

Manager Scheduling Tasks



The Schedules Widget

Quick Actions
Click to toggle the availability of shortcuts to edit the schedule.

Display Options
Use these items to change aspects of the display.

Context Selectors
Display the current employee set and date range for the schedule. To change the context, select a different item in either or both lists.

Save
Save your scheduling edits.

Refresh
Discard any unsaved edits and reload the schedule with the most current data in the database.

Calendar Headings
Indicate weeks and days for the selected time period. Click a column heading to zoom in on that column. Drag across column headings to zoom in on those days.

Scheduled Shifts
Displays the start and end times of scheduled shifts.

Indicators
Click to display the value of specific indicators for each schedule day.

Editing Scheduled Shifts

By Employee Name ^	3/19 - 3/25						
	Sun 3/19	Mon 3/20	Tue 3/21	Wed 3/22	Thu 3/23	Fri 3/24	Sat 3/25
Campanella, Jackie		7:30AM - 4:00PM					
Conte, Monty		7:00AM - 7:00PM	7:00AM - 7:00PM	7:00AM - 7:00PM			
Gasson, Joyce		7:30AM - 4:00PM					
Lynch, Kate		9:00AM - 3:00PM					
Shea, Tyler		6:30AM - 3:00PM					

- You can edit a scheduled shift directly in the schedule by clicking a cell and changing the start and/or end times.
- You can delete scheduled shifts directly in the schedule by clicking a cell and deleting the start and end times.
- You can add a schedule shift by clicking an empty cell and entering the start and end times.

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Adding an Employee to a Schedule Group

1. In the View menu, select By Schedule Group.
2. Right-click an employee's name.
3. Click Add to Group.
4. In the Schedule Group list, select a group.
5. Select start and end dates.
6. Click Apply.
7. Click Save.

When selected, this option enables you to replace a schedule group assignment, essentially moving an employee from one schedule group to another.

Schedule Group Schedules

If you add an employee to a schedule group that has a schedule assigned to it, the employee will inherit the group's schedule.

Removing an Employee from a Schedule Group

To remove an employee from a schedule group, follow this same process except for step #3, in which you should instead select Remove from Group.

Assigning a Schedule Pattern Template to an Employee

1. In the View menu, select By Employee.
2. Right-click an employee's name.
3. Click Schedule Pattern.
4. In the Pattern Template list, select a pattern template.
5. Select anchor, start, and end dates.
6. Click Apply.
7. Click OK.
8. Click Save.

Scheduling a Pay Code

1. In the Schedules widget, click Quick Actions.
2. Click the Pay Code quick action and select a pay code from the list.
3. Click the cell for each applicable employee on each applicable day to replace any previously scheduled shift with the pay code.
4. Click the Pay Code quick action again to deactivate it.
5. Click Save.

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Creating a Schedule Pattern Template

1. In the Setup widget, find the Scheduler Setup section and click Pattern Templates.
2. Click New.
3. Enter a Name for the pattern template.
4. In the Recurring section, enter the number of weeks over which the pattern repeats.
5. In the column for one of the days on which the pattern will have a shift, enter the start and end times of the shift and press Enter.
6. Right-click the shift you just entered and select copy.
7. In the column for each other day on which the pattern will have a shift, right-click and select Paste.
8. Click Save.

Access to Setup Required

You can only create schedule pattern templates if you have access to the Setup widget.

Don't Reinvent the Wheel

When creating a new pattern template that is similar to an existing pattern template, it may be most efficient to duplicate the existing template and edit (and rename) the duplicate.

Assigning a Schedule Pattern Template to a Schedule Group

1. In the View menu, select By Schedule Group.
2. If the schedule group you need isn't displayed, click Load Group, select the applicable group from the list, and click Apply.
3. Right-click a schedule group's name.
4. Click Schedule Pattern.
5. In the Pattern Template list, select a pattern template.
6. Select anchor, start, and end dates.
7. Click Apply.
8. Click OK.
9. Click Save.

Schedule Inheritance

If the schedule group was created with the "Allow Schedule Inheritance" option selected, any employee that you add to the group will automatically be assigned to the same schedule assigned to the group.