

TIMECLOCKPLUS AT LEHIGH UNIVERSITY

Managing Employee Schedules

Overview

TimeClock's **Schedules** menu is a tool that assists managers who must ensure staffing coverage for customer service or special events. This module allows managers to enter, edit, and manage staffing coverage for their departments.

NOTE: Hours entered in this schedule are for planning and management purposes and do not affect pay, leave or overtime calculations that are fed to Banner.

Tip: Contextual help screens can be accessed within TimeClock by clicking on the "?" button found at the upper right of any screen

Employee Menu

On the **Schedules** menu, select **Employee**. On the left side of the screen, you will see a list where the first 100 employees will appear.

Specific employees or a different range can be set using the Employee Filter button. Employees can also be filtered by typing a name or LIN into the Search bar. The list can also be sorted by several methods in ascending or descending order by selecting your preferred sort criteria.

Selecting an employee (by clicking on their name) will return a view of their previously entered schedule. Note that you can manipulate the period of time displayed using the **Calendar** icons or dropdown menu. The default display does not include weekends. If you would like to include weekends, click the checkbox on the right side of the screen "**Display weekends**". **Time Code Filters** or **Index Filters** can also be selected. Click the **Update** button after entering your display criteria.

To add a schedule segment:

1) In the **Employee** section of the **Schedules** menu, click on **Add** beneath one of the days on the schedule to access the **Add Schedule** menu.

2) Select the **Type** of schedule segment you would like to create for the day. There are several different types of segments available for use.

Regular: A regular segment is one that is worked normally by the employee.

Off: An off segment is one that an employee will not be working, such as if the employee has school or the shop closes down at that time.

Open: An open segment is one where the employee is not scheduled but is available to work.

On-Call: An on-call segment is one where the employee is not working but can be expected to be called in.

Unavailable: An unavailable segment is one where the employee is completely unavailable to work during the time specified.

3) Create a Date and Time in as well as a **Date and Time out** for the schedule segment.

4) Select the **Time Code** this segment will be worked under.

TIMECLOCKPLUS AT LEHIGH UNIVERSITY

5) Enter any pertinent notes about the shift in the **Description** field.

6) If you would like to copy this schedule to other days within the week, select the number of days you would like to copy forward in the Days field. For example, if your week starts on a Monday and you want to copy this segment through Friday, you would setup Monday's schedule, and select 5 in the Days field.

7) Click **Save** to create the schedule segment.

To Delete a schedule segment:

Select it then select **Delete** from the blue **Manage** button. You can also right click on the segment and select **Delete**.

To Copy a schedule segment:

Select it then select **Copy** from the blue **Manage** button. You can also right click on the segment and select **Copy**. To Paste a copied segment to another day, right click on the day you would like to add the segment to and select **Paste**.

Daily Schedule

Selecting **Daily** from the **Schedules Menu** allows you to view the schedules of all employees working over the course of a single day. From here, schedule segments may not be added, but can be edited or deleted.

Select the day you would like to view by using the **Previous** and **Next** buttons, or by entering it using the calendar icon.

Once you have selected a date with hours, employee schedule segments will appear in the timeline. Segments can be filtered by Job Code, Employee, or Segment type by using the appropriate **Filter** button.

Segments can be edited or deleted by selecting them and clicking on the blue **Manage** button. In addition, selecting a single shift will also enable the option to View segment in Manage Schedules.

The grey **Options** button in the top right of Daily Overall Schedule allows you to configure what information is displayed in Daily Overall Schedule.

Start Time: This allows you to choose when the day starts for the Daily Overall Schedule. Please note that this will NOT change the time your day starts within the company.

Hours: Change the amount of hours displayed in the Daily Overall Schedule. This is the amount of hours that will display beginning from the start time. Hours can also be broken down into hour, half hour, or quarter hour portions by using the dropdown menu.

Display open shifts by default: This will display all segments marked as open in the Daily Overall Schedule by default.

TIMECLOCKPLUS AT LEHIGH UNIVERSITY

Display on-call shifts by default: This will display all segments marked as On-Call in the Daily Overall Schedule by default.

Display all segments for each individual on a single line (except open/on-call): With this option checked, all segments (with the exception of Open and On-Call) will be displayed on a single line. Otherwise, segments will be displayed in order of when they start, so an employee with two segments in a day may have them on different lines.

Display ID and description of job code: With this option checked, the job code ID and description will be displayed alongside the employee's name and ID.

Display shift description: With this option checked, the shift description (if any) will display alongside the employee's name and ID.

Colors: These options will determine how different types of segments are displayed in the Daily Overall Schedule. To change the color for a certain segment type, select it and pick the new color.

Once you save, the Daily Overall Schedule will reflect your new choice.

Weekly Schedule

Access Weekly Overall Schedules by selecting **Weekly** from the **Schedules** menu. The Weekly Overall Schedule allows you to view the schedules of all employees working over the course of a single week. From here, schedule segments can be edited or deleted.

Select the week you would like to view by using the **Previous** and **Next** buttons, or by using the calendar icons.

Once you have selected a date with hours, employee schedule segments will appear in the timeline below. Segments can be filtered by Job Code, Employee, Availability, or Segment type by using each respective **Filter** button. Segments can be edited or deleted by selecting them and clicking on blue **Manage** button, or by right clicking on them.

The gray **Options** button in the upper right of Weekly Overall Schedule allows you to change several options that determine what information the features displays

Sorting options: These allow you to change the primary and secondary sort keys for the weekly overall schedule. The Primary sort key is how employees will initially be sorted; if there are two employees with the same sort criteria (e.g., two employees with the same last name), the second sort key will be used.

Display employee number: Checking this option will display the employee's ID number alongside their name.

Display employee department: Checking this option will display the employee's department alongside their name.

Display employee class: Checking this option will display the employee's classification alongside their name.

TIMECLOCKPLUS AT LEHIGH UNIVERSITY

Display last name first: Checking this option will display names in Last name, First format.

Display Job Code ID: Checking this option will display the job code ID that the employee is scheduled to use.

Display Job Code description: Checking this option will display the Job Code description that the employee is scheduled to work in.

Display segment description: Checking this option will display the Job Code description that the employee is scheduled to work in.

Display scheduled hours total: Checking this option will display the total amount of hours that employee is scheduled to work that week.

Time format: This drop down allows you to change how time is displayed on the Weekly Overall Schedule.
Number of individuals to display: This option allows you to enter how many individuals you would like to display (up to 25).

Ask for confirmation when deleting segments: When this option is checked, you will be asked to confirm the operation when deleting segments for employees.

Normalize employee names: This option will normalize all names to Title Casing. This is useful for when employees have been imported from different sources and may have different capitalization standards.

Recurring Schedules

The **Recurring** menu allows managers to create repeating schedules for employees. These are schedules for one to eight weeks that will repeat indefinitely (or until they reach a designated stop date). These schedules can then be assigned to your employees, negating the need to create schedules for each pay period.

Schedule Templates

The **Template** menu allows managers to create, manage, and edit schedule templates. Templates allow managers to quickly assign similar schedules across one or more days without having to manually create the segments. There are three types of schedule templates.

Staffing Requirements

The Staffing Requirements menu allows managers to create, manage, and edit required schedule segments. Required segments are periods that require a certain amount of employees to be working in that job code. For example, if the Friday afternoons require at least five customer service staff, a required segment could be created. Then, if less than five customer service staff are scheduled to be working, managers will receive a warning letting them know that the schedule segment is not sufficiently covered.

TIMECLOCKPLUS AT LEHIGH UNIVERSITY

Segments that were created through Staffing Requirements will appear on Individual Schedules with an asterisk.

BEST PRACTICES: Deleting a staffing requirement will permanently clear out the required schedule segments created for employees. Therefore, it is **STRONGLY RECOMMENDED** that you do not delete a staffing requirement if it has been used.

Reports

Selecting Scheduler Reports from the Reports menu allows managers to create, customize, print, and save reports on employee schedules across a given period. These reports can be customized to show information on selected employees and can be printed as well as downloaded in HTML, PDF, or OpenXML formats.

When you enter Scheduler Reports, you will see a number of options. You can select the desired report from the list on the left side. Once you have selected a report, you'll see a number of options on the right.