WILYA - User Guide

WILYA - USER GUIDE

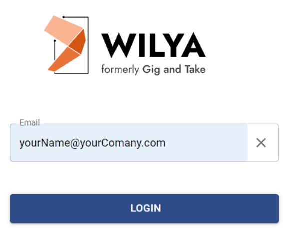
LOGIN

This section will guide you through the login process for the Supervisor Web App

LOGIN PROCESS

Enter Your Credentials: On the login screen, provide your registered email address and password in the respective fields.

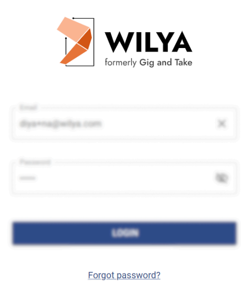
Click on Login: Once you've entered your credentials, click on the Login button to proceed.



WILYA Login Screen

FORGOT PASSWORD

If you forget your password, click on the Forgot Password option. Enter your registered email id and click on the “Send password reset link” button. You will receive the link to update the password in your registered email address. Click on the link and you will see the “Reset Password” screen. Type your new password that you want to set and then confirm your password. Now click on the “Reset Password” button to complete the reset process.



Forgot Password

FIRST TIME LOGIN

1. When logging in for the first time, enter your email id on the login screen and click the login button.
2. Then click on the "forgot password?" option. This will send a password reset link to your registered email address.
3. Check your inbox and you will be able to see an email from ‘**Wilya <noreply@wilya.com>**’ consisting of a link for resetting your password. Click on the link and reset your password.

LOGIN ERRORS

1. Login Failed - Username or password is incorrect : If you see a login failed error, It is because either the email id or password is incorrect. Double- check email id and password, and try to login again.
2. Login failed - An error occurred : This error occurs when there is no internet connection available. Please ensure you have an active internet connection and attempt to login again.
3. Mail not received : If you do not see the reset password email in your inbox, check your spam mail. You can do it by following the steps below :
    a. Using Gmail

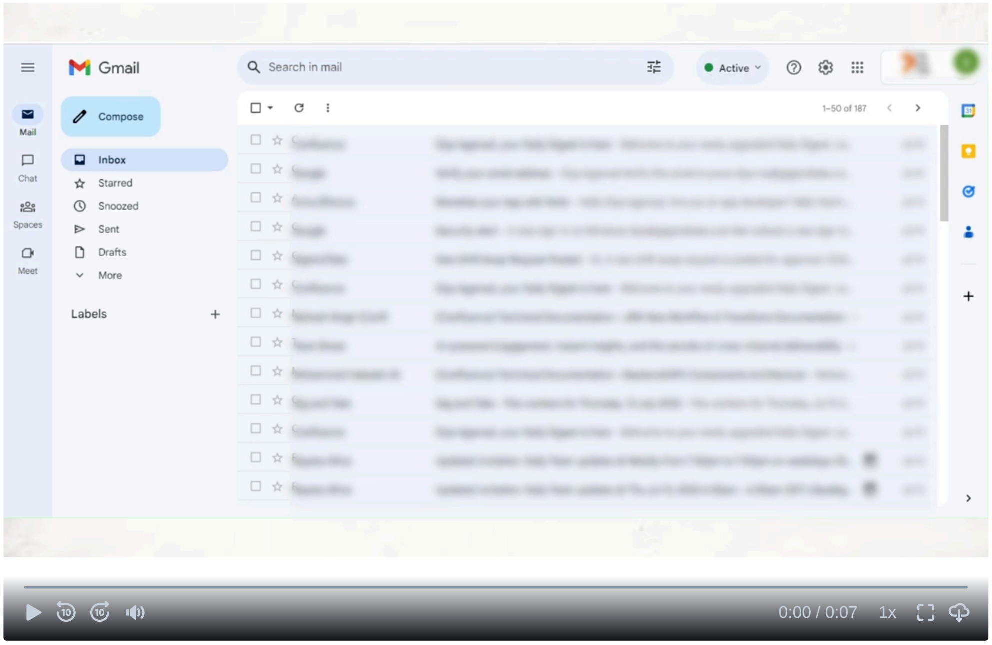
i. Open your email using your registered email address.

ii. On the screen, from the left side bar, choose the drop down menu “More”.

iii. Now click on “spam” and you will be able to see all the emails in your spam folder.

iv. Look for an email from ‘**Wilya <noreply@wilya.com>**’ to reset your password.

v. You will find a link in the email. Click on it to reset your password.



b. Using Outlook

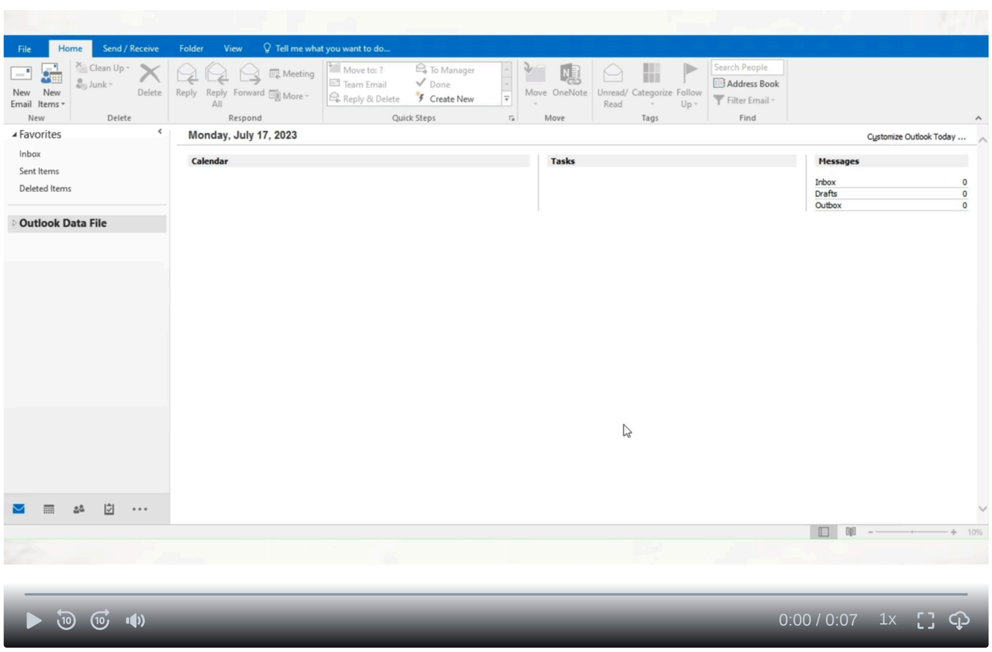
i. Access your outlook email using your registered email address.

ii. Look for the "Junk Email" folder in the left sidebar. It will be present under the "Outlook Data File" dropdown.

iii. Click on the "Junk Email" folder to view its contents.

iv. You will see a list of emails. Look for an email from ‘**Wilya <noreply@wilya.com>**’ to reset your password.

v. You will find a link in the email. Click on it to reset your password.



PASSWORD POLICY

Password policy is a set of rules for creating safe passwords for better security of accounts. The rules are as follows

1. Your password must have a minimum of 8 characters.
2. Your password should contain at least one special character, such as symbols like &, #, @, ! , %, $, *.
3. Your password must include at least one numeric digit (0-9).
4. You are suggested to include at least one upper case letter (A-Z) and at least one lower case letter (a-z) in your password .

SSO AUTHENTICATION

Single Sign-On (SSO) authentication is a method that allows users to access multiple applications or websites using a single set of login credentials.

Instead of having separate usernames and passwords for each application, SSO enables users to log in once and access various services without having to re-enter their credentials.

You can simplify the login process, save time, and enhance security by reducing the need for multiple passwords.

Steps to Login Using SSO (Single Sign-On):

1. On the login screen, locate the email field. Enter your email ID associated with your SSO account.
2. Click on the "Login" button to proceed.
3. You will be directed to a new screen with two options - “Reset“ and “Login with SSO“.
4. To reset your email, select the "Reset" option.
5. To continue logging in using your SSO account, choose the "Login with SSO" option.
6. A list of available SSO accounts will be displayed.
7. Select the account from the list that you wish to use for login.
8. If you cannot find your account in the list, click on "Use Another Account" and enter the credentials for the desired account.
9. Once the correct credentials are entered, you will be logged in to the system.

Please note that access to this feature may vary depending on your contract terms.

CREATING YOUR FIRST SHIFT

SCHEDULE SHIFT

CREATE SHIFT

To create a shift:

1. Click the cell corresponding to the date and time when you want to create the shift and this will prompt a dialog box to appear.
2. Alternatively, you can also click the "+ Shift" button to initiate the creation of a new shift. This will prompt a dialog box to appear.
3. In the dialog box, provide the necessary details using the available drop-down menu options.
   a. Specify date, start time, and end time for the shift.
   b. Additionally, select the work center and the number of workers required.
   c. Select the shift type that you want to publish. Select "Job Role" and corresponding job roles required, if you want to publish shift by job role, or select "Skills" and corresponsing skills required if you want to publish shift by skills.
   d. Optionally, add a note to inform workers about any relevant information.
4. Then, click the "Create Shift" button located at the bottom of the dialog box to create the shift.
5. To complete the process of creating a shift, click on the "Publish and Notify" button at the top of the page. This action will publish the shift and notify all workers assigned to the designated job role, informing them that a shift has been created and is now available at the specified date and time.
6. If you decide to cancel creating the shift, click on the "Cancel" button at the bottom of the dialog box.

UserGuide-Supervisor-Create a shift

PUBLISH AND NOTIFY

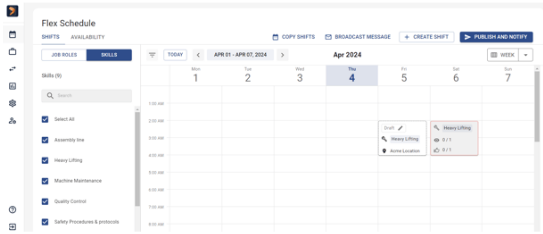
Use the “Publish and Notify” button at the top right corner of the screen to make a shift available for the workers and to notify them.

1. Click the “Publish and Notify” button at the top right corner of the screen.
2. Select the shifts you want to publish by clicking the checkboxes next to them.
3. Confirm your selection by clicking the checkbox at the bottom of the dialog box.
4. Click “Publish and Notify” at the bottom of the dialog box.

UserGuide-Supervisor-PublishAndNotify

Additional Details:

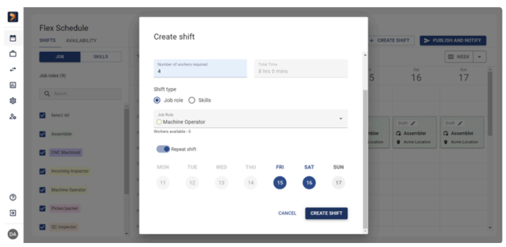
- After a shift is published, it looks different from a draft shift. Draft shifts are labelled as "Draft" and contain job role/skill and workcenter.
- Published shifts have the job role/skill and two additional parameters:
  - An eye symbol 👁️ followed by the number of workers who have viewed the notification out of the total number of workers that are eligible for that job role.
  - A thumbs-up symbol👍with the number of workers who have accepted the shift from the number of workers that are required for that shift.
- When a supervisor publishes a shift, all the workers with a job role/skill associated with this published shift are notified. Workers can then view and accept the published shift.



REPEAT SHIFT

To conveniently repeat shifts utilize the "Repeat Shift" toggle button in the create shift dialog box. The steps to be followed are:

1. Click on the toggle “Repeat Shift” button to activate it.
2. Select the desired days of the week by clicking on the dates.
3. Click on the “Create shift” button at the bottom of the dialog box.



COPY SHIFT

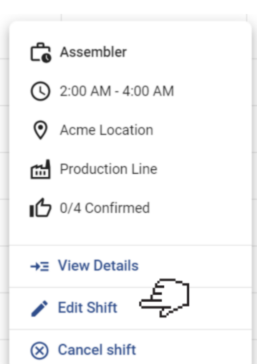
To again create a shift with the same details as of a shift that is already created before, use the copy shift option.

1. Click on the “Copy shift” button located in the top row, and a dialog box will appear.
2. From the first calendar that is the calendar to the left, select the week that you want to copy shifts from.
3. Now, in the second calendar that is to the right side, select the week that you want to paste the shift in.
4. Scroll down and select the job roles for which the shift is to be copied.
5. Go through the summary of shifts displayed and then click on the “Copy Shift” button at the bottom of the dialog box. Selected shifts are now copied.
6. Additionally, uncheck the “Only shift created by me” option if you want to copy all the shifts in that week including the shifts that are not created by you.

EDIT SHIFT

1. Click on the shift card that you want to edit.
2. Click the "Edit Shift" option.
3. A dialog box will then appear, allowing you to make the desired changes to the shift you created. After making the necessary adjustments, click "Save Shift".

The shift is now successfully edited.

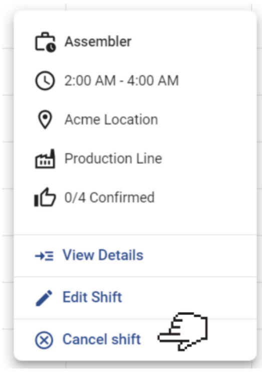


Edit Shift

CANCEL SHIFT

1. Click on the shift card that you want to edit.
2. Click the "Cancel Shift" option.
3. A confirmation pop-up will then appear, asking you if you are sure and want to delete the shift. Click "Yes".

The shift is now successfully canceled.



Cancel Shift

SHIFT SCHEDULING ERRORS

CREATE SHIFT BUTTON DISABLED

Make sure that you have at least one worker. “Number of staff” should be atleast one to create a shift.

JOB ROLE DROP DOWN DISABLED

Check if you have any job roles specified under “work center”. Job roles drop down will be accessible only if job roles are present.

1. Click on the logo to expand the left pane >> select settings >> select work centers.
2. Now click on the workcenter that you wanted to create a shift for.
3. Check if there are any job roles specified. If not, add job roles.

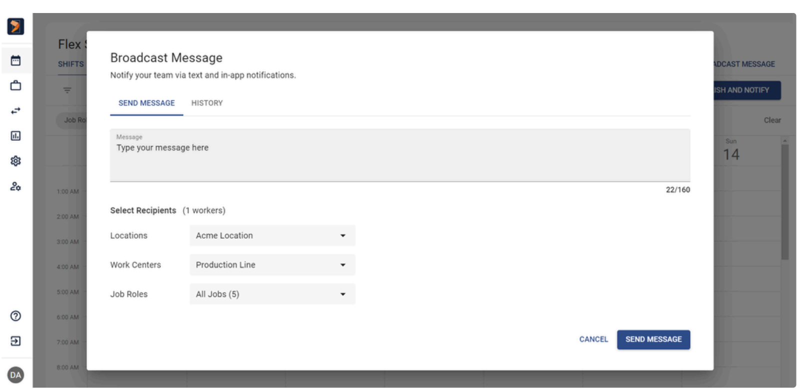
BROADCAST A MESSAGE TO WORKERS

Broadcast messages help you to communicate with your entire team as well as individual workers. When a message is broadcasted, workers will be notified via SMS and their mobile application.

You can send messages and also check the message history using the “Broadcast message” feature.

TO BROADCAST A MESSAGE

1. Click the “Broadcast message” button at the top. You’ll see a dialog box pop-up. Select the option “Send message”.
2. Type the message you want to send in the message field in 160 characters or less. The count of characters that you entered can be seen just below the message field in the right corner.
3. Select the Location, workcenter and job roles that you want to send this message to, by clicking on the drop down menu. You will be able to see the number of workers that will receive this message based on your chosen location, workcenters and job roles.
4. Click on the SEND MESSAGE button at the bottom of the dialog box to send the message.
5. If you want to cancel, click on the “Cancel” button.

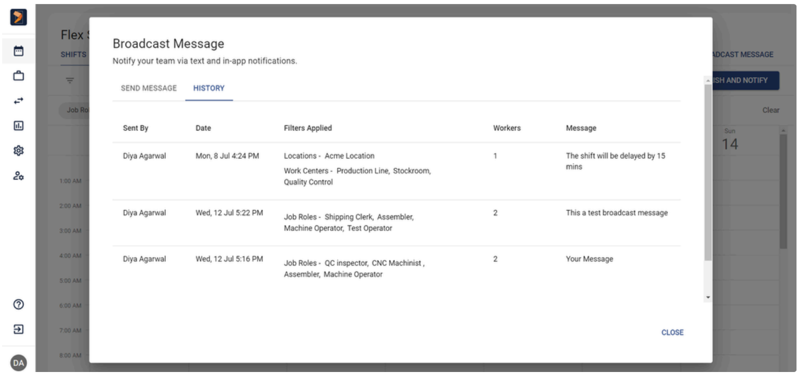


Braodcast Message

CHECK MESSAGE HISTORY

Click on the “Broadcast message” button at the top. You’ll see a dialog box pop-up. Select the option “History”. In the history tab, you will find a record of previous messages, including:

- The date the message was sent
- The content of the message
- The number of workers to whom the message was sent
- The person who sent the message and
- The Loaction, workcenter and job roles (All filters applied) to which the message was sent.



Braodcast message history

SORTING BROADCAST MESSAGE HISTORY

You can sort the content of any of the above columns, by clicking on the column header and then clicking on the arrow beside it to arrange the content.

DATE

To sort dates in chronological order(in the order they happened):

- Click on the column heading - “Date”.
- You’ll see an arrow mark beside it. Click on the arrow mark to sort the dates in order of as and when they happened.
- You can click on the same arrow again to arrange the dates in the reverse order.

MESSAGES AND SENT BY

To sort the “messages” and “sent by” in alphabetical order(in the order of the letters in alphabet):

- Click on the column heading - “Message” if you want to sort messages or click on the column heading - “Sent by” if you want to sort according to the sender’s name.
- You’ll see an arrow mark beside it. Click on the arrow mark to sort the messages or sender’s name in order of how letters appear in the alphabet (from a to z).
- You can click on the same arrow again to arrange it in the reverse order (from z to a).

WORKER COUNT

To sort worker count in ascending order:

- Click on the column heading - “Worker count”.
- You’ll see an arrow mark beside it. Click on the arrow mark to sort the count in lowest to highest order.
- You can click on the same arrow again to arrange this count in the highest to lowest (descending) order.

UserGuide-Supervisor-BroadcastMessage

MANAGE WORKERS (ADD/EDIT/REMOVE)

Managing workers allows you to add new workers, edit workers and delete workers.

You can access the “Manage workers” screen by following the steps below:

1. Click on the logo at the top left corner of the screen to expand the menu bar.
2. In the menu bar, select settings
3. Under settings, click “Workers"

(Menu bar >> Settings >> Workers)

ADD WORKER

To add a new worker:

1. Click on the “+Worker ” button present at the right of the screen and you will see the “Add Worker” window open
2. Add worker’s personal information in this section that is labeled as “Worker Details”. This is a required section. It is mandatory to fill in these details to create a new worker.
3. Add worker’s first name, last name, cell phone number and joining date in respective fields. These are all required fields.
4. Add worker’s location, worker type and reporting manager. These are all required fields.
5. Additionally, add worker’s other details like workercenter, worker ID, and primary job title. If it is a full time worker, you can also add their shift pattern.
6. Now click on the “Create Worker” button at the bottom of the screen to add this new worker.

UserGuide-Supervisor-AddWorker

Assign Job Roles

1. Go to the worker's page by clicking on “Workers” under “Settings” in the menu bar.
2. Search for the worker you want to edit and click on the pencil icon.
3. Scroll down to the “Assign Job Roles” section and click on the pencil icon.
4. Select the job roles that you want to assign to the worker by clicking on the corresponding checkboxes.
5. Click "Save".

UserGuide-Supervisor-WorkerAddJobRole

Assign Skills

1. Go to the worker’s page by clicking on “Workers” under “Settings” in the menu bar.
2. Search for the worker you want to edit and click on the pencil icon.
3. Scroll down to the “Assign skills and skill level” section.
4. Click “+ Skill” button and select all the skills that you want to assign to the worker.
5. Click “Add”.

Additional details:

Assign skills and skill level of the worker:

- Corresponding to the job roles that you selected in the previous section, you will be able to see the skills required for those job roles in this section.
- Click on a skill to see the drop down menu consisting of five categories and assign the appropriate skill level for the worker. The skill levels are:
  - No training: These workers have not received any formal training for the job.
  - Trainee: These workers are currently undergoing training for the job.
  - Certified: These workers have successfully completed the required training and obtained certification.
  - Expert: These workers possess extensive knowledge and experience in this skill.
  - Can train others: These workers have the ability to impart training to others in the respective job.

UserGuide-Supervisor-WorkerAddSkills

Assign Certifications

1. Go to the worker’s page by clicking on “Workers” under “Settings” in the menu bar.
2. Search for the worker you want to edit and click on the pencil icon.
3. Scroll down to the “Assign Certifications” section.
4. Click “+ Certifications” button and select all the certifications that you want to assign to the worker.
5. Click “Add”.

EDIT WORKER

To edit the details of an already existing worker:

1. Locate the row corresponding to the worker you wish to edit.
2. Hover your cursor over the row. (Place your mouse pointer anywhere in that row)
3. On the right side of the row, you will see symbols for edit and delete.
4. Click the pen symbol, which represents the edit option.
5. Make the desired changes to the worker's profile.

UserGuide-Supervisor-WorkerAddCertification

DELETE WORKER

To delete a worker:

1. Locate the row corresponding to the worker you wish to delete.
2. Hover your cursor over the row. (Place your mouse pointer anywhere in that row)
3. On the right side of the row, you will see symbols for edit and delete.
4. Click the trash bin symbol, which represents the delete option.
5. A confirmation pop-up will appear asking you to confirm if you want to delete the worker. Select "Yes" to proceed with deleting the worker or choose "No" to return without deleting the worker.

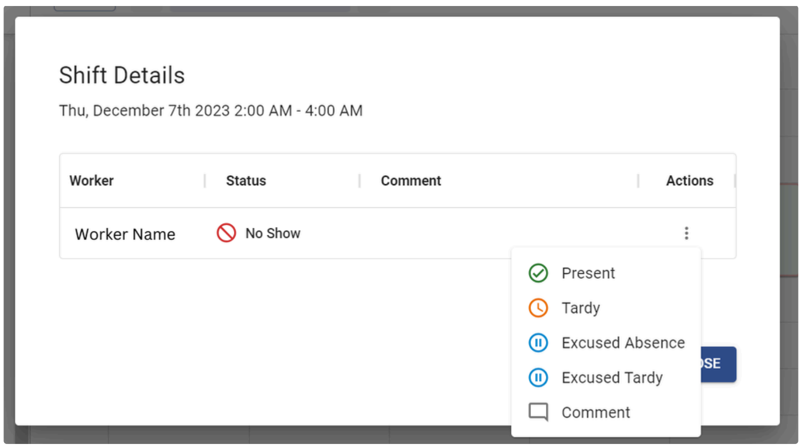
SCORE DETAILS

By clicking anywhere on a worker's row, you can view a right side pane appear with the badge, score details and skills of that worker.

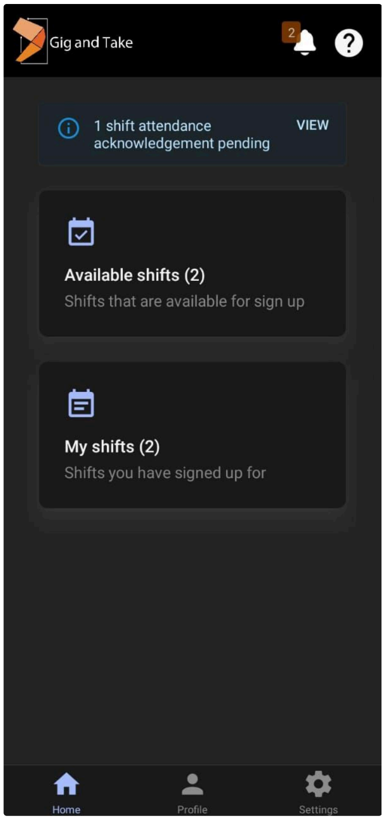
THE KARMA SCORE

In the right side pane, below the worker name, you can see the worker score. To know more about how the score is calculated, refer to the section Understanding worker profile - Karma Score in this guide.

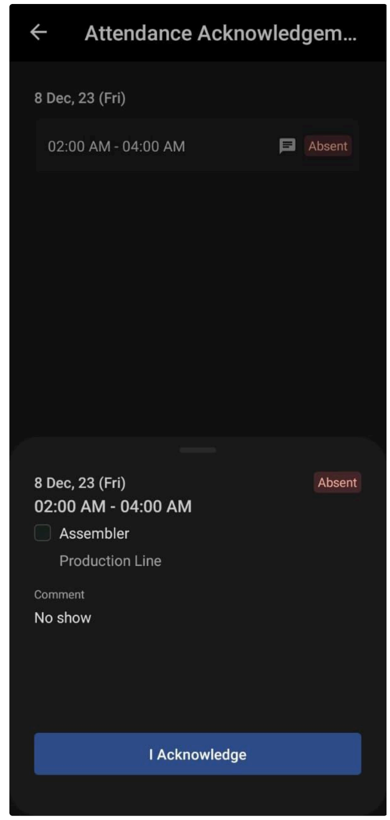
If Karma Score is selected, then the attendance acknowledgement feature is automatically turned on.



Supervisor marking attendance



Attendance Acknowledgement Feature in worker mobile app



Worker acknowledging attendance

SCORE DETAILS

1. Click anywhere on the row and a side pane will appear on the right.
2. Click “Score Details”.
3. In the score details tab, by selecting from the drop down menu, you can view
   a. Reliability Score :
      i. View worker's reliability score and the break down of factors affecting the reliability score.
      ii. Reliability score is calculated for the last 30 days and is affected by the attendance, timeliness and number of cancellations of the worker.
      iii. Reliability score is only calculated if manager updates the employee attendance.
   b. Consistency Score :
      i. View worker's consistency score and also see a weekly breakdown of the number of hours they have worked.
      ii. Consistency score is calculated by the system.
   c. Experience level :
      i. View experience level of the worker on a scale of 0 to 500, where
         1. 0 - 100 indicates beginner level
         2. 100 - 399 indicates intermediate level and
         3. Above 400 indicates advanced level
      ii. View other details like Hours Worked, Attended Shifts , Missed Shifts and Canceled Shifts.
      iii. Experience score is calculated by the system.
4. Click “Close” on the top of the side pane to close it. Alternatively, you can click anywhere on the row again to close it.

SKILLS

1. Click anywhere on the row and a side pane will appear on the right.
2. Click “skills” and view the job roles, skills and skill level of the worker.

UNDERSTAND WHO GOT NOTIFIED/ VIEWED/ ACCEPTED/ DECLINED A SHIFT

- After publishing a shift, the supervisor can view how many workers confirmed the shift by looking at the shift card.
- The “👍 x/y confirmed” on the shift card represents that x number of workers accepted the shift from y number of workers that were sent notification, .
- To view additional details:

1. Click on the shift card that you wish to see the details for.
2. Select the “View Details” option from the menu.
3. “Shift Details” dialog box will appear showing the status of all the workers as follows:
   a. Confirmed 👍 - Worker accepted the shift
   b. Assigned ☑️ - Worker is assigned the shift
   c. Declined ❌ - Worker declined the shift
   d. Applied ✋ - Worker applied for the shift and supervisor has to take an action
   e. Notified 📢 - Worker was notified about the shift
   f. Viewed 👁️ - Worker viewed the shift but did not take any action
   g. Not Eligible - Worker is not eligible for the shift. Hover over the status to know the reason.
   h. Not Notified - Worker is not notified about the shift. Hover over the status to know the reason.

RESEND NOTIFICATION

Renotify workers allows sending of a reminder notification to workers for the shift.

To renotify workers:

1. Click on the shift card that you want to renotify workers about.
2. Select the “View Details” option from the menu.
3. Choose the workers you want to renotify by selecting their checkboxes. To renotify all workers, check the box next to ‘Worker’ at the top of the dialog box.
4. Click “Resend Notification” button present at the bottom of this dialog box.

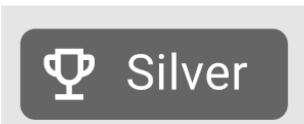
UserGuide-Supervisor-Renotify

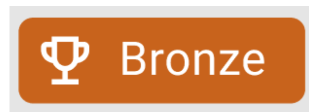
UNDERSTAND WORKER PROFILE - KARMA SCORE

The Karma Score is calculated using the combination of reliability score, consistency score and experience level of the worker. This rating system will encourage employees to improve their performance.

The Karma Score levels :

1. Tier 1 - GOLD: This tier is assigned when the reliability score is 'above 90%', the consistency score is 'above 50%', and the experience level is 'advanced'.
2. Tier 2 - SILVER: Workers who do not meet the criteria for Tier 1 and Tier 3 fall into this tier.
3. Tier 3 - BRONZE: This tier is assigned when the reliability score is 'below 80%' or if the consistency score is 'below 50%', or the experience level is 'Beginner'.





MANAGE JOB ROLES, SKILLS AND CERTIFICATIONS

CREATE JOB ROLE

To add a new job role:

1. Click on the logo at the top left corner of the screen to expand the menu bar.
2. In the menu bar, select “Settings”. Under settings, click “Job Roles"
3. Click “+ Job Roles” button to add a new job role.
4. Fill in the details like Job role, corresponding colour, workcenter and required skills.
5. Click “Create” to create the job role.

EDIT JOB ROLE

To edit a job role:

1. In the menu bar, select “Settings”. Under settings, click “Job Roles".
2. Search for the job role you want to edit and click on the pencil icon.
3. Make desired changes in the “Edit Job Role” dialog box that appeared.
4. Click “Update” at the bottom of the dialog box to save the changes.

CREATE SKILL

To add a new skill:

1. Click on the logo at the top left corner of the screen to expand the menu bar.
2. In the menu bar, select “Settings”. Under settings, click “Skills"
3. Click “+ Skill” button to add a new skill.
4. Fill in the details like Skill name and description. Click “+ Add Certifications” to associate certifications to this skill.
5. Click “Add” to add the skill.

An alternate way to create a skill, while creating a job role:

1. While creating a job role, locate the skills field.
2. Type the name of the new skill into the skills field and click "Create Skill" option which is loacted inside the skills field.
3. The new skill will instantly be created and will be associated with the job role you are creating.

EDIT SKILL

To edit a skill:

1. In the menu bar, select “Settings”. Under settings, click “Skills".
2. Search for the skill you want to edit and click on the pencil icon.
3. Make desired changes in the “Edit Skill” dialog box that appeared.
4. Click “Save” at the bottom of the dialog box to save the changes.

CREATE CERTIFICATION

To add a new certification:

1. Click on the logo at the top left corner of the screen to expand the menu bar.
2. In the menu bar, select “Settings”. Under settings, click “Certifications"
3. Click “+ Certification” button to add a new certification.
4. Fill in the details like name, type, description, and validity period.
5. Click “Add” to add the certification.

EDIT CERTIFICATION

To edit a certification:

1. In the menu bar, select “Settings”. Under settings, click “Certifications".
2. Search for the certification you want to edit and click on the pencil icon.
3. Make desired changes in the “Edit Certification” dialog box that appeared.
4. Click “Save” at the bottom of the dialog box to save the changes.

SKILLS MATRIX - FOR CROSS SKILLING

You can add, track and edit your worker’s skills here in skills matrix.

On this screen, you can analyse and update the skills and skill level of all the workers. There is a table-like structure with workers listed on the left side and skills listed as columns on the top. The cells in the table represent the worker's level in a particular skill. Different components on this screen are :

1. Main Table - Displaying workers and their skill level:
    - The table shows the worker's skill levels.
    - Worker's name and skill score is listed on the left side.
    - Job Roles, Skills and the associated skill weight is listed as column headings on the top.
    - Each cell in the table displays a symbol indicating the worker's level in that skill.
    - Additionally, you can update the skill levels of workers as needed.
        - When you click on the symbol in a cell, a menu will appear displaying all five different skill levels.
        - Select the desired level and a confirmation box will pop up, asking if you want to update the skill level of that worker.
        - Simply choose "Yes" to update the skill level or "No" to go back without making any changes.
2. Column Picker - Choose what columns you want to look at by clicking check boxes.

Skills Matrix - Column Picker

3. Filters - Apply different filter to view data like Location, workcenter, worker type, job roles, skills and manager.

Skills Matrix - Filters

SKILL PRIORITY

Note: This feature is made accessible by default. Please reach out to your Customer Success partner for additional details.

Using Skill Priority, skills can be assigned various levels based on the importance of the skill.

This enables “Skill Score” for workers, which is calculated by combining the importance of a skill (skill priority) with the proficiency level of worker for that skill.

UNDERSTANDING THE WORKER APP

The worker app has three tabs at the bottom of the screen: Home, Profile, and Settings.

At the top right, there are two options: Notifications and Help.

Home Tab

The Home tab is divided into two sections:

1. Available Shifts:
    - Shows shifts scheduled by the supervisor that are available for sign-up.
    - A "New Shift" toggle button displays shifts that the worker hasn't seen yet.
2. My Shifts:
    - Displays all the shifts that the worker has signed up for.

Profile Tab

- The Profile tab contains the worker's details like name, phone number, job roles, and skills.
- If your company turned on the Karma Score feature, worker will also see their score details.
- Additionally, it shows the "skills that the worker is interested in."
- At the bottom of the screen, there is a button "Learn New Skills." Workers can click this button to show their interest in crosskilling.

Settings Tab

In the Settings tab, workers can use toggle buttons to enable or disable the following features:

- Auto Accept Shift: Automatically accepts shifts if they are within the worker's availability, which worker would have set.
- SMS Notifications: Enables or disables receiving shift-related SMS notifications.
- SMS Daily Shift Reminders: Enables or disables receiving daily shift reminders via SMS.

There is also a "Log Out" option available in the Settings tab.

Notifications

This section contains all the important notifications for the worker, including:

- New Shifts: Notifications about newly posted shifts.
- Shift Swap Requests: Notifications for requests to swap shifts with other workers.
- Messages from Company: Messages from the company that the worker needs to be aware of.

Help and Support

Clicking on this option will redirect the user to a form where they can request support for their inquiry. Once received, the worker's request will be addressed by a Gig and Take team member.

NEED FURTHER ASSISTANCE?

If this user guide does not provide the information you are looking for, please email us at 'help@wilya.com'. Someone from our team will address your query and provide the necessary support.