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Dynamic Calendar for Retailers

Manager and Administrator Guide

Dynamic Calendar is a central point of organization for both staff members and location manager, showing assignments and opportunities for each person individually *as well as assignments for the location as a whole*.

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Dynamic Calendar Is Mobile-First!

First off, the new Dynamic Calendar is mobile friendly. It looks great on a smartphone, a tablet or a laptop. No more awkward scrolling to see the days of the week or the weeks of the month.

Personal Calendar or Location Calendar - You Chose!

As a manager or administrator, the Dynamic Calendar gives you two calendar views:

1. per staff member - one at a time

   (This is called the personal Calendar.)

2. per location with all staff members' assignments displaying for that location simultaneously

   (This is called the Location Calendar.)

What a Staff Member Sees

Staff members always see their personal Calendar when they access the Dynamic Calendar by clicking or tapping on the Calendar button.

What a Manager or Administrator Sees

Depending on how managers and administrators access the Dynamic Calendar, they can see:

1. the personal Calendar of an individual staff member (including their own personal Calendar if they so desire) by clicking or tapping on the calendar icon next to a staff person.

2. the Location Calendar of a location .

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Personal Calendar with Capacity Display

With the Dynamic Calendar, any staff member will be able to look at his or her individual personal Calendar with an improved design custom-made for mobile devices. Managers and admins, meanwhile, can see any staff member's personal Calendar at any time (depending on security permissions and hierarchy level).

Capacity Display

Staff members will immediately know if they are at capacity or not and so will you! No more overtime! With Hours Management activated, each staff member will have a daily view of how many hours she is available to work per day and she cannot go over the allotted maximum. Capacity Display will save you time and money guaranteed!

Location Calendar

Want to get a quick view of a location's schedule - today, this week, this month or this year? Roger that! Each location has its own Location Calendar - accessed right from a manager's Home page. Scan the Location Calendar for daily, weekly and monthly assignments to make sure you've got your location covered. Retailers, rejoice! You've now got your Location Calendar! Quickly view the tasks to complete per store daily, weekly or monthly and easily switch tasks between associates in Location Calendar view.

NOTE: **Dynamic Calendar** serves up either a personal **Calendar** or a **Location Calendar** depending on whether the user is a staff member or a manager/administrator. The personal **Calendar** replaces the **Assignment Calendar** as of October 7, 2015.

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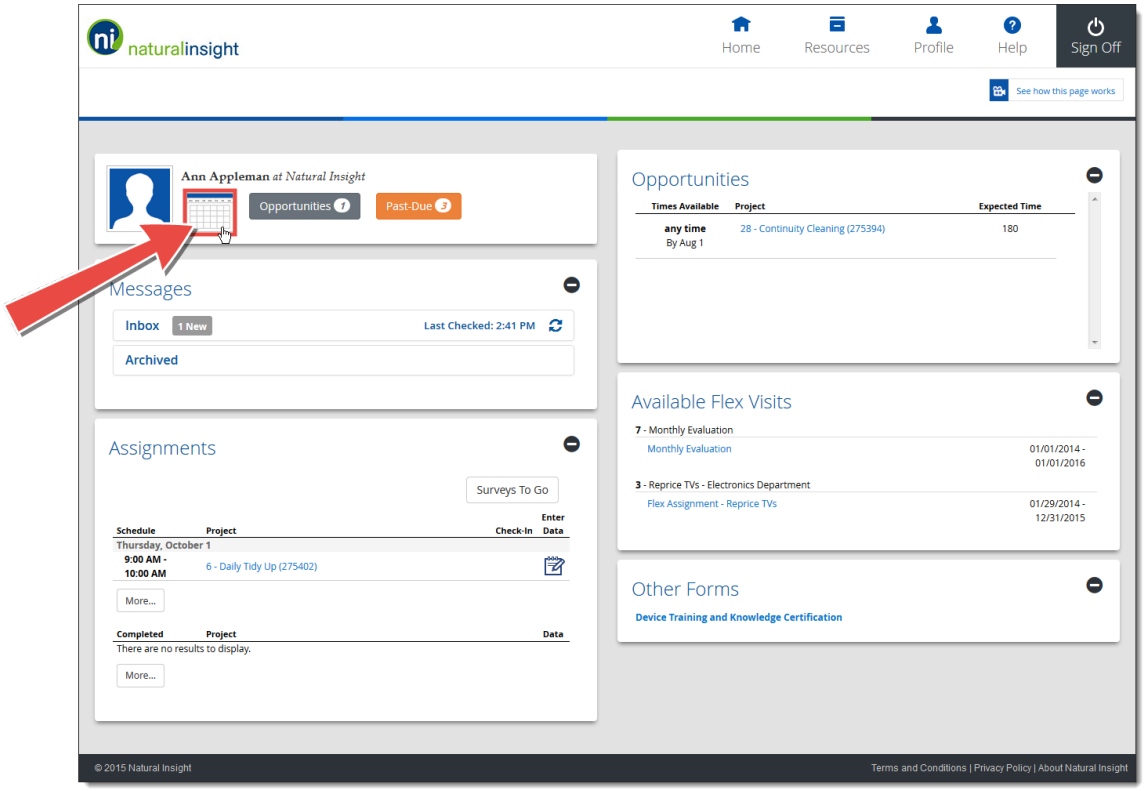
Personal **Calendar**

The personal **Calendar** for a staff member shows his scheduled and completed assignments.

A staff member accesses his personal **Calendar** via the **Calendar** button within the *Profile* pod on his **Home** page.



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Capacity Display

The staff member's personal Calendar in the weekly and daily view broadcasts the staff member's Capacity Display for each day. Capacity Display is the ratio of a staff member's daily assignment hours over his *Maximum Hours (Day)*. *Maximum Hours (Day)* is a cap on the number of hours a staff member is allowed to work per day. The *Maximum Hours (Day)* setting is available when Hours Management is activated for your Natural Insight account.

For more information regarding Hours Management, consult the HOURS MANAGEMENT *USER GUIDE* or speak with your Natural Insight Account Manager.

The daily Capacity Display ratio is calculated in one of three ways depending on whether the assignment(s) of the day have been completed or not.

1. If all assignment(s) have been completed for the day, Capacity Display equals:

   `total completed assignment hours for the day/Maximum Hours (Day)`

2. If all assignment(s) have not been completed for the day, Capacity Display equals:

   `total scheduled assignment hours for the day/Maximum Hours (Day)`

3. If some assignment(s) for the day are completed while others are not, Capacity Display equals:

   `the total of completed assignment hours for the day (for completed assignments) + the total of scheduled assignment hours for the day (for scheduled assignments/Maximum Hours (Day)`

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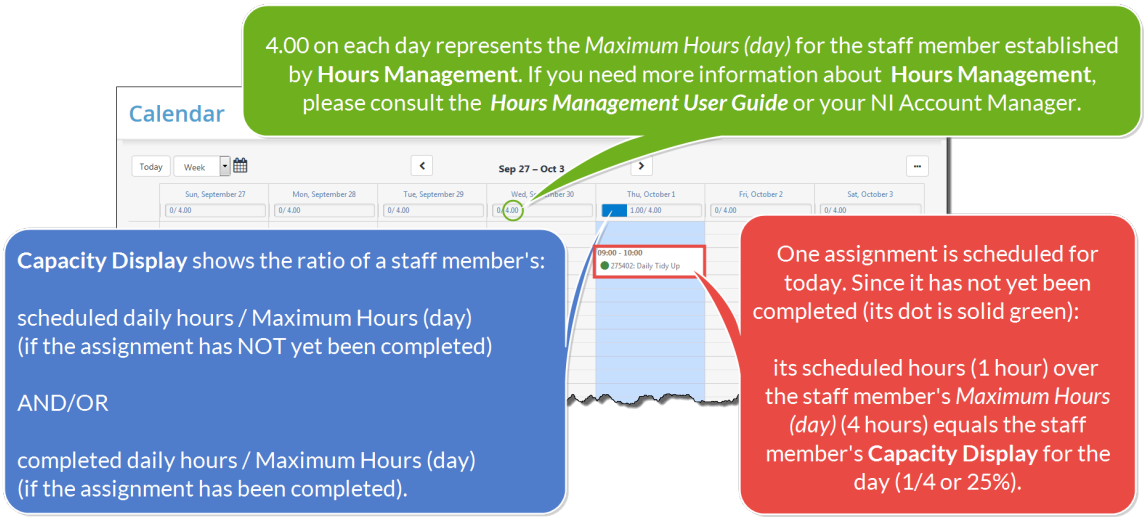
For example, in the next screenshot, a staff member is scheduled for a one hour assignment on Thursday, October 1, 2015. Since the assignment has not yet been completed, the assignment's scheduled hours - 1 hour - are used in the calculation of the daily Capacity Display October 1, 2015. The staff member's *Maximum Hours (Day)* happens to be 4 hours. As a result, the daily Capacity Display for October 1, 2015 is 1/4 or 25%.



Weekly and Daily Mobile View of Capacity Display

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The Benefit of Capacity Display

Capacity Display is a useful visual indicator to the staff member and to his managers of the staff member's capacity - how many hours a staff member can work in a day. Hours Management allows or prevents the staff member from scheduling additional assignments for the day based upon his Capacity Display ratio. Once a staff member has reached the *Maximum Hours (Day)* cap, Hours Management prevents the staff member from scheduling assignments that would result in overtime pay or other unintended costs for the employer.

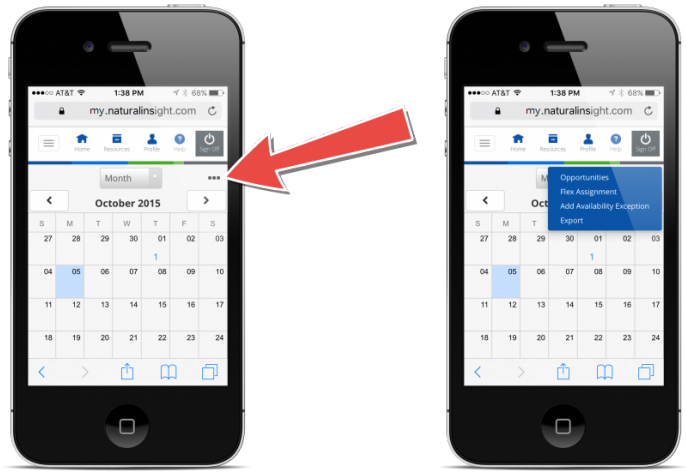
A staff member is not allowed to surpass his *Maximum Hours (Day)* when scheduling new assignments. In other words, if a staff member's daily Capacity Display is 100%, he has reached capacity for the day and cannot schedule additional assignments for that day.

However, a staff member's manager can always override the staff member's *Maximum Hours (Day)* cap and schedule the staff member for an assignment even if the added assignment hours would surpass the staff member's *Maximum Hours (Day)* cap.

Personal Calendar Menu

Staff members access options by tapping on the Personal Calendar Menu ••• button.

Personal Calendar Menu ••• Options in Monthly and Weekly View



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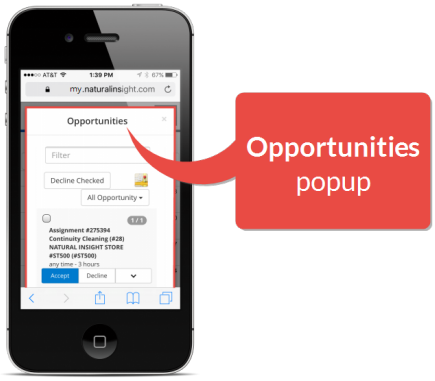
From the personal **Calendar**'s monthly and weekly views, the available options are:

Opportunities

View and schedule opportunities via the **Opportunities** popup.

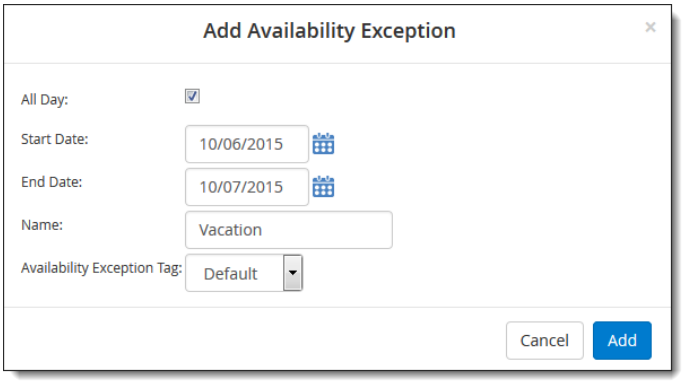


Flex Assignments

View and schedule available **Flex Assignments** via the **Flex Assignment** popup.

Add Availability Exception

Add an **Availability Exception** - a reminder to the staff member of days or times within a day when the staff member is not available (such as *Vacation* or *Dentist Appointment*) - to the **Calendar**.



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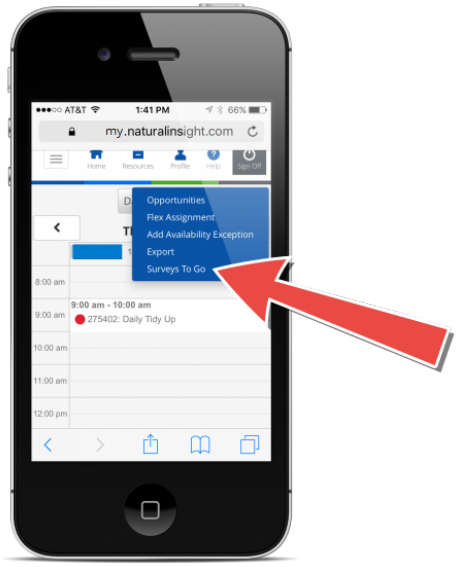
NOTE: An **Availability Exception** has no bearing upon a staff member's ability to accept or schedule work. It is only a visual reminder for the staff member.

» Export

Export a PDF of the Calendar that the staff member can download or print.

Personal Calendar Menu ••• Options in Daily View

From the personal Calendar's daily view, the available options are the same as in the monthly and weekly view PLUS the Surveys To Go option is added. The Surveys To Go button allows a staff member to download (when an Internet connection is present) the surveys for scheduled assignments for *the day* and then access these surveys throughout the day even if no Internet connection is present.



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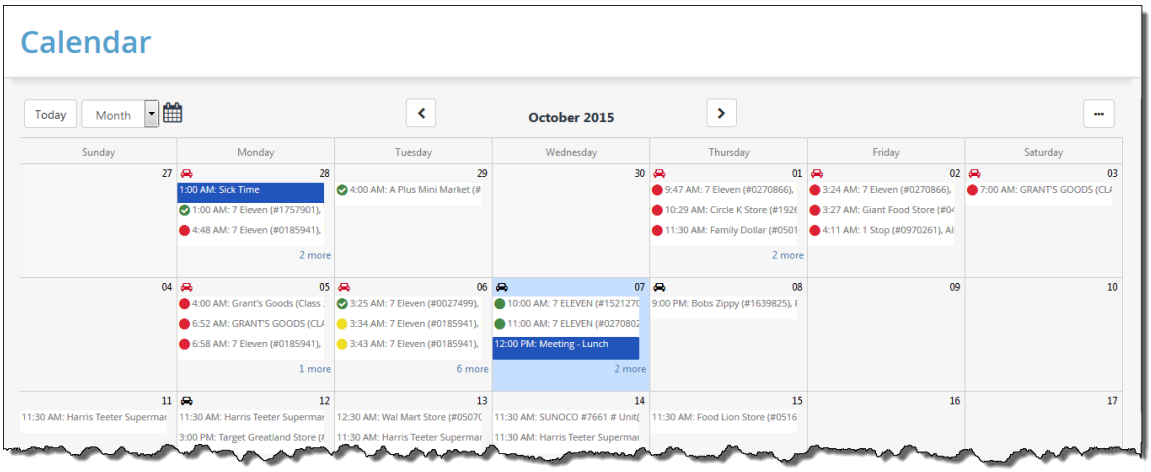
Personal Calendar Legend

Several colored icons provide you with information about the items displayed on the personal Calendar.



Assignment Legend

When assignments are listed on the personal Calendar, a staff member may see one of the following indicators:

A green solid dot indicates an assignment is to be completed today.

A green checked dot indicates that an assignment has been completed - i.e., the assignment's survey has been submitted.

A yellow dot indicates that the assignment should have been completed yesterday.

A red dot indicates that the assignment should have been completed the day before yesterday or prior.

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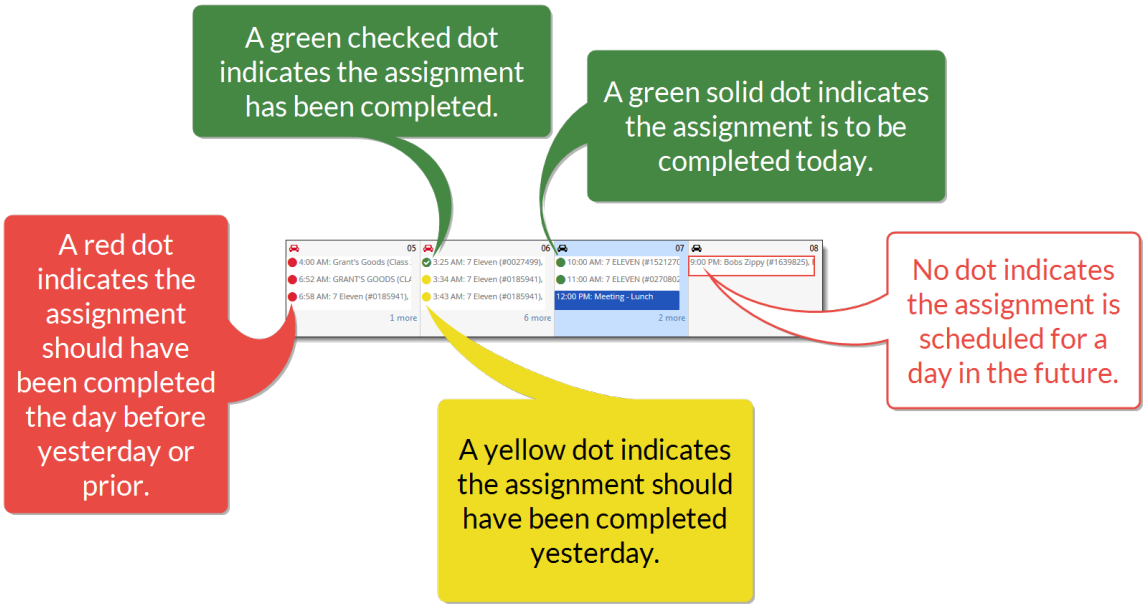
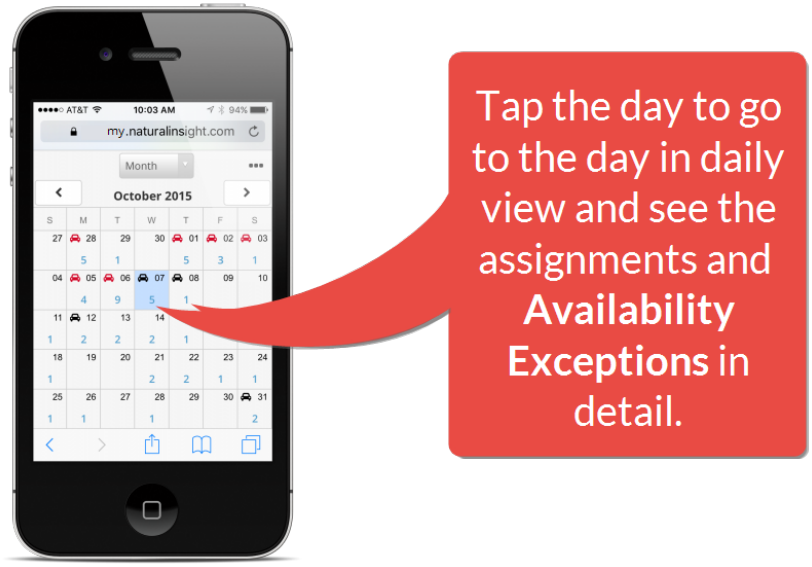
No dot indicates that the assignment is scheduled for a day in the future - i.e., tomorrow or beyond.



In mobile monthly view, the staff member will not see colored assignment indicators due to limited screen real estate. Instead, the staff member will see the number of assignments plus Availability Exceptions for that day in blue.



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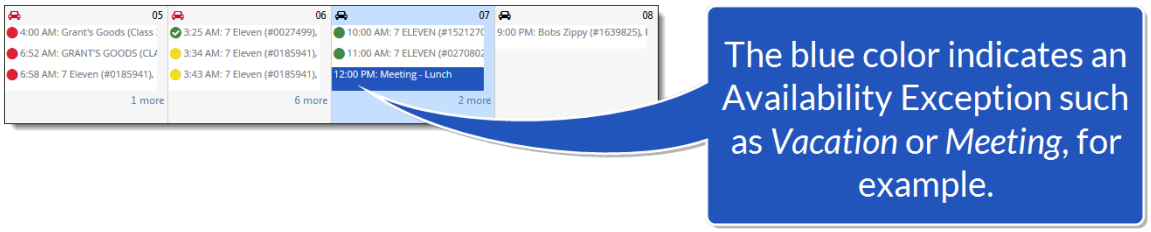
Tapping this number opens the selected day in daily view where the staff member can easily access each assignment and **Availability Exception** as well as the **Routing** button and the **Capacity Display** for the day.

Availability Exception Indicator

An **Availability Exception** such as *Vacation*, *Meeting*, etc. will be listed in blue.



Routing Indicators

If **Routing** is available for an assignment on a particular day, the staff member will see a **Routing** button on a **Calendar** day in one of two colors:

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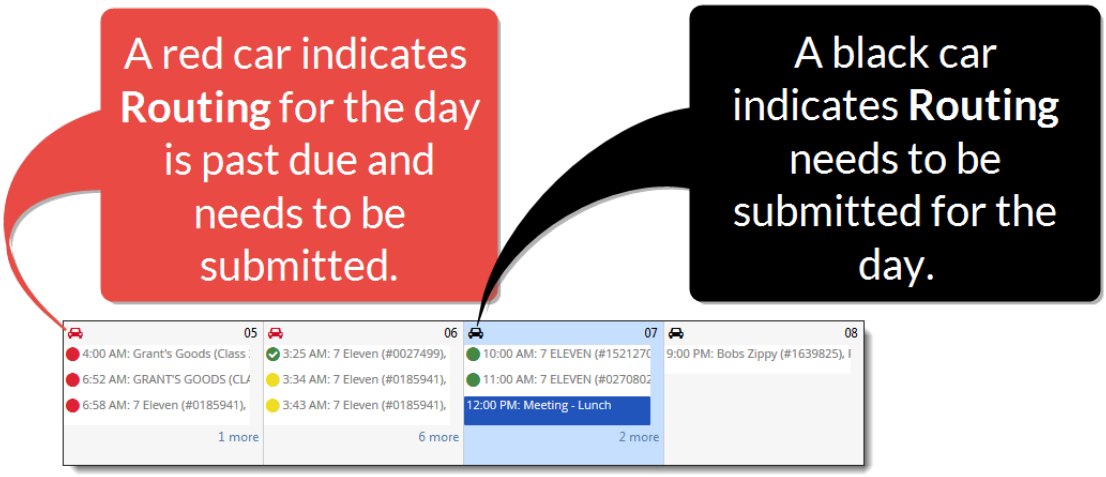
The black car button indicates that **Routing** needs to be submitted once the assignments for the day are completed. When the black car button is tapped or clicked, the **Routing** popup with map displays with turn-by-turn directions as well as the interface to submit **Routing** for the day.

A red car button indicates that **Routing** is past due and needs to be submitted for the day. Click or tap the red **Routing** button to open the **Routing** popup and submit **Routing** for the day.



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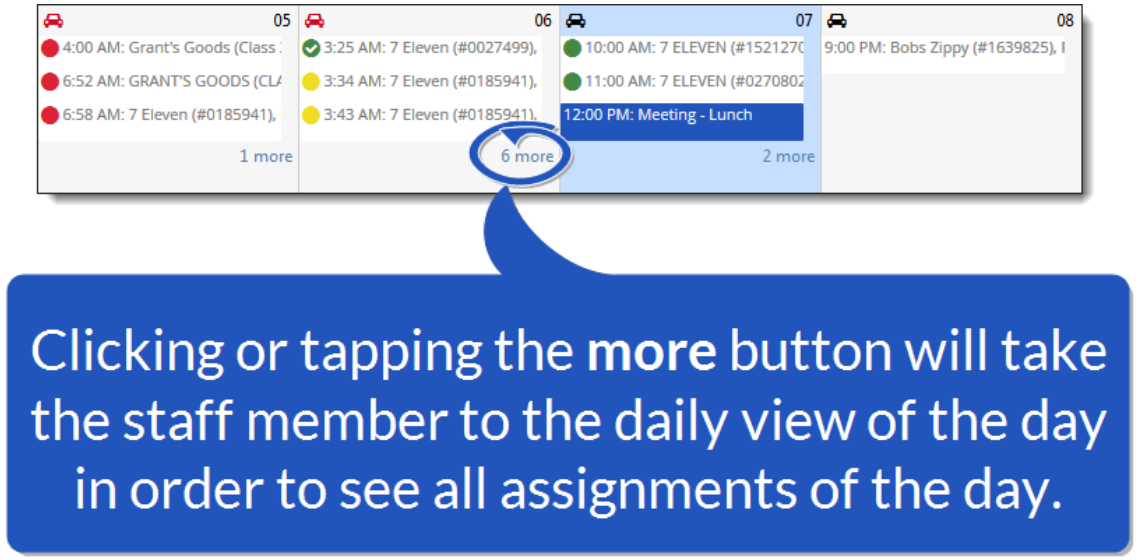
More Assignments Indicator

If more assignments exist that are not viewable on a calendar day within the monthly or weekly view of the personal Calendar due to space limitations, clicking or tapping on the more button will take the staff member to the daily view of the Calendar for that day in which all assignments can be viewed in detail.



Calendar Views

The personal Calendar offers three views on smartphones:

1. Daily
2. Weekly
3. Monthly

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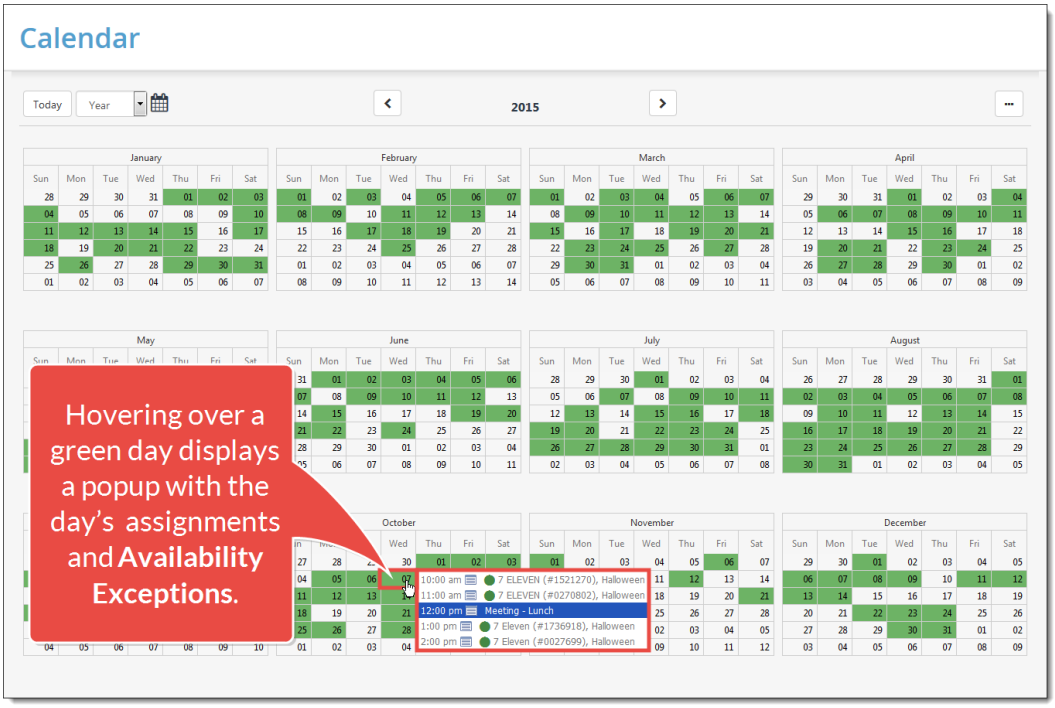
Four views are available on other devices such as tablets and laptops:

1. Daily
2. Weekly
3. Monthly
4. Yearly

The yearly view displays each day on which one or more assignments exists as green. Hovering over a green day displays a popup with the day's assignments and **Availability Exceptions**.



Clicking on the green day in the yearly view will open the day in daily view.

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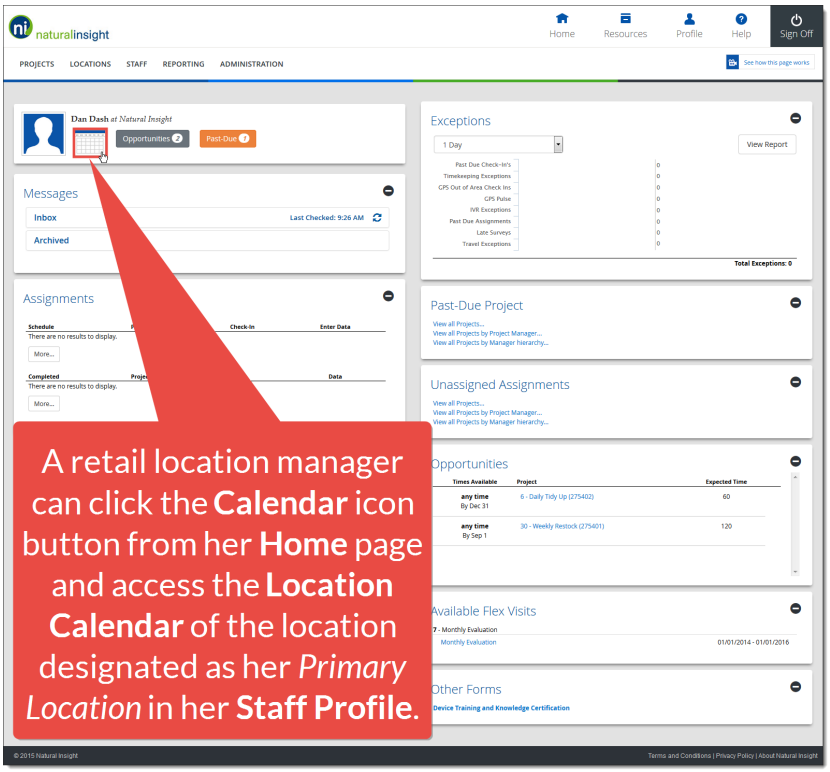
Location Calendar for Retail Managers & Administrators

A location manager can see at a glance all of the assignment activity per day, week, month or year for the location she manages. With this global view, it's a piece of cake to rearrange work and reschedule assignments among a location's staff.

Access to the Location Calendar from a Retail Manager's Home Page

A retail location manager can quickly access with one click from her Home page the calendar of the location she manages.



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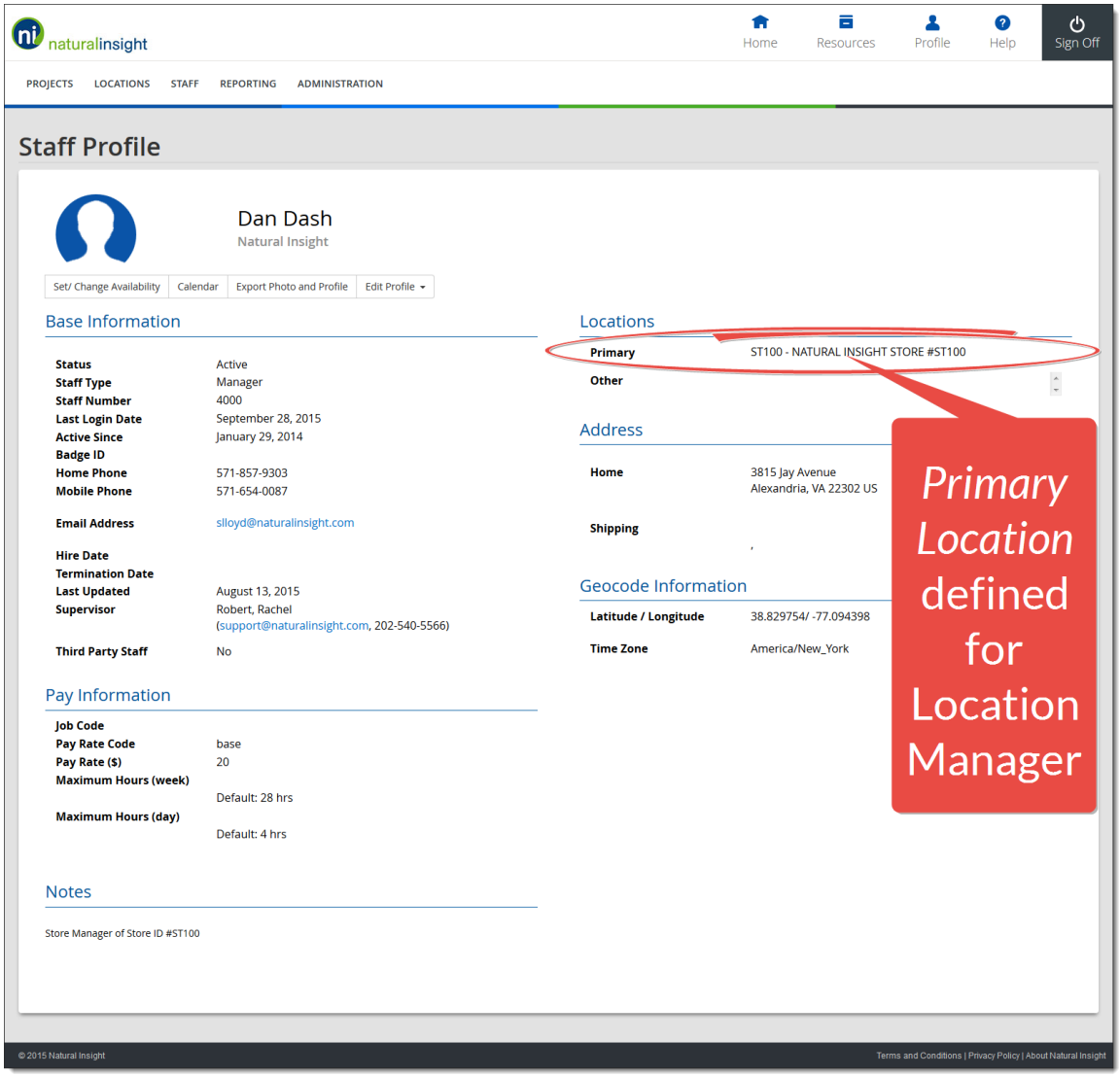
The retail location manager must first have that location designated as her *Primary Location* in her Staff Profile.



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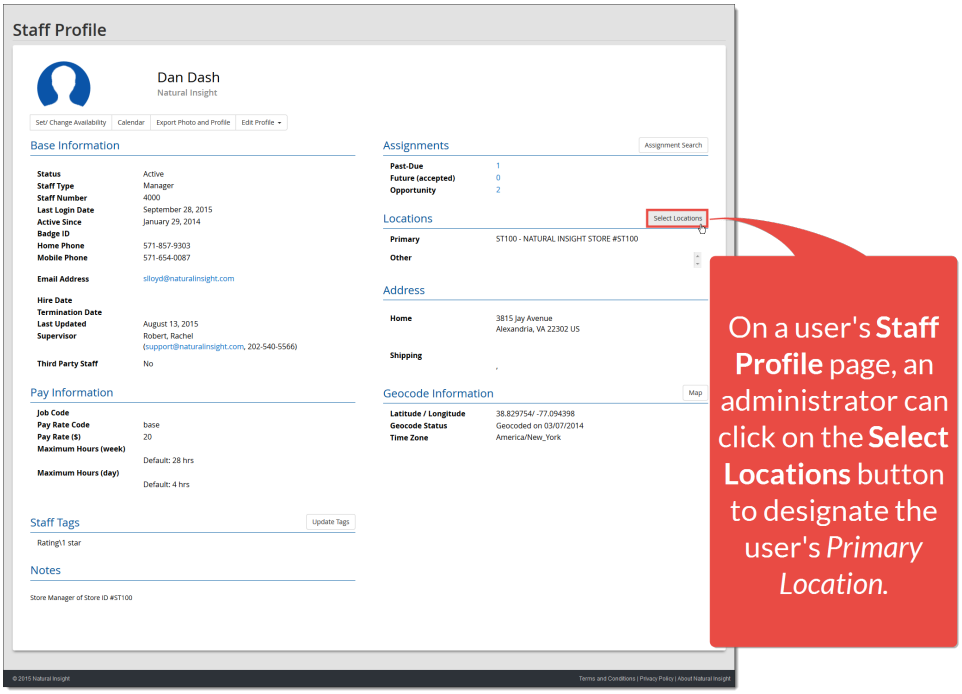
NOTE:

An NI administrator can designate a location manager's *Primary Location* by clicking the **Select Locations** button in the *Locations* section on the manager's **Staff Profile** page.



Upon clicking the Calendar button on the Home page, the location manager will see the Location Calendar of the location designated as his *Primary Location*.

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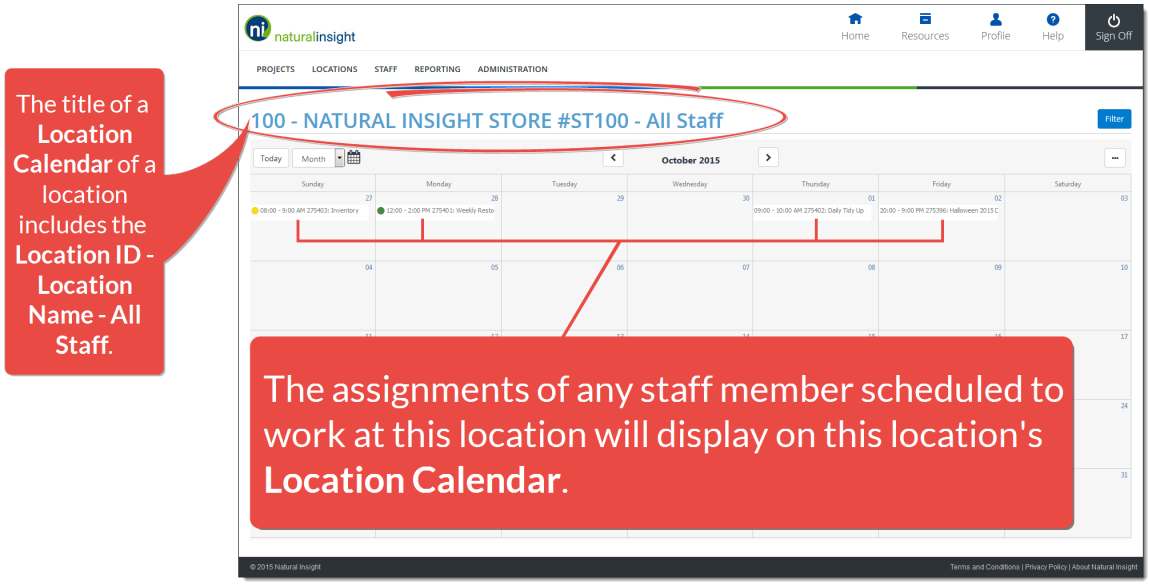
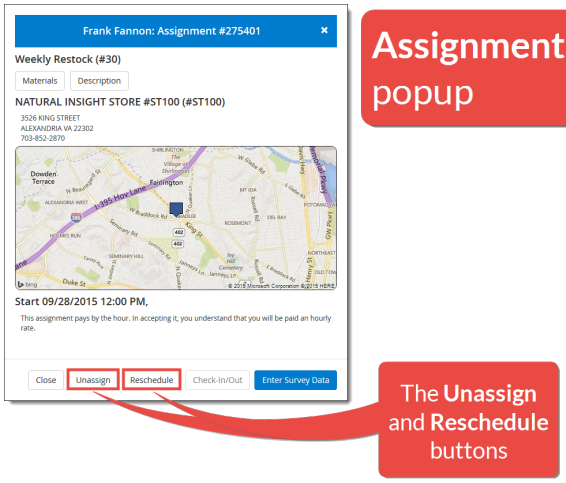
The **Location Calendar** includes all assignments taking place at a location no matter the staff member assigned.



Each assignment on the **Location Calendar** is labeled with the name of the project with which the assignment is associated. Clicking an assignment on the **Location Calendar** will display its **Assignment Info** popup from which a manager can unassign or reschedule the assignment via the **Unassign** and **Reschedule** buttons respectively at the bottom of the popup.



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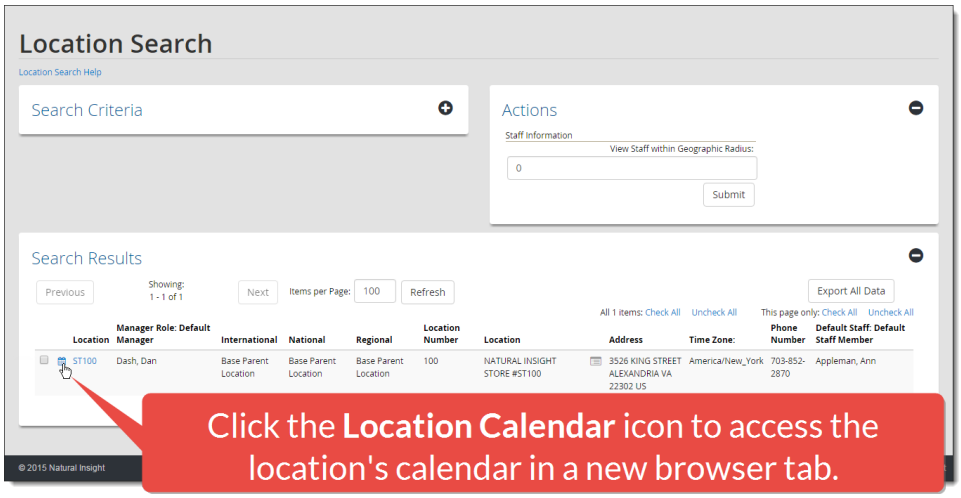
Access to the Location Calendar from Location Search

Managers and administrators can access a location's Location Calendar (in a new browser tab) from the Location Search page by clicking on the Location Calendar icon next to the desired location in the *Search Results* pod.



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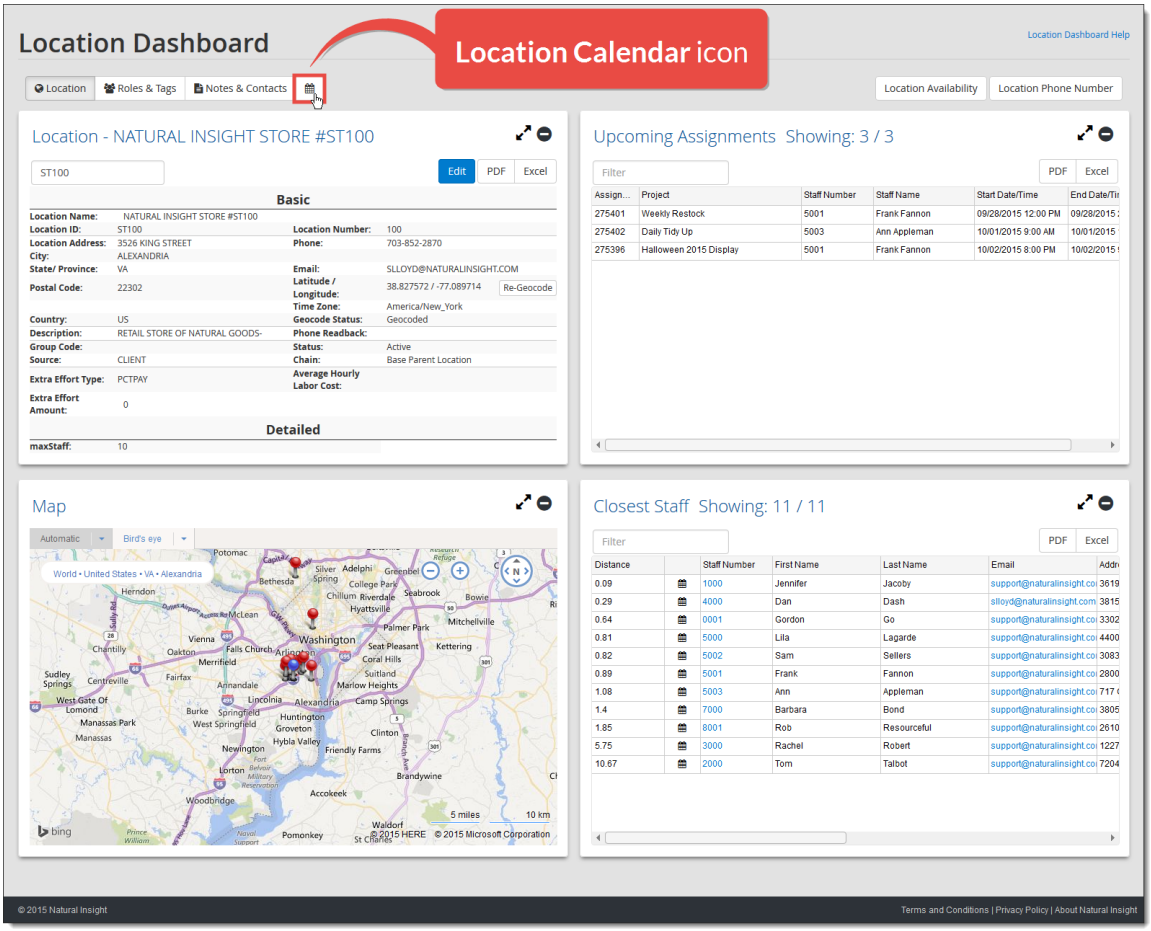
Access to the Location Calendar from the Location Dashboard

Managers and administrators can also access a location's **Location Calendar** (in a new browser tab) from a location's **Location Dashboard** page via its **Location Calendar** icon.



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