

## Simple Scheduler Job Aid

The purpose of this document is to describe how to use Simple Scheduler to create and maintain a Schedule for a team. This is a task completed by a Timekeeper or a Manager. This scheduler is found in Time and Attendance.

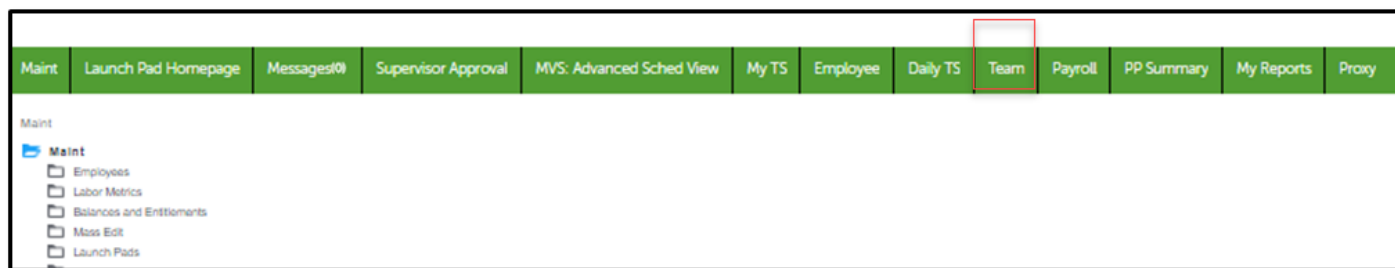
The document describes how to:

- Create team schedules.
- Analyze schedules to determine if and where changes are required.
- Edit schedules, if required.
- Publish or print schedule details.

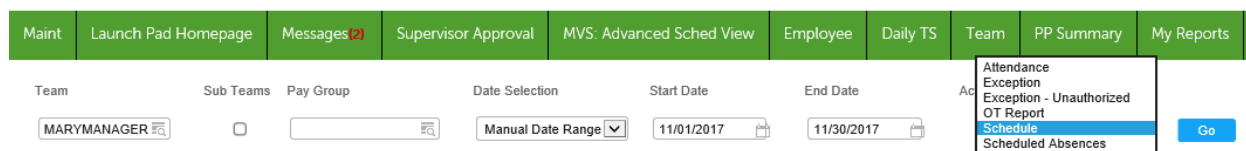
This job aid is useful if the shift you want is not available in the shift drop down list.

**Step 1** – Click into the **Time and Attendance** module. In Time and Attendance click Team tab.

**Note:** you can also create schedules for a single employee using **Employee Tab – Schedule**.



**Step 2** – Select desired Team > Select time period you want to create schedule for> Select **Schedule**>Click **Go**



### Step 3 – The Team Schedule view displays.

**Note:** Any existing shifts will display. They can be edited.

Team:   Sub Teams Pay Group:  Date Selection:  Start Date:  End Date:  Action:

#### Schedule

( 10/21 - 11/04 )

Employee	21 Sat	22 Sun	23 Mon	24 Tue	25 Wed	26 Thu	27 Fri	28 Sat	29 Sun	30 Mon
3000151-TEST - cal admin	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
3000150-TEST - john employee	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
3000163-TEST - lynn employee	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
CHRIS TEST - CHRIS TEST	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

OR

Copy Other Date Range...

Copy Schedule From Start Date

Copy Schedule From End Date

### Functional Buttons

**Timesheet** – Enables managers and timekeepers to modify schedule for individual employees.

**Show Applied Overrides** – To display timesheet modifications e.g. Overtime entry, absence and change/ or delete the modifications.

**Recreate Schedule** – Refresh the schedule.

**Copy Previous Period** – Copy a previously created schedule.

**Step 4** – Create a schedule as per labor requirements.  
 You can create a new schedule or copy an existing schedule.

**Create new schedule** - Input shifts as per labor requirements and click **Save**.

**Note:** Saved shifts display a blue \*.

Team:    
 Sub Teams:    
 Pay Group:    
 Date Selection:    
 Start Date:    
 End Date:    
 Action:    

Schedule

( 10/21 - 11/04 )

Employee	21 Sat	22 Sun	23 Mon	24 Tue	25 Wed	26 Thu	27 Fri	28 Sat	29 Su
3000151-TEST - cal admin	<input type="text"/>	<input type="text"/>	09:00 05:00 *	09:00 05:00 *	09:00 05:00 *	09:00 05:00 *	09:00 05:00 *	<input type="text"/>	<input type="text"/>
3000150-TEST - john employee	<input type="text"/>	<input type="text"/>	11:00 07:00 *	11:00 07:00 *	11:00 07:00 *	11:00 07:00 *	11:00 07:00 *	<input type="text"/>	<input type="text"/>
3000163-TEST - lynn employee	<input type="text"/>	<input type="text"/>	03:00 10:00 *	03:00 10:00 *	03:00 10:00 *	03:00 10:00 *	03:00 10:00 *	<input type="text"/>	<input type="text"/>
CHRIS TEST - CHRIS TEST	07:00 03:00 *	07:00 03:00 *	07:00 03:00 *	07:00 03:00 *	07:00 03:00 *	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

OR

Copy Other Date Range...

Copy Schedule From Start Date

Copy Schedule From End Date

## Copy Previous Pay Period or Copy other date range

This function allows you to copy a schedule created in the past.

a. Select the period you want to create a shift for. (10/28/2017 – 11/03/2017)

b. Select a date you want to copy a shift from. (10/21/2017 – 10/27/2017)

Click **Save** once you select the period.

Team: STEVEMANAGER | Sub Teams:  | Pay Group:  | Date Selection: Manual Date Range | Start Date: 10/28/2017 | End Date: 11/03/2017 | Action: Schedule | **Go**

### Schedule

( 10/28 - 11/03 )

Employee	28 Sat	29 Sun	30 Mon	31 Tue
3000151-TEST - cal admin	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
3000150-TEST - john employee	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
3000163-TEST - lynn employee	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
CHRIS TEST - CHRIS TEST	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

**Copy Previous Period**

OR

Copy Other Date Range...

Copy Schedule From Start Date: 10/21/2017

Copy Schedule From End Date: 10/27/2017

**Save**

The shift is copied from the previous pay period.

Team: STEVEMANAGER | Sub Teams:  | Pay Group:  | Date Selection: Manual Date Range | Start Date: 10/28/2017 | End Date: 11/03/2017 | Action: Schedule | **Go**

### Schedule

( 10/28 - 11/03 )

Employee	28 Sat	29 Sun	30 Mon	31 Tue	01 Wed	02 Thu	03 Fri
3000151-TEST - cal admin	<input type="text"/>	<input type="text"/>	09:00 05:00 *	09:00 05:00 *	09:00 05:00 *	09:00 05:00 *	09:00 05:00 *
3000150-TEST - john employee	<input type="text"/>	<input type="text"/>	11:00 07:00 *	11:00 07:00 *	11:00 07:00 *	11:00 07:00 *	11:00 07:00 *
3000163-TEST - lynn employee	<input type="text"/>	<input type="text"/>	03:00 10:00 *	03:00 10:00 *	03:00 10:00 *	03:00 10:00 *	03:00 10:00 *
CHRIS TEST - CHRIS TEST	<input type="text"/>	07:00 03:00 *	07:00 03:00 *	07:00 03:00 *	07:00 03:00 *	<input type="text"/>	<input type="text"/>

**Copy Previous Period**

OR

Copy Other Date Range...

Copy Schedule From Start Date:

Copy Schedule From End Date:

**Save**

**Timesheets** – This function allows you to view and modify schedule for individual employees (Permanent, Temporary and Casual staff) for desired pay period or work week. This function is similar to the daily time sheet.

Schedule

( 10/21 - 10/28 )

Timesheet

Show Applied Overrides

Recreate Schedule

The shifts saved on the basic scheduler using the Team tab will display on the employee timesheet.

**Note:** Scheduled hours DO NOT translate into paid work time to the employee.

To add paid work time, access employee timesheet. Click on the plus sign, add start/end time in the time pill and click **Save**.

A Manager clicks the **X** beside the time entry to authorize the hours. The **X** becomes a checkmark to indicate authorization.