GENERAL

aspect workforce management user guide

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Aspect Workforce Management User Guide

Managing a modern workforce requires more than just spreadsheets and paper schedules. With the rise of remote teams, flexible hours, and complex labor regulations, businesses need a robust system that can handle staffing, time tracking, and compliance all in one place. **Aspect Workforce Management** is a cloud based solution designed to streamline these processes, giving managers the tools they need to keep operations running smoothly.

This guide is crafted for new users, administrators, and seasoned professionals looking to maximize the platform's capabilities. It covers everything from initial setup to advanced reporting, ensuring you can harness the full power of Aspect Workforce Management without missing a beat.

1. Overview of Aspect Workforce Management

Aspect Workforce Management (Aspect WFM) is a comprehensive scheduling, time and attendance, and labor analytics platform. It helps organizations:

- Build and publish employee schedules.
- Track hours worked, overtime, and compliance.
- Automate shift changes and approvals.
- Generate real time reports and dashboards.
- Integrate with payroll, HR, and ERP systems.

Whether you run a retail chain, a manufacturing plant, or a tech startup, Aspect WFM adapts to your unique workforce needs.

Key Benefits

- Real time Visibility – Managers can view schedules, timecards, and labor costs on a single dashboard.
- Compliance Assurance – Built in rules enforce labor laws, reducing risk of penalties.
- Employee Empowerment – Workers can view schedules, request time off, and swap shifts through self service portals.
- Data Driven Decisions – Advanced analytics help identify staffing trends and optimize labor budgets.

2. Getting Started: Initial Setup

Before diving into daily tasks, set up your Aspect WFM account. The following steps will guide you through the initial configuration.

2.1 Create an Account

1. Navigate to Aspect.com and click "Sign Up."
2. Enter your company details, including name, industry, and preferred time zone.
3. Verify your email address and set a secure password.
4. Log in to the Admin Portal.

2.2 Configure Company Settings

1. Go to Settings > Company Profile to input company information, logo, and branding.

2. Set up Time Zone and Calendar preferences.
3. Define Pay Periods and Holiday Calendar to align with your payroll cycle.
4. Enable Security Settings – two factor authentication, password policies, and user roles.

2.3 Import Employees

Import your workforce data via CSV or integrate directly from your HRIS.

1. Navigate to People > Import.
2. Choose CSV Import or HRIS Integration (e.g., Workday, BambooHR).
3. Map fields (Name, Email, Position, Department).
4. Validate and complete the import.

2.4 Set Up Roles and Permissions

Control who can view, edit, or approve schedules.

1. Go to Settings > Roles.
2. Create roles such as Scheduler, Supervisor, HR Admin.
3. Assign permissions: view schedules, edit timecards, approve time off.
4. Assign users to roles.

3. Building Schedules

Creating accurate schedules is the backbone of workforce management. Aspect WFM offers flexible scheduling options to fit any business model.

3.1 Manual Scheduling

1. Navigate to Schedule > New Schedule.
2. Select a date range and assign shifts manually.
3. Drag and drop employees onto shift slots.
4. Use the Auto Schedule button for a quick draft.
5. Review and Publish the schedule.

3.2 Auto Scheduling Features

Leverage built in algorithms to generate optimal schedules.

- Skill Matching – Ensures employees with required skills are scheduled.
- Availability Constraints – Respects employee availability and labor laws.
- Shift Balancing – Evenly distributes workload.
- Overtime Prevention – Alerts when overtime thresholds are reached.

3.3 Shift Swaps and Time Off Requests

Employees can request changes through the portal.

1. Employee logs in to My Schedule.
2. Select Swap Shift or Request Time Off.
3. Supervisor receives notification and can approve or deny.
4. Schedule updates automatically upon approval.

4. Managing Time and Attendance

Accurate time tracking is essential for payroll accuracy and compliance. Aspect WFM integrates multiple clock in methods.

4.1 Clock In Options

- Web Clock In – Employees log in via the portal.
- Mobile App – GPS based check ins for remote workers.
- Biometric Devices – Fingerprint or facial recognition.
- QR Code Scanning – Quick check in for on site employees.

4.2 Timecard Review

1. Navigate to Time > Timecards.
2. Filter by date, employee, or department.
3. Approve or edit entries.
4. Export to CSV for payroll processing.

4.3 Overtime and Compliance Alerts

Aspect WFM automatically flags overtime violations and labor law breaches.

- Set overtime thresholds per state or country.
- Enable alerts for consecutive workdays exceeding limits.
- Generate compliance reports for audits.

5. Reporting and Analytics

Data-driven insights help managers optimize staffing and reduce costs.

5.1 Standard Reports

- Labor Cost Report – Hours worked, overtime, and total labor expense.
- Shift Utilization Report – Percentage of shift coverage.
- Time Off Summary – Accrued vs. taken leave.
- Compliance Dashboard – Real time view of labor law adherence.

5.2 Custom Report Builder

Create tailored reports using drag and drop components.

1. Go to Analytics > Custom Reports.
2. Choose dimensions (date, department, skill).
3. Add metrics (hours, cost, overtime).
4. Save, schedule, or export the report.

5.3 KPI Dashboards

Set up dashboards to monitor key performance indicators.

- Schedule coverage %.
- Average overtime per employee.
- Cost per hour.
- Employee satisfaction scores.

6. Mobile Access

Aspect WFM’s mobile app keeps your team connected on the go.

6.1 App Features

- View and edit schedules.

- Request time off or swap shifts.
- Clock in/out with GPS verification.
- Receive real time notifications.

6.2 Mobile First Scheduling

Managers can approve shift swaps and time off requests directly from the app, ensuring decisions are made promptly.

7. Integration Ecosystem

Aspect WFM seamlessly connects with your existing tech stack.

7.1 Payroll Systems

- Direct integration with ADP, Paychex, and QuickBooks.
- Export timecards and labor costs automatically.
- Synchronize employee data to avoid duplication.

7.2 HRIS and ERP Platforms

- Workday, BambooHR, SAP, Oracle, and others.
- Bidirectional sync for employee status and compensation.
- Maintain a single source of truth.

7.3 API Access

Developers can use the REST API to build custom workflows.

- Retrieve schedule data.
- Update employee records.
- Automate approval processes.

8. Best Practices for Optimal Use

Following these best practices will help you maximize efficiency and reduce errors.

- Regularly Review Schedules – Check for gaps or over staffing before publishing.
- Set Clear Policies – Document overtime, shift swap, and time off procedures.
- Leverage Auto Schedule – Use it for baseline schedules, then fine tune manually.
- Train Employees – Provide onboarding sessions on clock in methods and self service features.
- Audit Data – Conduct quarterly audits to ensure compliance and data accuracy.

9. Troubleshooting Common Issues

9.1 Clock In Errors

- Check network connectivity.
- Verify GPS accuracy for mobile clock ins.
- Ensure biometric device firmware is up to date.

9.2 Schedule Conflicts

- Review employee availability settings.
- Check for overlapping shifts in the scheduler.
- Adjust auto schedule rules to reduce conflicts.

9.3 Reporting Delays

- Ensure data sync is enabled in the integration settings.
- Verify that the correct date range is selected.
- Clear browser cache or try a different browser.

9.4 API Failures

- Check API key validity and permissions.
- Review request limits and throttling policies.
- Inspect error logs for detailed messages.

10. Frequently Asked Questions

Q: Can Aspect WFM handle multiple time zones?

A: Yes. You can set a default time zone for the company and individual time zones for employees. The scheduler automatically adjusts for time differences.

Q: Is there a mobile app for iOS and Android?

A: Absolutely. The mobile app is available on both platforms and offers full functionality for clock ins, schedule viewing, and shift requests.

Q: How do I integrate with my existing payroll system?

A: Navigate to **Integrations**in the admin portal, select your payroll vendor, and follow the step by step wizard to connect. If your system isn't listed, you can use the API to build a custom integration

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