. The status bar at the bottom indicates 'Admin' and '61 employees assigned to this labour category'.

Preferences

- This chart lets you tell ESP what your preferences are for assigning shifts. What factors are most important and what are least important. Use the slider bars to indicate your preference. Slide the bars to the right to increase the importance, and to the left to decrease the importance.
- This chart is also where you specify if you are using sales or transactions to measure the volume of your business.
- You also select your preferred rating scale. Is 1 better than 4 or worse than 4. This refers to the skill level of the employees.
- The “Gross sales adjustment” is used when the sales entered into the volume history include local tax. The statistics will divide the total sales by the number you enter here to calculate net sales
- The “Enable management /crew substitution when crew:manager ratio is greater than or equal to:” option tells ESP if it should determine when too many managers are working. If ESP detects too many managers it can automatically reassign one or more of the managers to employee positions and remove an employee shift. This feature helps reduce labour hours when there are extra managers working.
- The option to ensure a single shift manager is working, allows you to ensure you have one manager working at all times who is responsible for the entire business operation. You specify the minimum number of hours they must be in the shift manager position.



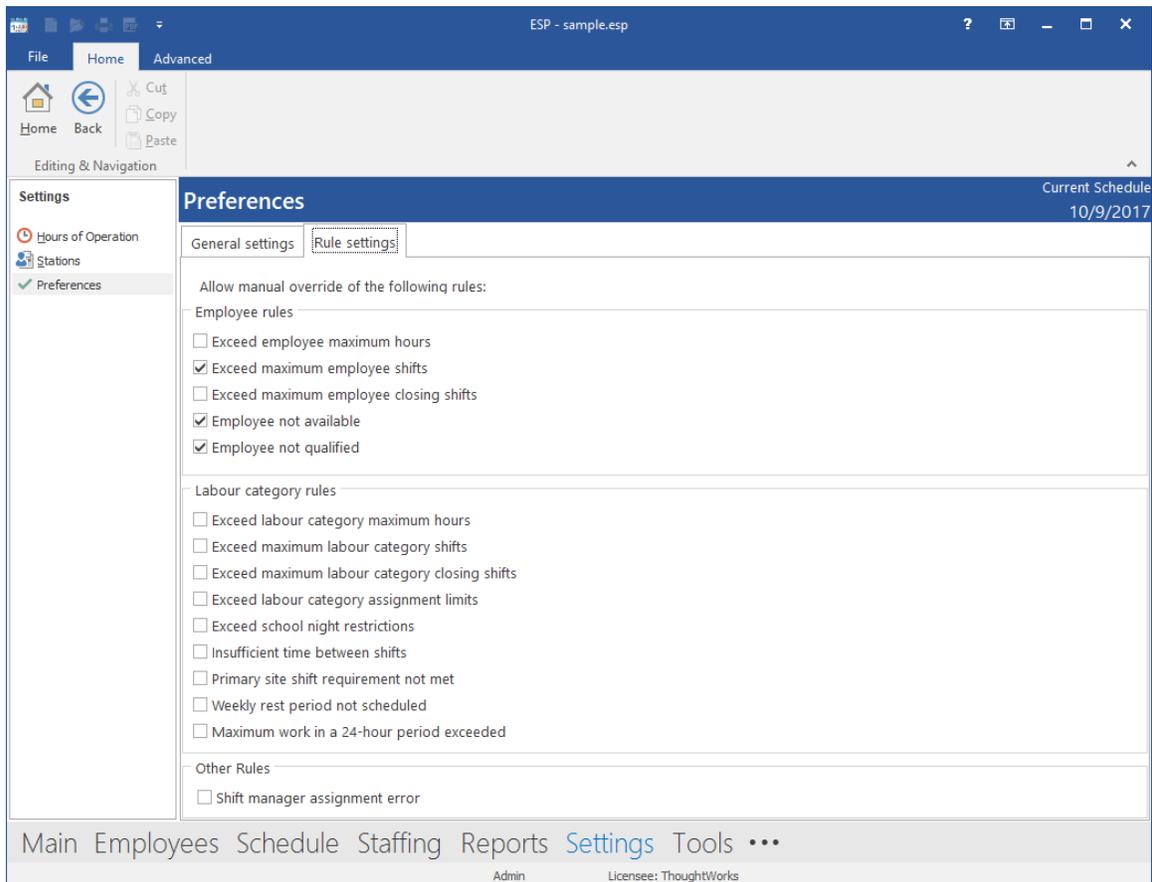
The screenshot shows the 'Preferences' settings page in the ESP software. The interface includes a navigation menu on the left with options like 'Hours of Operation', 'Stations', and 'Preferences'. The main content area is titled 'Preferences' and is divided into several sections:

- General settings / Rule settings:** Includes a dropdown for 'Sales or transactions setting' (set to 'Sales') and a checkbox for 'Apply gross sales adjustment of 1.00'.
- Schedule:** Contains checkboxes for:
 - 'If minimum shift spacing requirement has been met, may another shift start on the same day?' (unchecked)
 - 'Enable management/crew substitution when crew:manager ratio is less than: 8' (unchecked), with a sub-option 'Re-assign managers to a time period (in hours) of: .5' (unchecked).
 - 'Ensure a single shift manager is working during restaurant hours. Shifts must be minimum length of: 3' (unchecked).
- Employee ratings:** Features two radio buttons:
 - 'Lower rating means higher skill (1 is better than 4)' (selected)
 - 'Higher rating means higher skill (4 is better than 1)' (unselected)
- Weighting factors:** A section titled 'The following weighting factors indicate desired schedule preferences' with five sliders:
 - 'Rotate weekly shift assignments' (value: 40)
 - 'Maximize employee station rotation' (value: 50)
 - 'Distribute work hours evenly' (value: 100)
 - 'Assign employees closest to desired average ratings' (value: 49)
 - 'Optimize schedule labor cost' (value: 20)

The bottom of the window shows a navigation bar with 'Main Employees Schedule Staffing Reports Settings Tools' and a footer with 'Admin Licensee: ThoughtWorks'.

RULES

- The Rule Settings tab lets you specify what rules you are allowed to violate when you are manually editing your schedule.
- ESP will never violate rules but as the manager you may wish to temporarily assign shifts that break some rules.
 - If a rule is checked then this means you are permitted to manually violate this rule when editing your schedule. Shifts with these rule violations will turn **RED** on the editing screen to warn you. However they are permitted and ESP will let you proceed.
 - If a rule is **not** checked, this means you may not manually violate this rule and you will not be permitted to print your schedule if it contains any of this type of violation. Printing will be disabled until you correct the violation. Shifts with this type of violation will appear **ORANGE** to indicate to you that this must be corrected or you cannot print, or email your schedules.



ESP - sample.esp

File Home Advanced

Home Back Cut Copy Paste

Editing & Navigation

Settings

Hours of Operation Stations Preferences

Preferences

Current Schedule 10/9/2017

General settings Rule settings

Allow manual override of the following rules:

Employee rules

- Exceed employee maximum hours
- Exceed maximum employee shifts
- Exceed maximum employee closing shifts
- Employee not available
- Employee not qualified

Labour category rules

- Exceed labour category maximum hours
- Exceed maximum labour category shifts
- Exceed maximum labour category closing shifts
- Exceed labour category assignment limits
- Exceed school night restrictions
- Insufficient time between shifts
- Primary site shift requirement not met
- Weekly rest period not scheduled
- Maximum work in a 24-hour period exceeded

Other Rules

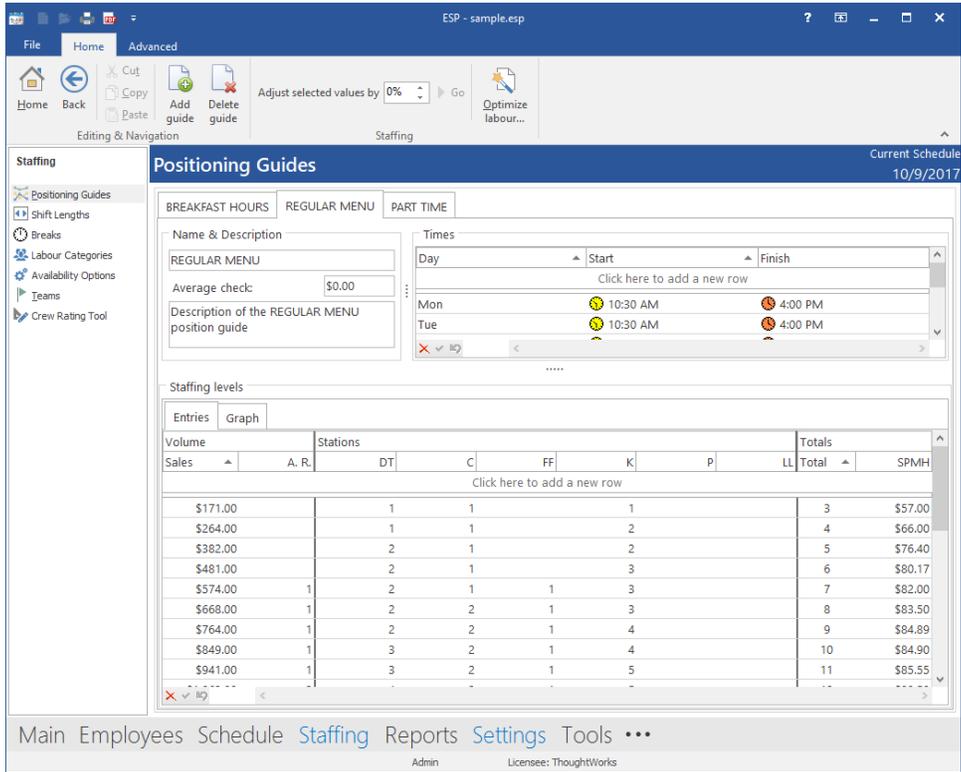
- Shift manager assignment error

Main Employees Schedule Staffing Reports Settings Tools ...

Admin Licensee: ThoughtWorks

Positioning guides

- These are the most important charts in the program. They determine how many people will be scheduled at each station based upon your sales or transactions.
- Each new row on the chart should only have one more person than the row above it. Adding 2 or more people may lead to wasted labour.
- Use the productivity column on the far right to help you create a chart that has productivity that increases steadily and smoothly. It should never be lower than the row above it or you may be wasting labour.
- Only variable labour positions will appear on this chart.
- Multiple charts. If there are times when your productivity level is significantly different then you will need to use a different positioning guide (e.g. full time versus part time staff) Your average check may also influence the need to use a different chart for different days.
- The AR field is used to let ESP know how much under scheduling you will tolerate when it encounters a **very short and dramatic increase** in sales. For example during a lunch rush, ESP often cannot schedule the exact amount of labour needed without wasting labour before and after the rush since the rush is too short. Setting the AR to 0 for the lowest sales, 1 for medium sales, and 2-3 for high or very high sales usually works well.
- The **Graph** can be used to visualize the productivity on your chart. A well designed chart will have a nice smooth upward curve. The yellow curve is your chart, the blue curve is the ideal chart if you average out the bumps in your chart.
- Press the **Optimize labour** button to have ESP automatically adjust your sales values to match the green curve.
- Add new guides or delete unused guides by clicking the Add and Delete guide buttons on the Ribbon.
- You may use the "Adjust rates by" option on the Ribbon to increase or decrease all the sales/transaction rates at once. This will increase or decrease the productivity on your chart and is a quick way to adjust your schedule.



ESP - sample.esp

File Home Advanced

Home Back Cut Copy Add guide Delete guide Adjust selected values by 0% Go Optimize labour...

Editing & Navigation Staffing

Staffing

- Positioning Guides
- Shift Lengths
- Breaks
- Labour Categories
- Availability Options
- Teams
- Crew Rating Tool

Positioning Guides

BREAKFAST HOURS REGULAR MENU PART TIME

Name & Description: REGULAR MENU

Average check: \$0.00

Description of the REGULAR MENU positioning guide

Times

| Day | Start | Finish |
|-----|----------|---------|
| Mon | 10:30 AM | 4:00 PM |
| Tue | 10:30 AM | 4:00 PM |

Staffing levels

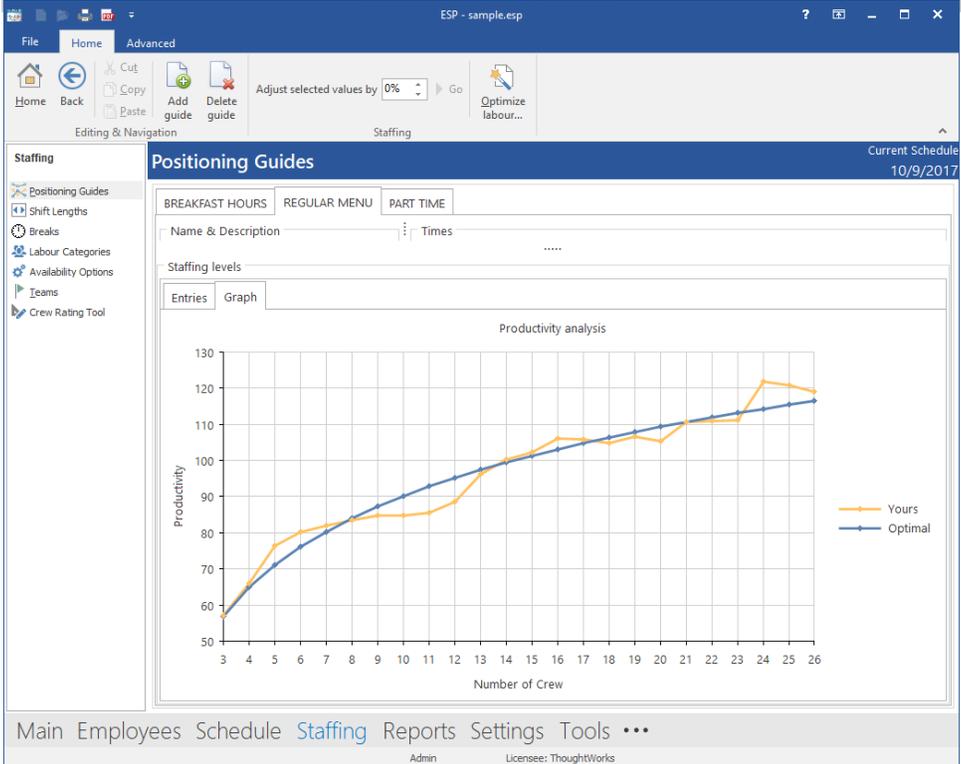
Entries Graph

| Volume | A. | R. | DT | C | FF | K | P | LL | Total | SPMH |
|----------|----|----|----|---|----|---|---|----|-------|---------|
| \$171.00 | | | 1 | 1 | | 1 | | | 3 | \$57.00 |
| \$264.00 | | | 1 | 1 | | 2 | | | 4 | \$66.00 |
| \$382.00 | | | 2 | 1 | | 2 | | | 5 | \$76.40 |
| \$481.00 | | | 2 | 1 | | 3 | | | 6 | \$80.17 |
| \$574.00 | 1 | | 2 | 1 | 1 | 3 | | | 7 | \$82.00 |
| \$668.00 | 1 | | 2 | 2 | 1 | 3 | | | 8 | \$83.50 |
| \$764.00 | 1 | | 2 | 2 | 1 | 4 | | | 9 | \$84.89 |
| \$849.00 | 1 | | 3 | 2 | 1 | 4 | | | 10 | \$84.90 |
| \$941.00 | 1 | | 3 | 2 | 1 | 5 | | | 11 | \$85.55 |

Main Employees Schedule Staffing Reports Settings Tools ...

Admin Licensee: ThoughtWorks

Note the yellow line which represents the productivity on the existing positioning guide. The blue line is what it will be if you click the Optimize labor button on the Ribbon.



ESP - sample.esp

File Home Advanced

Home Back Cut Copy Add guide Delete guide Adjust selected values by 0% Go Optimize labour...

Editing & Navigation Staffing

Staffing

- Positioning Guides
- Shift Lengths
- Breaks
- Labour Categories
- Availability Options
- Teams
- Crew Rating Tool

Positioning Guides

BREAKFAST HOURS REGULAR MENU PART TIME

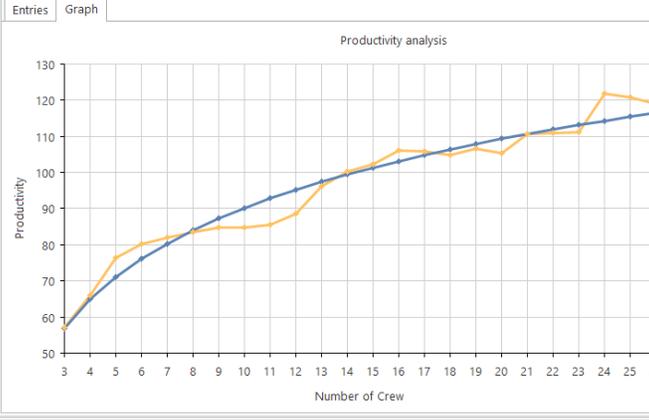
Name & Description: REGULAR MENU

Times

Staffing levels

Entries Graph

Productivity analysis



Productivity

Number of Crew

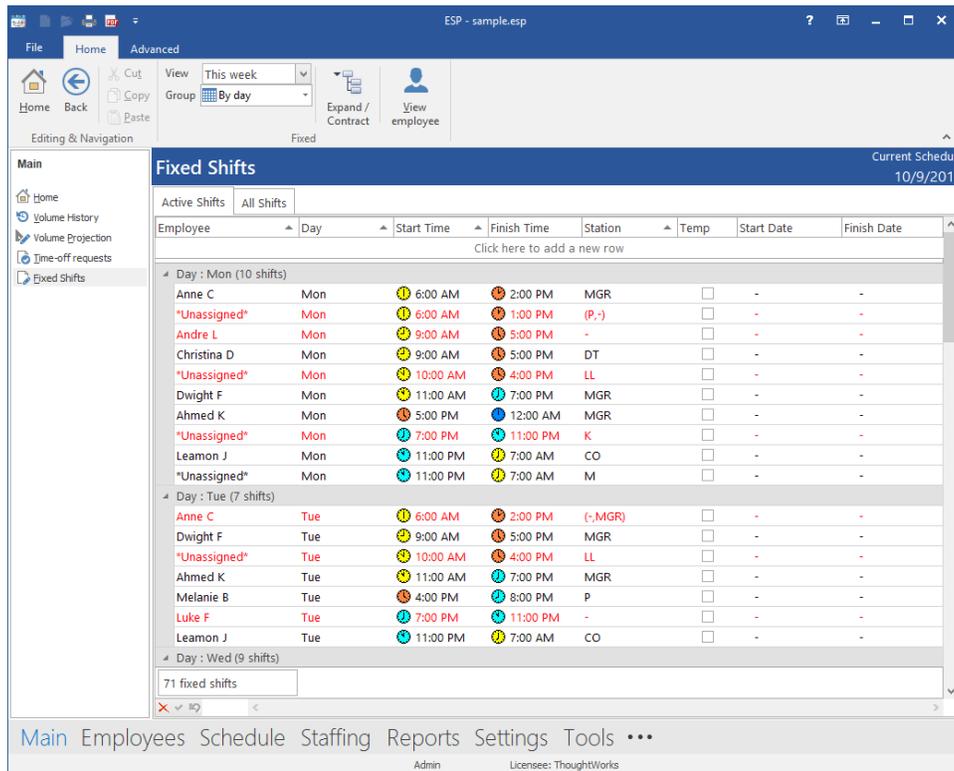
Yours Optimal

Main Employees Schedule Staffing Reports Settings Tools ...

Admin Licensee: ThoughtWorks

Fixed shifts

- This chart shows all the fixed shifts on your schedule. It lists both types of fixed shifts.
 - Fixed shifts that have not been assigned to a specific employee so ESP will find a qualified employee to fill it.
 - Fixed shifts that have already been specifically assigned to an employee. This type of fixed shift will also appear in the employees personal file.
- Using the TAB key you can very quickly add additional shifts because ESP memorizes the details and fills them automatically when you add the next shift. As soon as you type the name, ESP fills all the rest in for you. Just press tab until you are back at the beginning to start a new entry.
- Click the Expand/Contract all button to view all the shifts, or just the daily summary.
- The number of fixed shifts is listed beside the name of the day. The weekly total is listed at the bottom.
- Use the GROUP BY button on the Ribbon to group the shifts by day of the week, by employee name, or by the **Type** of station (manager, crew etc)
- Use the TEMP check box only if you wish to make this a temporary fixed shift. If you do this, you must specify the date range when it will be scheduled. ESP will automatically assume the current week only, so if that is correct you don't need to change anything.



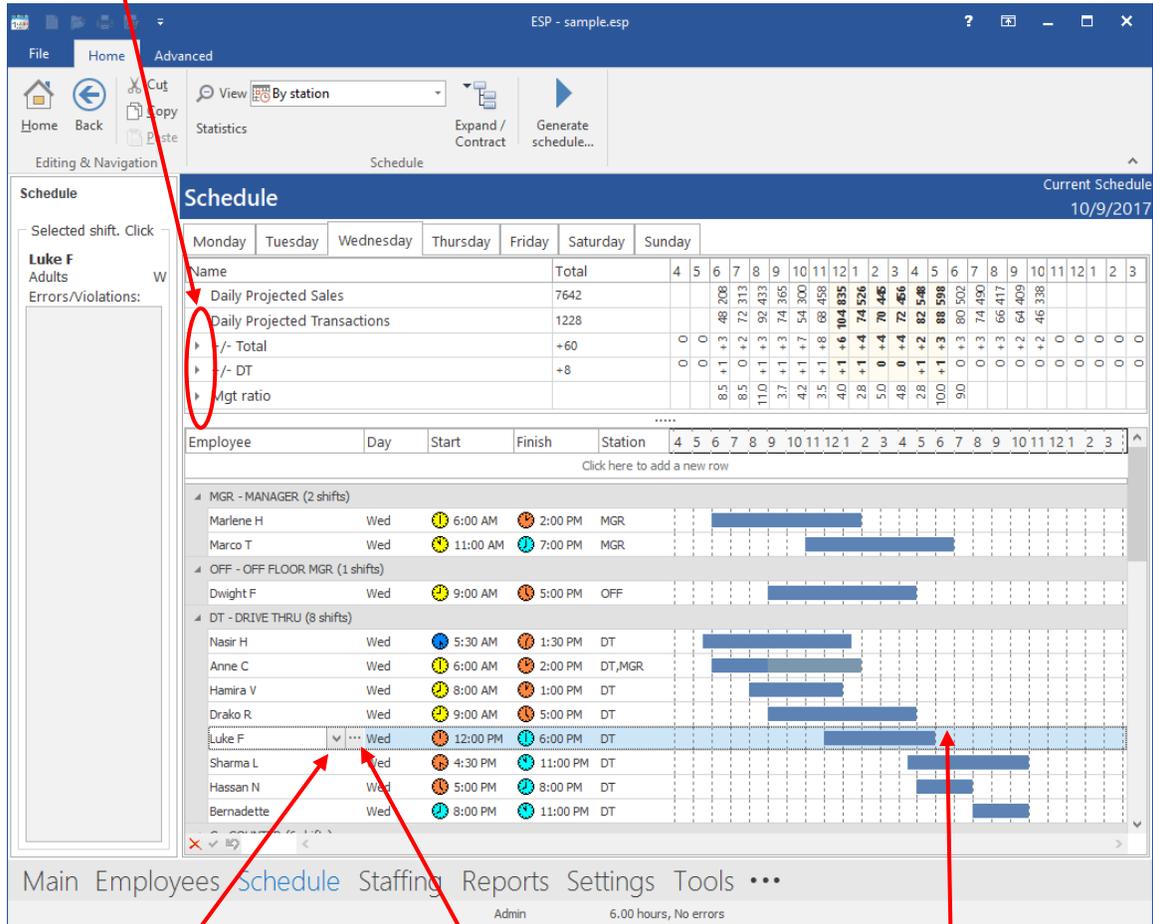
The screenshot shows the 'Fixed Shifts' section of the ESP software. The interface includes a ribbon with options like 'View', 'Group', 'Expand/Contract', and 'View employee'. The main area displays a table of shifts grouped by day. The 'Current Schedule' is for 10/9/2017.

| Employee | Day | Start Time | Finish Time | Station | Temp | Start Date | Finish Date |
|-----------------------|-----|------------|-------------|---------|--------------------------|------------|-------------|
| Day : Mon (10 shifts) | | | | | | | |
| Anne C | Mon | 6:00 AM | 2:00 PM | MGR | <input type="checkbox"/> | - | - |
| *Unassigned* | Mon | 6:00 AM | 1:00 PM | (P,-) | <input type="checkbox"/> | - | - |
| Andre L | Mon | 9:00 AM | 5:00 PM | - | <input type="checkbox"/> | - | - |
| Christina D | Mon | 9:00 AM | 5:00 PM | DT | <input type="checkbox"/> | - | - |
| *Unassigned* | Mon | 10:00 AM | 4:00 PM | LL | <input type="checkbox"/> | - | - |
| Dwight F | Mon | 11:00 AM | 7:00 PM | MGR | <input type="checkbox"/> | - | - |
| Ahmed K | Mon | 5:00 PM | 12:00 AM | MGR | <input type="checkbox"/> | - | - |
| *Unassigned* | Mon | 7:00 PM | 11:00 PM | K | <input type="checkbox"/> | - | - |
| Leamon J | Mon | 11:00 PM | 7:00 AM | CO | <input type="checkbox"/> | - | - |
| *Unassigned* | Mon | 11:00 PM | 7:00 AM | M | <input type="checkbox"/> | - | - |
| Day : Tue (7 shifts) | | | | | | | |
| Anne C | Tue | 6:00 AM | 2:00 PM | (-,MGR) | <input type="checkbox"/> | - | - |
| Dwight F | Tue | 9:00 AM | 5:00 PM | MGR | <input type="checkbox"/> | - | - |
| *Unassigned* | Tue | 10:00 AM | 4:00 PM | LL | <input type="checkbox"/> | - | - |
| Ahmed K | Tue | 11:00 AM | 7:00 PM | MGR | <input type="checkbox"/> | - | - |
| Melanie B | Tue | 4:00 PM | 8:00 PM | P | <input type="checkbox"/> | - | - |
| Luke F | Tue | 7:00 PM | 11:00 PM | - | <input type="checkbox"/> | - | - |
| Leamon J | Tue | 11:00 PM | 7:00 AM | CO | <input type="checkbox"/> | - | - |
| Day : Wed (9 shifts) | | | | | | | |
| 71 fixed shifts | | | | | | | |

Editing your schedule

There are many options available to you to help you prepare the best possible schedule.

Click the arrow to get an expanded view showing the Projected and Actual labour for each hour.



The screenshot shows the 'Schedule' window for '10/9/2017'. The main grid displays projected and actual labor for each hour (4-12) across various employee categories: MGR - MANAGER (2 shifts), OFF - OFF FLOOR MGR (1 shifts), and DT - DRIVE THRU (8 shifts). The employee list on the left includes Luke F, who is currently assigned to a DT shift from 12:00 PM to 6:00 PM. A red arrow points to a dropdown arrow next to Luke F's name, another points to a small (...) icon next to his shift, and a third points to the grid area.

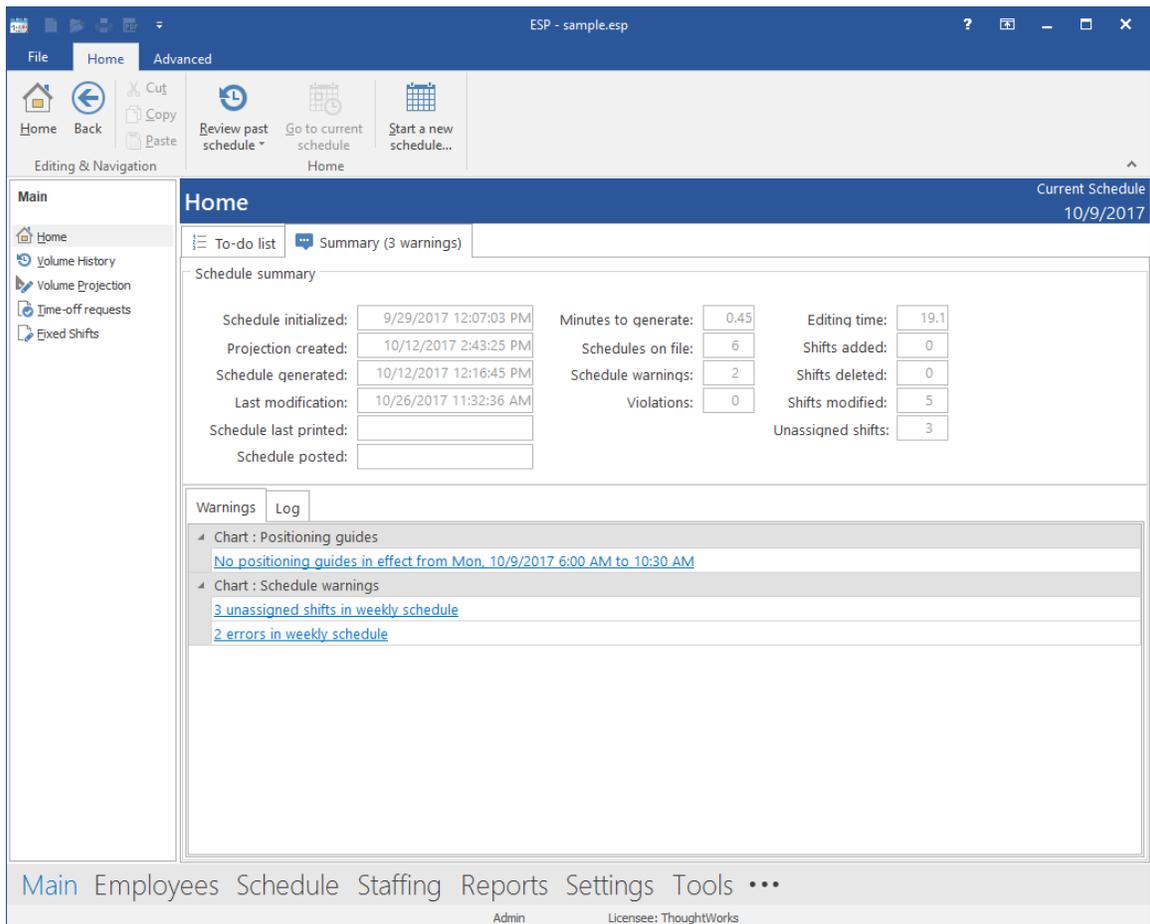
Click on the black arrow to simply choose any employee from the drop down list.

Click on the small (...) icon to get an on-call list showing who the best choice is for this shift.

To scroll up and down through the schedule click anywhere in the grid area and not the shift information on the left; then use the wheel on your mouse.

Tips for analysing your schedule

- From the home page click on the **Summary** tab to get some quick statistics about your schedule.
- The editing time is a good indicator of how much time spent editing the schedule. However anytime you have the on-screen line bar open this counts as editing time so it may be reporting more time than you actually spent. For example if you walk away from the computer while the editing screen is open, and then come back 5 minutes later, those 5 minutes are added to your editing time.
- The shifts added/deleted/modified is a good indicator of the true “amount” of editing you did. The lower the number the better your schedule setup.
- Any problems in the Warnings section should be resolved immediately to prevent future scheduling problems.
- The LOG tab keeps a record of various activities for troubleshooting. Things such as when data was imported, when email was sent, when schedules were edited and more.



The screenshot shows the ESP software interface. The top navigation bar includes 'File', 'Home', and 'Advanced'. The 'Home' tab is active, displaying a 'Summary (3 warnings)' section. The 'Schedule summary' section contains the following data:

| | | | | | |
|------------------------|------------------------|----------------------|------|------------------|------|
| Schedule initialized: | 9/29/2017 12:07:03 PM | Minutes to generate: | 0.45 | Editing time: | 19.1 |
| Projection created: | 10/12/2017 2:43:25 PM | Schedules on file: | 6 | Shifts added: | 0 |
| Schedule generated: | 10/12/2017 12:16:45 PM | Schedule warnings: | 2 | Shifts deleted: | 0 |
| Last modification: | 10/26/2017 11:32:36 AM | Violations: | 0 | Shifts modified: | 5 |
| Schedule last printed: | | Unassigned shifts: | 3 | | |
| Schedule posted: | | | | | |

The 'Warnings' section is expanded, showing three items:

- Chart : Positioning guides
 - [No positioning guides in effect from Mon, 10/9/2017 6:00 AM to 10:30 AM](#)
- Chart : Schedule warnings
 - [3 unassigned shifts in weekly schedule](#)
 - [2 errors in weekly schedule](#)

The bottom navigation bar includes 'Main', 'Employees', 'Schedule', 'Staffing', 'Reports', 'Settings', and 'Tools'. The user is logged in as 'Admin' and the license is 'ThoughtWorks'.



Evaluating your schedule

The best test of how well you have set up ESP is to compare your final edited schedule with an unedited, newly-generated schedule: There should be very little difference between the two. In general, you shouldn't be performing major surgery on your computer-produced schedule; your editing should be confined to minor touch ups. Download and use our [ESP score card](#) tool from our website to help track your performance.

The first thing to do is generate a new schedule and, without doing any editing, immediately record the daily and weekly hours used in the spaces below under Newly generated schedule.

Now do all the editing to your schedule that is necessary. Once you have finished all your editing, and you are ready to post the schedule record the daily and weekly hours used in the spaces below, under Finished schedule.

An acceptable variance between the two is between 3% - 5% (+ or -). If your variance is greater, you should review all the charts in the program to ensure that they accurately reflect the scheduling needs in your store. In particular your positioning guides and your shift length charts have a major impact on the number of hours scheduled.

You should also review the number of unscheduled shifts. An average store that is well-staffed with flexible employees can expect between 5-10 unscheduled shifts per week. A higher volume store, or a store that is experiencing staffing shortages, can expect a higher number.

| | Mon | Tue | Wed | Thu | Fri | Sat | Sun | Weekly total |
|--------------------------|-----|-----|-----|-----|-----|-----|-----|--------------|
| Newly generated schedule | | | | | | | | |
| Finished schedule | | | | | | | | |
| Difference | | | | | | | | |
| % difference | | | | | | | | |
| # unscheduled shifts | | | | | | | | |



Additional resources

Send us a copy of your ESP data and we will send you back an in-depth report. We will generate a number of different scenarios using various settings and send you a complete report of our findings, including tips to help you produce better schedules in less time.

When you send us your data, be sure you have completely finished your schedule for the current week, and have completed all of your editing. Try to choose a "typical" week, and avoid sending us your data during unusual dates that include special activities or holidays.

You can send us your data by e-mail. You must compress your database in ZIP format and then send it to us by e-mail. Our e-mail address is: support@thoughtworksinc.com Be sure to include a message with your e-mail that tells us who you are, your store number etc, and the reason you are sending us your data file. Please explain details of any problem you are experiencing. We will respond as quickly as possible.

Note sure where your data file is located? It's easy. Just open ESP as you normally do and click on FILE on the menu. The location of your database will be displayed on the top right where is says [FILE NAME](#)

Visit our web site

Our web site includes the latest updates to ESP, utility programs, our latest newsletter, documentation and dozens of tips and tricks for using ESP effectively. Our address is:

<https://www.thoughtworksinc.com>

Weekly Checklist

| Description | Done |
|--|-------------------------------------|
| | <input checked="" type="checkbox"/> |
| From the Home page click on "Start a new schedule" on the Ribbon. Review the date to ensure it is for the correct week, and click OK. | <input type="checkbox"/> |
| Review hours of operation. Take into account any holidays, changes in your hours, and changes in your openers/closers requirements. | <input type="checkbox"/> |
| Enter <u>actual</u> sales (TC's) from last week. (Main – Volume History) Verify correct date. If importing sales automatically, verify they were successfully imported Always add comments to volume history to aid with projecting sales in the future | <input type="checkbox"/> |
| Calculate Volume Projection (Main – Volume projection) Be sure to plan ahead. Decide what method you will use to project (Use previous weeks, or previous years?) | <input type="checkbox"/> |
| Add new employees you have hired. If employees are imported from payroll, be sure to verify they are correct and complete. | <input type="checkbox"/> |
| Enter a release date for any employees who have left, or if they are released through payroll verify they have been released properly. | <input type="checkbox"/> |
| Select which availability you want ESP to use for each labour category. (Staffing – availability options) Do this before performing your time off requests | <input type="checkbox"/> |
| Perform your employee time off requests (Main – Time off requests) Perform current week requests first, then future weeks last. | <input type="checkbox"/> |
| Make any other changes to employees as needed. Make permanent availability changes, update station ratings etc. | <input type="checkbox"/> |
| Enter fixed shifts, including managers schedule (Main – fixed shifts). When entering a full month of managers schedules it is best to enter all shifts for one week at a time. Then do the next week. ESP memorizes dates so it is easiest to do a full week at one time, and not each managers full month. In addition to managers shifts review all other fixed shift for accuracy. | <input type="checkbox"/> |
| If you are using the Team concept, review team availabilities and restrictions. Be sure to adjust day restricted if you are using this to rotate days off between teams. | <input type="checkbox"/> |
| Generate the new schedule. (Schedule) then click "Generate schedule" | <input type="checkbox"/> |
| Edit your schedule (Schedule) | <input type="checkbox"/> |
| Print your schedule (Reports – Schedule reports) If you are also e-mailing your employees their personal schedule, review the template and update the message if required (Reports – E-mail reports) | <input type="checkbox"/> |
| Make a weekly backup of your data to a removable drive for safekeeping. | <input type="checkbox"/> |