

# Scheduling Training

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# Scheduling Overview

# Class Overview

- Scheduling Overview
- How to remove the Default Employee Schedule group
- How to applying a Single Week Schedule Pattern
- How to apply a Multiple Week rotation schedule
- Editing a Current Pattern
- Editing a Current Pattern and adding a New One
- Adding Multiple Patterns

**Note:** we will not be covering Time Off in scheduler

# Employee Schedules

Schedules will be required for all nonexempt benefited employees in the new TRS. Schedules will be used to assist with tracking holidays, overtime, and missed punch corrections.

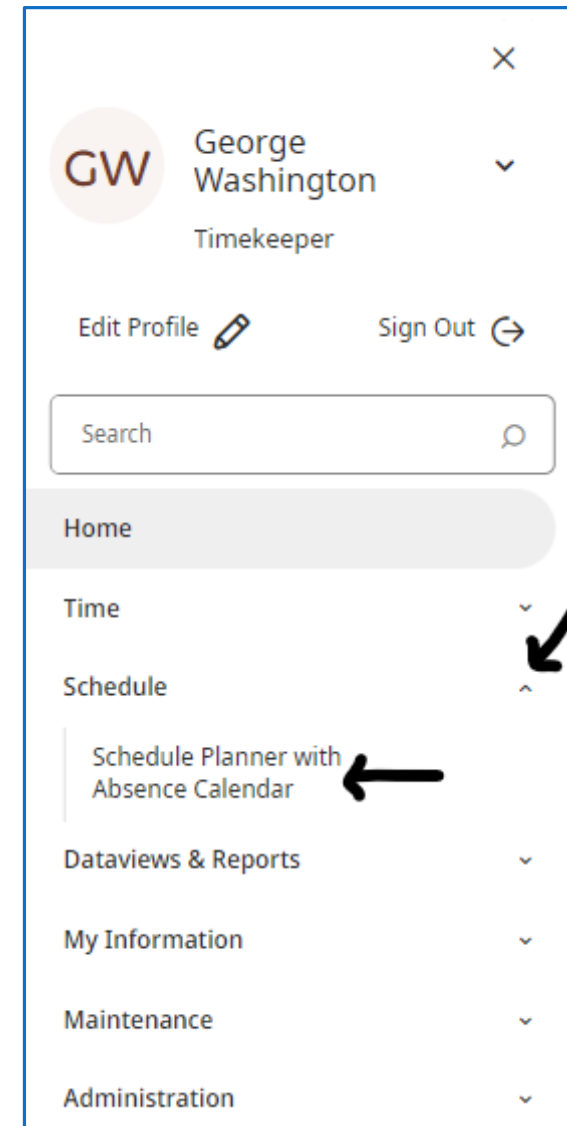
- All benefited nonexempt employees will be given a default Schedule Group of 8:30 am to 5:30 am
- Default schedules can be removed and then the correct Schedule Pattern can be applied
- If Schedules are not applied Time Off and Holidays will not populate correctly

# Navigate Schedule Workspace

# Navigate to the scheduler by Main Menu

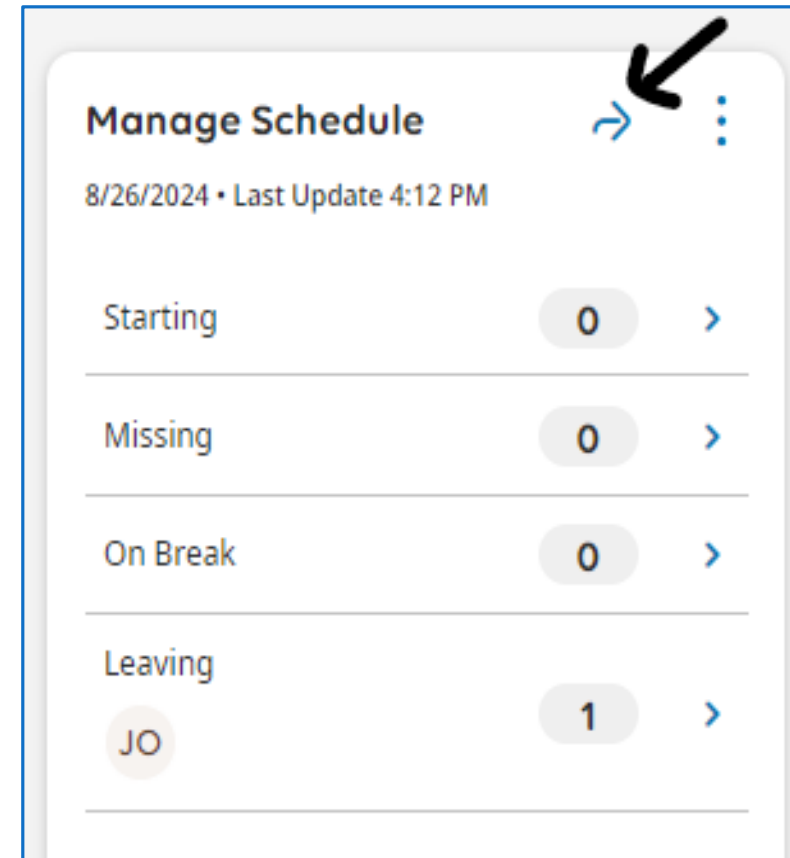
To navigate to the scheduler by the main menu:

- Select **Hamburger Icon** 
- Select **Schedule**
- Select **Schedule Planner with Absence Calendar**



# Navigate to the scheduler by Tile

To navigate to the scheduler you can click on the arrow in the right hand corner of the **Manage Schedule** tile



# Navigate the Schedule

**Quick Actions**

**Timeframe**

**Locations & Hyperfinds**

**Quick Actions**

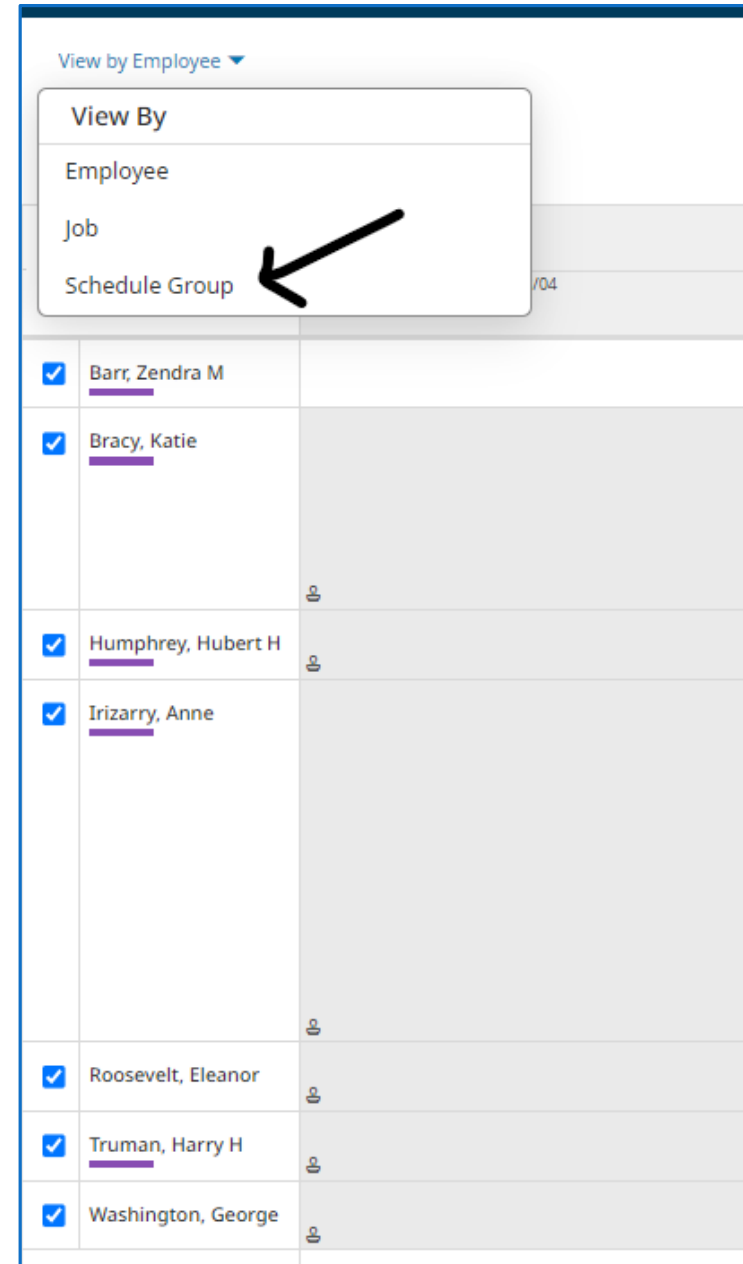
**Time Off**

Name	Sun 8/04	Mon 8/05	Tue 8/06	Wed 8/07	Thu 8/08	Fri 8/09
Barr, Zendra M						
Bracy, Katie		8:00 AM - 5:00 PM	8:00 AM - 5:00 PM	8:00 AM - 5:00 PM	SIC [2:30] 10:30 AM - 5:00 PM Time Off Request ✓ Approved	8:00 AM - 5:00 PM
Humphrey, Hubert H		9:00 AM - 5:00 PM	9:00 AM - 5:00 PM	9:00 AM - 5:00 PM	9:00 AM - 5:00 PM	9:00 AM - 5:00 PM
Irizarry, Anne		VACATION [8:00] 7:30 AM - 4:00 PM 3:30 PM - 4:00 PM	VACATION [8:00] 7:30 AM - 4:00 PM 3:30 PM - 4:00 PM	VACATION [8:00] 7:30 AM - 4:00 PM 3:30 PM - 4:00 PM	VACATION [8:00] 7:30 AM - 4:00 PM 3:30 PM - 4:00 PM	7:30 AM - 4:00 PM 7:30 AM - 4:00 PM
Roosevelt, Eleanor						



# Schedule View by

- The default schedule view is by **Employee**
- To check employees in the default employee group you will need to change the view to **Schedule Group**.



The screenshot shows a software interface with a 'View by Employee' dropdown menu. The menu is open, showing options: 'View By', 'Employee', 'Job', and 'Schedule Group'. A black arrow points to 'Schedule Group'. Below the menu is a table with a list of employees, each with a checked checkbox and a '0p' value in the right column.

View by	Employee	Job	Schedule Group
<input checked="" type="checkbox"/>	Barr, Zendra M		0p
<input checked="" type="checkbox"/>	Bracy, Katie		0p
<input checked="" type="checkbox"/>	Humphrey, Hubert H		0p
<input checked="" type="checkbox"/>	Irizarry, Anne		0p
<input checked="" type="checkbox"/>	Roosevelt, Eleanor		0p
<input checked="" type="checkbox"/>	Truman, Harry H		0p
<input checked="" type="checkbox"/>	Washington, George		0p

# View by Schedule Group

- Once you select view by **Schedule Group** you could see three groups.
  - **Ungrouped**- Default Schedule group has been removed
  - **Monthly NHP Accruals** – this is a time off group for Monthly employees and can be ignored
  - **Non Exempt – Default** – This is the default schedule group applied to benefited non-exempt employees

# View by Schedule Group

- You can use the arrows to collapse the groups you do not want to view.

**Schedule Planner with Absence Calendar**

View by Schedule Group

Quick Actions Show / Hide Gantt View Zoom Load Groups

Sun 8/25 Mon 8/26 Tue 8/27 Wed 8/28

Ungrouped Employee...  
Inheritance

Bracy, Katie  
8:00 AM - 5:00 PM

Humphrey, Hubert H  
9:00 AM - 5:00 PM

Irizarry, Anne  
7:30 AM - 4:00 PM

Truman, Harry H

Washington, George

Monthly NHP Accrua...  
Partial Group

Barr, Zendra M

Non Exempt - Default...  
Partial Group

Roosevelt, Eleanor  
8:30 AM - 5:30 PM

VACATION [8:00]  
4:00 PM - 5:00 PM  
Time Off Request  
Approved

# Removing Schedule Group

# Remove Schedule Group

Example:

- After collapsing the groups and leaving **Non Exempt- Default** open I see that Eleanor Roosevelt has the **Non-Exempt – Default** group that needs to be removed.

View by Schedule Group ▾

Quick Actions Show / Hide Gantt View Zoom Load Groups

☑ Name [7/7] ▾

	Sun 8/25	Mon 8/26	Tue 8/27	Wed 8/28	Thu 8/29	Fri 8/30
Ungrouped Employee... No Inheritance						
Monthly NHP Accrua... Partial Group						
Non Exempt - Default... Partial Group		8:30 AM - 5:30 PM	8:30 AM - 5:30 PM	8:30 AM - 5:30 PM	8:30 AM - 5:30 PM	8:30 AM - 5:30 PM
☑ Roosevelt, Eleanor		8:30 AM - 5:30 PM	8:30 AM - 5:30 PM	8:30 AM - 5:30 PM	8:30 AM - 5:30 PM	8:30 AM - 5:30 PM

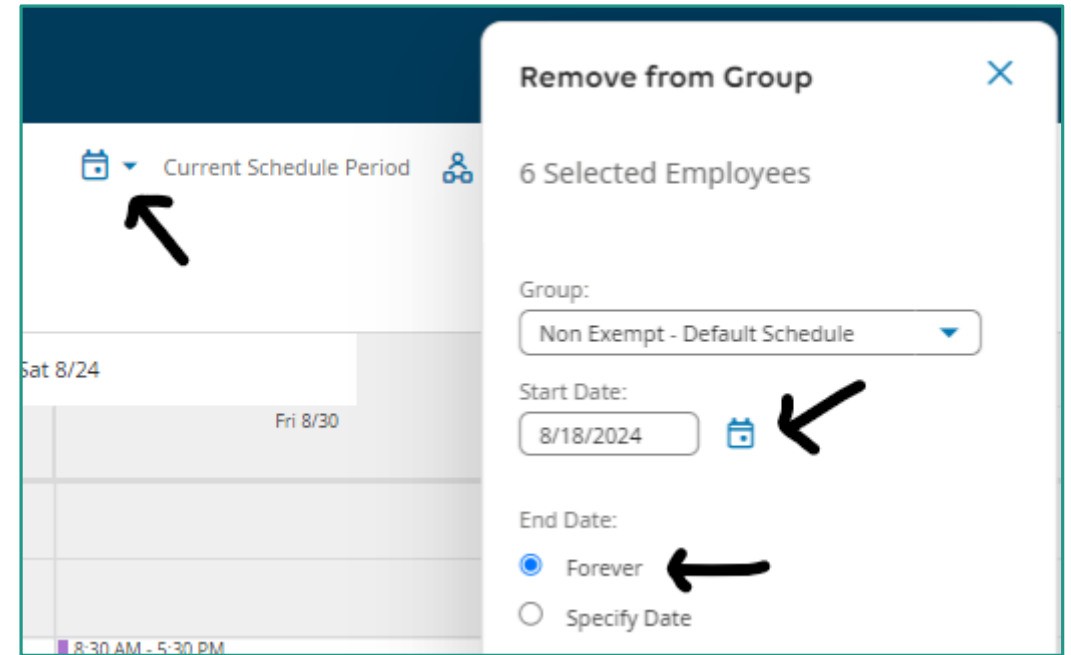
# Removing the default Schedule Group

1. In the schedule, click **View by > Schedule Group**. The available groups are listed in the first column as well as the ungrouped employees.
2. To remove an employee from a group, **right-click** an employee name or multiple employees and select **Remove from Group**
3. Make sure you have the correct **Time Period** selected. It can not be in a signed off pay period.

The screenshot displays the 'Schedule Planner with Absence Calendar' interface. At the top, there is a navigation bar with a hamburger menu, a home icon, and the text 'GW Schedule Planner with Absence Calendar'. Below this, a dropdown menu is open, showing 'View by Schedule Group' with a downward arrow. To the right of this menu, there is a calendar icon and the text 'Current Week'. Below the dropdown menu, there are five icons: 'Quick Actions', 'Show / Hide', 'Gantt View', 'Zoom', and 'Load Groups'. The main area of the interface is a calendar grid. The top row of the grid shows the days of the week: Sun 8/25, Mon 8/26, Tue 8/27, Wed 8/28, Thu 8/29, and Fri 8/30. A context menu is open over the calendar, showing '7 Selected Employees' and a list of actions: 'Schedule Pattern', 'Remove from...', 'Add Shift', 'Enter Time Off', and 'GoTo'. A red arrow points to the 'Remove from...' option. A red callout box with the text 'Select Employees' points to the '7 Selected Employees' header. In the top right corner of the calendar grid, there is a calendar icon with a red arrow pointing to it.

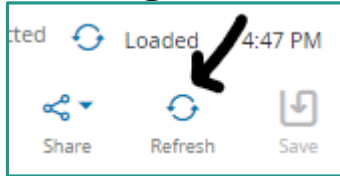
# Removing the default Schedule Group

1. **Confirm Correct Date** range is selected
2. **Select start date** of unsigned off pay period or preferred date that is not signed off
3. The system will prompt you for a date to end the group.
4. Select **Forever** for end date or specify a date if you do not want it forever

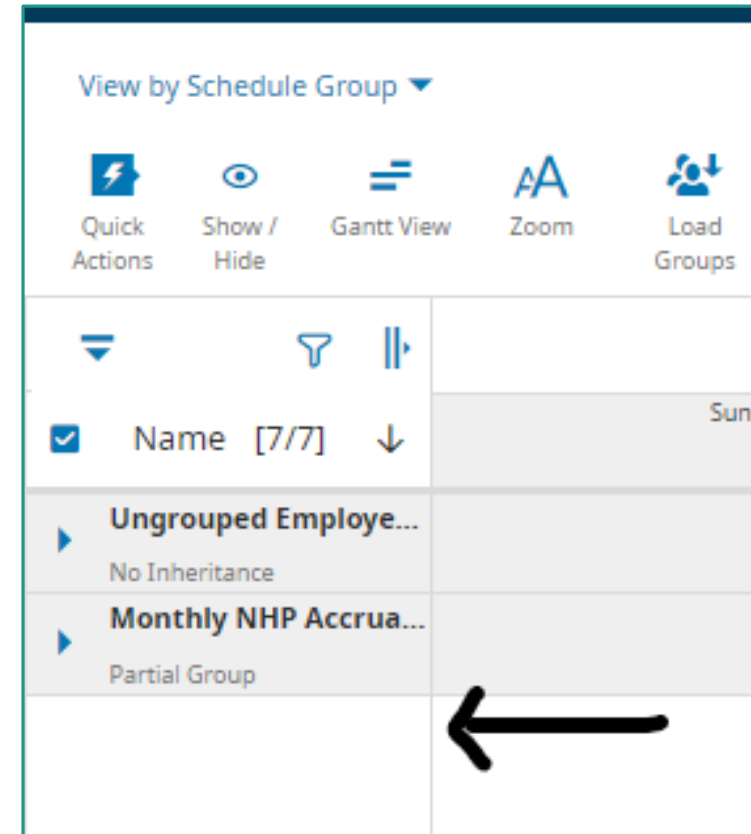


# Confirming Removal of default Schedule Group

- After removing Schedule Group Refresh your screen.



- Once everyone is removed from the Default Schedule Group you will no longer see that category unless there is still someone in it
- Refresh your workspace
- Please confirm your looking at correct date range.
- If you removed the schedule starting current pay period they will still appear in the group for Previous Pay Period.

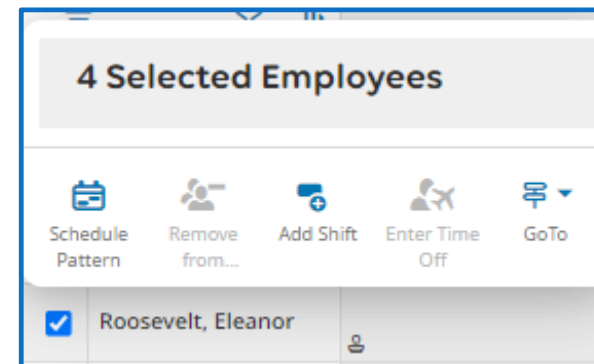
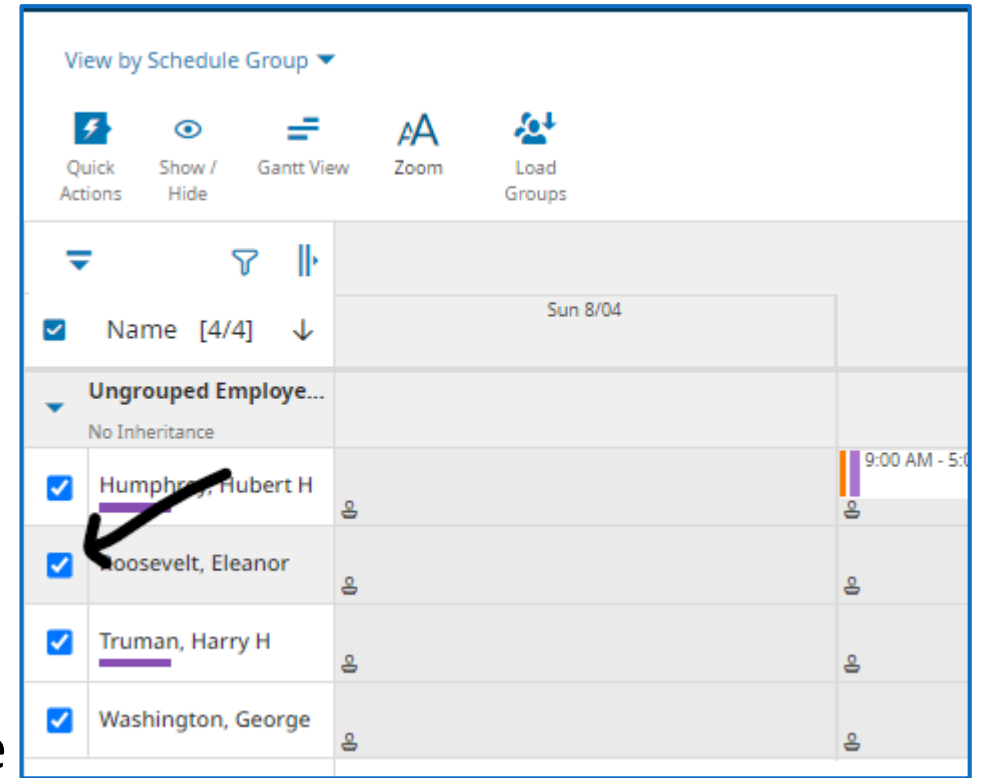




# Applying a single week Schedule Pattern

# Applying a Schedule Pattern

- After removing Schedule Group refresh your screen.
- The employee will appear under **Ungrouped Employees**
- Select one or multiple employees to apply a schedule pattern to
- Once selected **Right Click** over an employees name
- If you have selected more than one employee it will tell you how many employees are selected
- Select **Schedule Pattern**



# Applying a 1 Week Schedule Pattern

- You can select the **Tab Name** and name it something meaningful
- **Start Date**- Enter start date you want the Pattern to start
- **End Date** – Select **Forever** or a specify end date
- **Define Pattern** – 1 week is default
- Enter start and end times of shift or
- Select **pattern template**

The screenshot displays a scheduling application interface. At the top, a dropdown menu shows a selected pattern: "9:00am-5:00PM M-F" with a sub-menu option "8/18/2024-Forever" and a "Rename" button. Below this is a toolbar with icons for "Pattern Template", "Shift Template", "Comment", "Copy/Paste", and "Delete".

The main configuration area includes:

- A dropdown menu for "New Pattern" with a sub-menu "8/18/2024-Forever" and an "Add New Pattern" button.
- A "Start Date\*" field with "8/18/2024" and a calendar icon.
- An "End Date\*" section with radio buttons for "Forever" (selected) and "Specify Date".
- A "Define Pattern For\*" section with a "1" input field and a "Week(s)" dropdown menu.
- An unchecked checkbox for "Override Other Patterns".
- A "Start Pattern On\*" section with a "Week" input field set to "1".





On the right, a shift schedule grid is visible with columns for "No.", "Sunday", and "Monday". The "No." column contains a "1" and a plus icon. The "Sunday" column shows a shift from "7:30 AM - 4:00 PM". The "Monday" column shows a shift from "9:30 AM - 6:00 PM".

Black arrows point to the calendar icon, the "Forever" radio button, and the "Week(s)" dropdown menu.

# Applying a 1 Week Schedule Pattern

- Select **Apply**
- Select **SAVE**
- Refresh to see update
- It will say **Temporarily Unavailable** until it is fully applied



Ungrouped Employee...		
No Inheritance		
<input checked="" type="checkbox"/>	Humphrey, Hubert H	
<input checked="" type="checkbox"/>	Roosevelt, Eleanor Temporarily Unavailable	
<input checked="" type="checkbox"/>	Truman, Harry H	
<input checked="" type="checkbox"/>	Washington, George	

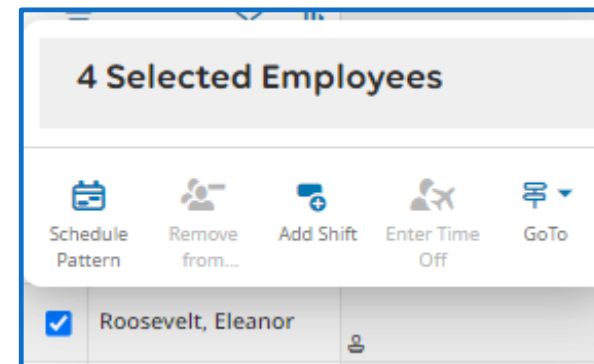
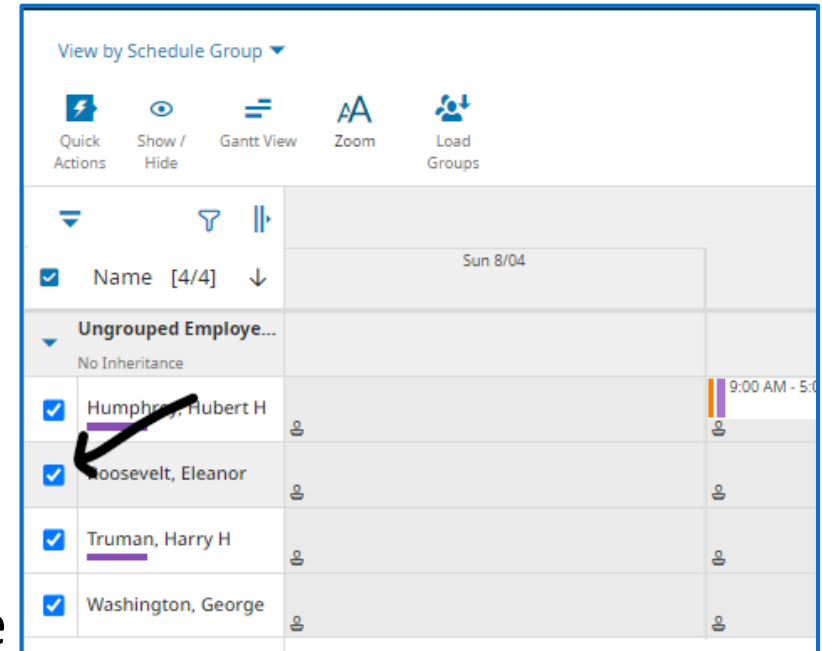
# Applying a Multiple week Rotation Schedule Pattern

# Why Use Multiple Week Rotation Schedules?

A rotating schedule is just like it sounds employees are scheduled for a certain shift, such as the night shift, and then rotate with the other teams working the day shift for the next set period of scheduling. Some instances call for a third shift rotation, but after that the scheduling cycle begins again.

# Applying a Rotation Schedule Pattern

- After removing Schedule Group **Refresh** your screen.
- The Employee will appear under **Ungrouped Employees**
- Select one or multiple employees to apply a schedule pattern to
- Once selected **Right Click** over an employees name
- If you have selected more than one employee it will tell you how many employees are selected
- Select **Schedule Pattern**



# Applying a Multiple Week Schedule Pattern

- If employee has more than one job select correct assignment
- **Start Date**- Enter start date you want the Pattern to start
- **End Date** – Select **Forever** or specify end date
- **Define Pattern** – Example is for 3 weeks. 1 week is default
- Enter start and end times of shift or Select **pattern template**
- **Start Pattern On** - **Example:** Could start on week 2

Truman, Harry H

Pattern Template Shift Template Comment Copy/Paste Delete

New Pattern 8/18/2024-Forever Add New Pattern

Assignment\* ...bassador I

Start Date\* 8/18/2024

End Date\*  Forever  Specify Date

Define Pattern For\* 3 Week(s)

Override Other Patterns

Start Pattern On\* Week 1

No.	Sunday	Monday
1	7:30 AM - 4:30 PM	7:30 AM - 4:30 PM
2		3:00 PM - 12:00 AM
3		7:30 AM - 4:30 PM



# Applying a Multiple Week Schedule Pattern

- Select **Apply**
- Select **SAVE**
- **Refresh** to see update
- It will say **Temporarily Unavailable** until it is fully applied

The screenshot displays a scheduling interface for creating a new pattern. On the left, there are input fields for 'Assignment\*' (set to '...bassador I'), 'Start Date\*' (8/18/2024), and 'End Date\*' (Forever). Below these is a 'Define Pattern For\*' section with a value of '3' and a unit of 'Week(s)'. The main area is a calendar grid with columns for Sunday through Friday. Three rows of schedule items are visible:

No.	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday
1	7:30 AM - 4:30 PM	7:30 AM - 4:30 PM		7:30 AM - 4:30 PM	7:30 AM - 4:30 PM	
2		3:00 PM - 12:00 AM	3:00 PM - 12:00 AM	3:00 PM - 12:00 AM	3:00 PM - 12:00 AM	3:00 PM - 12:00 AM
3		7:30 AM - 4:30 PM	7:30 AM - 4:30 PM	7:30 AM - 4:30 PM	7:30 AM - 4:30 PM	7:30 AM - 4:30 PM

# Editing a Current Pattern

# Edit Employee with a Schedule Planner

- Access employee Schedule Pattern
- **Click on the arrow** on the current Schedule tab
- Select **Edit**

Humphrey, Hubert H  
Job  
GW/GWU/9999999/Job

9:00am-5:00PM M-F • Afternoon Shift  
7/21/2024-Forever 8/18/2024-Forever

Edit  
Rename  
Delete

End Date\*  
 Forever  
 Specify Date

No.
1

# Edit Employee with a Schedule Planner

- Select **Start Date** to change pattern
- Select **Overwrite Pattern**
- Select **Apply**
- A new tab will be created with the new start date
- Make schedule changes
- **Apply**
- Select **SAVE**

### Edit Pattern X

Modify As Of Date

This will end the current pattern as of this date and start the new pattern as of this date.  
The date must be after the last signoff date.

Sample:

Overwrite Pattern

This will remove the current pattern and replace it with the edited one from the last signed off date. WARNING: You may be deleting past worked shifts.

Sample:

Humphrey, Hubert H  
Job  
GW/GWU/999999/Job

Pattern Template Ter

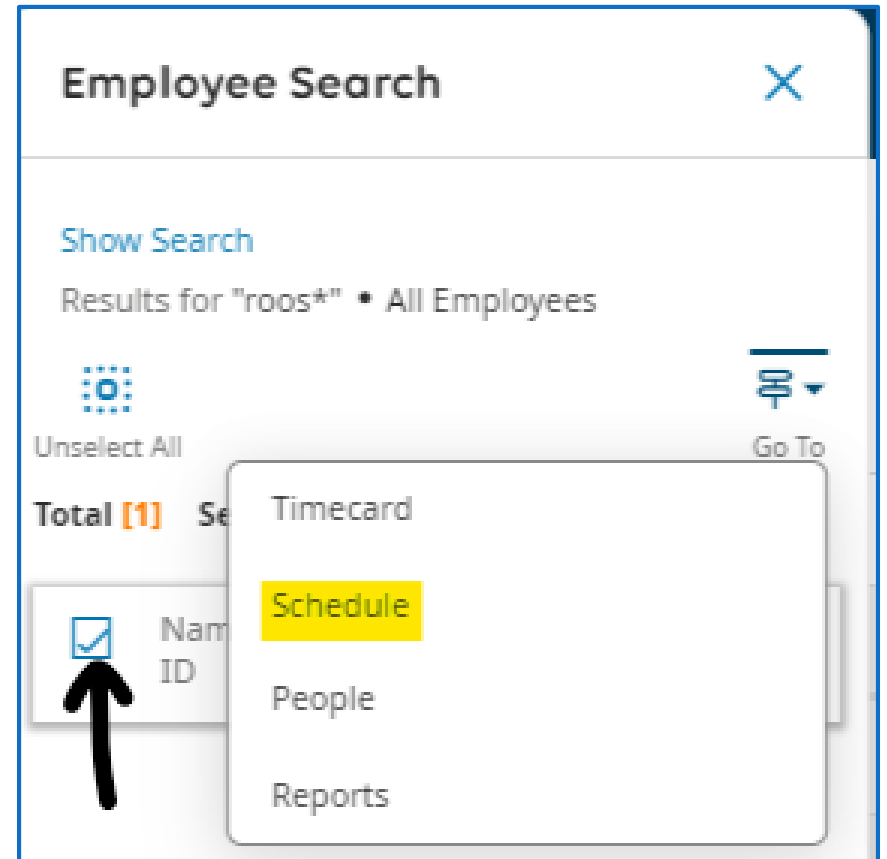
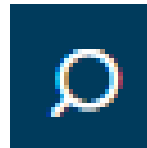
• 9:00am-5:00PM M-F  
7/21/2024-8/17/2024

• 9:00am-5:00PM M-F  
8/18/2024-Forever

# Ending a Schedule Pattern and adding a New One

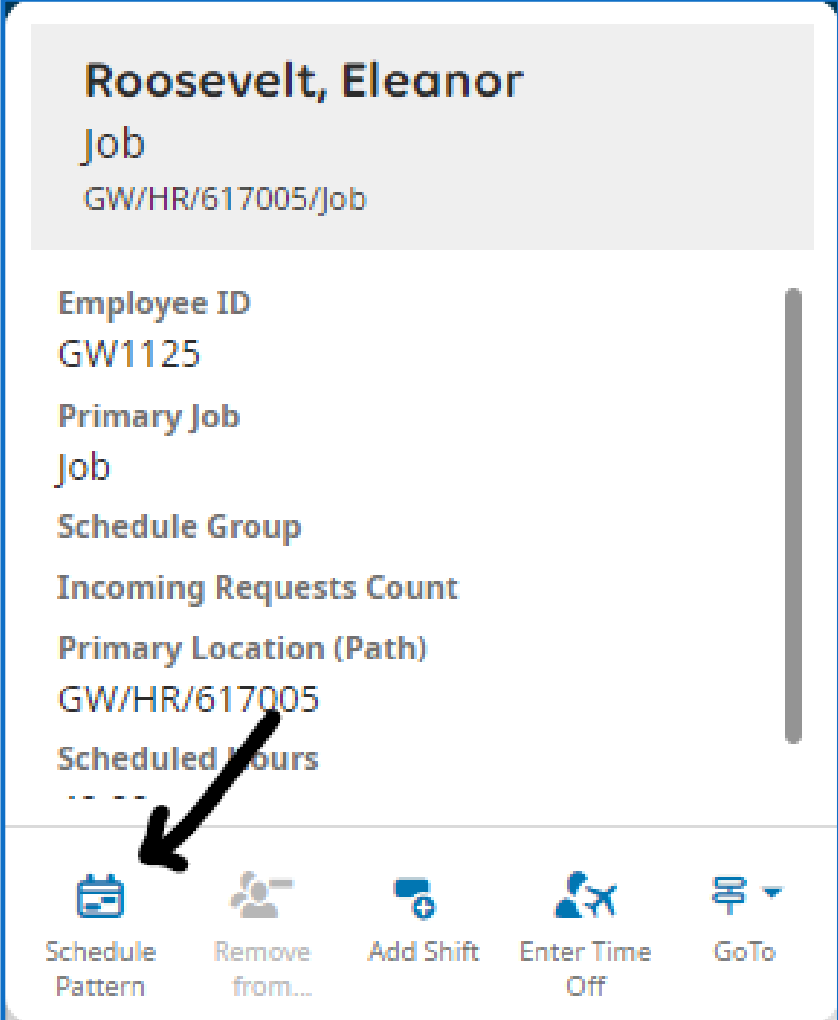
# Edit Employee with a Schedule Planner

- Access employee by going to **Scheduler** and searching for employee
- Use **search Icon** to search for employee
- Select employee name and **GoTo** Schedule



# Edit Employee with a Schedule Planner

- Confirm your under the correct date range
- **Right click** on employee name
- Select **Schedule Planner**



**Roosevelt, Eleanor**  
Job  
GW/HR/617005/Job

Employee ID  
GW1125


Primary Job  
Job


Schedule Group


Incoming Requests Count


Primary Location (Path)  
GW/HR/617005


Scheduled Hours  
-----

 Schedule Pattern

 Remove from...

 Add Shift

 Enter Time Off







 GoTo


# Ending Schedule Pattern

- When changing a pattern end date the current pattern
- Enter the date you want to end it
- Then select **Apply**
- Select **SAVE**
- **Select Refresh**
- Go back into employee **Schedule Pattern**


### Schedule Pattern

Roosevelt, Eleanor  
Job  
GW/HR/617005/Job

**New Pattern**   
8/18/2024-8/31/2024

Start Date*	No.	Sunday	Monday
8/18/2024	1		9:30 AM - 6:00 PM

End Date\*  
 Forever  
 Specify Date 

Define Pattern For\*  
1 Week(s)  
Start Pattern On\*  
Week 1



# Adding New Schedule Pattern

- In the second Pattern tab start entering in a **New Pattern**
- Select start date of Pattern
- Enter New Pattern
- Select **Override Other** just to confirm it wipes out old Pattern

**Schedule Pattern**

Roosevelt, Eleanor  
Job  
GW/HR/617005/Job

Pattern Template Shift Template Comment Copy/Paste Delete

New Pattern  
8/18/2024-8/27/2024  
New Pattern  
8/28/2024-Forever  
+ Add New Pattern

Start Date\*  
8/28/2024

End Date\*  
 Forever  
 Specify Date

Define Pattern For\*  
1 Week(s)

Override Other Patterns

No.	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday
1		7:30 AM - 4:30 PM	7:30 AM - 4:30 PM	9:00 AM - 6:00 PM	7:30 AM - 4:30 PM	7:30 AM - 4:30 PM

# Adding Multiple Patterns

# Why Multiple Patterns ?

- If you want the employee to clock in and out for a meal break
- If employee has a large break in between shifts

# Adding Multiple Patterns

- Add your first tab
- Enter **New Pattern**
- Assign the shift time
- Select start and end dates of pattern
- Select the second tab

Truman, Harry H

Pattern Template Shift Template Comment Copy/Paste Delete

• Morning Shift M-F 7A-11A 8/18/2024-Forever

• Afternoon Shift M-F 12A-4P 8/18/2024-Forever

+ Add New Pattern

Assignment\*  
Assignment  
GW/HR/412001/Job

Start Date\*  
8/18/2024

End Date\*  
 Forever  
 Specify Date

Define Pattern For\*  
1 Week(s)

Override Other Patterns

No.	Sunday	Monday
1		7:00 AM - 11:00 AM

# Adding Multiple Patterns

- On **the second tab** add the name of the shift pattern by **clicking on arrow** in corner of tab
- Add the employees schedule times
- Select start and end dates for schedule pattern
- If you want them both at the same time **DO NOT** select override

**Schedule Pattern**

Truman, Harry H

Pattern Template Shift Template Comment Copy/Paste Delete

• Morning Shift M-F 7A-11A 8/18/2024-Forever

• Afternoon Shift M-F 12A-4P 8/18/2024-Forever + Add New Pattern

Assignment\*  
Assignment  
GW/HR/412001/Job  
Start Date\*  
8/18/2024  
End Date\*  
 Forever  
 Specify Date

No.	Sunday	Monday	Tuesday
1		12:00 PM - 4:00 PM	12:00 PM - 4:00 PM

# Questions ?