Quick Reference Guide: Scheduling

Learn about utilizing **Scheduling** within MyCOH Time.

Access Employee Schedules

View Employee Schedules

Managers can view information about their employee's schedules from the Current Schedules page.

There are two ways to access the Current Schedules page:

Navigation: Main Menu > Schedule > Current Schedule

Navigation: Home page > Manage Schedule tile

Note The Manage Schedule tile displays the following information:

- Starting - number of employees starting within X minutes or hours.
- Missing - number of employees that are scheduled but have not punched in.
- On Break - number of employees that are currently on break.
  Leaving - number of employees whose shift ends within X minutes or hours.

Change the Schedule View

By default, schedules are organized by employee; however, schedules can also be displayed by schedule group.

Navigation: Main Menu > Schedule > Current Schedule

1. From the Current Schedule page, select **View By Employee**.
2. Then select Schedule Group.

Sort Employees

By default, employees display in alphabetical order.

To sort employees in reverse alphabetical order, select the **Arrow** icon in the Name column on the Current Schedule page.

Change the Timeframe

By default, schedules display for the previous day and the next six days; however, schedules can also be displayed for a variety of timeframes.

Navigation: Main Menu > Schedule > Current Schedule

1. From the Current Schedule page, select the **Timeframe** icon.
2. From the drop-down list, select your desired **timeframe** or choose **Select Range** to enter a start and end date.

> **Note** If a timeframe that includes multiple weeks is selected, select a week from the date header to navigate between weeks.

Access Employee Schedules

Schedule Display Controls and Options

Display controls and options enable you to effectively use the schedule.

- Context Controls
- Refresh and Save Controls
- View By Options
- Show/Hide Panel Display Options
- Availability
- Intervals
- Shift Display
- Paycode
- Display
- Gantt View
- Table View
- Tool Options

Context Controls

Context controls help you define dates and employees.

Icon name and description	Description
Select Timeframe - Small blue calendar icon in upper right of screen.	Defines the dates that are loaded. You can only act on the loaded dates in the schedule. To load different dates, choose the Select Timeframe icon.
Select Hyperfind - Small blue flowchart icon in upper right of screen.	Displays the employees that are loaded. You can only act on loaded employees. You can load all the employees at a location or load a predefined set of employees.

Refresh and Save Controls

Refresh and save controls display when a schedule was last loaded, when the most recent was applied, or when there are unsaved changes.

Visual Indicator	Description
Loaded [time] - Two blue half circles with arrows indicating spinning motion at the upper right of screen.	Displays the time the schedule was last loaded or when the most recent refresh was applied, whichever is later.

Refresh - Two blue half circles with arrows indicating spinning motion at the upper right of screen (below Loaded [time]).	Reloads the schedule data from the database. If there are unsaved changes, a warning message appears.
Save - Purple arrow in a square	Select to save changes.

View By Employee Options

The View by Employee drop-down list allows you to select how employees and their schedules are arranged on the screen.

- **Employee** - Displays the schedule of each employee as a row sorted alphabetically.
- **Job** - Displays grouped scheduled shifts by specific location and job. Employee names display on their assigned shifts. Locations can be collapsed or expanded.
- **Schedule Group** - Displays schedules with employees listed in rows within each schedule group. Groups can be collapsed or expanded.
- **Employment Terms** - Displays schedules with employees listed in rows within each employment terms group. Groups can be collapsed or expanded.

Employees display in rows in the schedule. Hours, days, and weeks display as columns.

Depending on screen size, the schedule can display many weeks of scheduled shifts in a single view. When you display a longer period, less detail is provided and you may have to drill down for detail.

Visible details (segments, breaks, indicators, shift labels, or start and end times) depend on the zoom characteristic.

Show/Hide Panel Display Options

The Show/Hide panel allows you to adjust the appearance of the schedule.

Select the **Show/Hide** icon to view the display options.

Availability

Availability allows you to query employee availability.

- All
- Unavailable
- Available
- Preferred
- Preferred Time Off

Intervals

Intervals define the precision of the schedule time dividers.

- Daily
- 4 Hours
- 1 Hour
- 15 Minutes

Shift Display

The **Shift Display** provides information about the available shifts.

- Shift Time
- Shift Label (if the shift is defined as a template)

> **Note** If a shift is not defined as a shift template, the shift time is always shown.

If configured in the **Schedule Planner** setup, Dashed Border for Outside Location Jobs displays a dashed border around shifts and shift segments scheduled for a location other than the locations currently loaded in the Schedule Planner. The dashed border also displays in the shift glance.

Dashed borders display only in the Employee view and only for Location-based views including All Home Locations.

Paycode Display

The **Paycode Display** section displays paycodes.

- Paycode Name
- Paycode Short Name

Display

The **Display** section allows you to show or hide schedule items.

- Availability
- Open Shifts
- Holidays
- Schedule Paycodes
- Schedule Shifts
- Schedule Tags

Schedule - Gantt View

The Gantt View is available only for displays of one week or less.

Select the **Gantt View** icon (Three horizonal blue lines) from the toolbar.

The Gantt View displays shifts, breaks, and other time-related entities with their length proportional to their duration and shows the current time as a vertical red line.

Schedule – Table View

The Table View allows you to view a summary of data.

Select the **Table View** icon (blue square divided into four sections) from the toolbar.

The Table View provides a simplified version of the Gantt view: less data rich, but sometimes easier to read and work with. A Table View displays longer periods than a Gantt View.

Entities are not proportional to duration and do not show breaks. The entire shift is displayed as being on the day the shift begins even if the shift spans midnight.

Tool Options

Tool option provides you with quick access to actions related to schedules.

- **Quick Post** — Posts loaded schedule for the loaded time frame and location.
- **Manage Schedule Posting** — Displays posted or unposted schedules for the loaded location and time frame. The location is the same as the location currently loaded.
- **Notify Employees** — Displays a warning of employees who need to be notified.

Add an Employee to a Schedule Group

Schedule Groups and Employees

Schedule groups organize employees who share characteristics into groups that make their schedules easier to manage or view.

When you assign an employee to a schedule group, the employee might be assigned a schedule created at the group level, depending on the type of schedule group it is. Employees can be in more than one group, but you can only add employees to one group at a time.

Add an Employee to a Schedule Group

Managers can easily add one or more employees to a schedule group using the Schedule Group view in the schedule.

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

1. In the schedule, select **View By** and then select **Schedule Group**.
2. The available groups are listed in the first column as well as the ungrouped employees.
3. To add an employee to a group, right-click an employee name, and select **Add to Group** from the employee glance.

> **Note** To add multiple employees, select the checkbox next to each name you want to add, then right-click one. You can also control-click or shift-click the employees, then right-click one of the employees.

4. On the Add to Group panel, do the following:
    a. Select a group from the **Group** drop-down list.
    b. Specify a **Start Date** and an **End Date**.
    c. Ensure that the **Remove Employees for Other Inheritance Groups for Selected Date Range** option is selected or cleared, as needed.
    d. Select **Apply**.

Assign a Paycode to Enter Time Off

Time Off Using Paycode

You can add a paycode to enter time off for a day or you can convert a shift to a paycode. In both cases, similar options are available.

Note You cannot add items on signed-off or locked days.

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 Open Shift Requests

Manage Open Shift Requests

When open shift requests are configured for manager approval, managers can review and act on requests from employees in the Control Center.

Navigation: Home page > Control Center

1. From the Control Center panel, review the request summary information. You can select **Approve** or **Refuse**, or to review request details, select **View All** and move to step 2.
2. From the Control Center page, select the applicable **open shift request notification**.
3. In the Details panel, review the request information, including employees requesting the same shift, request details, rule violations, and comments and request status history.

> **Note** If the requesting employee has multiple assignments, the request header information shows the employee's selected assignment when they initiated the request.

4. Expand the **Request Details** section to review shift details.

> **Note** If the requesting employee has multiple assignments, the request details area also shows the assignment associated with the employee's requested open shift.

5. If approving this request violates a schedule rule, expand the **Rule Violations** section to see more information.

> **Note** If the requesting employee has multiple assignments, the request details area also shows the assignment associated with the employee's requested open shift.

6. Expand the **Comments & Status History** section to review any comments the employee may have entered.
7. Select an action icon to **Approve** or **Refuse** the request, or to mark the request **Pending**.

> **Note** Once you approve the request, its status changes to Approved. The open shift is added to the employee's schedule. On the schedule, shift assignments that result from approved open shift requests display visual indicators when you hover on the shift. In addition, the shift glance displays a message indicating the shift was requested as an open shift and the shift label appears in bold.

View Schedule Period Layers for Future Time Periods in My Calendar

View Schedule Period Layers for Future Time Periods in My Calendar

Employees can view schedule period layers in their calendar. This feature allows an employee to select a symbolic predefined time frame for future time periods in an efficient manner when viewing their schedule.

Employees can select Next Schedule Period +1 and Next Schedule Period +2.

Navigation: Main Menu > My Information > My Calendar

1. From the My Calendar page, access the **Layers** menu.
2. From the Layers drop-down list, select the applicable **time period**.
    - **Next Schedule Period + 1**: The timeframe corresponding to two Schedule Periods in the future.
    - **Next Schedule Period + 2**: The timeframe corresponding to three Schedule Periods in the future.

Schedule Patterns

Understand Schedule Patterns

Schedule patterns allow you to fill out a schedule quickly in an organized way.

- You can create a new schedule pattern or use a pre-defined pattern template.
- You can assign patterns to any employee or group of employees.

Assign a Pattern Template to One or More Employees

You can create or use a pattern template for a single employee, multiple employees, a schedule group, or employees sharing the same employment terms.

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

1. In the schedule, open the Schedule Pattern glance for specific employees having the same schedule pattern, by doing one of the following:
    - Double-click an employee.
    - Right-click an employee, a schedule group row, or a employment terms row, and select Schedule Pattern.
    - Select the checkbox next to the employee's name to select multiple employees, then right-click any one of them and select Schedule Pattern.
    - Use shift-select or Ctrl-select to select multiple employees, then right-click any one of them and select **Schedule Pattern**.

Note If the Schedule Pattern glance appears with a schedule pattern already defined, select **Add New Pattern** before you begin.

2. Select **Pattern Template** at the top of the glance, then select a template.

Note Search for the name of a template by typing any part of the template name in the search box.

3. Verify the Start Date and (optionally) an End Date to indicate the effective period of the pattern.
4. Select the **Override Other Patterns** checkbox if the pattern should overwrite any shifts and paycodes created by a previously applied schedule pattern.
5. Select **Apply**.
6. Select **Save**.

Define a Schedule Pattern for One or More Employees

You can create a schedule pattern for a single employee, multiple employees, a schedule group, or employees sharing the same employment terms.

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

1. In the schedule, open the Schedule Pattern glance for specific employees having the same schedule pattern, do one of the following:
   - Double-click an employee.
   - Right-click an employee, a schedule group row, or a employment terms row, and select Schedule Pattern.
   - Select the checkbox next to the employee's name to select multiple employees, then right-click any one of them and select **Schedule Pattern**.
   - Use shift-select or Ctrl-select to select multiple employees, then right-click any one of them and select **Schedule Pattern**.

Note If the Schedule Pattern glance appears with a schedule pattern already defined, select **Add New Pattern** before you begin.

2. Specify a Start Date and (optionally) an End Date to indicate the effective period of the pattern.
3. At the Define Pattern For field, specify the length of the cycle that repeats (in days or weeks).
4. Select the **Override Other Patterns** checkbox if the pattern should overwrite any shifts and paycodes created by a previously applied pattern. Otherwise, shifts and paycodes in the current pattern are added to those previously created.

Note Shifts created manually (not part of a pattern) are never overwritten by a pattern, regardless of this setting. However, you must ensure that any manually created shifts do not conflict with the pattern created shifts.

5. Create a shift for any cell using one of the following methods.
   - Right-click the cell and select **Insert Shift Template**, then select a template.
     - You can also select multiple cells (using shift-click or control-click), right-click one of them, select **Insert Shift Template**, then select a template.
   - Select **Shift Template** at the top of the glance, then select a template, then select the cell where you want to create the shift. You can add the same shift template simply by selecting additional cells. When you are finished creating that type of shift, select Shift Template to deactivate the quick action.
   - Right-click the cell and select **Add Shift**, then define the shift parameters. You can also select multiple cells (using shift-click or control-click), right-click one of them, and select Add Shift to open the Add Shift panel. Define the shift parameters to insert the same kind of shift in each selected cell.
   - You can also use the quick action Copy-Paste to copy a shift and paste it in a different date cell. See Quick Actions for editing Schedule Patterns, later in this document.

Note Create shifts in the cell of the day they begin. For example, a shift that begins at 11:30 pm Monday is created in the Monday cell, even though most of the shift is on Tuesday.

6. Define the availability pattern for any cell. Right-click the cell and select **Edit Availability**, then define the Availability parameters for that cell.
7. You can also select multiple cells (using shift-click or control-click), right-click one of them, and select **Edit Availability** to open the Edit Availability panel. Define the availability parameters to apply to all the selected cells.
8. Create a paycode for any cell. Right-click a cell or a shift and select **Add Paycode**, then define a paycode, and select **Apply**.

Note Leave any cell blank to represent a day that has no shift or paycode.

1. Select **Apply**. The Schedule Pattern glance closes, and the pattern is applied for the loaded period.
2. On the main schedule page, select **Save**. The pattern is rolled out for its entire length.

Schedule Patterns Naming

Rename a Schedule Patterns

Managers can rename schedule patterns with a more meaningful name when needed.

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

1. On the schedule, open the **Schedule Pattern Editor** for specific employees with the same schedule pattern by doing one of the following.
2. Double-click an employee.
3. Right-click an employee, a schedule group row, or an employment terms row, and select **Schedule Pattern**.
4. Select the check box next to the employee's name to select multiple employees, then right-click any one of them and select **Schedule Pattern**.
5. Use Shift+select or Ctrl+select to select multiple employees, then right-click any one of them and select **Schedule Pattern**.
6. Select the tab of the pattern you want to rename.
7. On the tab, select the down arrow to open the pattern drop-down list, then select **Rename**.
8. At the **Name** field, enter a name.
9. Select **Apply**.
10. Select **Save**.