

DK Valet Workforce user handbook

Property setup scheduling and daily work

Use these 55 procedures to find the right screen, complete a task and check its result. Each procedure contains numbered instructions and a picture reference. The same procedures are available under Help and SOPs in the application.

Choose your starting point

New associates Start with SOPs 01–03, then 32–41 for planning, arrival, route work and closeout.

Supervisors Use SOPs 13–21 for scheduling and daily review, and 22–27 for setup walks and route publication.

Administrators Start property onboarding with 04–11. Use 28–31 and 42–52 for the advanced controls your role permits.

Set up a property in order

Create the property → approve its boundary → assign eligible people → set weekly service windows → complete a setup walk → review units → publish a master → publish the associate route → verify readiness → assign dated shifts.

Use each procedure

Read Before you start and Open first. Follow Steps 1, 2, 3 and any remaining steps, then check the result. Use the picture reference for the named step. Controls vary by role, property configuration and device.

Always confirm the property and displayed time zone. Keep unknown or degraded evidence visible. Phone location and inferred route lines do not prove an exact indoor unit or floor. Confirm that collection has stopped and that uploads have completed as separate checks.

Pictures contain training examples. Screenshots, component previews and workflow illustrations are labeled. This handbook describes the application as reviewed on 2026-10-12.

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SOP 01 | Getting started

Activate your account and sign in

Activate the account provided by your manager and open your assigned work.

For Web and mobile · Administrator / Supervisor / Associate

Before you start Use your own invitation and the approved DK Valet Workforce installation.

Open Invitation email or Sign in

Step 1 Open your invitation

Open the activation link in the invitation email. Follow the password setup screen. If the link has expired or was cancelled, contact the person who invited you.

Step 2 Set your permanent password

Enter and confirm the password requested on screen. If you were issued a temporary password, complete the required permanent password change before opening work.

Step 3 Sign in

Open the Operations website or installed mobile app. Enter your work email and password, then select Sign in. Complete device unlock if prompted.

Step 4 Check your workspace

Associates use My work. Managers and supervisors use their available management workspace. Confirm the property before taking any action.

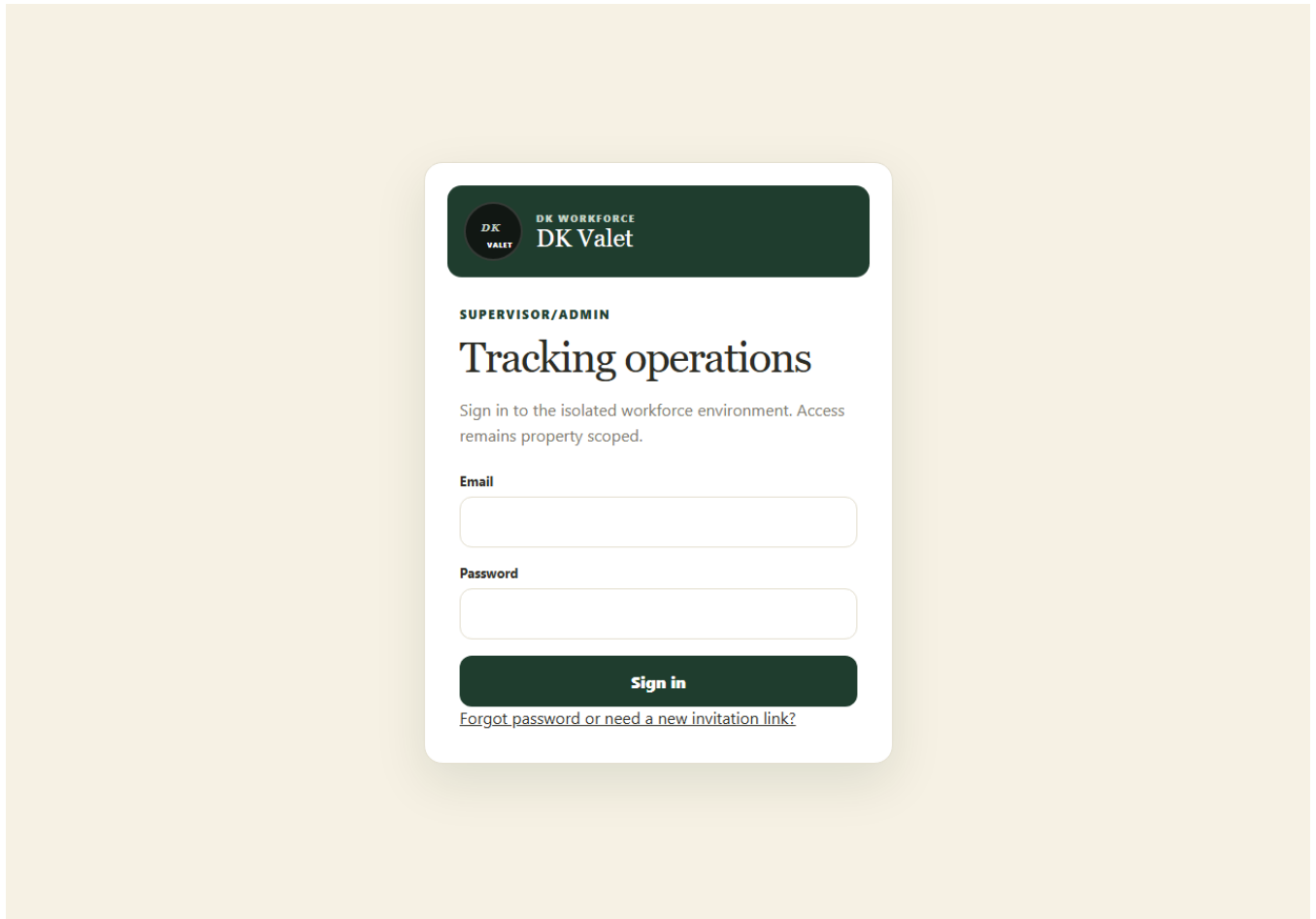
Check your result Your assigned workspace opens and your authorized properties are available.

If something goes wrong Missing properties need an access review by an administrator. Creating a second account will not fix access.

See the picture reference on the next page.

SOP 01 Picture reference

Activate your account and sign in



Step 3 · Sign in to the Operations website using your workforce account.
Application screenshot with training data.

SOP 02 | Getting started

Reset a password and unlock the app

Recover access to your existing account.

For Web and mobile · Administrator / Supervisor / Associate

Before you start Have access to the email address on your workforce account.

Open Sign in > Forgot password or Reset password

Step 1 Request a reset

On the website select Forgot password. On mobile enter your email and select Reset password.

Step 2 Open the latest email

Use the latest password reset link and follow the confirmation screen. Keep the link private.

Step 3 Save a new password

Complete the password and confirmation fields, submit, then return to sign in.

Step 4 Unlock an existing session

If mobile shows Session locked, select Use device unlock. Use another account signs out and returns to account entry.

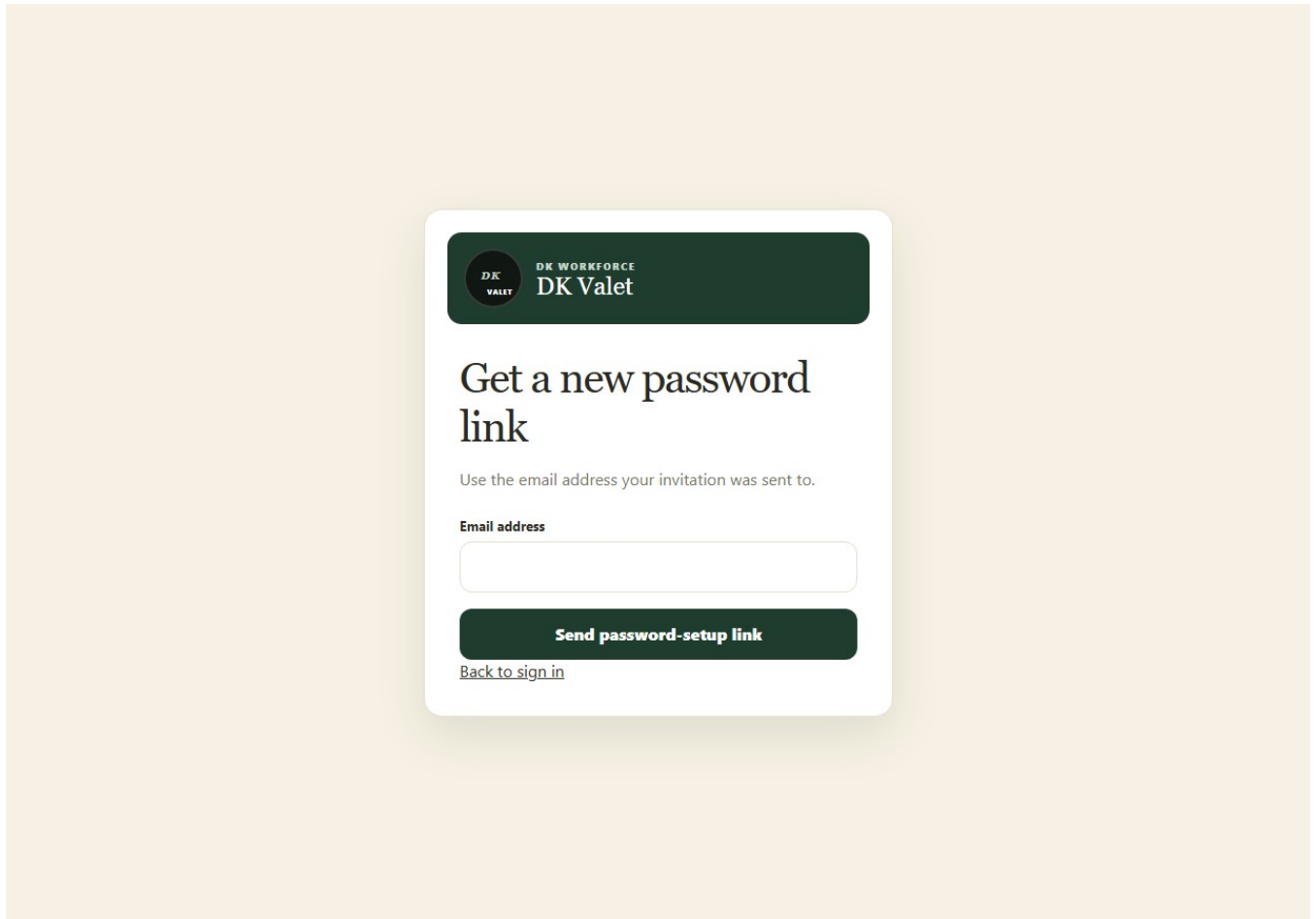
Check your result You can sign in with the new password or unlock your existing session.

If something goes wrong If a link is invalid, request a fresh one. If delivery or account status still prevents access, contact your supervisor.

See the picture reference on the next page.

SOP 02 Picture reference

Reset a password and unlock the app



Step 1 · Request an email to recover your existing workforce account.

Application screenshot with training data.

SOP 03 | Getting started

Find your workspace and the correct property

Choose the correct task and property before reading or changing information.

For Web and mobile · Administrator / Supervisor / Associate

Before you start Your account must have active access to the property.

Open Operations or My work

Step 1 Choose daily work

On web use Today, Schedule, Review and People. On mobile managers use the daily workspace tabs; associates start at My work.

Step 2 Open management when needed

Use Manage for setup and administration. On mobile, open Company run questions for company scope, or choose a property then Run questions. Return with the displayed Back action; check unsaved-draft warnings.

Step 3 Select and verify the property

Use the property selector or Find property search. Read the property name on the destination and its displayed time zone.

Step 4 Use the task navigation

Use the screen Back or Home action to leave a task. Page through lists when more results exist. Clear filters if the list appears empty.

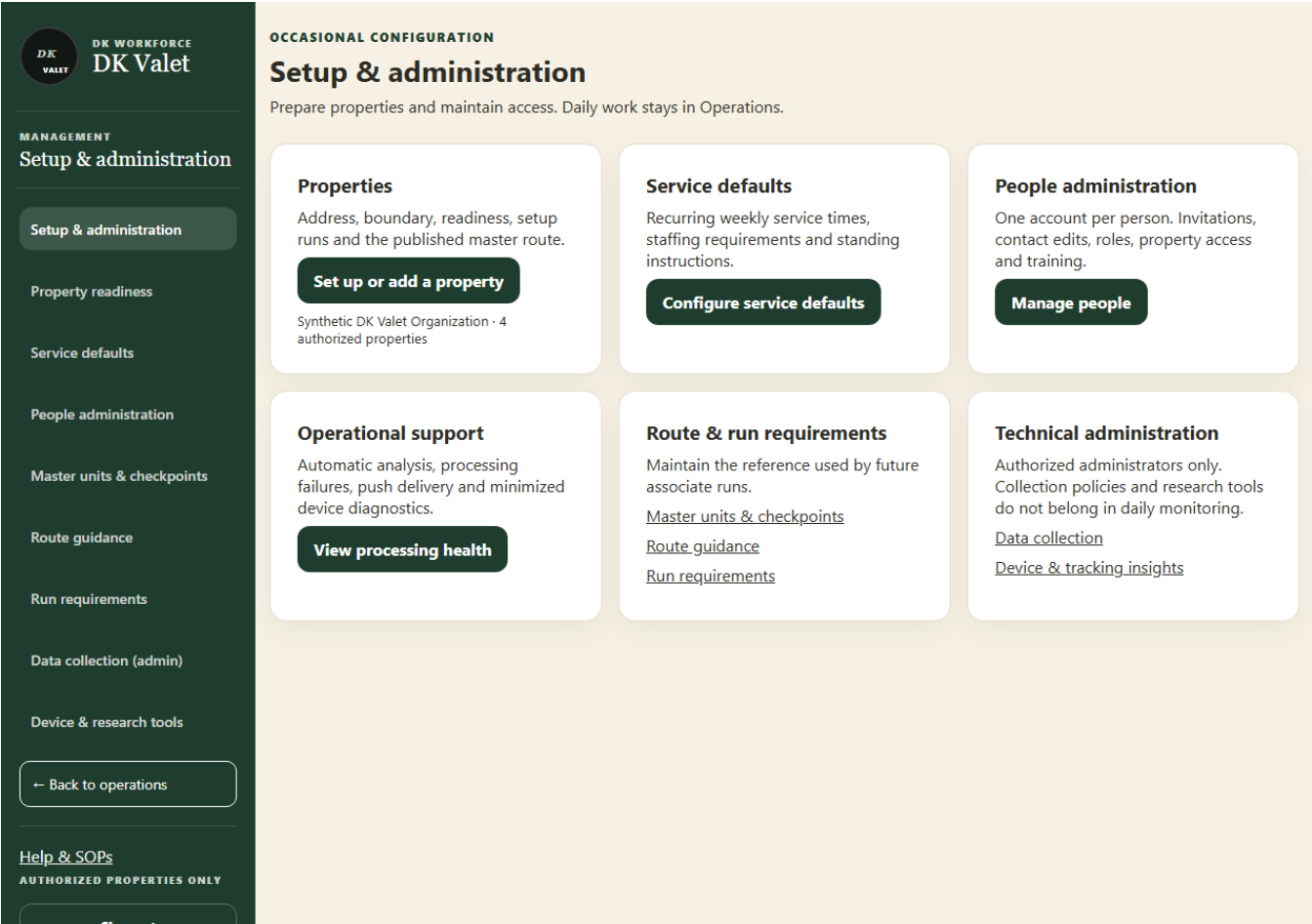
Check your result The screen header and selected property match the work you intend to perform.

If something goes wrong An empty authorized-property list is an access issue. Ask an administrator to review your assignment.

See the picture reference on the next page.

SOP 03 Picture reference

Find your workspace and the correct property



Step 2 · Setup & administration: use the property selector and the task controls shown.
Application screenshot with training data.

SOP 04 | Property setup

Create a property

Create the property record that the rest of setup uses.

For Web · Administrator

Before you start Have the approved property name, postal address and time zone. Organization-level creation access is required.

Open Manage > Set up or add a property

Step 1 Open property setup

Select Manage, then Set up or add a property. Locate Create address-only property.

Step 2 Enter the property identity

Choose the organization, enter Property name and verify Time zone. The default time zone may not be correct for this property.

Step 3 Choose and check the address

Use the address search and select the matching address. Review the structured address fields and correct them before submission.

Step 4 Create and select the property

Select Create address-only property and wait for the success message. Select the new property to continue its readiness steps.

Check your result The property appears in the authorized selector with its saved name and address.

If something goes wrong If creation is unavailable, ask an organization administrator. An address-only property still needs boundary, eligible people, weekly times and a published unit route.

See the picture reference on the next page.

SOP 04 Picture reference

Create a property

START HERE

Create address-only property

No units required

Set the property name, time zone, and Google address here. The structured address remains editable until you create the property; Step 1 uses the saved result without asking for it again.

Organization

Property name

Time zone

Synthetic DK Valet Organization

America/Chicago

Google address search

Start typing a valid property address

Street address

Address line 2

City

State/region

Postal code

Country code

Formatted address

US

Create address-only property

Step 3 · Enter the property identity and review the structured address before creating it.

Application screenshot with training data.

SOP 05 | Property setup

Review the address and save a work boundary

Define the reviewed outdoor boundary used by start checks.

For Web and mobile · Administrator / Supervisor

Before you start Create the property first and verify its address. Only users with boundary editing permission can save.

Open Manage > Property readiness > Review address and draw work boundary

Step 1 Open the property boundary

Select the property, then open Review address and draw work boundary. On mobile open the property readiness boundary task.

Step 2 Inspect the map

Locate the actual property and safe entrances. Verify the saved address and current boundary before drawing.

Step 3 Adjust the boundary

Use the available map boundary controls. For a polygon, place and review its corners around the property. Use the editor instructions to adjust or clear a draft.

Step 4 Review and save

Check the complete outline and any required review fields. Use the boundary save action, wait for confirmation and verify that an active boundary version is displayed.

Check your result Property readiness marks the boundary configured and the map shows the reviewed outline.

If something goes wrong A missing or inaccurate GPS position requires a fresh location check. Expanding a boundary to conceal a bad position is not a remedy.

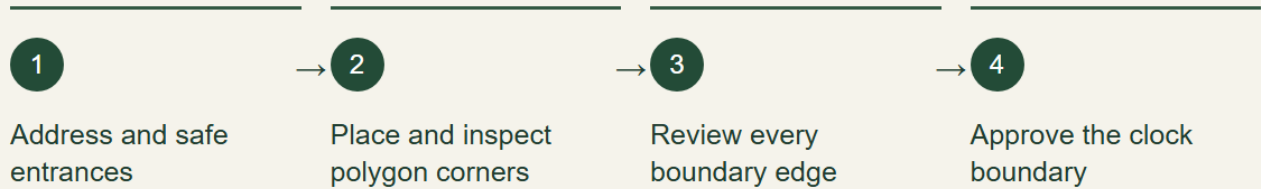
See the picture reference on the next page.

SOP 05 Picture reference

Review the address and save a work boundary

WORKFLOW ILLUSTRATION · SOP 05

Review the address and save a work boundary



Review the actual property outline before approving it. A clock boundary is not indoor unit evidence.

DK VALET WORKFORCE · Follow the numbered procedure for the complete instructions.

Step 2 · Review the actual property outline before approving it. A clock boundary is not indoor unit evidence.

Workflow illustration. Follow the complete numbered instructions on the previous page.

SOP 06 | Property setup

Complete property readiness

Check all requirements before assigning operational work.

For Web and mobile · Administrator / Supervisor

Before you start The property must already exist.

Open Manage > Property readiness

Step 1 Open the readiness checklist

Choose the property and read Ready for operations. Open each incomplete required step.

Step 2 Complete the first three requirements

Save a reviewed boundary, add at least one eligible worker and save weekly service times with staffing requirements.

Step 3 Complete the unit route

Perform the mobile setup walk, review its unit marks, publish a master reference and explicitly publish the associate route.

Step 4 Review instructions and run questions

Add useful start instructions and review Run questions for clock-in and clock-out. Use SOP 31 to configure company and property questions. Return to readiness and verify all four required steps.

Check your result Ready for operations is displayed for the selected property.

If something goes wrong Readiness does not itself clock anyone in. Device, assignment, training, policy and current start checks still apply.

See the picture reference on the next page.

SOP 06 Picture reference

Complete property readiness

INITIAL PROPERTY SETUP · LAKESIDE COMMONS SHOWCASE

Ready for operations

2 Of 4 Required Complete

Four starting conditions are required. Start instructions are optional. Completing setup does not itself authorize a route or prove attendance.

✓

Set property boundary

Boundary reviewed

[Review →](#)

✓

Add eligible people

4 eligible workers

[Review →](#)

3

Set weekly schedule

Add the property's normal service times

[Complete this step →](#)

i

Add start instructions (optional)

Optional — add guidance when this property needs it

[Add optional instructions →](#)

4

Map the unit route

Publish the master reference and route requirements

[Complete this step →](#)

Step 1 · Complete the four required readiness items for the selected property.

Application screenshot with training data.

SOP 07 | Scheduling

Set weekly service times and staffing defaults

Set the recurring service windows that scheduling uses.

For Web and mobile · Administrator / Supervisor

Before you start Know the property-local workdays, start and end times, and people needed.

Open Manage > Service defaults

Step 1 Choose the property

Open Service defaults on web, or Manage then the property and Weekly service times on mobile. Verify the property time zone.

Step 2 Set the common time

Set start and end once for the selected service days. New templates default to 8 PM through 10 PM; existing saved times are preserved.

Step 3 Choose days and headcount

Select the weekdays requiring service and enter People needed. Use Different times by day or extra windows for exceptions rather than overwriting them.

Step 4 Review and publish

Review every selected day, overnight end time and headcount. Enter the required reason, then save or publish the week. Check the resulting version.

Step 5 Assign dated shifts

Open Schedule to assign people. Property-local start and end times appear beside property names. Saving defaults does not assign or accept a shift.

Check your result The saved weekly service windows and required headcount appear in the staffing calendar.

If something goes wrong If a day has no service time, add one before staffing it. Check the property time zone and date when a window appears on an unexpected day.

See the picture reference on the next page.

SOP 07 Picture reference

Set weekly service times and staffing defaults

◀ Back

Weekly service schedule

Synthetic property

America/Chicago · Select days, then tap their times to edit.

Same time on every selected day

8:00 PM–10:00 PM · Edit times

✓ Mon

Tue

✓ Wed

Thu

Fri

Sat

Sun

Different times by day / extra windows >

How many people are needed?

For each service time

–

1

+

Review week

Step 3 · Choose service days, then set one common start and end time and the people needed.
Application component preview with training data. Native permission prompts may differ.

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SOP 08 | Property setup

Maintain standing start instructions

Give setup participants and associates the information they need before starting.

For Web and mobile · Administrator / Supervisor

Before you start Prepare short, property-specific instructions. Do not put access codes or private credentials in notes.

Open Manage > Service defaults > Standing instructions

Step 1 Open the instructions

Select the property in Service defaults, then find Standing instructions. On mobile open Standing instructions for that property.

Step 2 Write the two messages

Use Before property setup for setup participants and Before an associate route for workers. Leave a message empty when no special instruction is needed.

Step 3 Review the message style

Use the warning option only when the information changes what the person should do. Check names, entrances and current hazards.

Step 4 Save and verify

Enter the reason and select Save start notes. Verify the saved text and version. Associates review the applicable message during route preparation.

Check your result The property displays the saved start notes.

If something goes wrong A saved note does not replace direct escalation for an immediate safety issue.

See the picture reference on the next page.

SOP 08 Picture reference

Maintain standing start instructions

Standing instructions

Display style

Note

Warning

Before property setup

Example: Use the south entrance. Construction is active near Building C.

Before an associate route

Example: Begin at the clubhouse and report blocked access.

Why are these notes being saved?

Initial property instructions or approved update

Save start notes

Step 2 · Separate setup instructions from the message associates read before a route.
Application screenshot with training data.

SOP 09 | People and access

Invite a person to the workforce app

Create one workforce identity with the required property roles.

For Web and mobile · Administrator / Supervisor

Before you start Confirm the email and intended roles. Supervisors can grant Employee or Supervisor only at properties they manage; organization administration is not granted.

Open Manage > People administration > Invite

Step 1 Open invitations

In People administration choose the invitation action. On web the page is Invite a person to the app.

Step 2 Enter contact details

Enter First name, Last name and Email address. Add Phone number if available. Confirm the email with the person before sending.

Step 3 Choose facility access

For each allowed property choose No access, Associate or Supervisor. Select only the access the person needs.

Step 4 Send and inspect the result

Select Send one app invitation. Wait for success and inspect Recent invitations. The person must use their activation email.

Step 5 Correct an unused invitation if needed

For an incorrect outstanding invitation use its cancellation action and provide the required reason. Check the resulting status before sending a replacement.

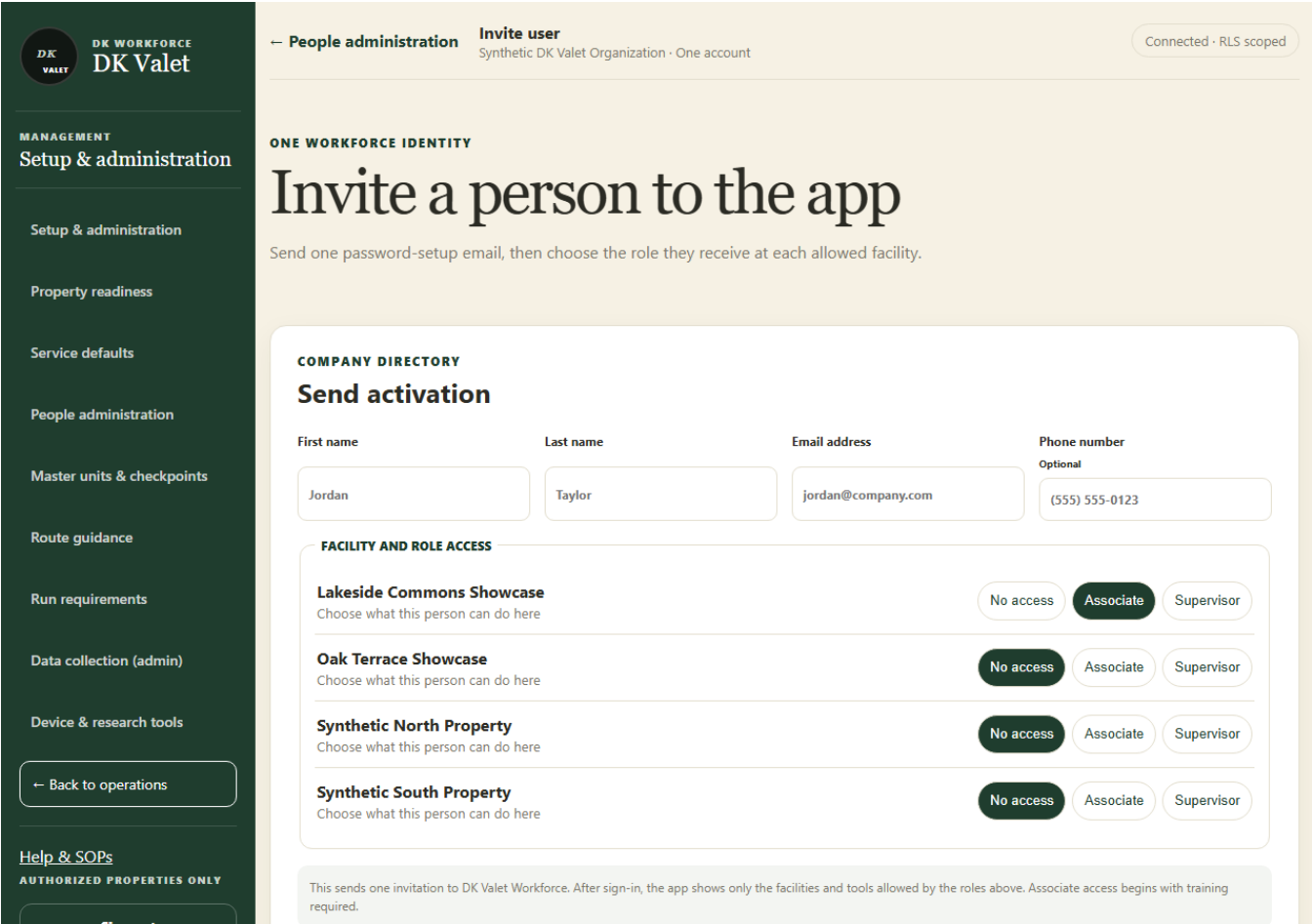
Check your result One invitation record shows the intended recipient and property access.

If something goes wrong Do not repeatedly send invitations after an uncertain response. Refresh recent invitations first.

See the picture reference on the next page.

SOP 09 Picture reference

Invite a person to the workforce app



Step 2 · Invite a person to the app: use the property selector and the task controls shown.

Application screenshot with training data.

SOP 10 | People and access

Maintain people and property access

Keep contact records and property roles accurate.

For Web and mobile · Administrator / Supervisor

Before you start Supervisors can manage property roles at their own properties. Organization-wide contact and account security controls remain administrator-only.

Open People or Manage > People administration

Step 1 Find the person

Search People by name or email and open the correct person. Check the identity before editing.

Step 2 Update contact details

Where available, edit the contact fields and enter the reason. Save the contact change and wait for confirmation.

Step 3 Review each property role

Open the property access controls. Choose the intended role or remove access using the available options. An organization-wide role may also grant access.

Step 4 Save the property change

Enter the required reason and save or confirm the change. Reopen the person and check the resulting property role.

Step 5 Review training separately

Open Property access & training for work eligibility. An account or property role alone does not establish eligible training.

Check your result The person's saved contact details and intended property scopes are shown.

If something goes wrong If you cannot manage a listed property, ask an administrator who can. A preferred/default property does not grant authority.

See the picture reference on the next page.

SOP 10 Picture reference

Maintain people and property access

Amelia Taylor

Activation pending

showcase.associate09@example.test

Contact

Access & training

Account

Contact details

First name

Last name

Phone · optional

Reason for change

Example: Added to the weekend team

Review contact changes

Step 2 · Open the person, choose Contact or Access & training, and review changes before confirming.
Application screenshot with training data.

SOP 11 | People and access

Record property access and training eligibility

Make a worker eligible for the property when the training requirement has been satisfied.

For Web and mobile · Administrator / Supervisor

Before you start Use an existing workforce identity and verify the training status through your normal process.

Open Manage > People > Property access & training

Step 1 Select property and worker

Open the property access and training screen, choose the property and locate the employee in the organization roster.

Step 2 Review the current record

Check existing assignment, effective dates and training status before changing them.

Step 3 Record the approved status

Use the access/training form to enter the intended effective access and actual training status. Provide the required audit reason.

Step 4 Save and verify eligibility

Submit and refresh. Check the employee appears as eligible for the full shift window when assigning a shift.

Check your result The property roster displays the intended access and training status.

If something goes wrong If the employee is not selectable, review effective dates, account status and training. Do not label incomplete training eligible to bypass scheduling.

See the picture reference on the next page.

SOP 11 Picture reference

Record property access and training eligibility

Eligible associates

Amelia Taylor

Eligible · Showcase-Safety-V3

Harper Jackson

Eligible · Showcase-Safety-V3

Henry White

Eligible · Showcase-Safety-V3

Lucas Thomas

Eligible · Showcase-Safety-V3

Organization roster member

Access change

Training state

Training content version

Amelia Taylor

Grant or update employee access

Required

Optional version identifier

Reason

This control can grant only employee access. It cannot elevate a user to supervisor or administrator. Access cannot end until future and active shift assignments are removed or cancelled.

Save property access

Step 3 · Review eligibility and use the property access and training form.
Application screenshot with training data.

SOP 12 | People and access

Use account security controls

Perform an approved password, session or account-status action for the correct person.

For Web and mobile · Administrator

Before you start Company administrator access and a clear operational reason are required.

Open People administration > Person > Account security

Step 1 Open the correct account

Find the person and open Account security. Verify name, email and current Active or Inactive status.

Step 2 Choose the action

Read the description under Account action. Choose the specific password, session or activation action needed.

Step 3 Enter required details

Enter the reason. If setting a temporary password, follow the displayed length requirement and share it privately.

Step 4 Review and confirm

Select Review account change. Verify the named person and action, then select Confirm account change.

Step 5 Verify the result

Wait for Account change completed and check the refreshed state. Ask the affected person to complete any required password setup.

Check your result The account action completes and the refreshed status matches the intended action.

If something goes wrong If the result is uncertain, refresh before retrying. Account changes do not grant new property access.

See the picture reference on the next page.

SOP 12 Picture reference

Use account security controls

Example Associate

Account security

Company administrator

Active

Choose an action for Example Associate

Account actionSend password-setup email ▼

Send a fresh password-setup link to the account email. This does not change property access.

Reason for account change

Review account change

Step 2 · Choose an account action and enter the reason before reviewing the change.
Application component preview with training data. Native permission prompts may differ.

SOP 13 | Scheduling

Read the staffing calendar

Find open service windows and distinguish assignment from acceptance.

For Web and mobile · Administrator / Supervisor

Before you start Recurring service times should already be saved for the property.

Open Schedule

Step 1 Choose the week and property

Open Schedule. Use Previous week or Next week and the Property filter. Times are local to each property.

Step 2 Filter staffing status

Use Needs people, Waiting for acceptance or Fully accepted to find the work requiring attention.

Step 3 Open a day or shift

Select a shift card to see the required people, current assignments and gaps. On phones use the day selector and pagination.

Step 4 Inspect person view when needed

Open View options & assignment tools and switch Calendar rows to Person. Select a person to review their week.

Check your result You can identify uncovered time and shifts still waiting on worker replies.

If something goes wrong Fully accepted means staffing is confirmed; it does not mean the run was completed. Clear filters before concluding a shift is missing.

See the picture reference on the next page.

SOP 13 Picture reference

Read the staffing calendar

DK WORKFORCE

DK Valet

DAILY OPERATIONS

Schedule

Today

Schedule

Review

People

Manage · setup & administration

Help & SOPs

AUTHORIZED PROPERTIES ONLY

Sign out

Schedule

Synthetic DK Valet Organization · staffing and assignments

Property schedule

Week of 2026-09-28

Property

All properties

Staffing

All shifts

► Staffing guide · local property times

► View options & assignment tools

Clear filters

Property coverage · 2026-09-28

PROPERTY	MON, SEP 28	TUE, SEP 29	WED, SEP 30	THU, OCT 1	FRI, OCT 2	SAT, OCT 3
LAKESIDE COMMONS SHOWCASE AMERICA/CHICAGO	7:47 AM–9:59 AM Confirmed Harper Jackson (completed)		9:47 AM–1:47 PM Confirmed Amelia Taylor (completed), Lucas Thomas (completed)	12:02 PM–4:02 PM Awaiting replies Amelia Taylor (waiting), Harper Jackson (waiting), Henry White (waiting), Lucas Thomas (waiting)	11:47 AM–3:47 PM Confirmed Amelia Taylor (confirmed), Lucas Thomas (confirmed)	11:47 AM–3:47 PM Awaiting replies Amelia Taylor (waiting)
OAK TERRACE SHOWCASE AMERICA/CHICAGO			9:47 AM–1:47 PM Confirmed Evelyn Harris (completed), James Martin (completed)	12:02 PM–4:02 PM Awaiting replies Evelyn Harris (waiting), James Martin (waiting), Luna Garcia (waiting)	11:47 AM–3:47 PM Confirmed Evelyn Harris (confirmed), James Martin (confirmed)	11:47 AM–3:47 PM Awaiting replies Evelyn Harris (waiting)
SYNTHETIC NORTH PROPERTY AMERICA/CHICAGO	6:00 PM–10:00 PM Needs staffing 1 open · Company calendar verification		7:47 AM–9:59 AM Confirmed Maya Thompson (completed)	12:02 PM–4:02 PM Awaiting replies Ethan Johnson (waiting), Maya	11:47 AM–3:47 PM Confirmed Maya Thompson (confirmed), Noah	11:47 AM–3:47 PM Awaiting replies Maya Thompson (waiting)

Step 2 · Schedule: use the property selector and the task controls shown.

Application screenshot with training data.

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SOP 14 | Scheduling

Assign people to a service window

Assign eligible people and review overlap warnings before saving.

For Web and mobile · Administrator / Supervisor

Before you start Property access and training must cover the entire shift.

Open Schedule > Service window

Step 1 Open the service window

Select the correct property, week and window in Schedule. Review time, required headcount and current gaps.

Step 2 Choose the workers

In Who is working? select eligible employees. Read any eligibility or overlap messages. Add shift instructions if needed.

Step 3 Review the change

Enter Reason for change and select Review assignments. Read the confirmation and any overlap warning.

Step 4 Confirm assignments

Confirm assignments if correct. If a warning is acceptable after review, use Save anyway. Cancel to revise the draft.

Step 5 Track the replies

Refresh the calendar and check the new assignments. They await each person's reply; follow up on outstanding acceptance.

Check your result The calendar shows the intended assignees and their response status.

If something goes wrong An overlap warning may be advisory, but access and training restrictions still apply. Protected workers on an active run cannot be removed.

See the picture reference on the next page.

SOP 14 Picture reference

Assign people to a service window

← Calendar

Assign this shift

Synthetic South Property · 2026-10-03 · America/Chicago

Scheduled shift · 1 needed

Awaiting replies ·

No run completed. You can change this shift; scheduling alone does not complete the work.

Who is working?

☐ Employee B

Eligible

☐ Ethan Johnson

Eligible

☐ Isabella Wilson

Eligible

☐ Liam Davis

Eligible

☐ Mateo Anderson

Eligible

☐ Maya Thompson

Warning: also scheduled at Synthetic North Property. You can assign anyway.

☐ Noah Williams

Eligible

☒ Olivia Brown

Step 2 · Select eligible people and read overlap warnings. Scroll to the reason and review controls below.
Application screenshot with training data.

SOP 15 | Scheduling

Create edit or cancel a dated shift

Maintain a specific shift while preserving work already recorded.

For Web and mobile · Administrator / Supervisor

Before you start Confirm the property, local date, employees and whether a run has started.

Open Property Schedule or Schedule & requests

Step 1 Open the property schedule

Use the property schedule tools to create a shift or open the existing dated shift for editing.

Step 2 Enter permitted changes

Set Starts (property time), Ends, Property phase, Route notes and eligible employees. Locked fields remain unchanged when work has started.

Step 3 Review and save

Use Schedule shift or Save schedule change. Read the overlap confirmation and save only if the details are correct.

Step 4 Cancel only when appropriate

For an eligible shift, enter Cancellation reason and use Cancel shift. A started or protected shift may block cancellation.

Step 5 Check the saved outcome

Refresh and inspect assignments, status and change history. Workers receive schedule updates that they must review.

Check your result The dated shift reflects the saved change and retains its historical work.

If something goes wrong When a field is locked, read its on-screen guidance. Use a separate future shift instead of trying to rewrite active or historical work.

See the picture reference on the next page.

SOP 15 Picture reference

Create edit or cancel a dated shift

LAKESIDE COMMONS SHOWCASE

Schedule a shift

Central Time (America/Chicago)

Starts (property time)

10/01/2026 02:02 PM

Ends (property time)

10/01/2026 06:02 PM

Property phase

No phase assigned

Route notes

Operational route notes; do not store access codes

ELIGIBLE PROPERTY EMPLOYEES

☐ Amelia Taylor

Eligible

☐ Harper Jackson

Eligible

☐ Henry White

Eligible

☐ Lucas Thomas

Eligible

Choose a future service time for a new shift.

Overlapping shifts show a warning; you can save anyway. Property access and training must cover the whole shift.

Schedule shift

Step 2 · Use property-local dates and eligible employees for a dated shift.

Application screenshot with training data.

SOP 16 | Scheduling

Review a time off request

Approve or decline a request and resolve the staffing impact separately.

For Web and mobile · Administrator / Supervisor

Before you start Review the employee, property and full requested interval.

Open Review > Time off & coverage

Step 1 Open requests

Choose Review, then Time off & coverage. On mobile open Requests for the property.

Step 2 Inspect the time off request

Read requested dates, local times, note and current status. Compare against the staffing schedule.

Step 3 Record the decision

Choose the available approval or decline decision, enter the decision note and submit the review.

Step 4 Check staffing separately

Refresh the request status. If approved leave conflicts with a shift, adjust staffing or arrange coverage; the request does not automatically cancel an assignment.

Check your result The recorded decision appears on the request and any staffing gap has a separate plan.

If something goes wrong If the request changed before saving, refresh and review its latest state.

See the picture reference on the next page.

SOP 16 Picture reference

Review a time off request

AT

Amelia Taylor
Employee request

Pending

Date	Until	Submitted
Oct 4, 2026, 3:00:00 AM CDT	Oct 5, 2026, 3:00:00 PM CDT	Sep 29, 2026, 7:47:19 AM CDT

Employee note

Family appointment — awaiting decision.

!

Coverage impact
No overlapping scheduled shift was found.

Review note

Deny

Approve

Step 3 · Read the request and coverage impact before recording the approval or denial.

Application screenshot with training data.

SOP 17 | Scheduling

Request coverage and assign a replacement

Find a qualified replacement and complete the separate assignment change.

For Web and mobile · Administrator / Supervisor

Before you start Identify the shift and employee being replaced.

Open Review > Time off & coverage

Step 1 Open a coverage request

Choose the property and shift, identify the worker needing replacement and enter the required reason or note. Submit the request.

Step 2 Review candidate responses

Refresh coverage requests and inspect candidates' availability, eligibility and responses.

Step 3 Choose the candidate

Use the candidate decision controls to select the suitable person or decline a response, with the required note.

Step 4 Finish the assignment

Open Finish assignment for the selected replacement. Review the proposed employee list, retain other workers and save the separate schedule change.

Step 5 Confirm acceptance or cancel the request

Check the replacement in Schedule and track their acceptance. If coverage is no longer needed, use the request cancellation control and reason.

Check your result The replacement is assigned in the calendar; selection alone is not treated as completed staffing.

If something goes wrong If the shift changed or started, the replacement draft needs review. Reopen the current shift before changing assignments.

See the picture reference on the next page.

SOP 17 Picture reference

Request coverage and assign a replacement

QUALIFIED EVIDENCE · MANUAL SCHEDULE ACTION

1

Coverage requests

Open

Coverage for Amelia Taylor

Oct 3, 2026, 11:47:19 AM CDT – Oct 3, 2026, 3:47:19 PM CDT

Open showcase coverage need

Opened by Jordan Rivera. Qualified means effective property access, eligible training, a covering declared window, and no overlapping active assignment at the time checked.

Lucas Thomas · volunteered

Qualified now: no
Synthetic qualified candidate volunteered.

Decision

Decision note

Approve evidence

Approval records selection evidence only. It never assigns or removes an employee; use a separate reasoned schedule edit after review.

Record coverage decision

Close reason

Close coverage request

This workflow does not automatically reassign the shift and does not add pay, attendance, discipline, commute, location, autonomous scheduling, or provider-delivery behavior.

Step 3 · Candidate selection and the separate shift assignment are distinct actions.

Application screenshot with training data.

SOP 18 | Daily operations

Monitor daily and district operations

Review current work and act on property-specific exceptions.

For Web and mobile · Administrator / Supervisor

Before you start Only authorized properties are shown. Refresh before relying on stale information.

Open Today

Step 1 Open Today

Choose the company or district and selected property scope. Review the date, current work and attention counts.

Step 2 Inspect the map and property list

Choose a property or worker to focus its boundary and details. Check last-seen time and reported accuracy.

Step 3 Review incomplete information

Read unknown, degraded, stale, offline or permission warnings alongside progress. Missing updates do not establish absence or missed service.

Step 4 Open the relevant task

Use Schedule for staffing, Review for exceptions, or the selected run to inspect evidence. Refresh after addressing the issue.

Check your result You have identified the property and work item that requires follow-up.

If something goes wrong District totals may be incomplete when individual data loads fail. Use the shown freshness and warning labels.

See the picture reference on the next page.

SOP 18 Picture reference

Monitor daily and district operations



Step 2 · Use property, person, freshness and quality together when following up on daily work.

Workflow illustration. Follow the complete numbered instructions on the previous page.

SOP 19 | Daily operations

Record a handoff and review an exception

Leave a property-specific handoff or record the outcome of an exception review.

For Web and mobile · Administrator / Supervisor

Before you start Open the exact property, shift or run that needs follow-up.

Open Today or Review > Needs attention

Step 1 Inspect the item

Read the exception or existing handoff and open the associated run or staffing details when needed.

Step 2 Write the operational note

Use the handoff or review form. Describe the observed issue and next action without access codes, medical details or unsupported location claims.

Step 3 Review the decision

Choose the available review outcome where required. Verify the selected property and the note before confirmation.

Step 4 Save and verify

Submit the form and inspect the saved handoff or review state. Communicate urgent issues through the established supervisor channel.

Check your result The note or review is retained on the correct operational item.

If something goes wrong Marking an exception reviewed does not rewrite tracking evidence or prove service completion.

See the picture reference on the next page.

SOP 19 Picture reference

Record a handoff and review an exception



Step 2 · The note or review is retained on the correct operational item.

Workflow illustration. Follow the complete numbered instructions on the previous page.

SOP 20 | Run review

Find and inspect a completed run

Locate a run and interpret its evidence in context.

For Web and mobile · Administrator / Supervisor

Before you start Know the property and approximate work date.

Open Review > Run history

Step 1 Filter history

Open Run history, choose the authorized property and apply available date, person or status filters.

Step 2 Open the run

Select the intended employee and run. Verify property, start and end times and run status.

Step 3 Read evidence quality

Review GPS freshness and accuracy, permission and device information, upload state and any gaps.

Step 4 Compare the recorded evidence

Use route replay and checkpoint or unit evidence. Read inferred visit results separately from explicit marks and the employee finish statement.

Step 5 Follow up on exceptions

Open the closeout review or record the appropriate operational follow-up. Keep unknown results unknown until supporting evidence exists.

Check your result Your review identifies what was recorded, what was inferred and what remains unresolved.

If something goes wrong An ordinary phone location does not prove an exact indoor unit or floor.

See the picture reference on the next page.

SOP 20 Picture reference

Find and inspect a completed run

DK VALET

DK WORKFORCE

DK Valet

DAILY OPERATIONS

Review

Today

Schedule

Review

People

Manage · setup & administration

Help & SOPs

AUTHORIZED PROPERTIES ONLY

Sign out

Needs attention

Run history

Time off & coverage

Route history

Property-scoped route evidence

Connected · RLS scoped

Oak Terrace Showcase

Synthetic North Property

Synthetic South Property

Lakeside Commons Showcase

EVIDENCE STAYS REVIEWABLE

Route history

Today and recent routes
43 routes

EMPLOYEE / ROUTE	STATUS	STOPS
Evelyn Harris Building/floor not configured · Sep 27, 2026, 2:59 PM UTC	Pending	0 / — confirmed stops
Evelyn Harris Building/floor not configured · Sep 15, 2026, 2:59 PM UTC	Pending	0 / — confirmed stops
Luna Garcia Building/floor not configured · Sep 19, 2026, 2:59 PM UTC	Pending	0 / — confirmed stops
James Martin Building/floor not configured · Sep 23, 2026, 2:59 PM UTC	Pending	0 / — confirmed stops
Ethan Johnson Building/floor not configured · Oct 1, 2026, 5:03 PM UTC	In progress	0 / — confirmed stops
Sofia Martinez Building/floor not configured · Oct 1, 2026, 5:03 PM UTC	In progress	0 / — confirmed stops
Noah Williams Building/floor not configured · Oct 1, 2026, 5:03 PM UTC	In progress	0 / — confirmed stops
Maya Thompson Building/floor not configured · Oct 1, 2026, 5:03 PM UTC	In progress	0 / — confirmed stops

Step 2 · Route history: use the property selector and the task controls shown.

Application screenshot with training data.

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SOP 21 | Run review

Replay compare and export run evidence

Compare an associate run with the approved reference and export permitted evidence.

For Web and mobile · Administrator / Supervisor

Before you start Open the correct run. Analysis may need accepted uploads and processing before results appear.

Open Run history > Run detail

Step 1 Open replay and comparison

From the run detail open its route replay, analysis or employee-run comparison view. Check which reference version is being used.

Step 2 Inspect layers and timing

Use the available playback, time, unit and path controls. Read gaps, uncertainty and quality labels beside the path.

Step 3 Review analysis status

Refresh pending results. Where offered, use the authorized analysis action, then wait for its result instead of repeatedly submitting.

Step 4 Export when needed

On web use the offered evidence export link. Check the property and run in the exported file and share it only with authorized recipients.

Check your result The comparison or export remains tied to the selected run and property.

If something goes wrong Different path models are interpretations of the same evidence. A drawn line or inferred visit is not a checkpoint scan.

See the picture reference on the next page.

SOP 21 Picture reference

Replay compare and export run evidence



Step 2 · Explicit observations, phone positions and inferred visits answer different questions.

Workflow illustration. Follow the complete numbered instructions on the previous page.

SOP 22 | Property setup

Start a mobile property setup walk

Start an authorized setup recording before marking the unit route.

For Mobile · Administrator / Supervisor

Before you start Use the approved sensor-capable app build, a registered device, setup permission and reviewed boundary. Clock out of routine tracking first.

Open Manage > Property > Property readiness & setup runs

Step 1 Choose the property

Open its setup task. Read property instructions or What is recorded? and confirm the address.

Step 2 Choose recording mode

Choose Screen-off or Screen-on only and read the consent text. Screen-on recording pauses when the app is left or the phone locks.

Step 3 Check your position

Tap Show my live position. Allow the requested precise location permissions and move safely to the authorized start area.

Step 4 Start the recording

When start checks pass, use Agree & start background setup or Start screen-on setup. The button depends on the selected mode.

Step 5 Choose phone position

Select where you will carry the phone and keep it there while walking. Confirm the app shows the active setup walk.

Check your result Walk to the next unit is available and recording status is shown for the selected property.

If something goes wrong A map preview is not a started setup run. If sensors, permission or boundary checks fail, resolve the displayed issue before starting.

See the picture reference on the next page.

SOP 22 Picture reference

Start a mobile property setup walk



Step 2 · A live map preview does not start recording. Use the authorized start action.

Workflow illustration. Follow the complete numbered instructions on the previous page.

SOP 23 | Property setup

Mark units and add optional setup photos

Record explicit unit labels and supporting observations during the setup walk.

For Mobile · Administrator / Supervisor

Before you start An authorized setup recording must be active on this device.

Open Active setup > Walk to the next unit

Step 1 Walk to the actual unit

Follow the property safely and stop at the physical door or checkpoint you intend to record.

Step 2 Open the unit marking task

Use the mark-unit action. Copy the posted Unit number exactly; this field is required. A configured numbering rule can decode the posted label into building and floor for future marks. Explicit entries take precedence; an unmatched label stays unknown.

Step 3 Add identification details

Add the Building and Floor labels when known. Optional notes should help identify the door. Add a photo only when useful and appropriate.

Step 4 Save the unit

Review the label, optional details and measured position, then save using the displayed unit-save action. Verify the units-saved count.

Step 5 Continue the walk

Return to the map and proceed to the next unit. Use Status to inspect capture and upload health during a long walk.

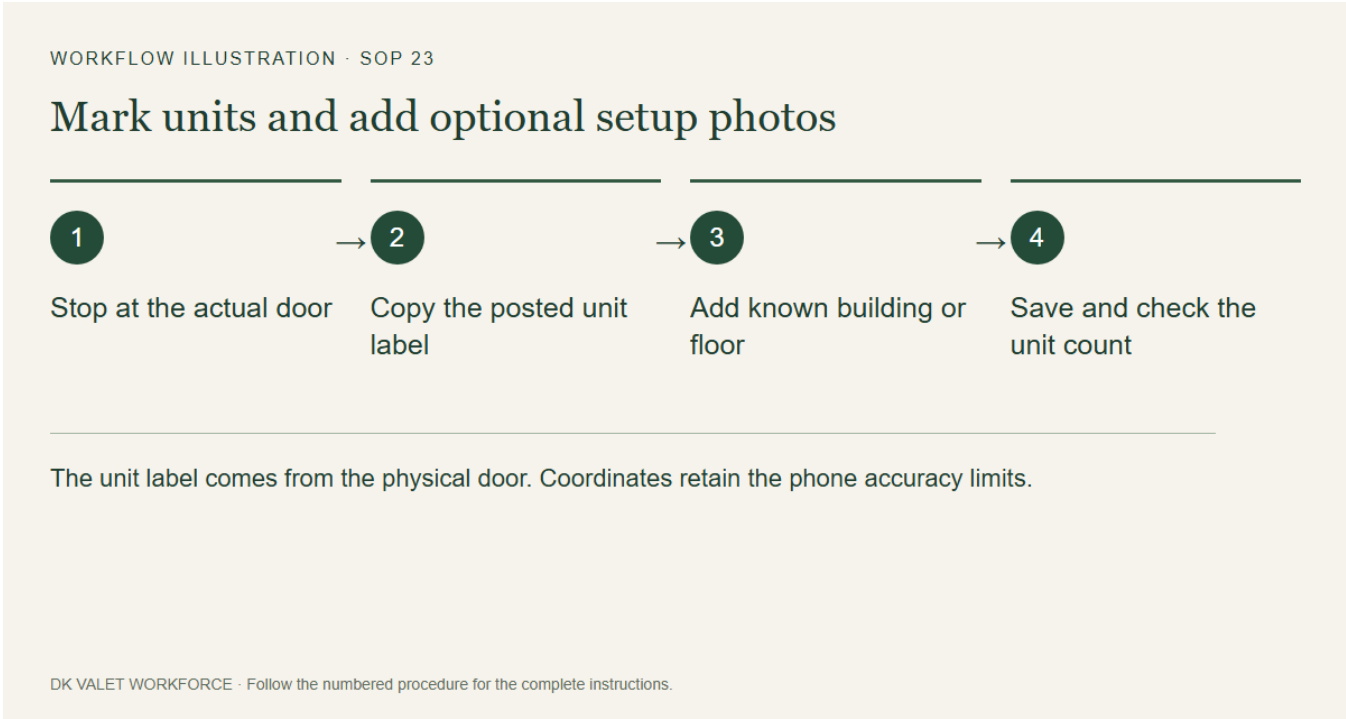
Check your result The new mark appears in the saved unit count and later in the setup review.

If something goes wrong A saved mark records your explicit observation. Its phone coordinates retain their accuracy limits and are not exact indoor positioning.

See the picture reference on the next page.

SOP 23 Picture reference

Mark units and add optional setup photos



Step 2 · The unit label comes from the physical door. Coordinates retain the phone accuracy limits.

Workflow illustration. Follow the complete numbered instructions on the previous page.

SOP 24 | Property setup

Finish recover and upload a setup walk

Stop setup recording and verify pending evidence is uploaded.

For Mobile · Administrator / Supervisor

Before you start Keep the same phone and account while local evidence is waiting.

Open Active setup > Status or Review and finish

Step 1 Inspect capture status

Open Status to compare saved-on-phone, accepted-by-server, waiting-to-upload and rejected/dropped counts.

Step 2 Recover a paused or interrupted walk

Return to the existing setup task. Use Upload / resume recovery or the displayed retry control for that run; follow any device-ownership warning.

Step 3 Review the finish summary

Use the review-and-finish action. Check units marked and pending batches before confirming Finish.

Step 4 Keep pending evidence available

Finish stops GPS and motion collection. Keep the phone connected and use the upload/recovery action if data remains pending.

Step 5 Open the completed review

Use View last setup or the saved setup run to inspect accepted marks and capture gaps.

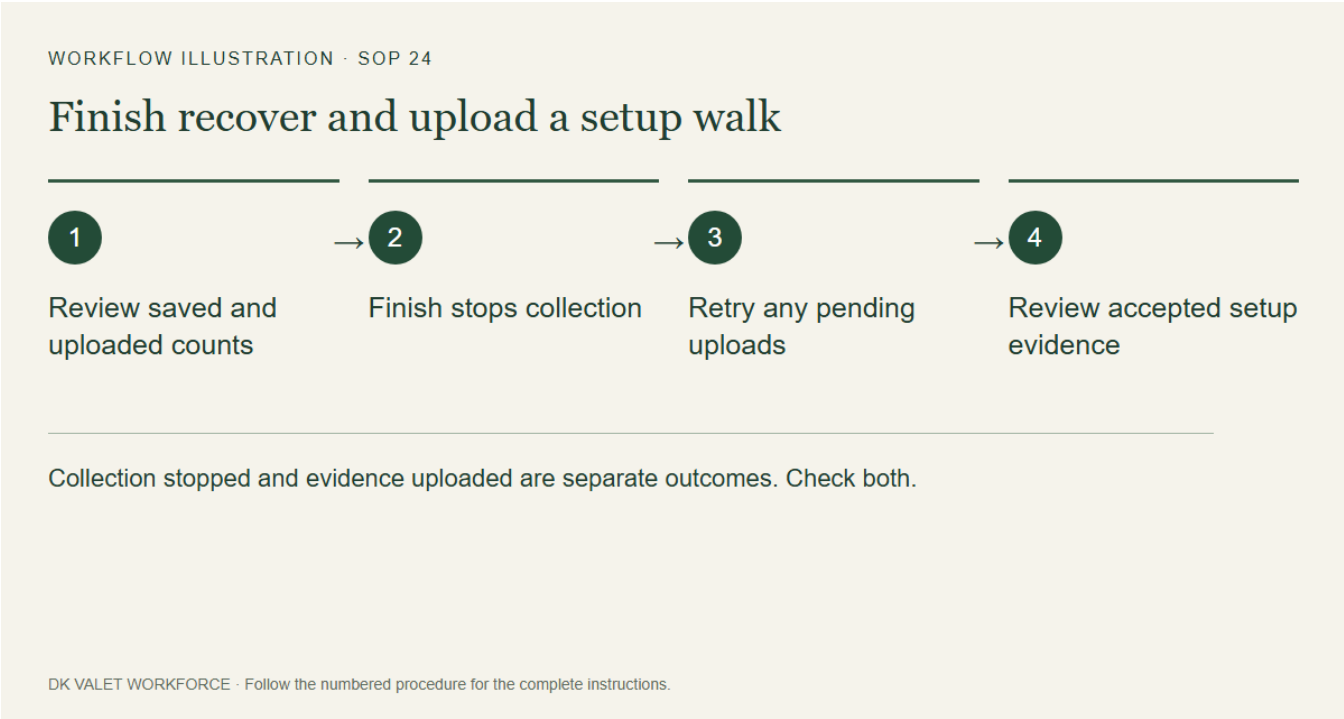
Check your result The setup run is finished and its accepted evidence can be reviewed; any remaining upload issue is explicitly identified.

If something goes wrong Do not clear app storage or switch accounts to fix a pending queue. If another device owns an active run, contact the supervisor responsible for it.

See the picture reference on the next page.

SOP 24 Picture reference

Finish recover and upload a setup walk



Step 2 · Collection stopped and evidence uploaded are separate outcomes. Check both.

Workflow illustration. Follow the complete numbered instructions on the previous page.

SOP 25 | Property setup

Review setup walks and unit records

Inspect a completed setup recording and review its explicit unit marks.

For Web and mobile · Administrator / Supervisor

Before you start At least one setup walk must have accepted evidence.

Open Property readiness > Review setup walks and unit records

Step 1 Open the completed walk

Select the property and choose View walk and captured data or the completed setup review on mobile.

Step 2 Check recording completeness

Compare recorded interval, GPS points, unit marks, samples and upload or gap warnings. Use replay and time controls to inspect the whole walk.

Step 3 Inspect marked unit sequence

Check unit labels, building/floor observations, duplicates and their capture order. Read observed coordinates with accuracy metadata.

Step 4 Compare server analysis models

After uploads finish, open Models on mobile or Model analysis in web review. Select V1, V4, V5, V6 or V7, then Analyze recording. V7 is a sparse-GPS experiment: compare GPS budgets, missing coverage and the 90% within 5 m target; offline controls use future GPS. Inspect the route and metrics; open Details for provenance. Pause stops after the current saved path step; Analyze resumes. Refresh models loads server additions. Download full JSON on web or share a mobile summary, keeping the model revision and input digest with your independent observer log. Results remain estimates and do not change the published master.

Step 5 Review unit records on web

Where a unit is awaiting review, set its checkpoint label, order, decision and review note. Use Record review to approve/promote or reject the draft.

Step 6 Continue to master review

Choose appropriate reviewed marks in the master workspace. Reviewing a mark alone does not publish an associate route.

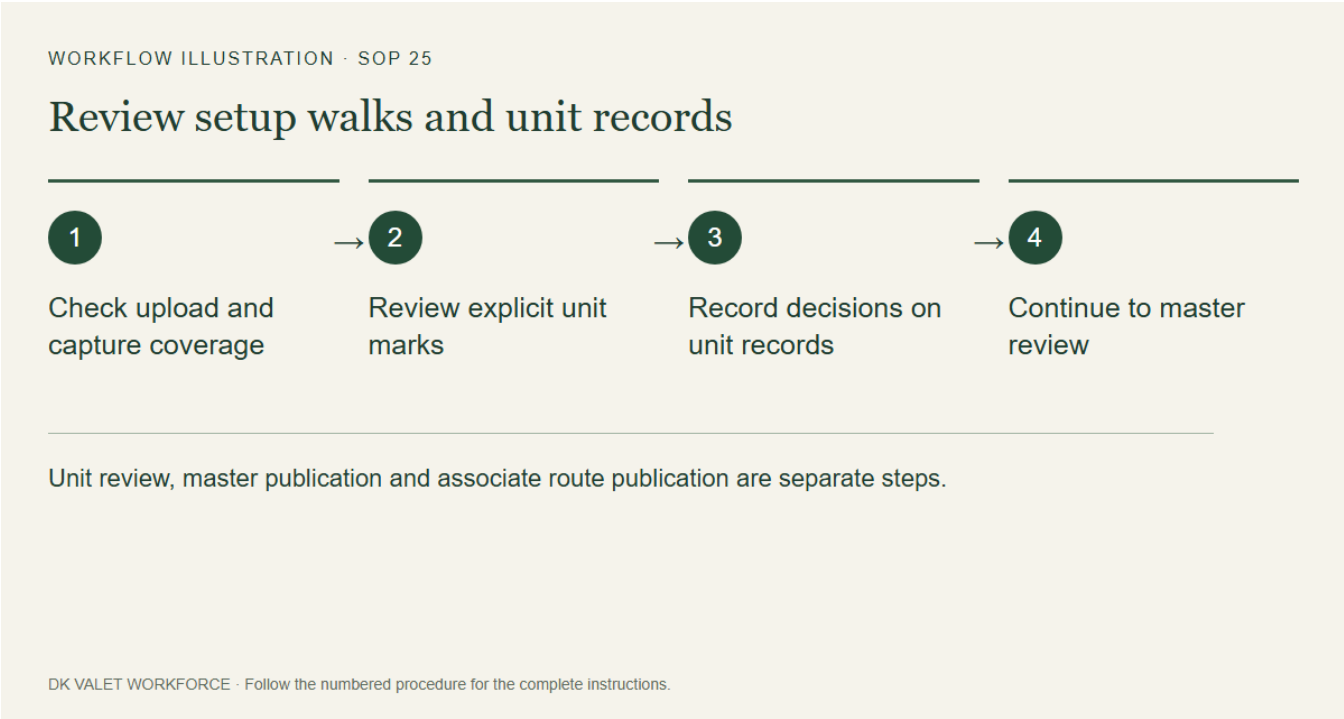
Check your result Each reviewed unit retains its decision and the accepted walk is ready for master-reference review.

If something goes wrong Incomplete uploads and GPS gaps must stay visible. Do not infer an exact floor from pressure or GPS alone.

See the picture reference on the next page.

SOP 25 Picture reference

Review setup walks and unit records



Step 2 · Unit review, master publication and associate route publication are separate steps.

Workflow illustration. Follow the complete numbered instructions on the previous page.

SOP 26 | Property setup

Review and publish the master reference

Choose an ordered, reviewed reference from setup walks.

For Web · Administrator / Supervisor

Before you start Review setup evidence first and verify that the correct property is selected.

Open Manage > Master units & checkpoints > Master review

Step 1 Select the source runs

Select run A and an optional run B. Each run has one Model selector: choose Original unit marks or an analysis model. A saved model revision appears immediately; Analyze recording draws the new result on the main map, including V6. Expand Saved revisions to inspect an older result.

Step 2 Inspect units and differences

Use map, order, floor and differences controls to check labels, sequence, repeated marks and position differences.

Step 3 Build the draft

Choose original marks or a saved revision, then select unit marks or Use entire run A. On-demand model previews cannot supply publication coordinates until they have a matching saved path. Review the repeated-unit choice, order and source revision. Changing the displayed model preserves units already in the draft.

Step 4 Review publication

Advance through the draft review, enter the required reason and inspect the publication summary.

Step 5 Publish and check the version

Confirm the master publication and verify its saved version. Continue to Publish the associate route to make the units available to future associate runs.

Check your result A versioned master reference is saved with its selected ordered unit sources.

If something goes wrong Changing a comparison model should not be treated as automatically changing the published master or an active run.

See the picture reference on the next page.

SOP 26 Picture reference

Review and publish the master reference

Synthetic master-run review

314-unit review fixture · No production data

1. Compare runs

2. Review draft (0)

3. Publish master

Choose a whole run, review any differences, then confirm a new master version. Associate-route publication is a separate step below. Raw evidence never changes.

Run A

Test Walker 1 · Sep 7, 7:00 AM CDT · 314 marks

Compare with run B

No comparison

A coordinate source

Original unit marks (GPS)

Each coordinate source drives its comparison pins, path and distances; it does not change already-selected draft units. Floor labels are entered observations, not verified sensor floors. Showing recent completed runs and published-master sources.

314
A saved marks

314
A distinct units

0
A repeat marks

0
A no floor label

Use entire run A

Map time window

Whole run

Map filter only; all units remain in the review and whole-run draft.

► About automatic path models

314 marks positioned · 0 original-mark fallbacks. Fallbacks keep their recorded GPS accuracy, do not fill missing floors, and are never counted as fusion coverage.

► Rebuild V1 / V4 / V5 from retained evidence

Map & direction

Walking order

Floor / level

All floors

Step 2 · Compare the selected setup runs, coordinate source and unit counts before building a master draft.

Application component preview with training data. Native permission prompts may differ.

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SOP 27 | Property setup

Publish the associate route

Make every unit from the approved master available to future associate runs.

For Web · Administrator / Supervisor

Before you start A complete reviewed master with positioned units must exist.

Open Manage > Master units & checkpoints > Publish the associate route

Step 1 Review the master

Open Publish the associate route for the correct property. Verify the master version and all required units.

Step 2 Name and scope the route

Enter the route name and choose the property default or intended phase using the form. Provide the publication reason.

Step 3 Review publication

Select Review publication. Check route name, scope, master version and total units.

Step 4 Confirm and verify

Confirm the publication. Inspect Current operational routes and return to property readiness to check the unit route requirement.

Check your result The operational route records the intended master version and all its units for future starts.

If something goes wrong A master publication and an associate-route publication are separate actions. Existing runs keep their pinned reference.

See the picture reference on the next page.

SOP 27 Picture reference

Publish the associate route

USE THE REVIEWED MASTER

Publish the associate route

Publish every unit in the reviewed master as the required route for future runs. Associates may visit the units in any order.

No operational route publication is currently effective for this property.

Master v1 · 1 units · published 10/1/2026, 12:00:00 PM UTC.

► Review all 1 required units

Route name

North Property Example unit route

Applies to

Property default route

Route instructions

Publication reason

Review publication

Step 2 · Check the master version, route name, phase and reason before review.

Application component preview with training data. Native permission prompts may differ.

SOP 28 | Advanced administration

Maintain checkpoint definitions

Maintain reviewed labels, order and optional reference coordinates.

For Web · Administrator / Supervisor

Before you start Use the correct property and a reviewed source for any coordinates.

Open Manage > Master units & checkpoints

Step 1 Open checkpoint configuration

Select the property and inspect the ground-truth map and configured checkpoints.

Step 2 Add or open a checkpoint

Use Add checkpoint or the existing checkpoint editor. Enter Label, Kind, Building, Floor and Unit label where applicable.

Step 3 Review order and position

Set Sort order. Add optional Latitude and Longitude only from a reviewed reference and preserve the stated uncertainty.

Step 4 Save and inspect

Use the create/update action and wait for success. Review the ordered list and map. Review and publish the operational route separately when required.

Check your result The checkpoint definition is saved in the selected property.

If something goes wrong Editing a reference does not retroactively rewrite raw tracking events or prove a prior unit visit.

See the picture reference on the next page.

SOP 28 Picture reference

Maintain checkpoint definitions

Add checkpoint

Label	Kind	Building	Floor
	Area	Not assigned	Not assigned
Unit label (optional)	Sort order	Latitude (optional)	Longitude (optional)
	0		

☒ Active and available to employees during authorized sessions

Add checkpoint

Step 3 · Maintain the checkpoint label, type, order and reviewed position.
Application component preview with training data. Native permission prompts may differ.

SOP 29 | Advanced administration

Publish phase guidance and change a shift phase

Maintain phase-specific notes and choose a phase for an eligible shift.

For Web · Administrator / Supervisor

Before you start The property must have configured phases. Confirm no active run is being rewritten.

Open Manage > Route guidance

Step 1 Select property and phase

Open Route guidance and choose the property phase in the guidance form.

Step 2 Write and publish guidance

Enter Route notes, Tracked areas and Tricky areas as requested. Add Publication reason and select Publish guidance version.

Step 3 Change an eligible shift phase

If needed, use Change assigned shift phase. Choose the shift, New property phase and Operational reason.

Step 4 Verify both results

Select Record phase change and check the saved guidance and shift. Active and historical sessions retain their captured configuration.

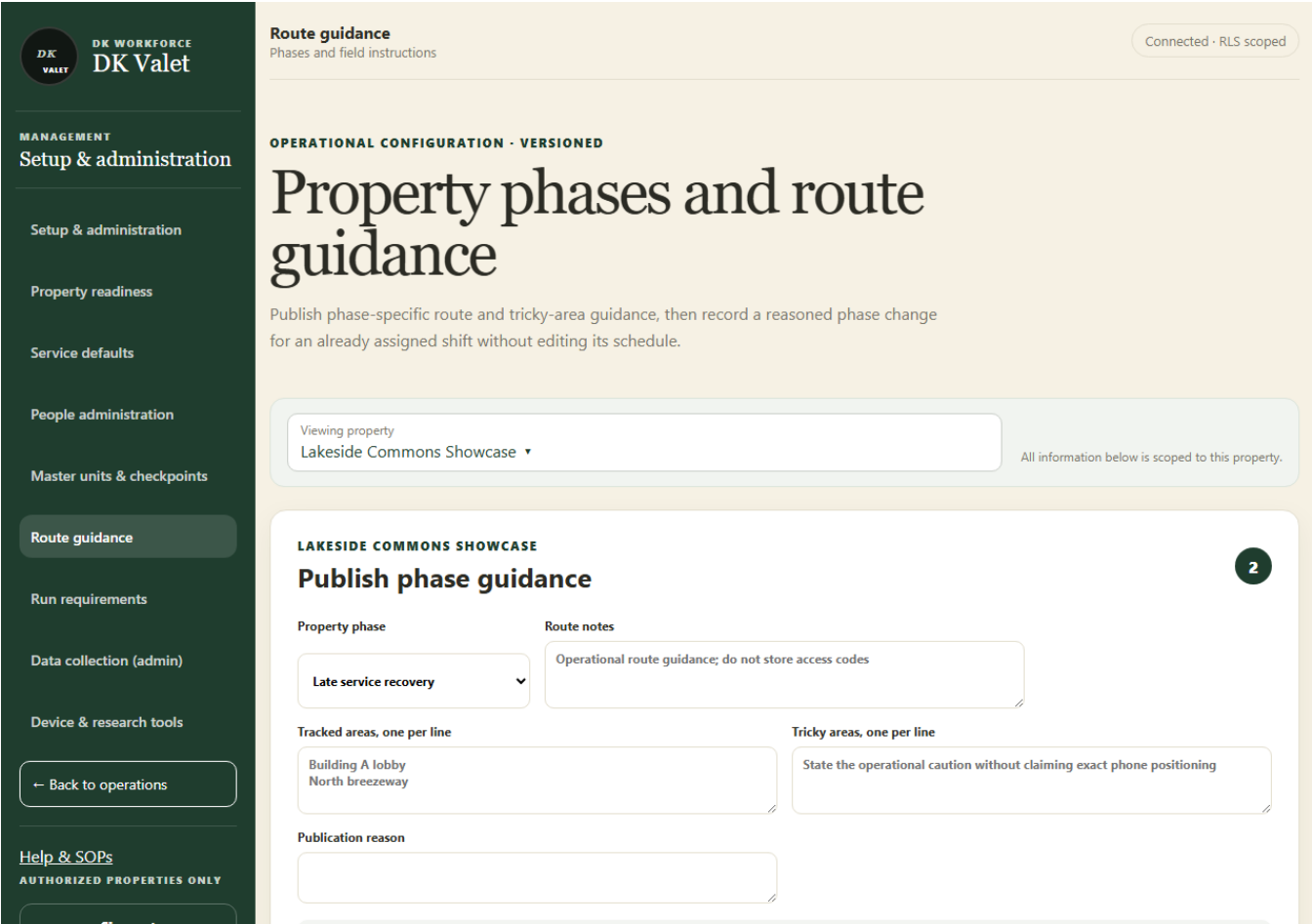
Check your result Future applicable work uses the saved guidance and the selected eligible shift has the intended phase.

If something goes wrong If no eligible shifts or phases are offered, review configuration and run status. This action does not create, move or cancel a shift.

See the picture reference on the next page.

SOP 29 Picture reference

Publish phase guidance and change a shift phase



Step 2 · Property phases and route guidance: use the property selector and the task controls shown.
Application screenshot with training data.

SOP 30 | Advanced administration

Publish run requirements and review closeout exceptions

Configure explicit checkpoint requirements and review incomplete or unknown closeouts.

For Web · Administrator / Supervisor

Before you start Checkpoints and any required phases must exist.

Open Manage > Run requirements; Review > Run closeouts

Step 1 Choose the property

Open Manage > Run requirements and select the intended property. Current requirements are read-only until you choose Edit requirements.

Step 2 Define a new version

Under Edit requirements > Publish run requirements, enter the template details, phase, checkpoint requirements and route notes. Review required versus optional items.

Step 3 Publish and inspect

Select Publish new version and verify it under Current phase templates. New runs use the applicable effective version.

Step 4 Review exceptions

Open Review > Run closeouts and select the property. The queue starts with Needs review; use search and status filters to find a run or review history. Select a run to inspect accepted, missing and unknown evidence and the employee reason.

Step 5 Record the review

Choose the review decision and note, select Mark as reviewed, then Confirm review.

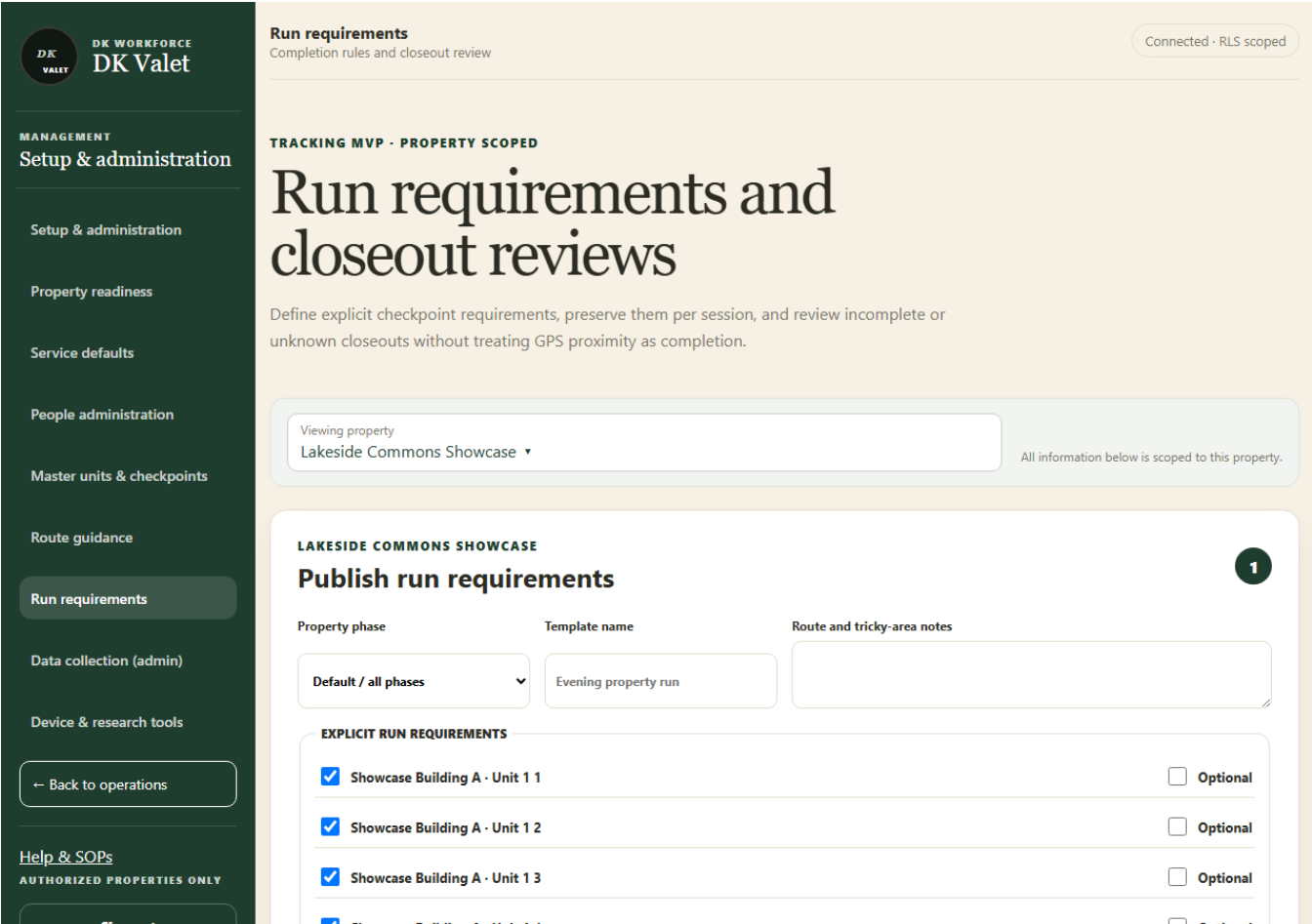
Check your result The template version or exception review is recorded with its property scope.

If something goes wrong If no template is configured, closeout may remain unknown. A reviewed override does not create missing checkpoint evidence.

See the picture reference on the next page.

SOP 30 Picture reference

Publish run requirements and review closeout exceptions



Step 2 · Run requirements and closeout reviews: use the property selector and the task controls shown.
Application screenshot with training data.

SOP 31 | Advanced administration

Configure run questions

Publish questions, photo requirements and timing for future runs.

For Web and mobile · Administrator / Supervisor

Before you start Use approved questions and authorized properties. Install Android 69 or iOS 44, or later approved builds, on participating phones before setting expiration dates. Older builds support unlimited questions only.

Open Web: Manage > Property setup > Run questions. Mobile: Operations > Manage > Company run questions, or a property > Run questions.

Step 1 Select the scope

Choose company or property questions and verify the property name. Company questions appear first. Read-only access does not permit publication; company editing requires company administration access.

Step 2 Edit the question

Add or edit the text, clock-in or clock-out step, required answer and none, optional or required photo. Reorder or retire questions in the draft. No questions interrupt an active route.

Step 3 Choose audience and recurrence

Select the applicable properties and employees. Choose every run or a 1–365-day interval per employee and property. An interval advances after an ordinary answer and any attached photo upload, independently of manual review.

Step 4 Set an optional end date

Leave expiration blank for no limit. The chosen date is included in each property's local time; later newly opened steps omit the question even when its interval is due. Clearing a date removes the limit for future runs.

Step 5 Review and publish

Save each question to the draft, enter a publication reason, review the full selected-scope list and confirm publication. Verify the new version. Existing run questions, responses, photos and review history remain unchanged.

Step 6 Handle an unconfirmed result

Use Retry same publication when offered; reload after an access or version change. Confirm the displayed version before making another edit. Unpublished drafts are lost when the app closes.

Check your result The intended scope shows the new configuration version. No real expiration is set automatically by an app update.

If something goes wrong A saved draft is not published. A required answer may truthfully be No. Keep all participating phones updated before using expiration; Android 68/iOS 43 reject questions carrying an expiration date.

See the picture reference on the next page.

SOP 31 Picture reference

Configure run questions

Audience and timing

Repeat

When due after an interval ▼

Repeat every (days)

30

Expiration date (optional)

11/01/2026

Leave blank for no expiration. The selected date is included, using each property's local time.

After the expiration date, newly opened question steps omit this question, even when its repeat interval is due. Steps already opened keep their questions; saved answers and photos remain available and can upload later. Published changes apply to new runs.

► How due dates work

Due questions are selected when this clock-in or clock-out step first opens, then retained through back navigation, offline work and retries. No in-run reminders are sent.

☐

All company properties, including future properties

☒

North property

☐

South property

☒

All assigned employees

Step 4 · Actual web timing controls with synthetic data. The end date includes the property-local day. This component preview is not a physical-phone screenshot.

Application component preview with training data. Native permission prompts may differ.

SOP 32 | Associate work

Use My work and Account and help

Find the next shift, outstanding replies and supervisor contact.

For Mobile · Associate

Before you start Sign in with your own workforce account.

Open My work

Step 1 Refresh your work

Tap Refresh and read the update or warning message. Counts marked unknown need another refresh before you rely on them.

Step 2 Open the next action

Use Prepare for this shift, Return to run / finish, Complete run closeout or Review finished run according to the status shown.

Step 3 Check requests and updates

Open Shifts to accept, Work updates or Coverage opportunities. Use View my calendar and Availability & time off for planning.

Step 4 Open Account

Use Account to inspect notification status, open phone settings or contact your supervisor. Managers can switch to their manager workspace when available.

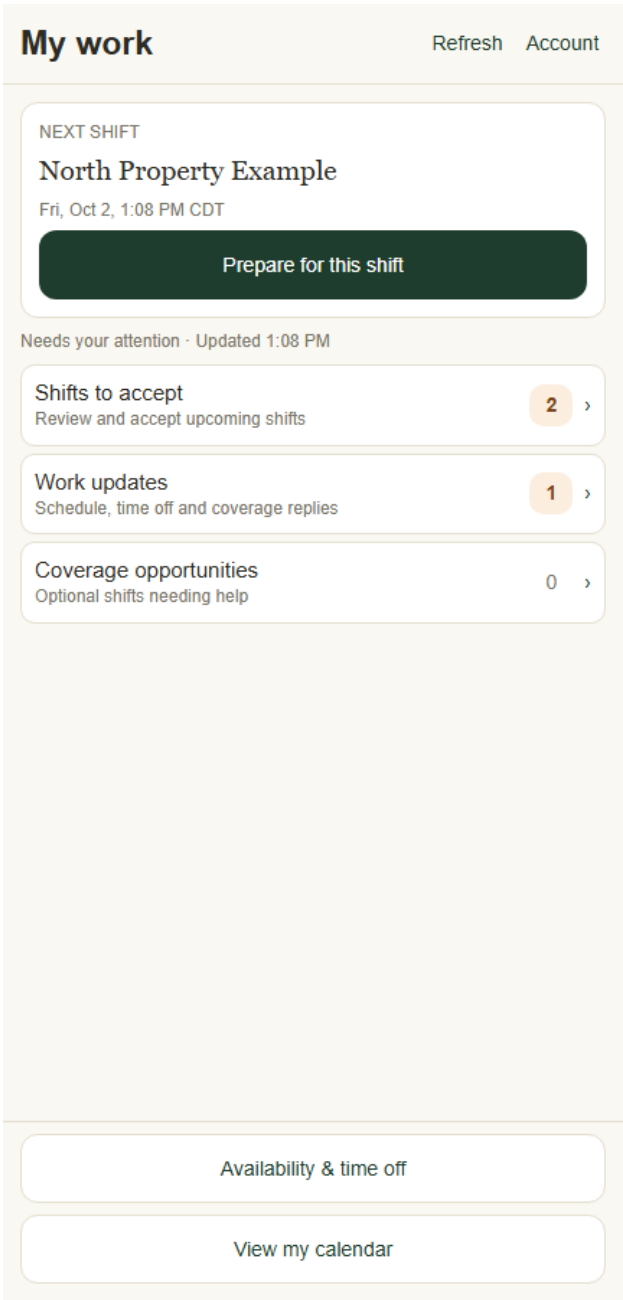
Check your result You can identify the next task and reach your supervisor when a task is blocked.

If something goes wrong If work data did not load, refresh before assuming there are no assignments or updates.

See the picture reference on the next page.

SOP 32 Picture reference

Use My work and Account and help



Step 2 · My work shows the next shift, replies and planning actions.
Application component preview with training data. Native permission prompts may differ.

SOP 33 | Associate work

View your calendar and accept or decline shifts

Review your assignments and explicitly respond.

For Mobile · Associate

Before you start Confirm the property, date and local time for each assignment.

Open My work > Shifts to accept or View my calendar

Step 1 Open your schedule

Use Shifts to accept for pending replies or View my calendar to browse scheduled work.

Step 2 Inspect the shift

Select the relevant date and shift. Read the property, start and end time, instructions and current assignment response.

Step 3 Respond to the assignment

Use the displayed accept or decline control. When selecting several shifts, review the selected list before confirming acceptance.

Step 4 Check the saved response

Wait for confirmation and refresh the schedule. Use Prepare for this shift when it is time to review start checks.

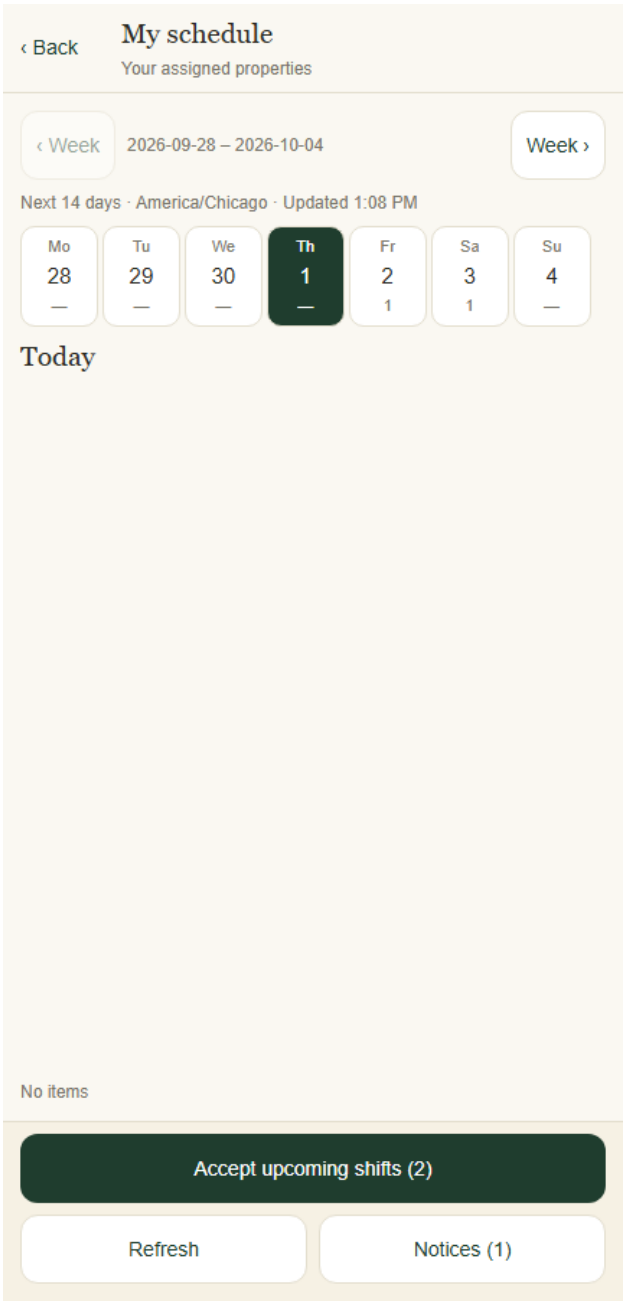
Check your result The shift shows your saved acceptance or decline response.

If something goes wrong Acknowledging a schedule notification is separate from accepting a shift. If a response is rejected, refresh the latest schedule.

See the picture reference on the next page.

SOP 33 Picture reference

View your calendar and accept or decline shifts



Step 1 · Use the calendar to inspect dates and assigned shifts.
Application component preview with training data. Native permission prompts may differ.

SOP 34 | Associate work

Read work updates and reply to coverage opportunities

Acknowledge changes and respond to optional coverage requests.

For Mobile · Associate

Before you start Refresh My work before acting on an old notification.

Open My work > Work updates or Coverage opportunities

Step 1 Open Work updates

Read the schedule, time off or coverage update. Check its property and dates, including old versus new times where shown.

Step 2 Acknowledge the update

Use the receipt or acknowledgment control. Then open the schedule if the assignment itself still needs your response.

Step 3 Open Coverage opportunities

Read each offered property, interval and request. Use the interested/available or decline response offered on screen.

Step 4 Check the final assignment

Refresh replies and your calendar. Volunteering for coverage does not itself assign the shift; wait for the manager's selection and schedule update.

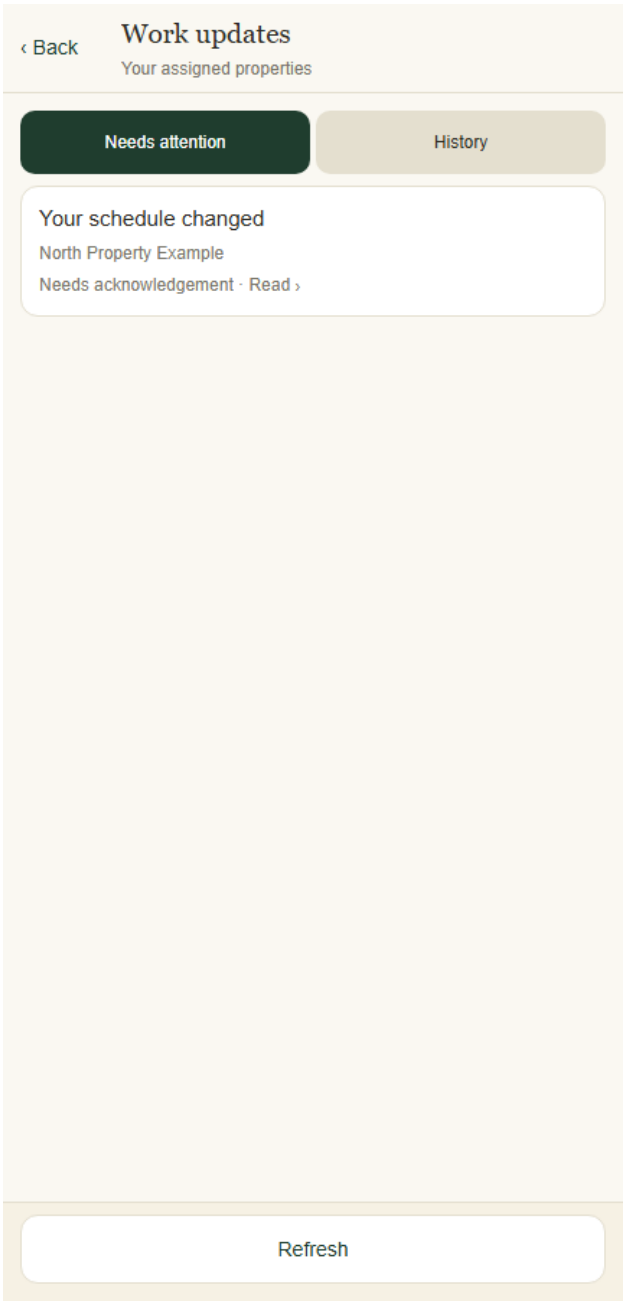
Check your result Your receipt or coverage response is saved and you know whether a shift was actually assigned.

If something goes wrong Push notifications can be delayed. Work updates in the app remain the place to review changes.

See the picture reference on the next page.

SOP 34 Picture reference

Read work updates and reply to coverage opportunities



Step 1 · Work updates retains changes that need your attention.
Application component preview with training data. Native permission prompts may differ.

SOP 35 | Associate work

Set recurring weekly availability and review extra hours

Set personal recurring hours across currently assigned properties without changing shifts.

For Mobile · Associate / Administrator / Supervisor

Before you start Managers need management access to all of the employee's assigned properties to edit personal hours.

Open My work > Availability & time off or People > Person > Work hours

Step 1 Open personal hours

From My work select Availability & time off. Managers open the person in People and use the work-hours action. Check whose hours are displayed.

Step 2 Review the current week

Use Weekly hours and the week arrows. Tap a day for details. Refresh hours if the record is stale.

Step 3 Edit the recurring plan

Select Edit weekly hours. Set the effective date and Hours time zone. Enable the days the person is available and use each day's editor to set start/end time and AM/PM.

Step 4 Review and confirm

Select Review weekly hours. Check effective date, time zone and every enabled day, then Confirm save. Availability does not assign a property or shift.

Step 5 Review earlier extra hours

If Extra hours is shown, inspect earlier one-time availability windows. Associates can open one, choose Remove window and confirm the reviewed change.

Check your result Weekly hours shows the effective recurring plan; any earlier extra-hour window remains separate.

If something goes wrong If a save is unconfirmed, use Resume unconfirmed save and Retry same save. Do not create a second change while the first result is unknown.

See the picture reference on the next page.

SOP 35 Picture reference

Set recurring weekly availability and review extra hours

◀ Back

Recurring weekly hours

Your hours · all assigned properties

Effective 2026-10-01 · Change ▶

America/Chicago

Sun

☐

Not available

Mon

☒

18:00–22:00 ▶

Tue

☒

18:00–22:00 ▶

Wed

☒

18:00–22:00 ▶

Thu

☒

18:00–22:00 ▶

Fri

☒

18:00–22:00 ▶

Sat

☐

Not available

Review weekly hours

Step 3 · Set the effective date, time zone, available days and recurring hours.
Application component preview with training data. Native permission prompts may differ.

SOP 36 | Associate work

Request or cancel time off

Request time away and track the manager's decision.

For Mobile · Associate

Before you start The current mobile request applies to all currently assigned properties. Managers decide each property's request separately.

Open My work > Availability & time off > Time off

Step 1 Open your personal hours

From My work select Availability & time off, then Request time off.

Step 2 Set dates and hours

Choose First day and Last day. Keep All day time off enabled for whole days, or edit the start/end hours. Verify the displayed time zone and assigned-property count.

Step 3 Review your request

Add an optional note without medical details. Select Review time off. Check the full interval and the notice that it applies to all currently assigned properties.

Step 4 Save and inspect decisions

Select Confirm save. Open the Time off tab and tap the saved group to inspect each property's status and manager response.

Step 5 Cancel active requests when needed

Open the saved time-off group, choose Cancel active requests where offered, review the interval and Confirm save. Refresh and check each resulting status.

Check your result The request and its current decision are visible in your list.

If something goes wrong A time off request, even if approved, does not automatically cancel your existing assigned shift. Contact your supervisor about conflicting work.

See the picture reference on the next page.

SOP 36 Picture reference

Request or cancel time off

◀ Back

Request time off

Your hours · all assigned properties

Applies to all 1 assigned properties. Times: America/Chicago. Managers review each property; shifts are not cancelled automatically.

First day: 2026-10-02

Last day: 2026-10-02

All day ☒

Optional note — no medical details needed

Review time off

◀ Back

Review changes

Your hours · all assigned properties

Request time off 10/2/2026, 12:00:00 AM to 10/3/2026, 12:00:00 AM

For all currently assigned properties. Does not change access, training or scheduled shifts.

Confirm save

Left · Step 2 · Review the time zone and all assigned properties before requesting time off.

Right · Step 3 · Confirm save applies the reviewed request; existing shifts stay unchanged.

Application component preview with training data. Native permission prompts may differ.

SOP 37 | Associate work

Prepare for a shift and clock in

Complete the displayed checks and start an authorized run.

For Mobile · Associate

Before you start Use your assigned account and approved app. Be at the correct property with location services available.

Open My work > Prepare for this shift

Step 1 Verify the shift

Read the selected property, date and time on Prepare your route. Use the schedule if a different assignment should be selected.

Step 2 Resolve start checks

Open the first missing check or See what to do. Refresh checks after access, route, device or policy issues have been corrected. Employees cannot clock in before the scheduled start. Supervisors use Today then Clock in at a property for support work outside a scheduled window. Both must be inside the configured boundary.

Step 3 Read all instructions

Use Next instruction until the last page, then I've read this — continue.

Step 4 Check your position

Open Property map and Show my position. Use directions to a safe entrance and check the measured position and accuracy against the boundary. Previewing does not clock you in.

Step 5 Clock in

When the scheduled time and all other checks are ready, select Clock in. Confirm a second run only if more work is actually needed. Continue to the due run questions and requested photos (SOP 38).

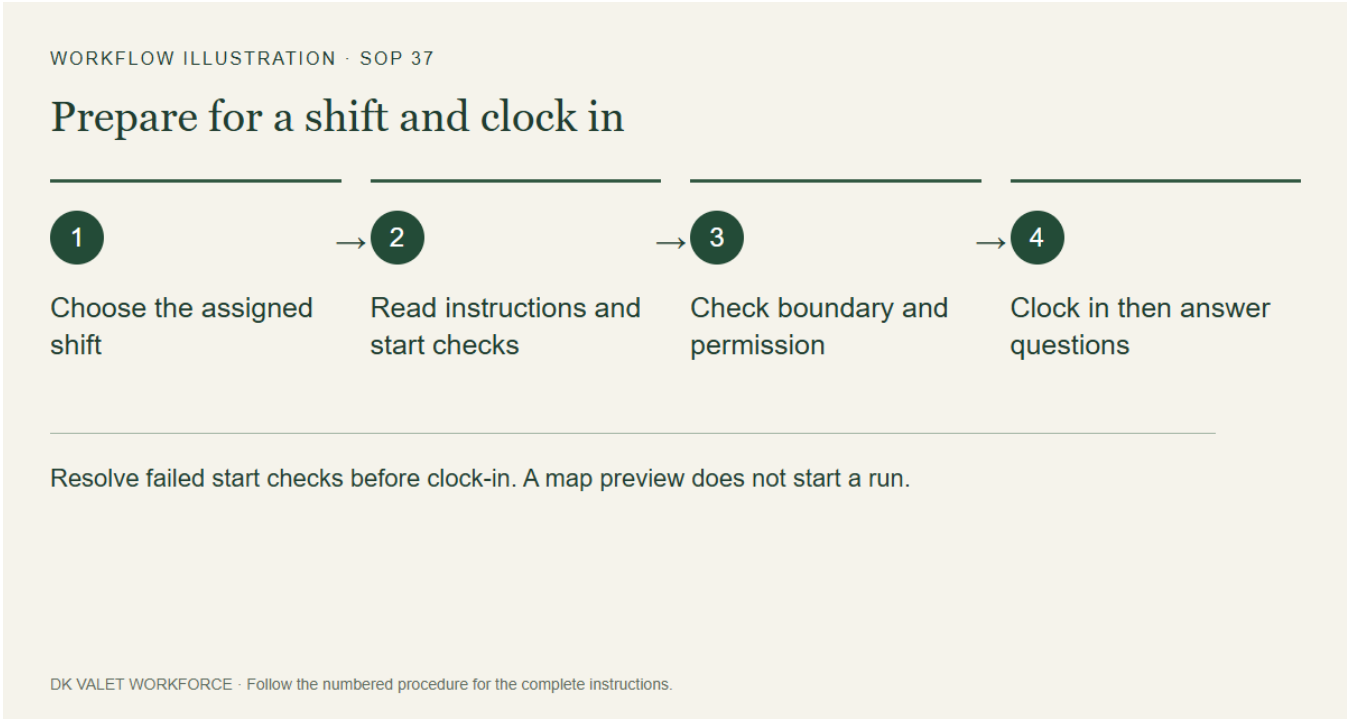
Check your result Clock-in is accepted and the Run questions step or active route opens.

If something goes wrong For permission issues use Check location permissions or Open phone settings. For missing access or unpublished units contact the supervisor; repeated start attempts will not fix configuration.

See the picture reference on the next page.

SOP 37 Picture reference

Prepare for a shift and clock in



Step 2 · Resolve failed start checks before clock-in. A map preview does not start a run.

Workflow illustration. Follow the complete numbered instructions on the previous page.

SOP 38 | Associate work

Answer run questions and add photos

Save truthful answers and requested photos before opening the route.

For Mobile · Associate

Before you start Clock-in must already be accepted; authorized route collection has started.

Open After accepted clock-in > Run questions

Step 1 Read the due questions

Company questions appear before property questions. Check the answer and photo requirements. The list is fixed when this step first opens, including after returning, restarting or crossing an expiration date offline.

Step 2 Answer and capture

Choose Yes, No or Not applicable truthfully. When a photo is required, take and review it, then use the photo to save the answer and image together. Cancelling capture leaves the question incomplete.

Step 3 Continue after saving

Optional questions may be skipped; optional photos may be added. Continue when the step's answers are saved on this phone. Review saved answers to distinguish saved, uploaded and manually reviewed evidence.

Step 4 Recover or stop safely

Use the displayed retry for camera, storage or question errors. If you must stop, use Stop with an exception or Stop route now. Camera work and pending uploads must not delay stopping collection.

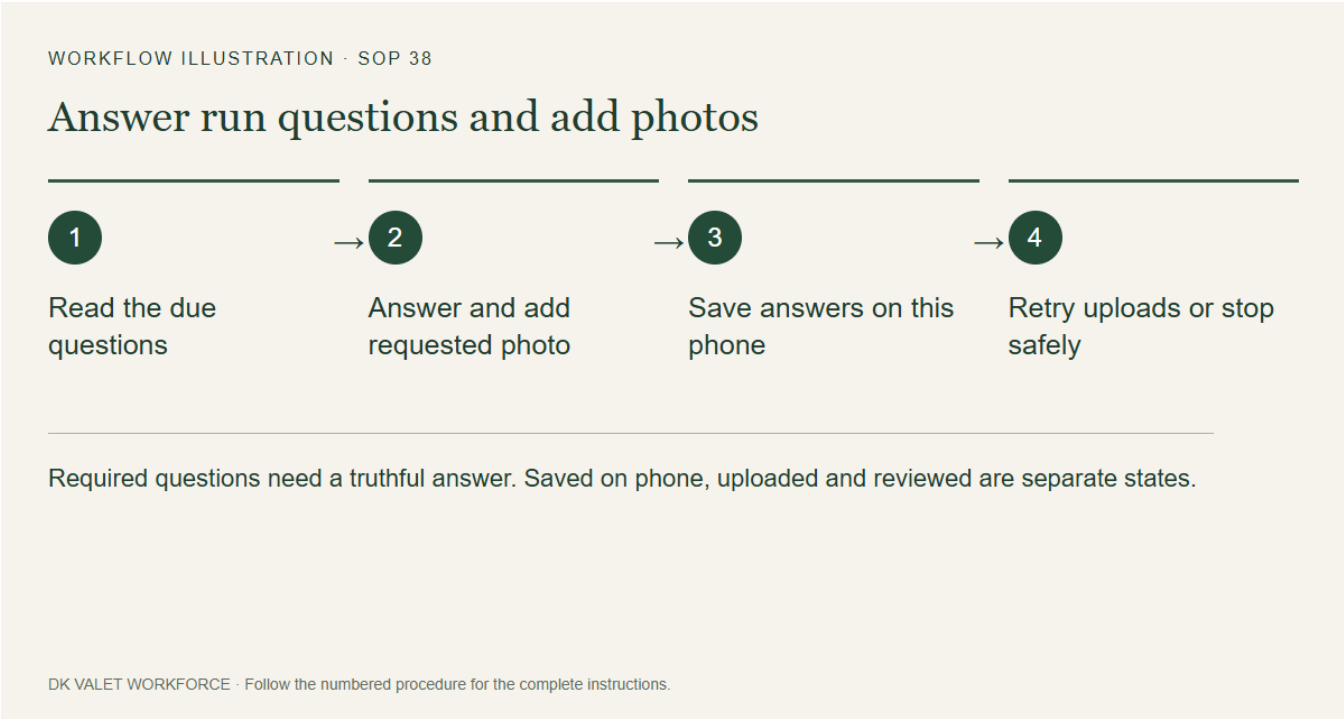
Check your result Saved answers lead to the route; pending uploads remain visible for recovery.

If something goes wrong Keep the same account and device, reconnect and retry pending answers/photos, including after clock-out. Do not uninstall or clear storage. Manual photo acceptance does not prove service completion or an exact indoor location.

See the picture reference on the next page.

SOP 38 Picture reference

Answer run questions and add photos



Step 2 · Required questions need a truthful answer. Saved on phone, uploaded and reviewed are separate states.

Workflow illustration. Follow the complete numbered instructions on the previous page.

SOP 39 | Associate work

Follow the route and report an issue

Perform the assigned work while checking recording health.

For Mobile · Associate

Before you start An authorized active run and the assigned unit list must be available.

Open Your route

Step 1 Review the route

Read the instructions and use the route map or Assigned units to understand the work.

Step 2 Work the assigned units

Walk the route normally with the phone carried consistently. Routine associate runs do not require scanning or tapping at every unit.

Step 3 Read evidence status

Watch supporting visit evidence, unresolved units, GPS accuracy and upload warnings. Those are evidence indicators, not proof that each unit was serviced.

Step 4 Report an issue

Use Report an issue and contact the supervisor shown. Describe blocked access, equipment problems or unresolved work.

Step 5 Finish when work ends

Select Finish route when done. If scheduled time has ended but the run is still active, complete closeout; the displayed separate safety cutoff still applies.

Step 6 Check your teammates

During a shared property run, orange pins show fresh coworker positions. Tap a T unit marker for attributed team evidence. Team confirmations do not silently increase your personal totals. Stopped or stale coworker positions disappear.

Check your result You reach route review with an accurate understanding of the work performed and any exceptions.

If something goes wrong If route or unit data is unavailable, refresh when connected and contact your supervisor. Do not claim all units were hit when unsure.

See the picture reference on the next page.

SOP 39 Picture reference

Follow the route and report an issue



Step 2 · Associates work the route without tapping every unit. Supporting evidence is not service proof.

Workflow illustration. Follow the complete numbered instructions on the previous page.

SOP 40 | Associate work

Finish a route and confirm clock out

Stop collection and submit an accurate completion statement.

For Mobile · Associate

Before you start Review the actual work and unresolved units before confirming.

Open Your route > Finish route

Step 1 Review your route

Select Finish route. Complete the due clock-out questions and requested photos, then inspect Review your route and unresolved items. Questions are retained from when the clock-out step first opens.

Step 2 Choose the truthful statement

Use Confirm all units hit only if you can confirm it. Otherwise use Finish with exceptions and add the relevant note.

Step 3 Clock out and submit

Use Clock out and submit confirmation or Clock out with exceptions. Wait for the resulting stopped/finished state.

Step 4 Confirm the stop

If Collection is stopping remains, keep the phone online and use Retry clock-out confirmation.

Step 5 Confirm the upload

On Route finished, check collection stop separately from the statement, answers and photo uploads. Reconnect and use the displayed retry for pending evidence. Uploaded photos may still await manual supervisor review.

Check your result Clock-out is recorded, collection is stopped and the finish statement is confirmed or explicitly marked pending.

If something goes wrong Use the stop-with-exception action if questions or camera fail. If phone collection stop needs attention, turn off location permission and contact the supervisor. Never clear pending app data to retry.

See the picture reference on the next page.

SOP 40 Picture reference

Finish a route and confirm clock out

WORKFLOW ILLUSTRATION · SOP 40

Finish a route and confirm clock out



Stop collection even when evidence is pending. Keep saved answers and photos for recovery.

DK VALET WORKFORCE · Follow the numbered procedure for the complete instructions.

Step 2 · Stop collection even when evidence is pending. Keep saved answers and photos for recovery.

Workflow illustration. Follow the complete numbered instructions on the previous page.

SOP 41 | Associate work

Recover from offline or tracking problems

Protect pending work and resolve recording or upload failures.

For Mobile · Associate / Supervisor

Before you start Stay with the same device and signed-in account holding the pending evidence.

Open Active run or setup > Status

Step 1 Read the exact warning

Distinguish permission failure, stale or inaccurate location, interrupted collection, camera/storage trouble and pending answers or photo uploads. Record the property, run and warning.

Step 2 Restore the required condition

Reconnect to the network for upload problems. Check location permission and services for recording problems. Return to the active task after changes.

Step 3 Use the existing recovery action

Use the displayed recovery action for the same run. Saved question steps, answers and photos can upload after clock-out or expiration; reopening the app must not create a new answer merely to retry.

Step 4 Verify stop and upload separately

Read collection status separately from answer, photo, route and finish uploads. Saved on phone, uploaded and supervisor-reviewed are different results. An unresolved upload does not authorize off-shift collection.

Step 5 Escalate unresolved problems

Contact your supervisor with the message and approximate time. Keep the app's pending records; do not uninstall or clear storage as a retry method.

Check your result The app either confirms recovery or shows a specific remaining issue for supervisor follow-up.

If something goes wrong An emergency cutoff limits authorization even while offline. Restoring connectivity does not authorize collecting new off-shift location.

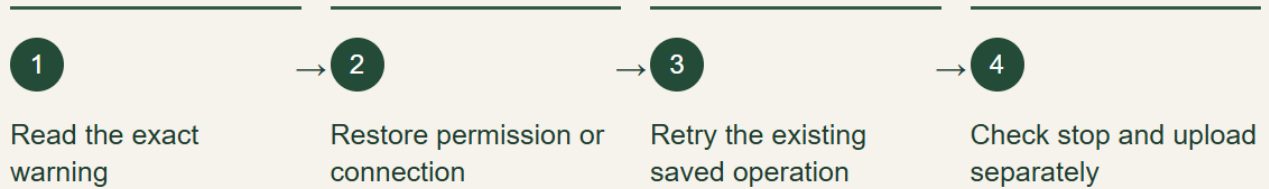
See the picture reference on the next page.

SOP 41 Picture reference

Recover from offline or tracking problems

WORKFLOW ILLUSTRATION · SOP 41

Recover from offline or tracking problems



Preserve pending evidence and retry the same operation. Do not uninstall or clear app storage.

DK VALET WORKFORCE · Follow the numbered procedure for the complete instructions.

Step 2 · Preserve pending evidence and retry the same operation. Do not uninstall or clear app storage.

Workflow illustration. Follow the complete numbered instructions on the previous page.

SOP 42 | Advanced administration

Use tracking safety and emergency controls

Record an authorized effective-dated property tracking control.

For Web and mobile · Administrator / Supervisor

Before you start Verify the exact property and operational reason. These controls affect tracking authorization.

Open Account > Tracking safety & emergency stops

Step 1 Select the property

Open Tracking safety or Remote tracking control and verify the property header.

Step 2 Choose the control

Select the intended enable/disable state. Read the effective start and optional end fields; web control times are explicitly UTC.

Step 3 Record the reason and save

Enter Operational reason and use Record tracking control. Verify the saved history and effective interval.

Step 4 Follow up on device state

Devices stop when they receive the control. Check the affected run and contact the worker if a phone remains offline or local stop needs attention.

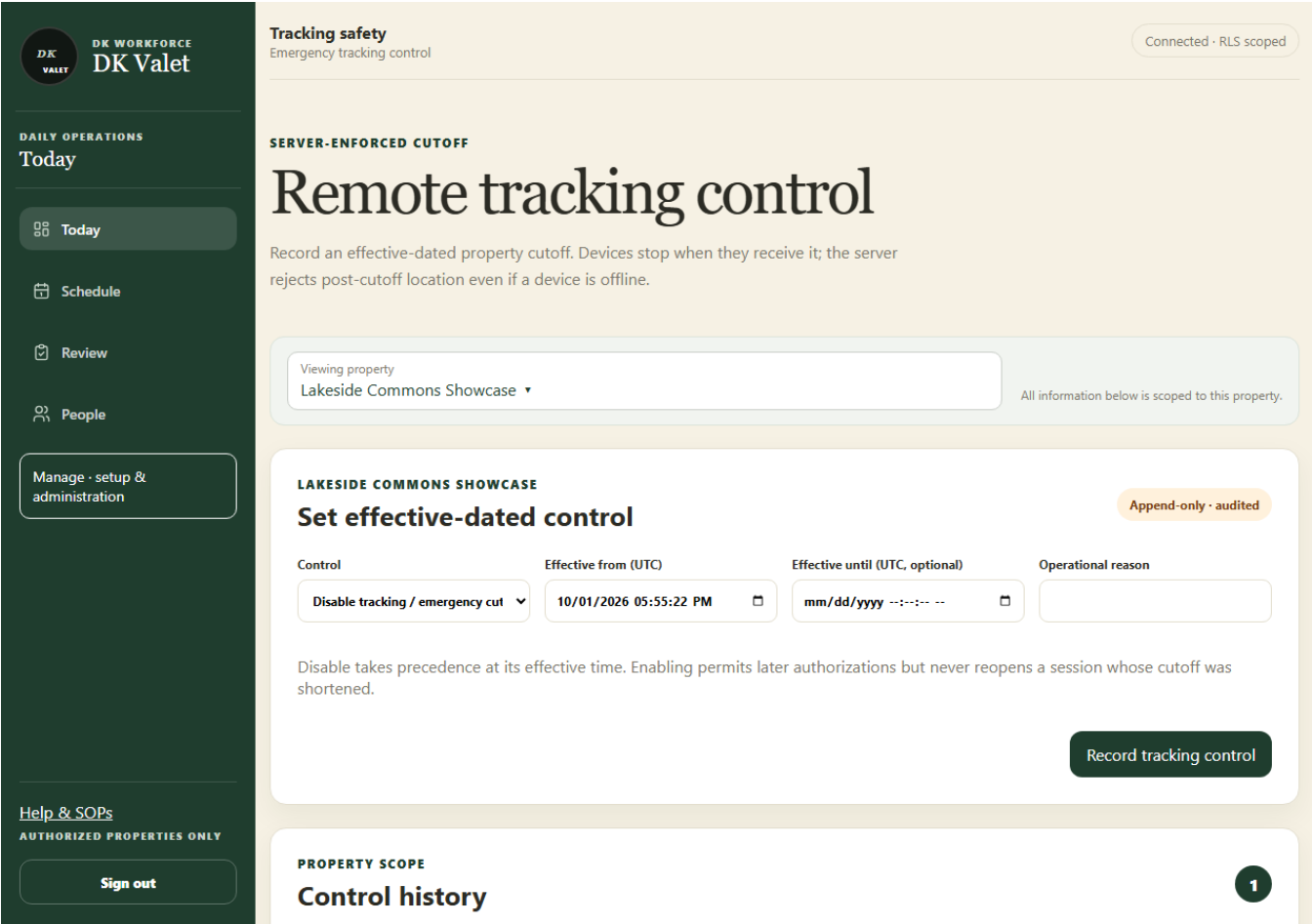
Check your result Control history shows the intended version and interval; the server rejects post-cutoff collection.

If something goes wrong An offline phone may not receive a remote instruction immediately. Re-enabling tracking does not bypass assignments, policy or a session cutoff.

See the picture reference on the next page.

SOP 42 Picture reference

Use tracking safety and emergency controls



Step 2 · Remote tracking control: use the property selector and the task controls shown.
Application screenshot with training data.

SOP 43 | Advanced administration

Inspect processing health and retry a failed job

Find processing failures and retry only after reviewing the issue.

For Web and mobile · Administrator / Supervisor

Before you start Support access is required. Associate uploads may need to arrive before analysis can finish.

Open Manage > Operational support

Step 1 Open processing health

Choose Manage and View processing health, or Operational support on mobile. Select the authorized property scope.

Step 2 Inspect the job

Read queue status, failure information and the associated session. Check device diagnostics and push delivery information when relevant.

Step 3 Review an eligible retry

For a job needing attention, select Review retry and investigate repeated failures before retrying.

Step 4 Queue and verify

Enter Reason for retry and select Queue this retry. Refresh the queue and later inspect the run's analysis result.

Processing queue

Showing the most recent 50 unfinished jobs. Investigate repeated capacity failures before retrying.

- [Run 10000000](#) · attention · 2 attempts · processing failed [Review retry](#)

Reason for retry [Queue this retry](#) [Cancel](#)

Review an unfinished job and give a reason before queueing its retry. Application component preview with training data.

Check your result The job shows its new queue state or a completed analysis result.

If something goes wrong Repeated capacity or processing failures need an administrator's investigation. Repeated retries alone are not a repair.

SOP 44 | Advanced administration

Manage approved data collection and timing policies

Review effective settings and apply an approved policy to future work.

For Web · Administrator

Before you start Administrator access and approval for the intended collection configuration are required. This guide does not authorize a new pilot.

Open Manage > Data collection admin

Step 1 Choose the scope

Open Data collection and select the intended organization/property. Read inherited defaults and current property overrides.

Step 2 Review the relevant section

Choose routine tracking, setup sensors, associate route evidence, collection defaults or run timing as appropriate. Read the displayed effective settings.

Step 3 Enter approved values

Set only the approved values, notice version and reason. For timing, review early-start behavior and the separate maximum run duration.

Step 4 Confirm futurerun changes

Review the form's confirmation checkbox or review step and publish using the named policy action.

Step 5 Verify the effective version

Refresh and confirm the new version and scope. Existing sessions keep their authorized snapshot and emergency cutoff.

Check your result The intended future-run policy is recorded with its reason and effective version.

If something goes wrong Technical settings do not themselves approve employee notice, retention, experimental pilots or employment consequences.

See the picture reference on the next page.

SOP 44 Picture reference

Manage approved data collection and timing policies



Step 2 · The intended future-run policy is recorded with its reason and effective version.

Workflow illustration. Follow the complete numbered instructions on the previous page.

SOP 45 | Advanced administration

Read device and tracking insights

Inspect aggregate quality patterns without overinterpreting small cohorts.

For Web · Administrator

Before you start Authorized insight access is required.

Open Manage > Device & research tools

Step 1 Open the insight screen

Select Device & tracking insights from authorized administration tools.

Step 2 Set the available filters

Choose property and the available device, platform or time filters. Read the cohort counts.

Step 3 Interpret the quality measures

Compare accuracy, freshness, permission, sync and device dimensions together. Respect suppressed or unknown results.

Step 4 Investigate a supported issue

Use an authorized run review or Operational support for a concrete failure. Preserve the distinction between device quality and employee performance.

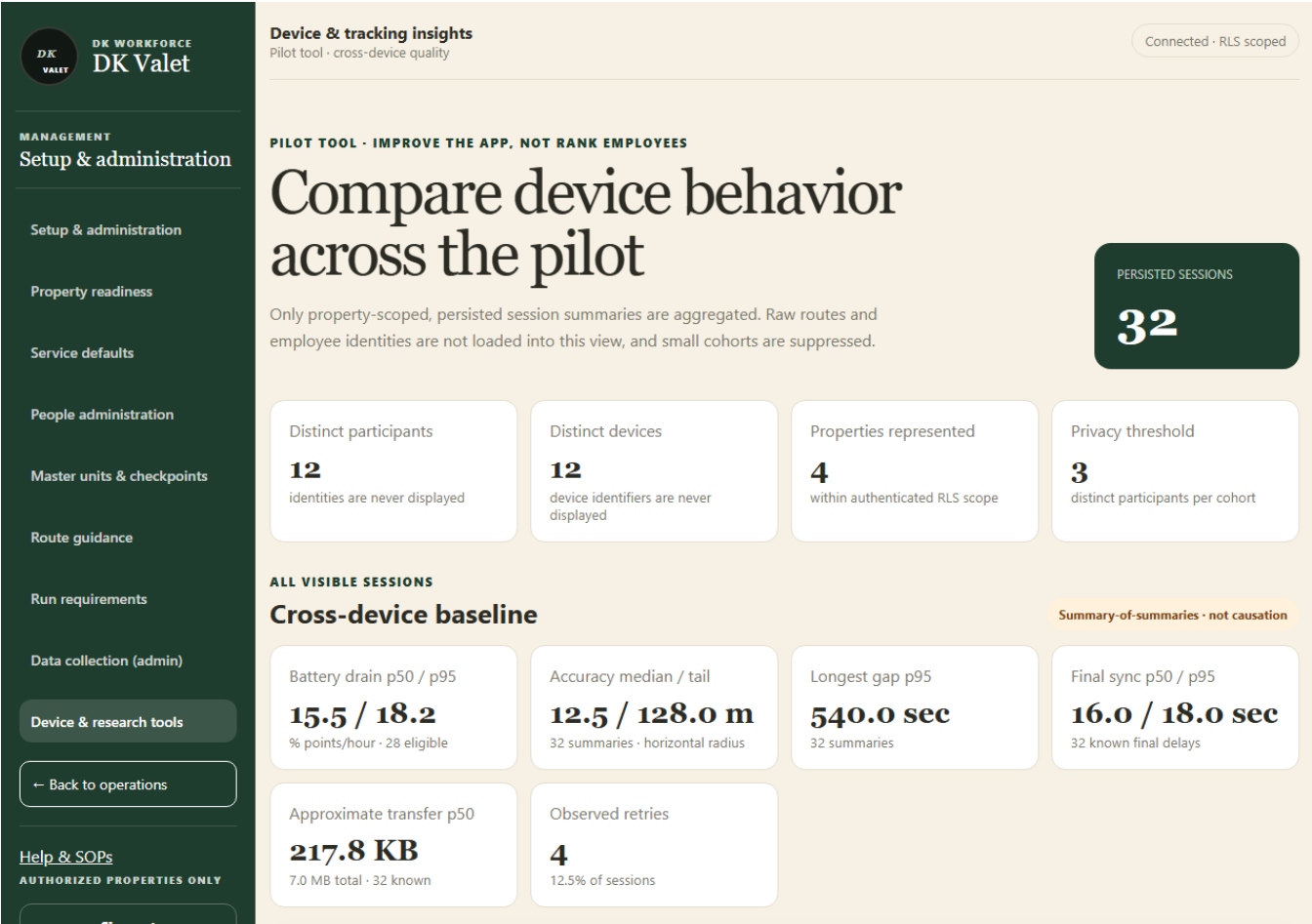
Check your result You can describe the supported quality pattern and any limitations of the cohort.

If something goes wrong Small cohorts may be withheld. Missing or degraded evidence cannot be converted into an exact indoor visit claim.

See the picture reference on the next page.

SOP 45 Picture reference

Read device and tracking insights



Step 2 · Compare device behavior across the pilot: use the property selector and the task controls shown.

Application screenshot with training data.

SOP 46 | Advanced administration

Use the setup research workbench

Compare existing recorded evidence using the available research tools.

For Web · Administrator / Supervisor

Before you start Use only an authorized research workflow. Experiments are separate from route publication.

Open Completed setup run > Research workbench

Step 1 Open the source recording

Choose the correct property and completed setup run, then open Research workbench when available.

Step 2 Select the comparison

Read the available model, replay and analysis options. Keep the recorded run and comparison settings identifiable.

Step 3 Run and inspect the result

Use the offered comparison action and wait for results. Inspect raw coverage, marked units, path gaps and uncertainty together.

Step 4 Keep the interpretation qualified

Record observations for the authorized study. Publish operational references only through the separate reviewed master and associate-route workflows.

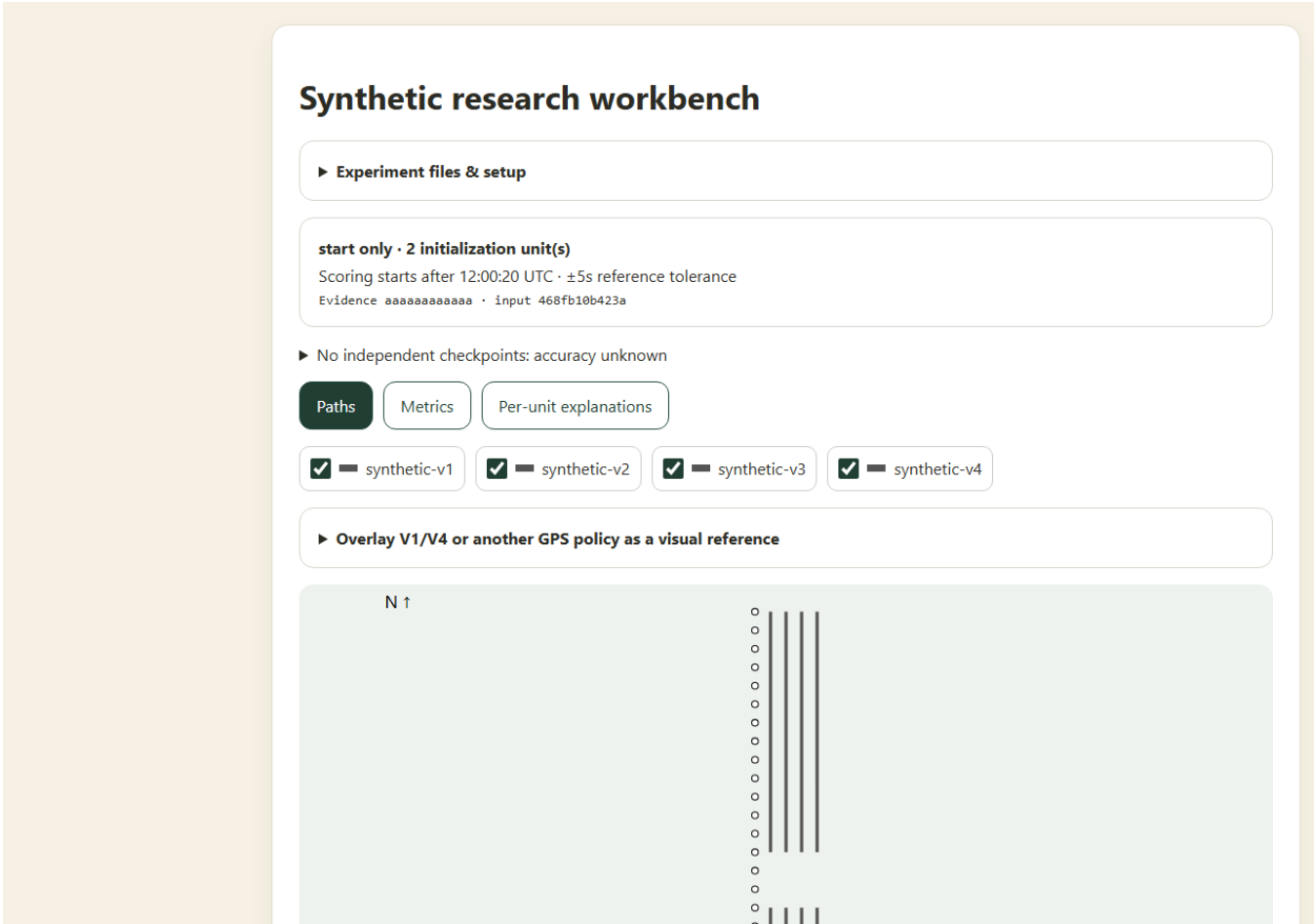
Check your result The result is tied to a known recording and comparison configuration.

If something goes wrong A research path is an estimate. This screen does not authorize new collection or automatically change the operational master.

See the picture reference on the next page.

SOP 46 Picture reference

Use the setup research workbench



Step 2 · Compare retained setup evidence in the research workbench; model paths remain estimates.
Application component preview with training data. Native permission prompts may differ.

SOP 47 | Advanced administration

Perform an authorized guided movement test

Follow the existing measured walking/stopping test sequence and inspect local results.

For Mobile · Administrator / Supervisor

Before you start An authorized setup session, supported build and safe measured test area are required. Use only an approved field study.

Open Property setup > Movement tests or Saved tests

Step 1 Open Movement tests

In property setup select Movement tests. Prepare the specified straight or square course and review the recording mode.

Step 2 Start and follow the prompts

Pass start checks and start test recording. Follow each on-screen trial's walking, turning or stopping instructions and enter actual observations when requested.

Step 3 Finish the recording

Complete the prescribed trials and finish the authorized setup recording. Check pending uploads and save status.

Step 4 Inspect Saved tests

Open Saved tests on the same phone, select the recording and review the preserved trials and comparisons.

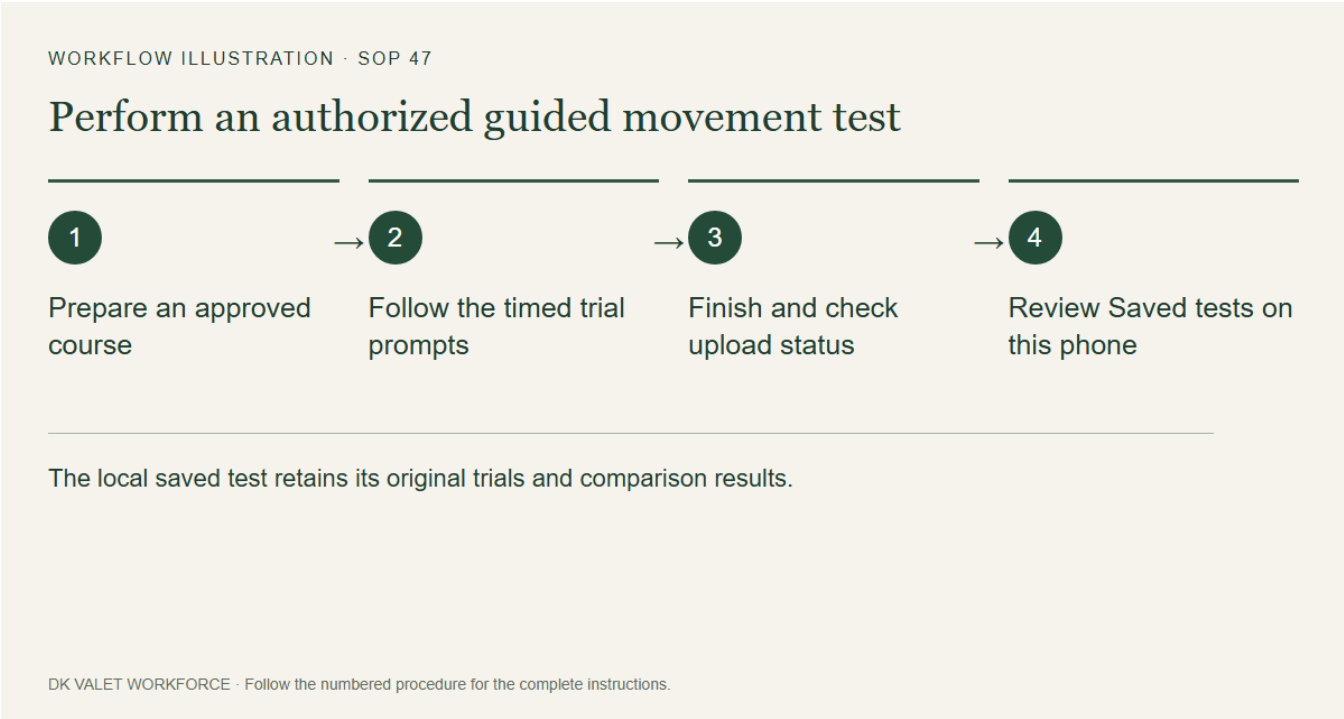
Check your result The local saved test retains its original trials and comparison results.

If something goes wrong These tests do not prove exact indoor location and do not replace operational setup or route publication.

See the picture reference on the next page.

SOP 47 Picture reference

Perform an authorized guided movement test



Step 2 · The local saved test retains its original trials and comparison results.

Workflow illustration. Follow the complete numbered instructions on the previous page.

SOP 48 | Advanced administration

Find missing setup history and request an archive review

Understand why an earlier setup may be hidden and request an authorized history review.

For Web and mobile · Administrator / Supervisor

Before you start Have the property and approximate recording date. There is no end-user archive or restore button in this version.

Open Property readiness > Setup history

Step 1 Refresh the property history

Open the correct property's setup history and refresh or reopen it. Confirm that you are looking at the intended property.

Step 2 Check retained references

An archived walk may be hidden from ordinary history while a published master still refers to it. Use an authorized source-evidence link from the retained reference when offered.

Step 3 Request an administrator review

Send the responsible administrator the property, recording date and reason for reviewing hidden history. Archive or restore requires a separately approved operator maintenance action.

Step 4 Verify after the approved change

After the administrator confirms a change, refresh history and verify the intended visibility. Raw observations and published references are retained.

Check your result The missing history is explained or the approved visibility change appears after refresh.

If something goes wrong Do not try to delete a property or change its current master to clear history. Ask the administrator to investigate the specific recording.

See the picture reference on the next page.

SOP 48 Picture reference

Find missing setup history and request an archive review



Step 2 · This version has no end-user archive or restore button. Request a specific history review.

Workflow illustration. Follow the complete numbered instructions on the previous page.

SOP 49 | Getting started

Sign out and review privacy information

End your account session and find the application's privacy and terms information.

For Web and mobile · Administrator / Supervisor / Associate

Before you start Complete active run/setup closeout and preserve pending uploads first.

Open Account > Sign out and website footer

Step 1 Check current work

Confirm any route or setup recording is finished. Read pending stop, upload and finish-statement messages before changing accounts.

Step 2 Open Account

On mobile open Account & help. On web use Account or the sidebar Sign out control.

Step 3 Sign out

Select Sign out and follow any pending-work warning. If sign-out is blocked, complete the indicated recovery or contact your supervisor.

Step 4 Read the published notices

On the Operations website use Privacy and Terms in the footer. Use Help & SOPs to return to these procedures.

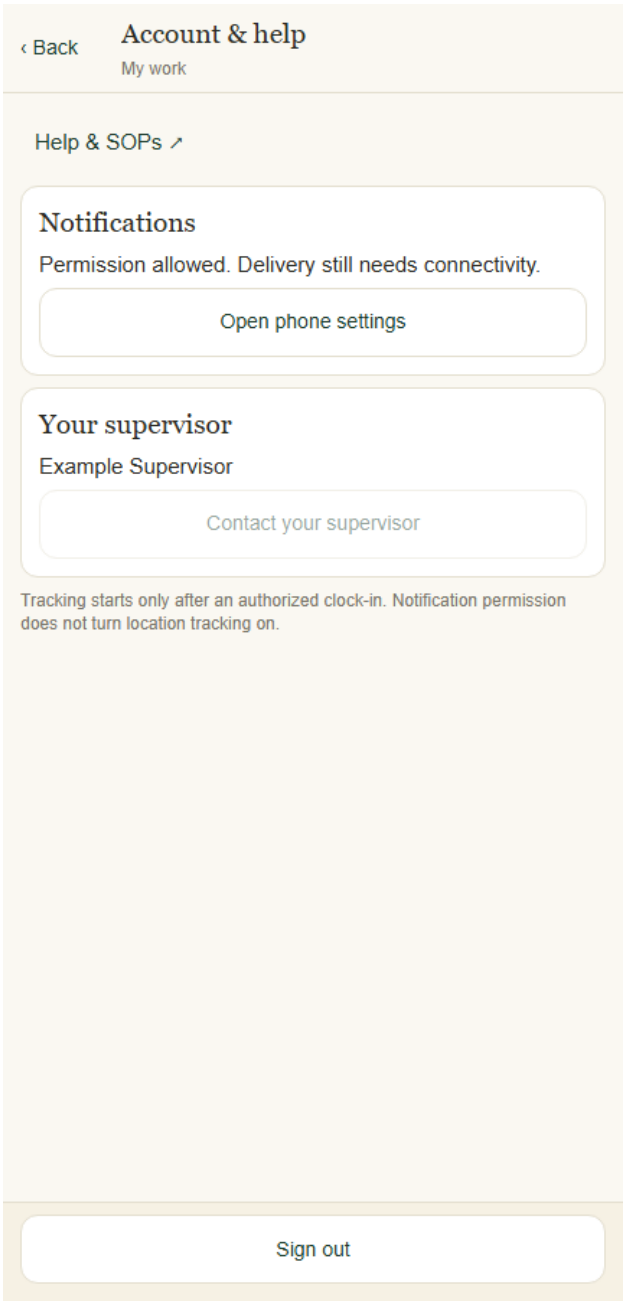
Check your result The app returns to sign-in when sign-out is permitted; pending-work warnings have been addressed.

If something goes wrong Signing out is not a substitute for confirming collection has stopped.

See the picture reference on the next page.

SOP 49 Picture reference

Sign out and review privacy information



Step 2 · Account and help contains support, notification settings and Sign out.
Application component preview with training data. Native permission prompts may differ.

SOP 50 | Scheduling

Build copy or bulk edit shifts

Review a multi-shift change before applying the batch.

For Web · Administrator / Supervisor

Before you start Verify the selected properties, dates and eligible workers. A batch is limited to 100 operations.

Open Schedule > Property schedule > Portfolio schedule

Step 1 Open the batch tools

Open Property schedule from Schedule, then expand Build shifts across properties to use the Bulk schedule composer.

Step 2 Build or reuse the draft

Choose properties, service dates and eligible employees per property. Set Starts locally, Ends locally, notes and reason. Optionally load a device template or use Copy previous week, then inspect every copied date.

Step 3 Review and apply

Select Review batch. Read every operation and warning, then Apply reviewed batch only when the full batch is correct.

Step 4 Bulk edit existing shifts

Select eligible shifts in the portfolio schedule. In Bulk shift action choose Move or reassign or Cancel selected shifts. Set the change and required reason, then Review selected changes and Apply reviewed batch.

Step 5 Verify the result

Inspect the saved shifts and pending acceptance. Save device template stores a reusable draft on this browser; it is not a published schedule or shared server template.

Check your result The reviewed batch is applied together and the calendar shows the intended dated shifts.

If something goes wrong Clear selections and refresh if a shift has changed or started. Access/training restrictions still apply even when overlap warnings are advisory.

See the picture reference on the next page.

SOP 50 Picture reference

Build copy or bulk edit shifts

DRAFT → PREVIEW → ATOMIC PUBLISH

Bulk schedule composer

Up to 100 operations

1. PROPERTIES

☐ Lakeside Commons Showcase

☐ Oak Terrace Showcase

☐ Synthetic North Property

☐ Synthetic South Property

2. SERVICE DATES

☐ Thu, Oct 1

☐ Fri, Oct 2

☐ Sat, Oct 3

☐ Sun, Oct 4

☐ Mon, Oct 5

☐ Tue, Oct 6

Starts locally

08:00 PM

Ends locally

11:00 PM

Route notes

Required batch reason

Template name

Save device template

Load a template

Copy previous week

Review batch

Select properties, dates, and eligible employees, then review. Overlaps are advisory; access and training are required. Saving records any overlap warnings in the audit history.

Step 2 · Choose properties, dates and employees, then review the complete batch.

Application screenshot with training data.

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SOP 51 | Advanced administration

Set an effective staffing target

Record a property staffing target from an approved effective date.

For Web · Administrator

Before you start Property-administrator permission is required. Distinguish this target from the people needed in each recurring service window.

Open Property schedule > Set staffing target

Step 1 Open the target form

Open the portfolio/property schedule tools and locate Set staffing target.

Step 2 Choose property and headcount

Select Property and enter Required headcount. Confirm the target is for the selected property.

Step 3 Set the effective time and reason

Enter Effective from (property time) and the approved Reason. Check the property time zone.

Step 4 Save and verify

Select Save effective target, wait for confirmation and inspect the staffing summary after refresh.

Check your result A new effective target is recorded; it does not itself assign any worker.

If something goes wrong Use Service defaults to change individual recurring window requirements and Schedule to assign workers.

See the picture reference on the next page.

SOP 51 Picture reference

Set an effective staffing target

Set staffing target

Property-administrator only. This creates a new effective record and does not invent pay, attendance, or discipline rules.

Property

Lakeside Commons Showcase

Required headcount

Effective from (property time)

mm/dd/yyyy --:-- --

Reason

Save effective target

Step 3 · Set an effective property-local staffing target with a reason.
Application screenshot with training data.

SOP 52 | Daily operations

Export the operations view

Export the loaded reporting period for selected authorized properties.

For Web · Administrator / Supervisor

Before you start Verify selected properties and the loaded reporting period. Calendar day, status and text filters do not narrow this export.

Open Portfolio operations > Export operations CSV

Step 1 Choose the properties

Open Property schedule and select the intended properties in the portfolio operations filter. Confirm the authorized scope.

Step 2 Check the reporting period

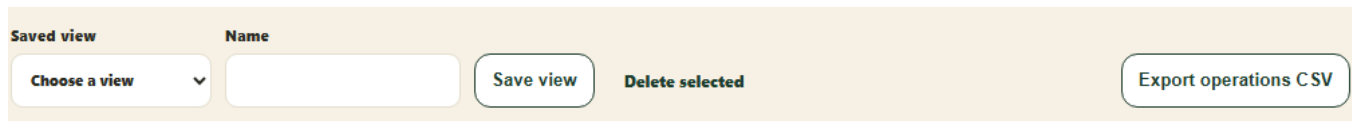
The export uses the full reporting period loaded by this page. Calendar date, Day/Week view, shift status and text search affect the screen but do not narrow the exported dataset.

Step 3 Export

Select Export operations CSV beside the saved-view controls. Wait for the download or read the export failure message.

Step 4 Verify the downloaded rows

Open the CSV and check property and date values. Filter the file to the required dates if necessary. Share workforce information only with authorized recipients and preserve unknown and degraded labels.



The screenshot shows a user interface for managing saved views. It includes a 'Saved view' section with a 'Name' input field, a 'Choose a view' dropdown menu, and buttons for 'Save view', 'Delete selected', and 'Export operations CSV'.

Export operations CSV uses the selected properties and full loaded reporting period. Application screenshot with training data.

Check your result The CSV contains the selected properties across the loaded reporting period.

If something goes wrong If the export fails, refresh the view and retry. Do not broaden the property scope to work around an access failure.

SOP 53 | Property setup

Publish property and global notes

Publish temporary or newcomer instructions to the properties you manage.

For Web and mobile · Administrator / Supervisor

Before you start Prepare a short message without private credentials. Global means the explicitly selected properties, not future properties.

Open Manage > Property and global notes

Step 1 Choose the target and message

Select one property or All properties I manage. Enter the message and choose setup, associate runs or both.

Step 2 Set audience and expiration

Choose Everyone or New to this property. Newcomer notes appear before the first routine clock-in and for the configured number of days afterward. An optional expiration ends that date in your device time zone.

Step 3 Review and publish

Check the explicit target count, message, audience and expiration, then publish. The message appears in applicable pre-start instructions; it does not send a push notification.

Step 4 Withdraw when no longer needed

Open the note at the relevant property and withdraw it. The history is retained. Global publication creates a separate scoped record for each target.

Check your result The note appears at the intended properties with its audience and expiration.

If something goes wrong If publication is uncertain, refresh before retrying. Use direct contact for urgent safety issues.

See the picture reference on the next page.

SOP 53 Picture reference

Publish property and global notes

◀ Back

Property & global notes

Synthetic company

Audience

Everyone at the property

▼

Expiration date · YYYY-MM-DD (optional)

2099-10-31

Expires at the end of that date in your phone's
timezone. Newcomer notes also stop when their
display window ends.

Review note

Step 2 · Choose who sees the note and its optional expiration. Review the explicit property target before publishing.
Application component preview with training data. Native permission prompts may differ.

SOP 54 | Property setup

Configure building and floor numbering

Decode consistent door labels for future setup marks without treating GPS as floor evidence.

For Web and mobile · Administrator / Supervisor

Before you start Know the actual property numbering convention. Earlier observations are not changed.

Open Manage > Property > Unit numbering or floor rule

Step 1 Open the selected property

On web open Service settings, then Unit numbering. On mobile select the property in Manage, then Unit numbering or floor rule.

Step 2 Describe the label

Use one B, F or U per character for building, floor and unit groups. BFUU decodes 1324 as building 1, floor 3, unit 24. Use the floor offset only when the actual convention requires it.

Step 3 Test a real example

Enter a representative label in the preview. Check every decoded field. Nonmatching labels remain unknown; explicit building and floor entries override decoding.

Step 4 Save for future marks

Enter a reason and save. A blank pattern disables future decoding. The rule version and original request are retained; changing rules does not rewrite historical evidence.

Check your result The preview matches the numbering convention and the saved rule applies to future marks.

If something goes wrong If the existing rule cannot be loaded, refresh before saving. Do not guess a rule for inconsistent labels.

See the picture reference on the next page.

SOP 54 Picture reference

Configure building and floor numbering

◀ Back

Unit numbering rule

Synthetic property

B = building, F = floor, U = unit. One letter per digit; hyphens/spaces match literally. BFUU: 1324 → building 1, floor 3, unit 24. Blank turns decoding off.

BFUU

Floor adjustment (–5 to 5)

0

Example unit label

1324

Building 1 · Floor 3 · Unit 24

Match property numbering

Save for future marks

Step 3 · Preview the actual label convention before saving a rule for future setup marks.
Application component preview with training data. Native permission prompts may differ.

SOP 55 | Daily operations

Start a supervisor support run

Record work at an assigned property outside a normal scheduled window.

For Mobile · Administrator / Supervisor

Before you start An active field-property assignment, published route, configured run-duration policy and usable location are required.

Open Today > Clock in at a property

Step 1 Choose the property

Select Clock in at a property from Today. Search and choose the property where you will actually work. Preparation alone does not collect location.

Step 2 Complete arrival checks

Review applicable instructions and permissions. Be inside the configured boundary. The supervisor timing exception does not bypass geofence or device checks.

Step 3 Clock in and answer run questions

Clock in only when ready to work. Answer the due questions truthfully and add requested photos (SOP 38), then follow the published unit route.

Step 4 Finish and verify

Use Finish run when work ends. Review unconfirmed units and submit your truthful statement. Confirm collection stopped and evidence uploaded separately. The independent safety cutoff remains active.

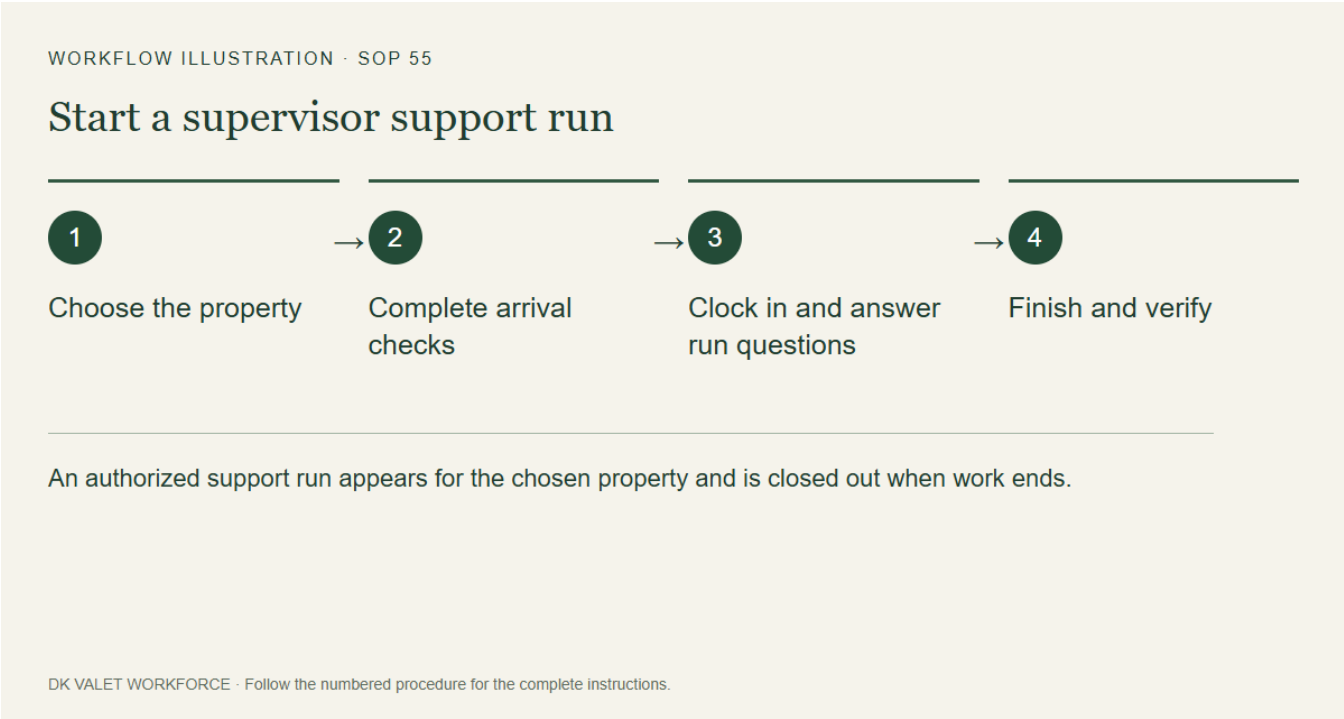
Check your result An authorized support run appears for the chosen property and is closed out when work ends.

If something goes wrong If multiple phase routes exist without a property-wide route, use an explicitly scheduled phase shift. Ask an administrator to resolve missing configuration.

See the picture reference on the next page.

SOP 55 Picture reference

Start a supervisor support run



Step 2 · An authorized support run appears for the chosen property and is closed out when work ends.

Workflow illustration. Follow the complete numbered instructions on the previous page.