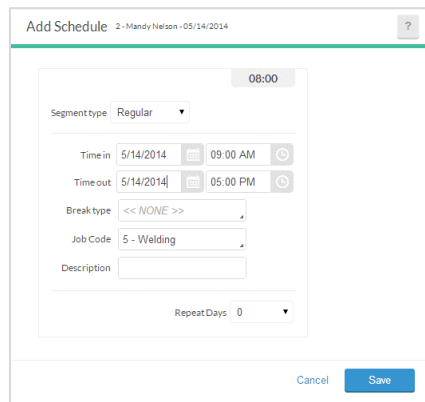


Scheduler Essentials

TimeClock Scheduler, available from the **Schedules** menu in **TimeClock Manager**, allows you to create and view employees' schedules and schedule templates, as well as run reports on scheduled time.

Creating an Employee Schedule

1. Select **Employee** from the **Schedules** menu.
2. Select an employee.
3. Click on **Add** beneath one of the days on the schedule to access the **Add Schedule** menu.



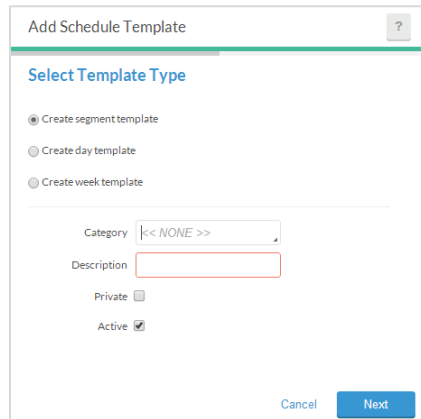
4. Select the type of segment you would like to create for the day. The different types of segments are below:
 - **Regular:** A regular segment is one that is worked normally by the employee
 - **Off:** An off segment is one that an employee will not be working, such as if the employee has school or 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 lets other managers know that these hours are blacked out for the employee.
5. Enter the **Time In** and **Time Out** for the segment.
6. If this segment ends in a break or job code change, select a **Break** type from the dropdown menu.
7. Select the **Job Code** this segment will be worked under. Enter any notes about the shift in the **Description** field.

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8. If you'd like to copy this schedule to other days within the week, select the number of days you'd 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 select **5** in the **Days** field.
9. Click **Save**.
10. To delete a segment, select it then select **Delete** from the **Manage** menu. You can also right click on the segment and select **Delete**.
11. To copy a segment, select it then select **Copy** from the **Manage** menu. You can also right click on the segment and select **Copy**.
12. To paste a copied segment to another day, right click on the day you would like to add the segment to and select **Paste**.

Creating a Schedule Template

1. Select **Template** from the **Schedules** menu.
2. Click on **Add** in the upper right hand corner.



3. Select the template type you'd like to create:
 - **Segment:** This template consists of a single worked segment
 - **Day:** This template consists of one or more segments across one to seven days.
 - **Week:** This template consists of several segments across one to eight weeks.
4. Enter a brief **Description** (e.g., Mid-shift) for the template. If your organization plans on using several templates, consider entering a **Category** for easy organization.
5. Once you have selected the template type and named it, click **Next**.
6. Create the template as you would in **Employee Schedules**. The segment can be assigned to a specific job code, or can use the employee's **Default Job Code** to increase versatility in assigning the segment. The Default Job Code will only be possible if a default job code was assigned to each employee's profile or role. Once the segment has been created, click **Finish** to add it to the list of **Schedule Templates**.

Applying a Schedule Template

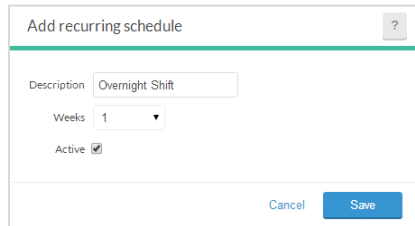
Once you have created one or more schedule templates, you can begin using them anywhere that allows you to create schedules. Segment templates can be assigned using the **Add** button, which will overwrite the values in the **Add Segment** window with those of the template.

To use a day or week template, select the day you'd like the template to begin on, then select **Paste from Template** from the **Manage** menu. Here, you will see a sortable list of all templates and can select the one you'd like to apply.

After selecting the template and clicking **Select**, the template segment(s) will appear on that employee's schedule.

Creating a Recurring Schedule

1. Select **Recurring Schedule** from the **Schedule** menu.
2. You may select and edit the Company Default schedule and skip to step 7 or create a new recurring schedule (steps 3-7).
3. On the **Manage Recurring Schedule** feature, click on **Add** in the upper right corner.



4. Enter a **Description** for the recurring schedule. This is how users will select the recurring schedule from a list to assign to employees or edit.
5. Select how many **Weeks** the recurring schedule will consist of. This determines how many weeks the recurring schedule will consist of before repeating. For example, a two week recurring schedule assigned on February 1st will repeat two weeks later, on February 15th.
6. Select whether or not you would like the recurring schedule to be active by checking the **Active** checkbox. Inactive recurring schedules cannot be assigned to employees.
7. Create segments for the recurring schedule as you would in **Employee Schedules**. Once you have finished editing the recurring schedule, click **Save**.

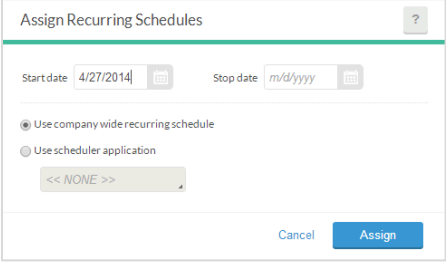
Assigning a Recurring Schedule to an Employee

1. Select **Employee** from the **Schedules** menu.

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2. Select an **Employee** from the list, then select the **Recurring** tab.
3. Click on **Assign**.



4. Enter the **Start date** for when you would like the schedule to take effect. If you'd like the schedule to stop being applied to this employee at a certain date, enter in a **Stop date** as well.
5. Select the **Use company wide recurring schedule** radio button or, if you created a new recurring schedule, select the **"Use scheduler application"** radio button, and select a recurring schedule from the dropdown menu. Then click **Assign** and **Save** to save the contents of the **Hour** tab.

Global Scheduler

The **Global Scheduler** allows you to copy or delete schedules for selected employees. This allows you to copy schedules that are unique to an employee to future weeks, as well as perform this operation for several employees at once or copy those schedules into **Individual Hours** as hours that employee has worked. In addition, multiple schedules can be deleted at once with Global Scheduler.

Applying a Global Schedule

1. Select the **Schedules** drop down menu, then select **Global Scheduler**.
2. Select the employees you would like to copy schedules for by either selecting specific employees from the list or by using a **Filter**. Once you have identified the employees you would like to schedule, click **Next**.
3. Select **Apply schedules** from the Schedule operations list, then click **Next**.
4. Select the **Start date** by entering the beginning date of the weekly schedule(s) you would like to create or edit. Select the **Number of weeks** you would like to create or edit and click **Apply**.
5. Create the segment(s) you would like to add for the selected employee(s). Segments can be created by clicking **Add**, copying already added segments, or pasting from templates. When you have created the segments you would like to add to the selected schedule(s), click **Next**.
6. The **Summary** screen will provide a summary of the operation you are about to perform, including the number of individuals affected, and the segments you are creating. Select

Preview to view the copy operation without making any changes to the schedule, or click **Process** to add the segments.

Copying a Global Schedule

1. Select the **Schedules** drop down menu, then select **Global Scheduler**.
2. Select the employees to be scheduled by either selecting the specific employees from the list or by using a **Filter**. Once you have selected the employees you would like to copy schedules for, click **Next**.
3. Select **Copy schedules** from Schedule Operations and click **Next**.
4. Select the **Source date range** by entering in the dates of schedules you would like to copy or select the dates using the date picker.
5. If you would like to only copy segments from certain job codes, create a **Job Code Filter**.
6. Select either a **Linear** copy, or **Day to Day** copy.
 - A **Linear** copy will move the segments across without regard to the day of the week. For example, Day 1 of the source schedule will copy to Day 1 of the destination range.
 - A **Day to Day** copy will move segments to the appropriate day of the week, so a segment that starts on a Monday will be copied to each Monday in the destination range. If you would like to copy blank days on the schedule (such as days off not marked as such), check **Copy blank days**.
7. Check the various options for different types of segments you would like to include. Click **Next**.
8. Select the **Destination date range** by entering in the dates of schedules you would like to copy, by selecting them from the date picker, or use one of the preset ranges in the drop down list.
9. Select the different types of days you would like to overwrite by checking the relevant checkbox. Once you have configured your destination range, click **Next**.
10. The **Summary** screen will provide a summary of the operation you are about to perform, including dates, the number of individuals affected, and the options selected for the source and destination dates. Select **Preview** to view the copy operation without making any changes to the schedule, or click **Process** to copy schedules as configured.

Deleting a Global Schedule

1. Select the **Schedules** drop down menu and then select **Global Scheduler**.
2. Select the employees you would like to delete schedules for by either selecting the specific employees from the list or by using a **Filter**. Once you have selected the employees you would like to delete schedules for, click **Next**.
3. Select **Delete schedules** and click **Next**.

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4. Select the **Source date range** by entering the date range of schedules you would like to delete, by selecting them using the date picker, or use one of the preset ranges in the drop down list.
5. If you would like to only delete segments from certain job codes, create a **Job Code Filter**.
6. Check the various options for different types of segments you would like to include. Once you have finished configuring the source dates, click **Next**.
7. The Summary screen will provide a summary of the operation you are about to perform, including dates, the number of individuals selected, and the types of segments you will be deleting. Select **Preview** to view the copy operation without making any changes to the schedule, or click **Process** to delete the schedules.

Modifying a Scheduled Segment

1. Select the **Schedules** drop down menu and then select **Global Scheduler**.
2. Select the employees you would like to modify one or more segments for by either selecting the specific employees from the list, by creating a **Filter**. Once you have selected the employees you would like to modify segment(s) for, click **Next**.
3. Select **Modify schedule segment** then click **Next**.
4. Select the **Source date range** by entering in the dates of schedules you would like to modify, by selecting them using the date picker, or use one of the preset ranges in the drop down list.
5. If you would like to only modify segments from certain job codes, create a **Job Code Filter**.
6. Check the various options for different types of segments you would like to include.
 - Include schedule segments
 - Include recurring segments
 - Include recurring override segments
 - Include segments tied to requirements
 - Include regular segments
 - Include on-call segments
 - Include off segments
 - Include unavailable segments
7. If you would like to limit the segment(s) being modified to those that took place at a certain time, check **Include segments matching**.
 - Check **Time in and time out match exact range** if you would only like to modify segments with that specific time in and time out.
 - If you would like to edit segments where the employee clocks in during certain time range, enter that range in the Time In and Time Out fields and select **Time within Range**.

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- If the scheduled segments must fall within a certain time range, enter that range and select **Time in and time out within range**.
8. Once you have configured your range, click **Next**.
 9. Select the data you would like to edit on the **Configure Segment** screen by checking the box for the relevant segment information and enter the modifying information. Once you have made your changes, click **Next**.
 10. The **Summary** screen will provide a summary of the operation you are about to perform, including the number of individuals affected and the options selected for the source and destination dates. Select **Preview** to view the copy operation without making any changes to the schedule, or click **Process** to modify schedules.

Transfer Job Code Information

If you have time scheduled that you want to create regular hours for, you can use the **Transfer Job Code Information** function to create segments in the employees' hours that are based directly off of scheduled segments within the employees' schedules.

1. Select the **Schedules** drop down menu and then select **Global Scheduler**.
2. Select the employees you would like to transfer job code information for by either selecting specific employees from the list, by using a **Filter**. Once you have selected the employees you would like include, click **Next**.
3. Select **Transfer Job Code Information** then click **Next**.
4. Select the **Source date range** by entering in the dates of schedules you would like to modify, by selecting them using the date picker, or use one of the preset ranges in the drop down list.
5. If you would like to only transfer certain job codes, create a **Job Code Filter**.
6. Check the various options for different types of segments you would like to include.
7. If you would like to limit the segment(s) being modified to those that took place at a certain time, check **Include segments matching**.

Check **Time in and time out match exact range** if you would only like to modify segments with that specific time in and time out.

If you would like to edit segments where the employee clocks in during certain time range, enter that range in the **Time in** and **Time out** fields and select **Time within Range**.

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If the scheduled segments must fall within a certain time range, enter that range and select **Time in and time out within range**.

8. If the employee is required to use a cost code, check **Use employee default cost code if required**. Once you have configured your range, click **Next**.
9. The **Summary** screen will provide a summary of the operation you are about to perform, including dates, the number of individuals selected, and the types of segments you will be transferring. Select **Preview** to view the copy operation without making any changes to the schedule, or click **Process** to transfer schedules into **Individual Hours**.

**For assistance please call Customer Support at: (325) 223-9300
Or visit us at: Support.TimeClockPlus.com**

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