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aspect workforce management system user guide

Published: September 3, 2026 | Index ID: #-

Aspect Workforce Management System User Guide

Welcome to the definitive user guide for Aspect Workforce Management (AWM). Whether you're a new administrator, a team leader, or an end user, this guide will walk you through every feature, workflow, and tip that will help you get the most out of Aspect's powerful workforce management platform. From creating schedules to generating compliance reports, you'll find step by step instructions, best practices, and troubleshooting advice—all designed to boost productivity, reduce labor costs, and keep your organization compliant.

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Introduction

Aspect Workforce Management is a cloud based solution that brings together scheduling, time tracking, labor compliance, and analytics into a single, intuitive interface. Designed for businesses ranging from retail chains to manufacturing plants, the platform helps you:

- Automate shift creation and reduce scheduling conflicts.
- Track employee hours in real time.
- Maintain compliance with labor laws and company policies.
- Generate actionable insights through advanced reporting.

In this guide, we'll cover every aspect of using AWM—from initial login to advanced analytics—ensuring you can confidently navigate the system and optimize workforce operations.

Getting Started

1. Account Creation and Login

To access the platform, you'll need a valid user account. If you're a new user, your administrator will provide a temporary password and an account link.

1. Navigate to https://www.aspect.com/login.

2. Enter your email address and the temporary password.
3. Click Login. You'll be prompted to change your password on first sign in.
4. Complete the password change and verify your account via the confirmation email.

2. Profile Setup

Once logged in, complete your profile to enable personalized features:

- Update your contact information.
- Set your time zone and preferred language.
- Configure notification settings (email, SMS, push).

3. User Roles & Permissions

Aspect distinguishes between several user roles, each with specific permissions. Typical roles include:

- Administrator – Full access, including user management and system configuration.
- Scheduler – Create and modify schedules, approve time cards.
- Employee – View schedule, clock in/out, request time off.
- HR Analyst – Generate reports, monitor compliance.

If you're unsure of your role, check the **Users** section in the admin console.

Core Features Overview

Aspect's core modules work together to streamline workforce management:

- Scheduling – Automated shift planning, skill matching, and shift swapping.
- Time & Attendance – Real time clock in/out, overtime calculation, and biometric integration.
- Leave & Absence Management – PTO, sick leave, and flexible scheduling.
- Compliance & Labor Law – Automatic compliance checks for minimum rest periods and maximum work hours.
- Analytics & Reporting – Custom dashboards, trend analysis, and KPI tracking.
- Mobile App – Full functionality on iOS and Android devices.

Below, we'll dive into each module in detail.

Scheduling & Shift Planning

1. Creating a New Schedule

1. Navigate to Scheduling > Create Schedule.
2. Enter the schedule name (e.g., "Week 34 – Store A").
3. Select the date range using the calendar picker.
4. Choose the shift templates (e.g., "Morning Shift 8 12", "Evening Shift 4 8").
5. Assign employees to each shift by dragging and dropping from the employee list.
6. Click Save to generate the schedule.

2. Skill Matching and Coverage Rules

Aspect allows you to set skill requirements for each shift. For example, a cash register shift may require a "Cashier" skill.

- In the schedule editor, click on a shift block.
- Open the Skill Requirements panel.
- Add the necessary skills and set the minimum quantity required.

- When assigning employees, only those with the matching skill set will appear.

3. Shift Swapping and Request Approval

Employees can request shift swaps directly from the platform. Managers review and approve or deny these requests.

1. Employee selects My Schedule > Shift Swap.
2. Choose the shift to swap and the desired employee.
3. Send the request; the manager receives a notification.
4. Manager reviews the request in Scheduling > Swap Requests and clicks Approve or Deny.

4. Managing Overtime and Labor Limits

Aspect automatically flags potential overtime violations.

- Navigate to Scheduling > Labor Limits.
- Set maximum weekly hours and minimum rest periods per your company policy.
- During schedule creation, the system will highlight conflicts in red.
- Adjust or add a compensatory time as needed.

Time Tracking & Attendance

1. Clocking In and Out

Employees can clock in/out via the web portal or the mobile app. For enhanced accuracy, biometric devices can be integrated.

- On the mobile app, tap Clock In or Clock Out.
- On the web, click Time > Clock In from the dashboard.
- For biometric devices, ensure the device is connected to the Aspect API.

2. Automatic Overtime Calculation

Once an employee clocks out, Aspect calculates overtime based on the schedule and labor limits.

- Overtime is displayed in the employee’s time card.
- Managers can override overtime calculations if necessary.

3. Handling Late or Early Clock Ins

Late arrivals or early departures trigger alerts.

1. Navigate to Time > Alerts.
2. Review the Late/ Early logs.
3. Send a reminder or disciplinary note directly from the alert.

4. Time Card Review and Approval

Schedulers review time cards before final approval.

- Open Time > Time Cards and filter by Week or Employee.
- Check for discrepancies (e.g., missed clock outs).
- Click Approve to finalize payroll entries.

Approval Workflows

1. Leave Requests

Employees submit leave requests, which managers review and approve.

1. Employee selects My Profile > Leave Request.
2. Choose the type of leave (PTO, Sick, Unpaid).
3. Enter the start and end dates and add a note.
4. Submit; the manager receives a notification.
5. Manager approves or denies via Scheduling > Leave Requests.

2. Shift Change Requests

Shift change requests follow a similar process.

- Employees submit the request in the Schedule module.
- Managers review and either approve or deny.

3. Custom Approval Chains

For larger organizations, you can create multi level approval chains.

1. Navigate to Admin > Workflow Settings.
2. Define the approval hierarchy (e.g., Supervisor !’ Manager !’ HR).
3. Assign roles to each level.
4. Enable the chain for specific request types.

Analytics & Reporting

1. Standard Reports

Aspect offers pre built reports that cover common metrics.

- Hours Worked – Total hours per employee, per department.
- Overtime Analysis – Overtime hours, cost, and compliance.
- Attendance Trends – Late arrivals, absenteeism rates.
- Compliance Dashboard – Rest period violations, labor law breaches.

2. Custom Report Builder

Build reports tailored to your organization’s KPIs.

1. Go to Analytics > Custom Reports.
2. Click Create New Report.
3. Select Data Source (Time, Scheduling, Leave).
4. Add Filters (date range, department, skill).
5. Choose Metrics and Visualization (bar, line, pie).

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