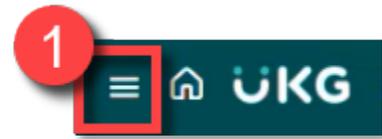# PROCESS OVERVIEW

Use the schedule planner to generate schedules and manually update schedules based on need. The data that is used to generate an initial schedule comes from the forecast planner.
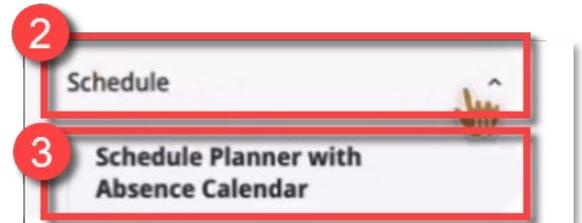
## Generating a Schedule

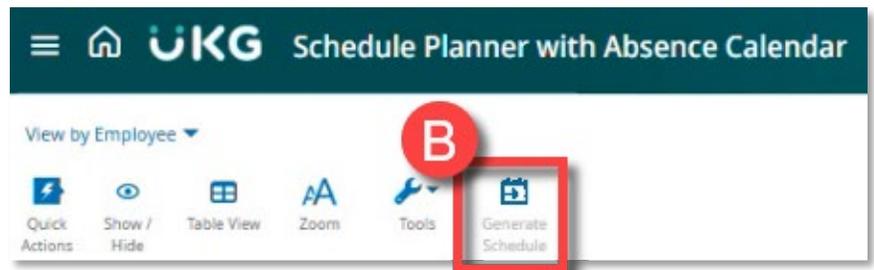A. To generate a schedule, start by navigating to the schedule.

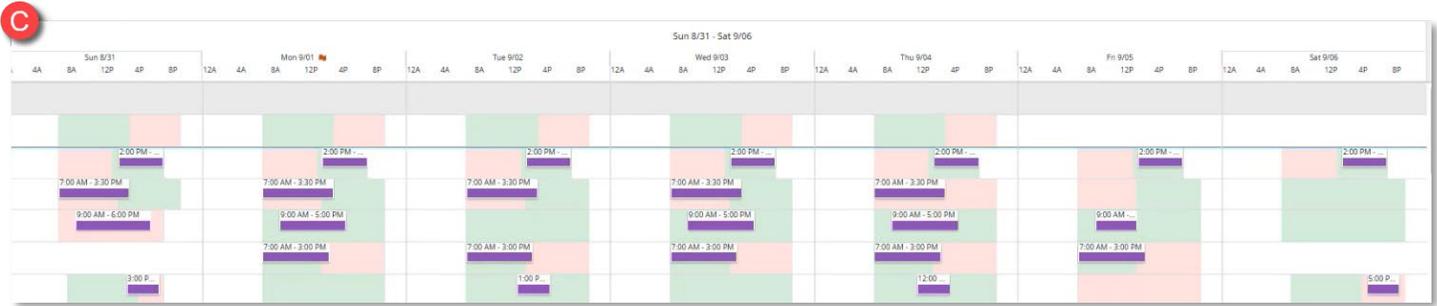1. Click the **hamburger icon** on the top lefthand corner.



2. Select the **Schedule** dropdown.

3. Click **Schedule Planner with Absence Calendar.**



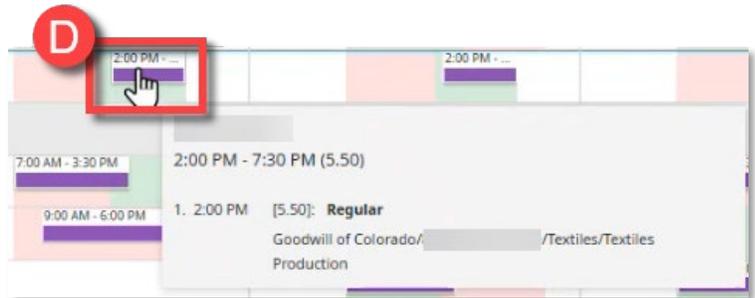B. Click **Generate Schedule** on the top toolbar.

C. You will see a full 2-week schedule post.



⚠ **IMPORTANT**: Managers will have full authority to make edits to the generated schedule based on employee availability and manager knowledge.

D. To see details about individual shits, hover your mouse over the purple shift.
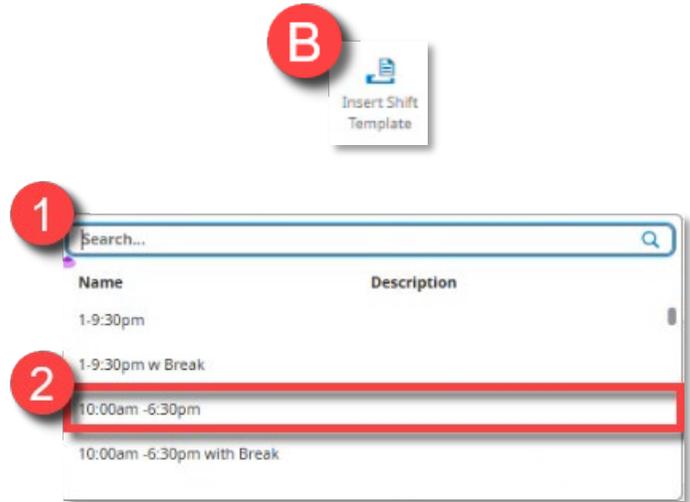


## Shift Templates

A. To start making edits to the schedule, select the Quick Actions button on the toolbar at the top.
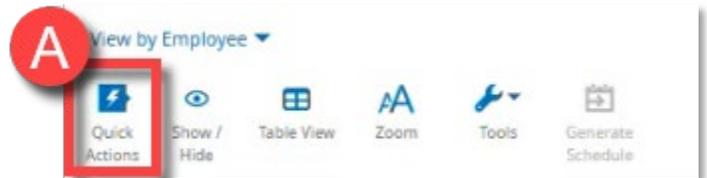
B. To manually add a shift to an employee, you can select **Insert Shift Template.**
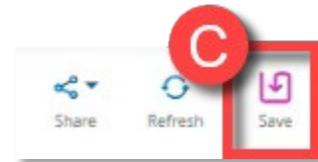
1. A list of all the shift templates that have been plugged into the system will appear.
2. Select the shift that you want to assign.

3. Click the specific date on the employee's row you wish to assign the shift.
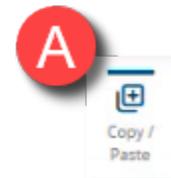   a. Unsaved changes will have a pink dot next to them.

C. Click **Save** on the righthand side to save any changes.

## Copy and Paste

A. On the **Quick Actions** toolbar, there is a **Copy / Paste** function.
   1. Use this function to copy a scheduled shift and paste additional shifts without typing.

B. Select **Copy / Paste**

1. Click on a shift that you want to copy.

2. Click on any open shift on the employee you want to schedule, and the copied shift will populate.
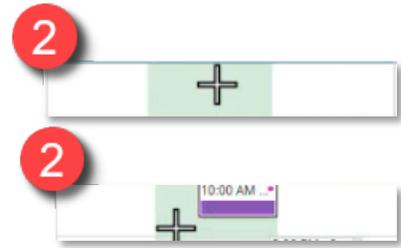
3. Click **Save** on the righthand corner to save changes.

## Transfers

A. To transfer employees from one job code to another, select the shift on the employee's row that you want to transfer.

   1. Click Edit on the bottom toolbar.

   2. Click Transfer Employee on the menu that pops up.
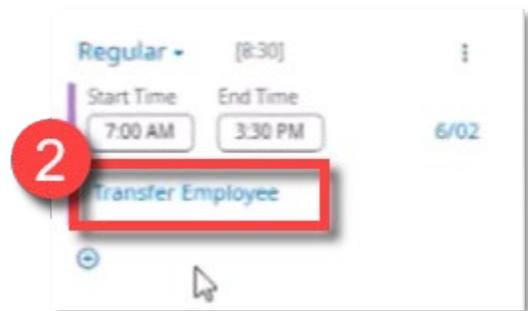
   3. Select Add Business Structure.

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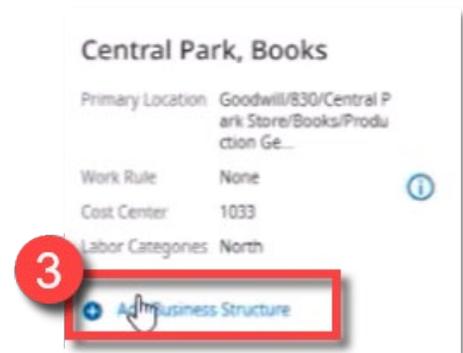


4. Select the job code/description you want to transfer the employee to.
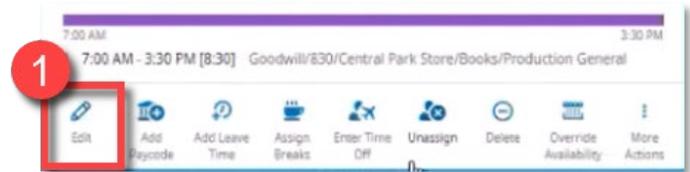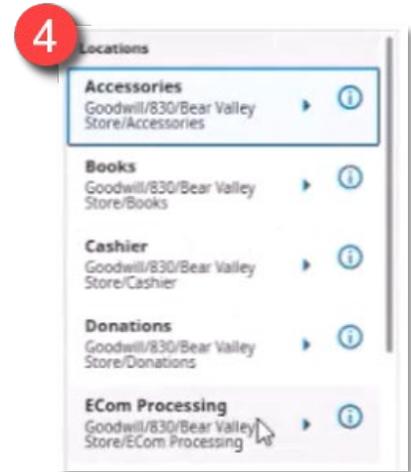
5. Select Ok.



6. Select Apply.



B. Transferred shifts will change colors from purple to blue on the schedule.



C. Click **Save** on the righthand side to save any changes.



**IMPORTANT**: Paycodes may change with job transfers – double check to see if the employee is getting paid the right amount for the job they are doing .

# Unassigning shifts and Open Shifts

A. To unassign shifts that are generated or assigned to employees, right click on a shift.
   1. Select **Unassign.**
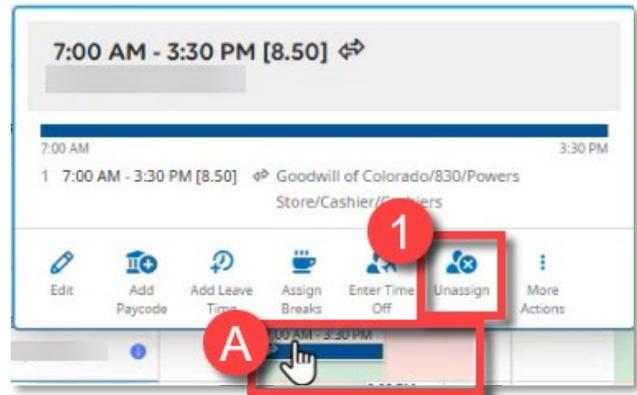
B. To have the number of open shifts per day visible, select Show / Hide.
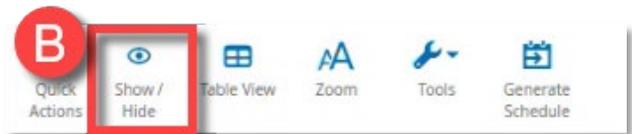
   1. Click the check box next to Open Shifts.
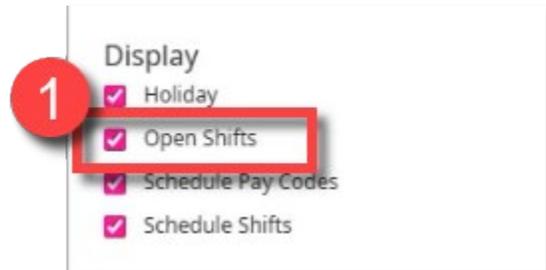
   2. Select Apply.

C. When you have open shifts that are unassigned, the total number of open shifts per day will populate at the top of the schedule.
   1. These shifts will be available on the shift marketplace for employees to claim.
   2. Managers can also drag and drop the shift into the schedule to assign them to an employee.

## Rule Violations

A. Icons like the ones to the side will appear on the schedule when there have been rule violations.

B. To view these violations, select **Rule Violations** on the bottom menu.

| Absence Calendar | age | Rule Violation | Coverage |
|---|---|---|---|

C. There are three types of **rue violations.**

### Rule Severity Levels

- Informational: A rule has been broken, but at the lowest level of severity. You can save the schedule and continue without responding to the violation. The solution does not save these rule violations to the database.

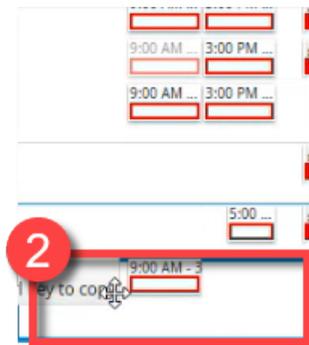- Warning: You can save the schedule and continue without responding to the violation. The solution saves these rule violations to the database.

- No Save: The schedule cannot be saved with this severity of rule violation.

D. Here are three examples of each **rule violation** in the menu.

| Severity | Rule Type | Description |
|---|---|---|
| No Save | Employee conforms to minor rule set | Scheduled for 44.5 hours, which is more than the weekly maximum of 40.0 hours. |
| Warning | Maximum hours per week that the employee can be scheduled | Scheduled for 44:30 hours which is more than the weekly maximum of 42.5 hours. |
| Informational | mployee imum days per week that the employee can be scheduled | Scheduled for 6 days, which is more than the weekly maximum of 5 days. |

## Other Edits

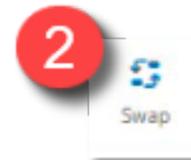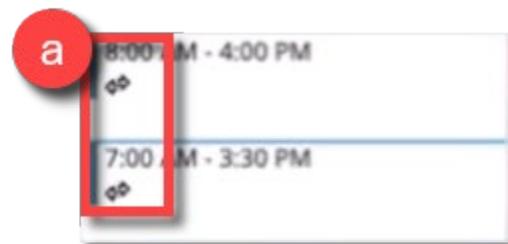A. Other Quick Action edits you can make will include:

1. Delete – This will delete the shift entirely (it will not become an open shift)

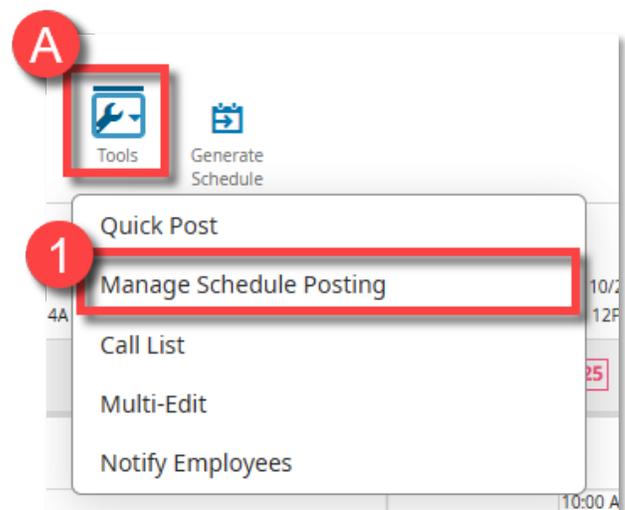2. Swap – You can swap shifts between employees.

   a. Swapped shifts will have this icon attached.

## Posting the Schedule

A. To post the schedule for employees to view within their accounts, select the **Tools** dropdown.

1. Select **Manage Schedule Posting.**

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B. This view will give you the option to select which departments will be posted. Click the checkbox next to **All** to post the entire schedule.

1. Click **Post.**

**Manage Schedule Posting** ✕

Filter by Location:
...f Colorado/830/Powers Store ▼

Status:
Unposted ▼

Total [41]   Selected [41]

☑ All

☑ Posted...  10/26/2025 - 11/0...
Posted...
Location  .../Accessories
Job        Production Gene...  ›

☑ Posted...  10/26/2025 - 11/0...
Posted...
Location  .../Powers Store
Job        Assct, Retail Gen...  ›

☑ Posted...  10/26/2025 - 11/0...
Posted...
Location  .../Books
Job        Production Gene...  ›

☑ Posted...  10/26/2025 - 11/0...
Posted...
Location  .../Cashier
Job        Cashiers  ›

☑ Posted...  10/26/2025 - 11/0...
Posted...
Location  .../Powers Store
Job        Cashiers  ›

☑ Posted...  10/26/2025 - 11/0...
Posted...
Location  .../Deja Blue
Job        Production Gene...  ›

Cancel    Post