



Aspect Software, Inc.

Back-office software for restaurateurs

How To: Scheduling

Opening An Employee Schedule

After schedule names and schedule positions have been entered, you are ready to begin entering an employee schedule. Select **Weekly Schedule** from the Navigator. The default date of the schedule should be the end of the upcoming week. Correct the date if necessary and select **OK**.

(If the date is incorrect, select **Payroll Setup** from the Settings menu and then **Payroll Settings**. Click on the **Overtime** button and correct the starting date of the current pay period).

Selecting A Schedule

After opening a schedule, Aspect displays a grid containing all active employees.

Normally, you will want to limit the display to show only the employees on a particular schedule. For example, you might limit the display to show only bartenders or servers. To do this, click on the binoculars to open the list of displays. Highlight the display named "Schedule - Worksheet" where Schedule is the name of the schedule that you wish to work on. For example, highlight 'Bar - Worksheet'. Don't press **Ok** yet.

If this is the first time that you have entered schedules, you will need to tell Aspect how to display only those employees that belong on a particular schedule. To do this, press the **Custom** button and turn on the check box labeled 'Only employees who can work' and select **Bar** from the drop-down list. If you didn't create a schedule named bar, select the appropriate job code. You are telling Aspect to only display employees who can work this particular job code. Press the **Save** button and **Ok**. You will have to do this one time for each worksheet display.

Entering Shifts

To enter a shift, double-click an empty box on the schedule. When you select a position for the shift, Aspect fills in the job code, rate, time in and time out for you. Press the **Tab** key to move through the fields in the window and adjust the time in and out if necessary. Press the **Ok** button to save the shift.

Double-click on the box for the next day and continue adding shifts for the employee until all shifts have been scheduled. Notice that when you enter the next shift, Aspect automatically fills in the position based on the last position that you entered for the employee.

If Aspect does not automatically fill in the job code and time in/out when you select a position, check the default settings you entered when you created the position. Aspect may also fail to initialize the rate properly if an employee is not set up to work the selected job code on your POS system.

Entering Double-Shifts

To add a second shift for an employee on a particular day, double-click on the employee's name. Aspect will open a new window showing all scheduled shifts for the employee.

To add a shift in this window, press the Insert button and enter a date for the shift. Notice that you can schedule two shifts on the same day by entering two shifts, each with the same date. An employee can be scheduled for up to 3 shifts on a single day.

Press Ok to close the window and return to the schedule. If you added a double shift for the employee, you will find that the employee now has two lines in the schedule. You can add additional double shifts for the employee directly from the schedule.

Printing The Schedule

When you are ready to print the schedule, click on the binoculars and select the display named "Schedule - Schedule" where Schedule is the name of the schedule you wish to print, for example, 'Bar - Schedule'. Only employees that have shifts on the selected schedule will be displayed. To print the schedule, select Print from the File menu.

Saving The Schedule

It is important to note that changes made to the weekly schedule are not saved until you exit the schedule. This means that a system crash or power failure can cause you to lose a significant amount of work.

To prevent this, use the auto-save feature to automatically save your work every few minutes. To enable the auto-save feature, right-click anywhere on the schedule and select Auto Save.

The Auto Save window is used to specify how often the schedule should be saved. For example, a value of five will cause the schedule to be saved every five minutes. Enter a value of zero to disable the Auto Save feature.

Importing A Schedule

If you are starting with a blank schedule, you may wish to import a previous schedule and modify it for the upcoming week.

To do this, right-click anywhere on the schedule and select Import Previous Schedule. Select the schedule to import and the ending date of the week to import from. You may also choose to add to or replace the existing schedule. If you choose to replace the existing schedule, the current schedule will be completely deleted and replaced with the imported schedule.

Important: If you choose to replace the existing schedule, the entire schedule will be erased and replaced by the import, even if you have filtered the display to include only particular employees. For example, if you are working on a Bar schedule and you import from a previous week with the 'replace existing schedule' option turned on, you will replace not only the Bar schedule, but the Server schedule, the Kitchen schedule and any other schedules as well. This is true even if you only import the Bar shifts from a previous week. Be sure not to erase another person's work when you import!

Exporting A Schedule To Your POS System

Aspect currently exports employee schedules to H.S.I., Aloha, Restaurant Manager, and RCS point-of-sale systems. These POS systems use the exported schedule to ensure that employee clock in/out at the correct time. If an employee tries to clock in/out outside of a specified grace period, they must get a manager's approval.

To export a schedule, select Export Schedule from the Payroll menu. Enter the beginning and ending date of the week to be exported. Make sure the checkbox labeled 'Update the point-of-sale system after exporting' is turned on and that 'Export POS Schedule' is selected in the drop-down list. Press Ok to export the schedule. If you do not have the 'Export POS Schedule' option available, you will need to create a batch routine to copy the data from Aspect to the POS System.

If you are exporting a schedule to H.S.I., Aloha, or Restaurant Manager, you will need to enter grace periods into Aspect before you export the schedule. To do this, select Payroll Setup from the Settings menu and then Job Codes. Double-click on any job code. At the bottom, you will see a place for four grace periods - early in, late in, early out and late out. These grace periods must be entered for every job code. If you don't want to enforce the clock-out times, enter large grace periods, for example 120 minutes. After entering grace periods, you will also need to ask your HIS, Aloha, or Restaurant Manager representative to enable the scheduling feature on the POS system.

To enter grace periods for RCS, select Payroll Setup from the Settings menu and then Payroll Settings. You will find a line that says 'If an employee clocks in within...'. The value you enter here will be the grace period for both the clock in and out times. For example, enter 10 to set the grace period to 10 minutes. A secondary effect will be that employees clocking in early will automatically be rounded up to their scheduled clock in time. You do not have to enable the scheduling feature on RCS. RCS will begin enforcing the schedule as soon as you export it.

Projected Hours

When you enter an employee schedule in Aspect, you know what your labor cost will be for the upcoming week - at least in theory. In reality, employees will come in early, leave late, swap shifts and otherwise depart from the schedule.

The Projected Hours report gives you an up-to-date projection of what your labor cost will be based on what has actually happened so far and the remaining scheduled hours. For example, if you open a Projected Hours report at the beginning of the week, it will project the same cost as your schedule. However, if you open it on Friday morning, it will show the actual cost for Monday thru Thursday and the remaining scheduled cost for Friday thru Sunday. This makes it easy to see which employees will be going into overtime by the end of the week even if they were not scheduled for overtime.

FAQ: Top Ten (10) Most Frequently Asked Questions

1. Why is there a message saying that my license is about to expire?

When Aspect is installed, a forty day license is entered so you may begin using the program immediately. When the invoice is paid, a permanent license is entered and you will never be asked for a license again. If your license expires while the invoice is outstanding, simply call to have it extended. The program will warn you each day starting ten days before the license expires. If the license does expire, you will only be able to view the sample data. However, your data is not lost.

2. Why can't I print from Aspect?

If you receive a message saying 'Report not printed', you simply need to reboot your computer. If you are still unable to print, make sure that you have selected the correct printer in the drop-down list. You should also try printing from another program. If you are unable to print from other programs as well, then you need to inform your system administrator of the problem.

3. The buttons on the toolbar at the top have all disappeared. How do I get them back?

If the buttons on the toolbar disappear, you need to reboot the computer. This is not critical. The program will still function normally without these buttons and you can access the same commands by clicking on the File menu and Edit menu.

4. How do I import missing sales?

Sales and labor are normally imported for the previous day by selecting Import POS Totals from the Action menu.

In version 5.65 and later, you can import past sales by clicking the Import button in the Edit Daily Sales window.

In earlier versions, select Sales Summary Report from the Sales menu. Enter a range of dates that includes the day(s) you want to import. After the report opens, right-click on the day you wish to import, select Import Past Journal from the pop-up menu and press Ok. Sales for the day should import. (This will not work with Micros, RCS or Panasonic systems. Missing sales for these POS systems must be entered manually).

If the sales do not import, and you are using an HSI POS system, chances are that your sales were posted to the wrong day in HSI. This is especially true after a holiday or if the POS system has been posted twice on the same day. There are two ways to correct this. The first is to call HSI and ask them to correct the journals. You can then import the day as described above. Another approach is to select 'Import Past Journal' and then modify the name of the journal file there. The journal name will be 'g:\touchit\jor2\jorYYYYM.MDD', for example, 'g:\touchit\jor2\jor20021.224'. Try changing the date in the name to one day later (or earlier), for example, 'g:\touchit\jor2\jor20021.225', and press Ok.

5. How do I import missing labor?

Sales and labor are normally imported for the previous day by selecting Import POS Totals from the Action menu.

To import labor for a prior day, select Edit Daily Labor from the Payroll menu. Press the green '+' on the toolbar, enter the day you wish to import and press Ok. If the information is available on your POS system, it will be imported. If the program complains that the day already exists, you will need to delete it first and then insert it by pressing the green '+'.

6. How do I get terminated employees off the schedule (or active employees onto it)?

Select Edit Employee Records from the Payroll menu. Click on the binoculars on the toolbar and then on the Custom button at the bottom. Turn on the checkboxes labeled 'Terminated Employees' and 'Deleted Employees'. This will cause all employees to be displayed in the list. Double-click on any employee and note that there is a field for the employee's date-of-termination near the bottom right. If there is a date here, the employee will not appear on the schedule. If there is no date, they will.

Another thing to be aware of is deleted employees. Deleted employees will appear in light gray in the display. If you have deleted an employee, you can undelete that employee by double-clicking on their record and then selecting Ok. Answer Yes when asked if you want to Un-Delete the employee. Deleted employees will not appear on the schedule.

7. Why do I get an error whenever I try to open a particular report?

When you click on the binoculars on the toolbar to customize a display, the settings you choose are stored in a file. Sometimes this file can become corrupted and you will have trouble opening a report. Current versions of Aspect will recognize the problem and fix it. Older versions will not.

To correct this problem, you will need to delete a file. If you do not know how to delete a file, contact your system administrator.

Each report has its own file for recording display options. These files all end with an .fmt extension. They are located in the Aspect folder and a few are in the store folder. You will need to delete the appropriate .fmt file and Aspect will create a new one when you open the report again.

The most common .fmt files you might need to know are: Employee Records - employee.fmt, Labor Detail Report - labordtl.fmt, and Inventory Count - count.fmt.

Another way to determine the .fmt file that is in need of repair is to look at all of the .fmt files in Windows Explorer sorted by the date/time they were last modified. The one most recently modified is likely the one in need of deleting.

8. Why do I get an error saying "Can't load Borland controls"?

Aspect is primarily comprised of one (1) *.exe file and five (5) *.dll files that enables the software to run on Windows based operating systems. Sometimes Windows doesn't release one of these files to be reread or reopened. As a result, the program can't run. The only way to clear the error is to reboot the computer.

9. Why don't I see any employees in my schedule?

Click on the binoculars and select one of the 'Worksheet' displays. The 'Schedule' displays only show employees who have shifts on the schedule.

10. Can I print a shift card from Aspect showing all of the employees scheduled on a given day?

Yes. Select Projected Hours Report from the Payroll menu. Click on the binoculars and select one of the Shift Card displays. Click on the binoculars and press Custom to add or remove columns from the shift card.