This article is part of the Scheduling training.

Shifts are the detailed Employee assignments on the Schedule. The Shift form is generally opened as a pop-up window on the Schedule screen, but can also be opened from other places in the application as described below.

Create New Shift

Jobs *

Select Job ▾

Responsibility

Select responsibility ▾

Rating

☆ ☆ ☆ ☆ ☆

Employee

Select employee ▾

Business Date *

January 23rd 📅

Start time *

8:00 PM 🕐

End time *

4:30 AM 🕐 ⚠

☐ Override Break

Break Minutes

0

☐ Create template

Save **Cancel**

Note: Users with the following permission will be able to create, edit, and delete shifts:

- Labor → Scheduling → Schedule → Add/Edit/Delete Shifts
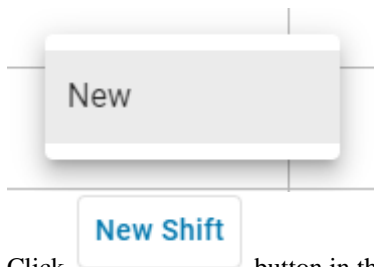
Note: Only Users with the following permission will be able to publish or unpublish shifts:

- Labor → Scheduling → Schedule →Publish/Unpublish Schedules

Creating a Shift

Blank New Shifts can be created using the following methods:

1. Right click a blank cell and select 'New'

2. Click [New Shift] button in the header of the Schedule Calendar Screen. This will pre-populate as many fields in the form as possible based on the cell that was right-clicked (Date, Employee, Job, Title, ect.)


Move or Update Shifts

3 AM	4 AM	5 AM	6 AM	7 AM	8 AM	9 AM	10 AM	11 AM	12 PM	1 PM	2 PM	3 PM

MAINTENANCE
5a-12p   7 h

Unavailable all day

Approved time off: All day

CASHIER
5:15a-1:15p   8 h

- **Move Shift.** To Move a Shift to a different Date or different Employee, click the Shift with the left mouse button and hold down the button while dragging it to the desired slot and then release the button. If moved to a different day then the Date of the Shift will be changed automatically. If moved to a different Employee Row then the Employee on the Shift will be modified.
- **Update Shift.** When in the Day view, to Adjust the Time on a Shift, first select a Shift by clicking on it. Next, left click on the left edge (for start time) or right edge (for end time) and drag the shift wider or narrower to change the time. You can also open the shift and adjust the times on the Edit Shift prompt manually

Copy a Shift
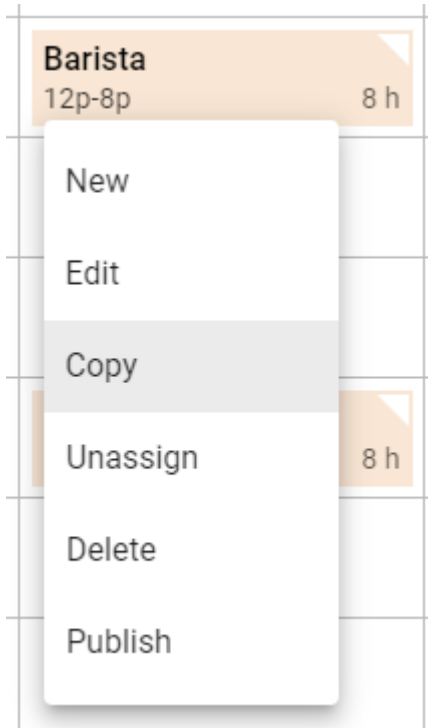
To Copy an existing Shift, right click on the Shift and select 'Copy'.
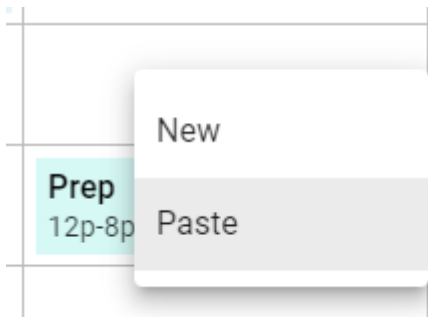
Next, right click in the destination cell for the new Shift and choose 'Paste'. This will create a copy of that Shift and will change the Date to the destination Date.

Open an Existing Shift

Existing Shifts can be opened using the following methods:

1. On the Schedule Calendar - double click on an existing Shift or right click and selecting 'Edit'

2. On the Manager Queue - Shifts can be opened to Approve or Deny Requests such as Shift Trades, Shift Drops, and Open Shifts Bids

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Shift Fields

Create New Shift

1 Jobs *
  Select Job ▾

2 Responsibility
  Select responsibility ▾

3 Rating
  ☆ ☆ ☆ ☆ ☆

4 Employee
  Select employee ▾

5 Business Date *
  January 23rd 📅

6 Start time *   7 End time *   8 ⚠
  8:00 PM 🕒   4:30 AM 🕒

9 ☐ Override Break   10 Break Minutes
                          0

11 ☐ Create template

12 **Save**   Cancel

1) Job Selector - Select the Job for the Shift. This is a required field for any Shift

2) Responsibility Selector - Select the Job Responsibility for the Shift. Only Employees with the Job Responsibility assigned on their Employee Record will be eligible for the Shift

3) Rating Requirement - Set the Rating Requirement for the Shift. Ratings are set for Each Employee on the Job Record and are kept private from the Employee. Similar to Job Responsibilities, Ratings offer an additional layer of filtering so that you only see the correct Employees that are eligible to successfully fill the Shift

4) Employee Selector - Select the Employee that will be Assigned to the Shift. This field can be left blank to save the Shift as an Unassigned Shift that will be filled at a later time. It is also recommended that when creating Shift Templates (see #8), that the Employee remain Unassigned for generic Shift Templates

5) Date Selector - Select the Date of the Shift. Note: if the Employee field is blank, the Unassigned Shift cannot be moved to a different day via 'drag and drop' on the Schedule Calendar. You must modify the Date value here on the Shift form in order to change the Date.

6) Start Time - Enter the Start Time for the Shift. If this Shift was created by right-clicking on the Schedule, the Start Time will default to the selected time when opened
- **Note:** The first hour listed is the first hour of the Location's Business Day. The last hour listed is the last hour of the Location's Business Day.

7) End Time - Enter the End Time for the Shift. If this Shift was created by right-clicking on the Schedule, the End Time will default to the selected time when opened
- **Important Note:** Selecting an 'End Time' earlier than the 'Start Time' will select that hour on the following Business Day, and create a Cross-Day Shift.

- **Note:** The first hour listed is the first hour of the Location's Business Day. The last hour listed is the last hour of the Location's Business Day.

8) Cross-Day Shift Warning - Indicates that the Shift is a Cross-Day Shift, since the 'End Time' extends the Shift into the next Business Day.

9) Override Break - Overrides the configured Break Rules when checked. The number of 'Break Minutes' (#10) will be applied instead.

10) Break Minutes - The number of Break Minutes included in the Shift. This field is only enabled when 'Override Break' (#9) is checked.

11) Create Template Checkbox - Check this box if this Shift will be used as a Template to more quickly fill out the Shift settings in the future. When checked, the 'Template Name' field will appear where a display name for the Template.

Templates are displayed directly above the Job Selector (#1) once the Job has been selected, as shown below:

12) Save & Cancel - Click the Save button to save the Shift, or Cancel to close the Shift Prompt without saving
- **Note:** If a warning window appears once 'Save' is clicked, this will note how the Shift violates a Minor Rule. Click here to learn more about Minor Rules and Minor Rule violations

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Scheduling an Upcoming Week

The 'Add Shifts' window will appear when scheduling an upcoming week or when the last shift is deleted on a schedule.

Add Shifts

You are starting a new week. Would you like to auto-populate this week with shifts from a prior week or template?

1 ○ Scheduler Template

2 ⦿ Prior Week

> January 16th 📅

3 ☑ Exclude Unpublished Shifts

4 ☐ All Departments/Jobs

> Select Departments/Job ▾

5
NO THANKS

6
USE

1) Scheduler Template - A Scheduler Template made previously can be used as the framework for a new week

2) Prior Week - The User is able to have the same shifts auto-populate from the prior week

- **Note:** If working on future schedules, any week prior to the week that the User is working on can be used as a framework for scheduling. For example, if working 4 weeks ahead, the User can select any of the 3 future weeks prior to that 4th week being scheduled

3) Exclude Unpublished Shifts - When checked, **only** 'Published' shifts will be copied from the selected prior week. Any shift that was on the schedule for the selected week but not published will not be copied to the new schedule.

4) All Departments/Jobs - When checked, all shifts from the selected 'Scheduler Template' or 'Prior Week' will be included when creating the new schedule. When unchecked, the 'Select Departments/Jobs' menu will be displayed. Here, Users can

manually select which Departments and Jobs to include.

Add Shifts

You are starting a new week. Would you like to auto-populate this week with shifts from a prior week or template?

○ Scheduler Template

◉ Prior Week

🔍 Search

☐ No Department

☐

☑ Janitorial

☐ Manager

☑ Runner FOH

☐ Trainee BOH

☐ Trainee FOH

☐ Production BOH

☑ Bartender

SELECT ALL   CLEAR ALL

NO THANKS   USE

5) No Thanks - This option allows the User to create a new week without a previous framework

6) Use - Click to populate the shifts to the new week

Shared Employee Shift Tiles

If an Employee works at more than one Location, the scheduled Shifts for those Locations will appear in grayed out boxes in the <u>Employee view</u> of each Location's Schedule Calendar. These are shown <u>only</u> for reference as the Schedule is created for the upcoming week and will not impact Labor metrics for the selected Location.

- **Note:** Schedulers will not be able to schedule Shifts during these times or include these Shifts when printing out a Location's Schedule.

Since Employees who work at multiple Locations have multiple Employee records in R365, these records need to be merged together into one Employee record for this feature to work successfully.