

# Scheduling Employees

Scheduling employees in Workforce Timekeeper provides many benefits to managers; for example, you can:

- Pay your employees from their schedule, which can include account transfers. This is especially useful if your employees are not punching in at a device.
- Track exceptions. For example, the system can compare punches to a schedule and highlight the instances when someone punches in early or late.
- Manage leave time. For example, the system keeps track of the number of vacation hours scheduled in a given week so that you can maintain adequate coverage and ensure that your employees are adhering to organizational policies.

Workforce Timekeeper provides standard scheduling tools so that you can:

- Build schedules for employees
- View schedules for the employees and time period you select
- Adjust schedules as needed

These scheduling tools work well when employees work predictable schedules and there is no concern for variations in how many employees are required to work at a particular time. An organization that runs three shifts, with employees hired to work a specific shift, will find these tools to be useful.

The optional Workforce Scheduler™ application provides tools for more complex scheduling where requirements vary depending on business demand. If you have this product, you can find details in the *Workforce Scheduler User's Guide*.

## Scheduler Concepts

Scheduling in Workforce Timekeeper uses the following concepts:

- **Shift**—A span of time with a start time and an end time, usually in the same day; for example, 7 A.M. to 3:30 P.M.  
Shifts can be divided into segments, which can contain any of the following:
  - **Regular**—Work time charged to the primary account (default).
  - **Break**—Nonworking time, such as meals.
  - **Transfer**—Time in a different job, labor account, and/or work rule.

- **Off**—Time associated with a work rule, such as when employees are scheduled to be on call, and the amount that they are paid depends on whether or not they are called in.
- **Unavailable**—Time that cannot be scheduled for work.
- In place of, or in addition to, a shift in a schedule, you can schedule planned leave time using *pay codes*, such as vacation or sick. Or if you use flexitime targets, you can insert *accrual amounts*. (See the on-line Help for flexitime details and procedures.)
- **Pattern**—One or more shifts, pay codes, or both that repeat over specific days or weeks; for example, 7 A.M.- 3:30 P.M., Monday through Friday.

You can create more complex patterns; for example, employees can be scheduled to work the morning shift for two consecutive weeks and then the evening shift for one week. At the end of the third week, the pattern repeats.

If you use flexitime, you can create accrual amount patterns.

- **Shift Template**—A shift that is saved with a name but no date so that it can be reused as needed. Shift templates save time if you have employees who work standard shifts. Shift templates are created in **Scheduler Setup > Shift Templates** on the navigation bar.
- **Pattern Template**—A pattern that is saved with a name but no date so that it can be reused as needed. Pattern templates save time if you have people who work standard patterns and you tend to edit schedules at the individual level. Pattern templates are created in **Scheduler Setup > Pattern Templates** on the navigation bar.
- **Schedule Group**—When a number of employees have similar working characteristics, you can group them into a named Schedule Group. You can select all the employees in the group and assign them the same schedule. When you need to make changes such as adding a shift or replacing or extending the time of an existing shift, you can select all of the employees in the group or select some of the employees in the group and make changes in a single operation.
- **Schedule Period**—The amount of time that your schedule covers, and the amount of time loaded into the Schedule Editor for Current, Next, and Previous Time Period; for example, two weeks. Schedule periods are defined in **Setup > Schedule Periods** on the navigation bar. They are then assigned to Display Profiles in Workforce Central Setup.
- **Job**—Level in an organization that is scheduled. Each job is combined with a location in the organization, such as Maternity,

## Scheduling Employees

Front End, or Line 23, to define the job assignment. You can transfer employees to a different job in Timecard or Scheduler. Note that jobs must be configured in Setup before you can use them in scheduling.

## Schedule Views

You can display the schedule for some or all of your employees, or for one employee at a time. In the Schedule Editor, you select which employees' schedules to view using a query in Show. The system loads these schedules for the Time Period that you select.

You can scroll horizontally to view any dates that do not fit into the view. To view dates that are not loaded, change the Time Period.

## Schedule Editor

The Schedule Editor displays schedules in tabular or graphical format. You can view the schedule for one week or for up to 28 days at a time.

To access the Schedule Editor, select Schedule Editor from the navigation bar.

Daily magnification shows seven days or more of scheduled shifts in a tabular format. Shifts can be displayed with start and end times or with shift labels, such as 7A8 for 7 A.M. to 3:30 P.M., E6 for the six hour evening shift, and so on. Shift labels save space so that you see more days of the schedule at one time.

| Schedule Editor   |          | Show: All Home                       |              | Edit        | Timecard Schedule |             | People      |        | Reports             |  |  |
|---|----------|--------------------------------------|--------------|-------------|-------------------|-------------|-------------|--------|---------------------|--|--|
| Loaded: 1:44PM  |          | Time Period: Current Schedule Period |              | Refresh     |                   |             |             |        | 2/27/2005-3/05/2005 |  |  |
| By Employee   |          |                                      |              |             |                   |             |             |        |                     |  |  |
| Save   Actions   Shift   Pay Code   Accrual Amount   View |          |                                      |              |             |                   |             |             |        |                     |  |  |
| Name  | Sch Hrs. | Sun 27                               | Mon 28       | Tue 01      | W... 02           | Thu 03      | Fri 04      | Sat 05 |                     |  |  |
| Rothchild, Judith   | 0.00     |                                      |              |             |                   |             |             |        |                     |  |  |
| Rothchild, Lisa   | 42.50    |                                      | 7A8          | 7A8         | 7A8               | 7A8         | 7A8         |        |                     |  |  |
| Savannah, Jo-Ann  | 56.50    |                                      | 3P8          | 845a - 845p | 845a - 845p       | 845a - 845p | 845a - 845p |        |                     |  |  |
| Sciliano, Susan   | 56.00    |                                      | Holiday 8:00 | 845a - 845p | 845a - 845p       | 845a - 845p | 845a - 845p |        |                     |  |  |
| Sharing, Sharon   | 60.00    |                                      | 845a - 845p  | 845a - 845p | 845a - 845p       | 845a - 845p | 845a - 845p |        |                     |  |  |
| Simmons, Monica   | 60.00    |                                      | 845a - 845p  | 845a - 845p | 845a - 845p       | 845a - 845p | 845a - 845p |        |                     |  |  |
| Smithson, Danielle  | 0.00     |                                      |              |             |                   |             |             |        |                     |  |  |
| Snow, F J   | 24.00    |                                      |              |             | 9am To 5pm        | 9am To 5pm  | 9am To 5pm  |        |                     |  |  |
| Scheduled Hours   | 897.00   | 8                                    | 152.5        | 176.5       | 207               | 176.5       | 176.5       | 0      |                     |  |  |
| Number of Employees                                       | 100      | 1                                    | 14           | 16          | 19                | 16          | 16          | 0      |                     |  |  |

The 4-hour and 1-hour magnification views show scheduled shifts in a multicolored graphical format so that you can easily see whether you

have the appropriate coverage. Shifts, patterns, and pay codes each appear in a different color; for example, pay codes are yellow.

| Name                | Sch Hrs. | Mon 28 |     |             |             |    | Tue 01 |             |     |       |    | Wed 02 |             |     |    |
|---------------------|----------|--------|-----|-------------|-------------|----|--------|-------------|-----|-------|----|--------|-------------|-----|----|
|                     |          | 4a     | 8a  | 12p         | 4p          | 8p | 4a     | 8a          | 12p | 4p    | 8p | 4a     | 8a          | 12p | 4p |
| Rothchild, Judith   | 0.00     |        |     |             |             |    |        |             |     |       |    |        |             |     |    |
| Rothchild, Lisa     | 42.50    |        | 7A8 |             |             |    |        | 7A8         |     |       |    |        | 7A8         |     |    |
| Savannah, Jo-Ann    | 56.50    |        |     |             | 3P8         |    |        | 845a - 845p |     |       |    |        | 845a - 845p |     |    |
| Scillano, Susan     | 56.00    |        |     | Holiday 8:0 |             |    |        | 845a - 845p |     |       |    |        | 845a - 845p |     |    |
| Sharing, Sharon     | 60.00    |        |     |             | 845a - 845p |    |        | 845a - 845p |     |       |    |        | 845a - 845p |     |    |
| Simmons, Monica     | 60.00    |        |     |             | 845a - 845p |    |        | 845a - 845p |     |       |    |        | 845a - 845p |     |    |
| Smithson, Danielle  | 0.00     |        |     |             |             |    |        |             |     |       |    |        |             |     |    |
| Snow, F J           | 24.00    |        |     |             |             |    |        |             |     |       |    |        | 9am To 5p   |     |    |
| Scheduled Hours     | 897.00   |        |     |             | 152.5       |    |        |             |     | 176.5 |    |        |             |     |    |
| Number of Employees | 100      |        |     |             | 14          |    |        |             |     | 16    |    |        |             |     |    |

- To switch between shift start and end times and shift labels, select **View > Shift Labels**. To switch back to shift start and end times, select **View > Shift Times**.
- To change the schedule magnification, use the View menu to select Daily, 4-hour intervals, or 1-hour intervals.
- To view the maximum number of days in the schedule, toggle to shift labels in Daily view, and minimize the navigation bar. Drag down to minimize the Comments tab. You can set your display preferences to have the Schedule Editor always open in this view.

## Schedule Outline

Schedule Outline displays schedule details for one employee at a time. To see an employee's schedule details, select the employee's name, and select **View > Schedule Outline**

| Simmons, Monica |         |            |          | Time Period: 2/27/2005 - 3/05/2005                |  |
|-----------------|---------|------------|----------|---|--|
| Name            | Type    | Start Date | End Date | Details   |  |
| 1 Week          | pattern | 2/27/2005  | Forever  | 1 Week :<br>845a - 845p (Mon, Tue, Wed, Thu, Fri) |  |

## Transfer Indicators

Codes next to the shift times or shift label provide information about the shift. When you display the schedule by shift start and end times, codes appear in the cell with the shift times. To see transfer indicators when you display the schedule by shift label, hold the mouse over the shift.

| <b>Code</b>                 | <b>Indicates</b>  |
|-----------------------------|---|
| (x)                         | Transfer (labor account only)   |
| <i>shift in italic text</i> | The location in which the shift is worked is not loaded and the shift does not count toward your coverage.  |
| shaded shifts               | If an employee has transferred into your location from another location, that employee's schedule appears in your view. Shifts in the schedule that are not scheduled in your location are shaded, and you cannot edit them.<br><br>If any of your employees have transferred out of your location, those shifts are also shaded, and you cannot edit them. |
| (work rule)                 | Work rule transfer  |
| (o)                         | Off day (labor account transfer)  |
| (u)                         | Unavailable   |

## Comments for Shifts and Pay Codes

If the shift or pay code has a comment associated with it, a small yellow square appears in the cell. The text for comments is displayed on the Comments tab at the bottom of the Schedule Editor, as well as in the Shift Editor or Pay Code Editor for that shift or pay code.

## Building Schedules

The Scheduler provides several ways to build schedules, including:

- Enter the shift start and end time directly into a date cell in the Schedule Editor.
- Use the Shift Editor or Pay Code Editor to enter shifts and pay codes one at a time.
- If you use standard shifts and patterns, use the Shift Editor, Pay Code Editor, or Pattern Editor to enter a shift template or pattern template.
- If you use flexitime, you can use the Accrual Editor or Accrual Pattern Editor to enter accrual amounts.

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**Note:** To access scheduling functions, use the menu options. Or you can right-click on a date cell or employee name. The associated shortcut menu appears, and you can select a scheduling function.

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## Creating Shifts for an Individual

You can build simple or complex shifts for an individual, one day at a time.

### Creating Simple Shifts

The easiest way to create a simple, regular shift is to type the start time and end time into a date cell for an employee.

Use the format 8 - 4p or 1130 - 530p. Because A.M. is the default, you do not need to enter a letter for A.M. times.

### Copying Shifts Into a Cell

You can copy and paste shifts and their attributes from one cell to another using Copy and Paste on the Actions menu.

### Inserting a Shift Template

To insert a shift template, select the date cell where you want the shift, and select **Shift > Insert Template**. Select the shift template from the list and click OK.

You can also type the name of the shift template into the date cell. The shift template name becomes the shift label.

If you want to edit a shift created from a template, highlight the shift in the Schedule Editor and select **Shift > Edit**. Edits to the scheduled shift do not affect the shift template.

## Using the Shift Editor

To create a more complex shift, use the Shift Editor.

1. In the Schedule Editor, click the date cell in the row of the employee for whom you want to add or edit a shift.
2. Select **Shift > Add**.

**Add Shift**

Employee: Snow, F J      Primary Job: Unspecified

Insert Shift...

|   | Start Date | Type    | Start Time | End Time | End Date  | Sch Hrs. | Transfer |
|---|------------|---------|------------|----------|-----------|----------|----------|
| ✕ | 2/28/2005  | Regular |            |          | 2/28/2005 |          |          |

Comments:

Shift Label:

Number Of Days:

OK    Cancel    Help

3. The shift type cell defaults to Regular. To change the shift type, click in the Type cell and select the shift type that you want.
4. Click in the Start Time cell and enter the start time for the segment.
 

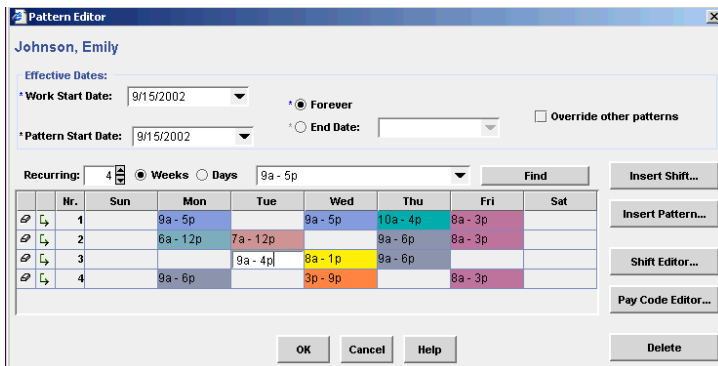
**Note:** You can type 630 and the system will enter 6:30a for 6:30 A.M. For P.M. times, enter 630p.
5. In the End Time cell, enter the end time for the segment and press Tab. The total number of hours scheduled appears in the Hrs cell.
6. If the End Date is different from the Start Date (for example, if the shift crosses midnight), edit the End Date for the shift. The Hrs total changes accordingly.
7. If you are scheduling a job, labor account, or work rule transfer, click the Transfer cell. Select an entry from the list of recent transfers, or select Search (see [“Entering a Transfer”](#) on page 64 for more details).
8. Repeat from step 3 for each segment in the shift.
  - To add a new row below the selected row, click the Add Row arrow icon.
  - To delete the highlighted row, click the eraser icon.

9. Optionally, you can add a comment to the shift; click the down arrow in the Comments area and select a comment.
10. Optionally, enter a Shift Label. This label appears instead of shift start and end times when you select **View > Shift Labels**.
11. Optionally, you can have this shift repeat for consecutive days. Specify the number of days in the **Number of Days** text box.
12. To close the Shift Editor, click OK.
13. To save the shift in the schedule, select Save in the Schedule Editor.
14. After you have saved a shift, you can use Copy and Paste to copy shifts and their attributes to other cells.

## Creating Schedule Patterns for an Individual

To create a schedule pattern for an employee, use the Pattern Editor described in this procedure.

1. In the Schedule Editor, click the name of the individual for whom you are creating a pattern.
2. Select **Shift > Add Pattern**. The Pattern Editor opens for the employee and the date that you selected.



3. In Work Start Date, enter the date on which the employee starts working this pattern.
4. Optionally, you can enter the date on which the pattern starts in Pattern Start Date. The default Pattern Start Date is the date on which the pattern originally started.

For example, if the Pattern Start Date is 02/04/2002, and that date was a Monday, then the first active cell in the schedule grid is a

Monday. If you change the Pattern Start Date to 02/05/2002, the first active cell in the schedule grid changes to Tuesday.

The Pattern Start Date may be different from the date on which the employee starts working the pattern.

5. Do one of the following:

- In End Date, enter the date on which the employee stops working this pattern.
- Select Forever to have the pattern repeat until otherwise indicated.

6. In the Recurring box, select the number of days or weeks in the pattern. Select Weeks or Days as appropriate.

7. Create a pattern using one of the following methods:

**Enter shifts manually:** Click in the date cell and type the shift start time and end time using the format 8 - 4p or 1130 - 530p.

**Insert a shift into one or more cells:**

- a. Select the cells into which you are copying the same shift. To select more than one cell, hold down Ctrl and click the cells.
- b. Enter the shift into the selected cells using either of the following methods:
  - Click Insert Shift, select a shift from the list, then click OK.
  - Click Shift Editor and create a shift in the Shift Editor.

**Insert a pattern:**

- a. Click Insert Pattern and select a pattern from the list.
  - b. Make any edits to the pattern, and click OK.
8. When you are finished, click OK.
9. Select Save in the Schedule Editor.

## Creating a Temporary Change to a Schedule

You can make a change to a schedule for an individual that will last for a specific length of time. For example, you can schedule overtime on Mondays and Wednesdays for the month of August. At the end of the specified time, the original schedule automatically takes effect again.

Scheduled pay codes are not overwritten by the temporary schedule.

To create a temporary change to a schedule:

1. In the Schedule Editor, click the name of the individual who has the schedule pattern for which you need to make a temporary change.
2. Select **Shift > Edit Pattern**. The Pattern Editor opens for the employee that you selected.
3. In the Work Start Date, enter the date on which you want the change to take effect.
4. In the End Date, enter the date on which you want the change to end. On the next day, the original pattern will start again.
5. Select **Override other patterns**. This ensures that only your changed shifts are scheduled during the time that you specify.
6. Make your edits to the pattern. You can enter a new pattern or edit the cells of the current pattern.
7. When you are finished, click OK.
8. Select **Save** in the Schedule Editor.

## Entering Planned Leave Time

To enter a pay code for planned leave time, such as vacation, sick, or maternity leave:

1. In the Schedule Editor, select the date cell into which you are entering leave time.
2. Select **Pay Code > Add**. The Pay Code Editor opens for the employee and date that you selected.

Note that if you defined pay code patterns for standard events such as maternity leave, you can select **Pay Code > Add Pattern** and assign a pattern using the Pattern Editor.

**Pay Code Editor**

Rothchild, Lisa    Effective Date: 2/27/2005

Pay Code: Sick

\* Amount (hh:mm):

\* Display Start Time:

\* Number Of Days: 1

Transfer:

Comments:

Override Shift

Whole Shift    Partial Shift

OK   Cancel   Help

3. Click **Pay Code** and select a pay code from the list.

Depending on the pay code that you select, the next field is Amount (hh:mm) or Amount (\$).

4. In Amount, enter the number of hours and minutes or the amount of money accrued by the employee for the pay code.
5. In Display Start Time, enter the time at which you want the pay code's colored block to begin in the graphical view. This is usually the time at which the employee's normal shift would begin.
6. If the date for the pay code is not the date that you selected in Schedule Editor, edit the Effective Date.
7. If the pay code involves a job, labor account, or work rule transfer, click Transfer. Select an entry from the list of recent transfers or click Search (see [“Entering a Transfer”](#) on page 64 for more details).
8. Optionally, you can add comments to the pay code; click the down arrow in the Comments area and select a comment.
9. If the pay code is replacing all or part of a shift (for example, when the employee is sick), select Override Shift. To replace the entire shift, choose Whole Shift. To replace a portion of the shift, choose Partial Shift. This will insert a new segment into the existing shift.  
If the pay code is in addition to the shift, for example, when you are paying a bonus or scheduling an on-call shift, leave the Override shift box clear.
10. When finished, click OK.
11. Select Save in the Schedule Editor.

## Entering a Transfer

When you create shifts and patterns, and when you assign pay codes, you can enter a transfer to a different job or location, labor account, or work rule.

Use a *labor account transfer* if an employee's shift segment should be charged to an account other than the primary account.

Use a *job transfer* if the employee is working a different job than their primary job. The time is automatically charged to the labor account that was configured for that job.

If you use organizational maps, you can assign a job transfer to a different location than the one in which the employee normally works. Time is automatically charged to the appropriate labor account.

When you create shifts, you can also add a *work rule transfer*; for example when an employee transfers to a job for which the pay is different.

To enter a transfer:

1. In Shift Editor or Pay Code Editor, click Transfer.

For a labor account transfer, you can select a labor account from a list of previously created labor accounts, or you can select Search to create a labor account to transfer to.

For a job or work rule transfer, select Search.

- If you select a labor account from the list, you are finished.
- If you select Search, the Select Transfer dialog box opens. Follow from step 2 to create the transfer:

The screenshot shows the 'Select Transfer' dialog box. The 'Job' section displays a tree view of organizational structure:

- Organization Beginning of Time - Forever
  - Hospitals 1/01/1977 - Forever
    - Hosp A 1/01/1995 - Forever
      - Floor 1 1/01/1995 - Forever
        - ER 1/01/1995 - Forever
        - Pediatrics 1/01/1995 - Forever
      - Floor 2 1/01/1995 - Forever
      - Floor 3 1/01/1995 - Forever
    - Hosp B 1/01/1995 - Forever
      - Floor 1 1/01/1995 - Forever
      - Floor 2 1/01/1995 - Forever

The 'Labor Account' section has a search field and a 'Clear Account' button. Below it is a list of 'Available Entries':

- 101,Westside Plant
- 102,Eastside Plant
- 103,Central Plant
- 104,Manufacturing
- 150,Connie's entry
- 1999,1999
- 9990,updated LLE 9991 Desci

To the right of the list is a table with radio buttons for selection:

|   |  |  |
|---|--|--|
| <input checked="" type="radio"/> Division |  |  |
| <input type="radio"/> Department          |  |  |
| <input type="radio"/> Job                 |  |  |
| <input type="radio"/> Cost Center         |  |  |
| <input type="radio"/> Product             |  |  |
| <input type="radio"/> Rem Number          |  |  |
| <input type="radio"/> Work Order          |  |  |

The 'Work Rule' section has a dropdown menu set to '<None>'. The 'Selected Transfer' section is empty. At the bottom are buttons for 'OK', 'Cancel', 'Refresh', and 'Help'.

2. You can transfer an employee to a different job (if you use organizational maps), labor account, and/or work rule.

If you enter a job transfer, the correct labor account is automatically charged and you do not have to enter a labor account transfer in addition.

If you enter a job transfer *and* a labor account transfer, the labor account data overwrites the job transfer data (see the on-line Help for more details).

| <b>Transfer Type</b> | <b>Action</b>   |
|----------------------|---|
| Job or location      | <p>In the Job area:</p> <ul style="list-style-type: none"><li>• Click the plus sign (+) next to each location in the hierarchy until you see the job that you want. Click the box next to the job so that a check appears.</li><li>• Or, if you know the job path, you can type it in Go To and click Show.</li></ul>   |
| Labor account        | <p>In the Labor Account area:</p> <ol style="list-style-type: none"><li>1. Click an option button to select the highest labor level in the list of labor levels that you need in order to define the labor account. You do not have to start at the highest level. The Available Entries area on the left lists the choices for the labor account that you select.</li><li>2. Select the entry that you want from the Available Entries on your left. Your selection is entered into the table on the right.</li><li>3. Continue to select entries for the labor levels that you are including until the labor account is defined. It is acceptable to leave some labor levels blank, because the primary labor account is used for the blank levels.</li></ol> |
| Work rule            | <p>In the Work Rule area, select a work rule from the drop down box in the Work Rule area.</p> <p>Note that the complete path name displays at the bottom of the screen.</p>  |

3. When you are finished, click OK to close the Select Transfer dialog box.
4. Complete the Shift Editor dialog box, and click OK.
5. Select Save in the Schedule Editor.

## Schedule Groups

When a number of employees have similar working characteristics, you can group them into a named Schedule Group. You can select all the employees in the group and assign them the same schedule. When you need to make changes, such as adding a shift or replacing or extending the time of an existing shift, you can select all of the employees in the group or select some of the employees in the group and make changes in a single operation.

Employees can belong to many groups at the same time. Shifts are assigned to individual employees; not to the group. You can make changes to one or more employee schedules without affecting the whole group.

### Viewing Schedule Groups

The Schedule Group Roll-up item on the navigation bar gives you an easy way to make changes that will affect the entire group.

The Schedule Group Multi-Line item on the navigation bar gives you an easy way to select members of a group so you can make changes.

### Creating a Schedule Group

To create a schedule group, first add a group in Scheduler Setup. Then, assign employees to the group from any detail Genie.

1. To add a new group:
  - a. Select **Scheduler Setup > Groups** from the navigation bar. The list of current groups appears.
  - b. Select **New** from the menu bar.
  - c. In Group Name, enter a unique name for the group.
  - d. To save the group name, click **Save & Return**. To quit without creating the new group, click **Return**.
2. To assign employees to a group:
  - a. From a detail Genie, such as QuickFind, select the names of the employees whom you are adding to the schedule group.
  - b. Select **Schedule > Add to Group** from the menu bar. The Add to Group dialog box appears.
  - c. In Start Date, enter the date on which the group assignment begins for the selected employees.

- d. In End Date, enter the date on which the group assignment ends for the selected employees.
- e. To save the group assignment, click **OK**.

### Creating a Schedule for Group Members

Schedules are associated with employees, not with the group as a whole. You can create schedules and have them apply across entire groups, but each schedule resides with each employee. Depending on your needs, you can choose one of the following ways to create schedules for group members:

- **For selected group members or for individual schedules**—Select the names of members from the Schedule Editor or from any detail Genie, such as the Schedule Group Multi-Line Genie. You can add shifts, pay codes, and transfers that apply to all selected employees.
- **For all members of a group**—Select the group name from the Schedule Group Roll-up Genie. You can add shifts, pay codes, and transfers that apply to everyone in the group.

To create schedules for multiple employees or for entire groups, proceed as follows:

1. To create schedules for multiple employees,  
In the Schedule Group Multi-Line, or any detail Genie such as QuickFind, select the members of the group to which you are assigning the schedule.

To create a schedule for an entire group,  
From the navigation bar, select **Scheduler > Schedule Group Roll-Up**. The Schedule Group Roll-Up workspace appears. Select the name of the group that you want from the list.

2. From the menu bar, select **Schedule**. You can do any of the following from the drop-down menu:
  - Add Shift
  - Add Pattern
  - Add Pay Code
3. When the schedule edits are complete, you can check the status in Group Edit Results.

## Modifying a Schedule for a Group of Employees

You can make any of the following schedule modifications to any number of employees in the group, from one to the entire group. You can also make these modifications to any number of employees regardless of their membership (or non-membership) in a group.

- Add individual shifts.
- Add schedule patterns.
- Replace a shift For example: schedule all day-shift employees to come in one hour later and stay one hour later. For the selected employees, the system searches for any shift with the start time and end time that you define. The new shift replaces the old shift on the date that is specified for the new shift.
- Enter a Transfer. For example: move all employees to a different work area. You can insert a transfer into an existing shift or shifts for the selected employees. The system inserts the transfer into all the shift segments that contain the transfer start time, and that are scheduled on the Effective Date for the transfer. If the transfer time is at the beginning of a shift segment, the segment is replaced with the transfer.
- Append time to the start or end of a shift. For example: add an hour to the beginning of all first shifts for safety training. You can modify the start time or end time of shifts that fall on the effective date you enter for the employees you select. Optionally, you can add a transfer to the appended segment.

Follow these steps:

1. In your Schedule Group Multi-Line Genie, or any detail Genie such as QuickFind, select the employees whose schedule you are modifying.
2. From the menu bar, select the modification from the **Schedule** menu. The appropriate workspace appears.
3. Enter the data to define the modification.
4. Click **OK**.

When you are finished, you can check the status in Group Edit Results.