

# SCHEDULING

## Starting A New Schedule

1. Once you are ready to create a new schedule, you will go into TeamworX and click on **Manage Schedules** on the left side of the screen in the menu panel (see right)
2. From here, you will click the **Create New** button in the top right corner of the screen

**Create New**

3. It will give you the following pop-up message to choose which week you will write the schedule for:

**Select Week Ending Date:**

09/08/2020

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09/15/2020

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09/22/2020

<b>CRUNCH TIME! TEAMWORK</b>
Schedule Overview
Daily Roster
<b>Manage Schedules</b>
Shift Builder
Manager Log
Staff Requests
Message Center
Employee List
Open Shifts
Manage Blackout Dates
Staffing Organizer
Activity Log

## Scheduling In the Day View

The day view will allow you to schedule employees per shift each day.

- You will know you are in the day view on the top left of the screen
- You can choose the day you want to work on underneath **Day View**
- When you are ready to add someone to the schedule, you will click on the + next to the job code you would like to add, and a line item will appear.

- Where it says **unassigned**, use the dropdown menu to choose the employee

**Select Employee**

Employee Name *	Rank	Skill Level	Pay Rate	Wkly Hrs	Primary Location
<i>Unassigned</i>					
ALEXANDER ZSOFKA			\$8.00	0	Nashua #1
JAQUELYN GRILLO			\$8.00	0	Nashua #1
KRYSTYNA WILLIAMS			\$8.00	0	Nashua #1
MELISSA LAMONTAGNE			\$8.00	0	Nashua #1

- Then click on the bars to the right to schedule the exact hours you want to schedule for that employee on that specific day

NOTE: Using the scheduling in the week view is more efficient when building a schedule from scratch.

## Scheduling In the Week View

The week view allows you to schedule an employee for an entire week in a certain position. If you copy over your shift each week from a prior week and tend to keep the same shifts but just move them around, this will be the easiest way to do that.

Position	P&L Sub	Employee	Rank	Wkly Hrs	Wednesday Sep 9, 2020	Thursday Sep 10, 2020	Friday Sep 11, 2020	Saturday Sep 12, 2020	Sunday Sep 13, 2020	Monday Sep 14, 2020	Tuesday Sep 15, 2020
Bar					Sched. Hrs. - 0	Sched. Hrs. - 0	Sched. Hrs. - 0	Sched. Hrs. - 0	Sched. Hrs. - 0	Sched. Hrs. - 0	Sched. Hrs. - 0
Cook					Sched. Hrs. - 0	Sched. Hrs. - 0	Sched. Hrs. - 0	Sched. Hrs. - 0	Sched. Hrs. - 0	Sched. Hrs. - 0	Sched. Hrs. - 0
Dish					Sched. Hrs. - 0	Sched. Hrs. - 0	Sched. Hrs. - 0	Sched. Hrs. - 0	Sched. Hrs. - 0	Sched. Hrs. - 0	Sched. Hrs. - 0
Host		ALEXANDER ZSOFKA		4.00	Add shift	5:00 PM-8:00 PM No Station	Add shift	Add shift	Add shift	Add shift	Add shift

- To start, it is the same as in the day view, you click the + next to the schedule you want to add an employee to, and select the employee
- Then click on the **Add Shift** button on each day that you want to schedule a shift (to schedule a second shift that same day, use the + beneath the first scheduled shift)
  - You will be asked the in time and out time for the shift
    - If you do not specify AM or PM it will give you available options for the shift to be scheduled so that you do not accidentally schedule the time of day
- To copy the same shift times to another day, click on **copy** symbol on the bottom left of shift

- Once you do that, all available days that you can schedule that shift will show the **copy here** symbol and you simply have to click on that day, the shift will then show up there too

## Posting the Schedule

Once you have reviewed the schedule and are ready to post, click on the **Save Draft** button and then the **Mark as Ready** button in the top right corner.

- Then, under the **Manage Schedules** page, click on the "..." button on the right

Week Ending Date	Created By	Modified By	Status	Actions
09/15/2020	Abby Zall	Abby Zall 09/09/2020 11:32 AM	Ready For Publish	Edit ...

- Click on the **Publish** button

## Creating “House” Shifts

If you want to create a shift unassigned to a specific person, available for an employee to pick up, the easiest way to do this is while creating the schedule (in which ever view is easiest).

- When you add a line to the specific job schedule, rather than choosing an employee, choose **Unassigned**

Select Employee					
Employee Name ^	Rank	Skill Level	Pay Rate	Wkly Hours	Primary Location
Unassigned					
ALEXANDER ZSOFKA				0	Nashua #1
JAQUELYN GRILLO				0	Nashua #1
KRYSTYNA WILLIAMS				0	Nashua #1
MELISSA LAMONTAGNE				0	Nashua #1

- Schedule the shifts as necessary
- When you post the schedule, these will become available shifts to pick up

## Changing the Schedule Time Increments

Your scheduler will automatically be defaulted to schedule your employees on the half hour. You can change these settings to either 15 minute increment or 10 minute increments. In order to do this, you must be on the **Day View**.

- On the top right of the screen while on the **Day View**, click on the settings option
- Once the settings menu opens, under the **Display** tab, you will be able to select the



### Labor Schedule Increments

#### Labor Schedule Settings

Display Show / Hide Employee Filter

Employee Display: First Name Last Name

Labor Schedule Increments: 15 Min

Submit Cancel

#### Labor Schedule Increments:

10 Min

15 Min

30 Min

60 Min

## Printing the Schedule

On the top right corner, choose the **Print** icon and choose which of your schedule options you would like to print.

