Add, Edit, Manipulate Schedules

Shifts are times during the day that employees are assigned to work. There are various ways that managers can add and update shifts in the schedule. Managers cannot add shifts on signed-off or locked days.

Add, Edit, Delete Shifts

Create a Shift in Table View

Managers can type a shift into the schedule in Table View.

Navigation: Main Menu > Schedule > [applicable Schedule Planner]

1. In the schedule, select a cell and enter the name of a shift.
   For example, if your site has a shift named day12, select the cell and enter "day12."

2. (Optional) Select a start time and an end time separated by a hyphen.
   Use standard time-of-day format. For example, select the cell and type "8a-4p" to create a shift from 8:00 in the morning to 4:00 in the afternoon.

Modify a Shift

Managers can update a shift using the More icon in the Edit Shift slider.

Navigation: Main Menu > Schedule > [applicable Schedule Planner]

1. On the schedule, right-click a shift.

2. Select **Edit** on the **Shift** glance.

3. Select the **More** icon (vertical ellipsis) near the top of the panel to access available actions for modifying the shift as a whole.

4. From the **Actions** drop-down list, select the following.

   o **Change Shift Label** modifies the label displayed on the schedule when Shift Label visibility is selected.

5. Select **Apply** two times.

6. Select **Save.**

Note Shift labels do not change automatically if you edit a shift. Example: If the shift label is 7a3p, and a manager changes the end time to 4:00pm, the label disappears and is replace by the start and end times. Best practice is to change the shift label if you modify the shift, in this case to 7a4p.

Add Comments to a Shift

The Add Comment feature allows you to attach a predefined comment to the shift by selecting it from a menu.

Navigation: Main Menu > Schedule > [applicable Schedule Planner]

1. On the schedule, right-click a shift.

2. Select **Edit** on the **Shift** glance.

The **Edit Shift** slider opens.

3. Select **Add Comment**.

4. Select the applicable predefined comment from the first drop-down list.

5. (Optional) In the box, enter a personal note.

6. To delete a comment or a note, select the adjacent **Trash** icon.

7. Select **Apply**.

8. Select **Save**.

Shifts with comments attached appear with a speech bubble visual indicator on the schedule.

Create a Shift Using Other Methods

There are several other ways to create a new shift in the schedule in addition to the Add Shift icon in the shift glance.

Navigation: Main Menu > Schedule > [applicable Schedule Planner]

1. Create a new shift in one of the following ways.

   o Select a cell with a previously defined shift, then press Ctrl+C. Select the cell you are defining, then press Ctrl+V. Repeat the Ctrl+V command to create additional copies.

   o Right-click a cell and select **Copy**. Then move the cursor to the cell you are defining, right-click and select **Paste**. You can repeat the Paste command to create additional copies.

- o   Use the **Copy/Paste** icon on the **Quick Actions** bar to select a shift to copy and then select date cells you are defining to paste the shift.

2. Continue defining the shift.

Add Schedule Transfer

You can transfer a specific shift worked by an employee to a different business structure (location and job), a different work rule, a different cost center (pay source), or a different labor category.

- Business Structure Transfer — A manager needs to transfer an employee one job to work on another job.
- Work Rule Transfer — An employee is called in to work a regular shift at the last minute. The Manager transfers the shift from a regular shift work rule to an overtime shift work rule because of the short notice.
- Cost Center Transfer — For a training session, an employee must be transferred from 3:00pm until the end of the shift.
- Labor Category Transfer — An employee scheduled to work a shift on one project must be transferred to another project for a complete shift.

Transfer a Shift Using Quick Actions

You can transfer a shift so employees can change shift assignments or locations in a schedule. The Insert Shift Transfer Quick Action provides an easy way to transfer assigned shifts to the locations and jobs that you work with most frequently.

Navigation: Main Menu > Schedule > [select a Schedule]

1. On the Schedule page, select Quick Actions.

2. Select Insert Shift Transfer and select a location and job from the list.

3. Select an assigned shift in the schedule grid.

4. Select the Insert Shift Transfer Quick Action again to turn it off.

5. Select Save.

Transfer a Shift to a Different Location or Job on the Business Structure

The Insert Shift Transfer panel includes options to perform business structure, work rule, cost center and labor category transfers. The business structure option defines the locations and jobs where employees can work.

Navigation: Main Menu > Schedule > [select a Schedule]

1. Complete one of the following.

o   Right-click an employee.

o   Select a specific set of employees using Shift-select or Control-select, then right-click one of the selected employees.

The Employee glance appears.

2. Select **More Actions** and then select **Insert Shift Transfer**.

The **Insert Shift Transfer** slider opens

3. Select the calendar icon then select an **Effective Date** during the schedule period that is currently loaded.

4. Enter the **Start Time** using the standard time format for your organization.

Maximum shift length is 24 hours.

5. Select the **Transfer** drop-down list and then select **More**.

6. Select **Add Business Structure**.

7. From the **Business Structure** panel, select the applicable location or job for the transfer.

This is typically the same job in a different location or a different job in the same location as the assigned shift.

8. Select **OK**.

Use **Search** to find a specific location or job quickly.

9. Select **Apply**.

10. (Optional) Select **Add Comment** and select the applicable comment from the drop-down list, and then select **Add**.

11. Select **Apply** again.

12. Review the shift transfers in the schedule.

13. Select **Save**.

Transfer a Shift to a Work Rule

The work rule defines how the pay for the employee's shift is calculated. Managers can apply a work rule transfer to one or more assigned shifts when necessary.

Navigation: Main Menu > Schedule > [select a Schedule]

1. Complete one of the following.

o   Right-click an employee.

- Select a specific set of employees using Shift-select or Control-select, then right-click one of the selected employees.

The Employee glance appears.

2. Select **Insert Shift Transfer**.

The **Insert Shift Transfer** slider opens.

3. Select the calendar icon then select an **Effective Date** during the schedule period that is currently loaded.

4. Enter the **Start Time** using the standard time format for your organization.

Maximum shift length is 24 hours.

5. Select the **Transfer** drop-down list and then select **More**.

6. Select **Add Work Rule**, and then from the drop-down list, select the applicable work rule.

Use the **Search** field to find a work rule quickly.

7. Select **Apply**.

8. (Optional) Select **Add Comment** and select the applicable comment from the drop-down list, and then select **Add**.

9. Select **Apply** again.

10. Review the shift transfers in the schedule.

11. Select **Save**.

Transfer a Shift to a Cost Center

The cost center defines the entity on the organization's business structure where an employee's work is charged. Managers can transfer all or part of an employee's shift to a specific cost center.

Navigation: Main Menu > Schedule > [select a Schedule]

1. Complete one of the following.

- Right-click an employee.

- Select a specific set of employees using Shift-select or Control-select, then right-click one of the selected employees.

The Employee glance appears.

2. Select **Insert Shift Transfer**.

The **Insert Shift Transfer** slider opens.

3. Select the calendar icon then select an **Effective Date** during the schedule period that is currently loaded.

4. Enter the **Start Time** using the standard time format for your organization.

Maximum shift length is 24 hours.

5. Select the **Transfer** drop-down list and then select **More**.

6. Select **Add Cost Center** and then select from the list of available cost centers.

Enter part or all of a cost center at the **Search** field.

7. Select **Apply**.

8. (Optional) Select **Add Comment** and select the applicable comment from the drop-down list, and then select **Add**.

9. Select **Apply** again.

10. Review the shift transfers in the schedule.

11. Select **Save**.

Transfer a Shift to a Labor Category

The labor category defines the work that employees can do within an organization.

Navigation: Main Menu > Schedule > [select a Schedule]

1. Complete one of the following.

   o Right-click an employee.

   o Select a specific set of employees using Shift-select or Control-select, then right-click one of the selected employees.

The Employee glance appears.

2. Select **Insert Shift Transfer.**
   The **Insert Shift Transfer** slider opens

3. Select the calendar icon then select an **Effective Date** during the schedule period that is currently loaded.

4. Enter the **Start Time** using the standard time format for your organization.
   Maximum shift length is 24 hours.

5. Select the **Transfer** drop-down list and then select More.

6. Select Add Labor Category and then select the applicable labor category.
   Enter part or all of a labor category at the **Search** field.

7. Select **Apply.**

8. (Optional) Select **Add Comment** and select the applicable comment from the drop-down list, and then select **Add.**

9. Select **Apply** again.

10. Review the shift transfers in the schedule.

11. Select **Save.**

Add a Paycode to the Schedule

Convert a Shift to a Paycode

Use the Paycode Quick Action to insert default values for a selected paycode with start and end times that correspond to the shift you replace.

Navigation: Main Menu > Schedule > [Applicable Schedule Planner]

1. From the toolbar, select **Quick Actions.**

2. From the **Quick Actions** bar, select **Paycode.**

3. From the drop-down list, select a paycode.

4. Select the shift you want to replace.

5. (Optional) Select additional shifts to replace them with the same paycode.

6. Select **Quick Actions** again to close the **Quick Actions** bar.

7. Select **Save.**

Add a Paycode from a Glance

Use the Paycode action available from different glances to access all options for creating a paycode.

Navigation: Main Menu > Schedule > [Applicable Schedule Planner]

1. On the schedule, right-click an employee, a shift, or an empty date cell.
   The corresponding glance appears.

2. Select **Add Paycode.**
   The **Paycode** panel appears.

3. Modify default options.
   a. **Effective date** - Select the Effective Date to define when to apply the paycode.
   b. **Paycode** - Select the Paycode type.
   c. **Start time**: Specify when the paycode should take effect.

      d. **Duration**: Durations may include Full Schedule Day, Full Pattern Day or Full Contract Day. **Specify Amount** allows you to enter a duration as Amount Hours (hh:mm).

The available options depend on the type of schedule entity you are working with. Default options appropriate to the context are provided.

4. Select override options.
      a. **Override Accrual Days**
      b. **Override Shift** - This checkbox is always selected by default. Select the **Whole Shift** or **Partial Shift** radio button.
      c. **Create Open Shift**

5. (Optional) Enter the number of consecutive days to repeat the paycode. This value is in continuous days and does not skip holidays or weekends.

6. (Optional) Select **Add Comment** to enter a reason for the edit.

7. Select **Apply**.

8. Select **Save**.

Manage Schedule Groups

Schedule Groups
There are two types of schedule groups: groups with inheritance and groups without inheritance.

- **Groups with no inheritance** - View a certain set of employees separately from other employees. The only impact is in the sequence of the list of employees and the ability to collapse the list.

- **Groups with inheritance** - Create and modify employee schedules in unison. When you apply a pattern, a shift, a paycode, or an availability status to a group with inheritance, that entity appears in the schedule of all the employees in the group. The entity can be modified or removed from the schedule of all employees with a single command. Individual shifts, paycodes, and availability can also be defined for specific employees at specific times. These entities are not inherited and must be managed at the employee level.

If you modify the schedule of individual employees in a group, the modified entity is un-linked from the group and will no longer be affected by any modification of the original group-based entity.

Apply a Shift or a Paycode to a Schedule Group
You can apply a shift or paycode for all employee schedules in a schedule group.

Navigation: Main Menu > Schedule > [Select a schedule]

1. Right-click a specific date cell in the group row. The group row glance appears.

2. Select the desired entity on the glance.

3. Specify the entity details the same way you would for an individual employee.

Delete or Edit a Shift or a Paycode for a Schedule Group

You can delete or edit a shift or paycode applied to a schedule group.

Navigation: Main Menu > Schedule > [select a schedule]
1. Right-click the entity in the group row. The group entity glance appears.

2. To delete, select **Delete**.

3. To edit, select **Edit**. The Edit Shift or Edit Paycode panel appears. Edit the group entity the same way you would for a single employee.

Create a Schedule Pattern for a Schedule Group

You can create a schedule pattern for all employees' schedules in a schedule group.

Navigation: Main Menu > Schedule > [Select a schedule]

1. Right-click the group name (not the group row). The group glance appears.

2. Select **Schedule Pattern**.

3. Specify the schedule pattern details the same way you would for an individual employee.

Delete or Edit a Schedule Pattern for a Schedule Group

You can delete or edit a schedule pattern that is applied to a schedule group.

Navigation: Main Menu > Schedule > [Select a schedule]

1. Right-click the group name (not the group row). The group glance appears.

2. Select **Schedule Pattern**.

   - To delete the group schedule pattern, select the down arrow to open the menu then select Delete. If part of the pattern has already been worked, you can only delete the part not yet worked. Do this by editing the pattern to define an End date in the future, or by accepting the prompt in the warning message that appears.

   - To edit the group schedule pattern, select the down arrow to open the menu, then select Edit. Edit the group schedule pattern the same way you would for a single employee.