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Overview

The Scheduler in TimeClock Plus allows for a seamless integration of employee shifts and timecards. It allows Supervisors to view availability reports, timecard exceptions, and prepare employee schedules efficiently. This document will show how to use the basic tools of the TimeClock Plus Schedule functions, and offer some best practices for scheduling Supervisors.

Schedules

The Schedules tab offers access to several scheduling operations and views to assist in the time management of a department and its employees.

**Employee Schedule** allows managers to add or edit schedules for an individual employee.

**Daily Schedule** displays the department schedule for the day in a graphical view.

**Weekly Schedule** allows for the schedule creation for a week at a time, adding multiple employees to varied shifts.

**Recurring Schedule** allows supervisors to utilize shift templates to build consistent schedules.

**Staffing Requirements Scheduling** enables the creation of minimums of required employees needed for certain dates and times, and monitor and fill those minimums by scheduling employees as needed.
Creating Employee Schedules

Schedules for individual employees can be created using the Schedule Tab and Employee section. This will display a list of all employees reporting to that Supervisor.

If the number of employees on the menu is too large, the list can be limited using the Employee Filter button. This allows the supervisor to restrict the list by categories such as Job Code, Classification, Location, and much more.

Individual Shift

Clicking on an employee name from the list will display the scheduling page and allow for many scheduling options for the individual using the Overrides schedule section.
Click on Add beneath one of the days on the schedule to access the Add Schedule menu.

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.

For the selected date, the time in and out for the shift is entered. The break type and job code may be changed if any edit needs made. A meal break is coded into each appropriate job code and time will automatically be deducted from the shift as necessary. An option to disable the automatic deduction is available by clicking the Extra button at the bottom of the window.
The shift will display on the day in the schedule. Multiple shifts for the same day may be added as necessary by repeating the steps using the Add button.

The shift may be duplicated across the week if needed, by right-clicking on the day with the shift added, selecting the Copy option, and then right-clicking the next desired day and selecting Paste.

Repeating this process is an easy way to fill in consistent shifts throughout a scheduling period. Similarly, once a week is completed, all days in the week can be selected and a right-click will allow for the copy and paste of the schedule of the entire week. This can also be accomplished by building a Recurring Schedule.

**Availability**

For those supervising student workers, unavailable times can be created for each employee to block time based upon the student class schedule. Add student classes in as a shift with the Segment Type as Unavailable. This will allow Availability Reports to display correct data.
Recurring Shifts

If an employee is scheduled to work a common shift, those dates and times may have been added to a Recurring Shift Template. Using the template, the employee can be scheduled for a period of time for the same shifts in simpler steps.

In the Employees Schedule page, selecting the Recurring schedules tab display the option to override the role settings and Assign the templated shift.

The schedule range will require a start date, and the end date may be left open, or added if there may be a change at the end of the period.

Selecting the option to Use recurring schedule, allows the supervisor to pick from the predefined shift templates, as found in the Recurring Schedules tab, and schedule the employee consistently throughout the chosen time frame.
Weekly Overall Schedule

The Weekly option allows for the scheduling of multiple employees in multiple shifts to create coverage for the time needed by the department or business over the course of a single week. The page lists the employees, which can be filtered as needed, and offers options of adding shifts viewed vertically by day.

Prior to creating a schedule, it is advisable to run the Availability Report for the timeframe. This will show any regularly scheduled unavailable time as well as any approved time off, listed by individual day.

![Weekly Overall Schedule](image)

Like the individual employee schedule, clicking the **Add** button below the appropriate date opens a shift window to add details. This page, however, lists all associated employees vertically to view each day with multiple employees and shifts.
A completed schedule will show the shifts and coverage in the Weekly Overall Schedule and a listing of employees covering the shifts. Changes can be made by clicking in the box to **Select Schedule** for a shift and clicking the **Manage** button, or using a right-click on the shift. This will display the shift entry pane for editing.
Daily Overall Schedule

The Daily Overall Schedule, accessed from the Schedule tab in the Daily option, provides a graphical view of the schedule, which is often easier to view to assure department coverage.

![Daily Overall Schedule graph](image)

Though from the Daily Overall Schedule, shifts cannot be added, they can be viewed and edited. A double-click on a displayed shift will open a display of the shift where the information can be updated as needed.

![Edit Schedule](image)
Time Off Requests

Employees may request time off using the Request Manager in the TimeClock Plus application. This tool allows the user to view and approve any time-off requests that have been submitted by employees. Additionally, employee time-off requests can be manually added through this feature. The Request Manager is accessed from the Tools tab, in the Requests section.

![Request Manager Interface]

The requests can be viewed by calendar or list by selecting the desired view tab at the top of the page. Buttons are included on the page to filter items by request approval status, employee, or job code.

When an employee has entered a request for time off, it will appear in the Request Manager for review. The request can be approved or declined by selecting the Pending request and clicking the Manage button, or by using a right-click and select the appropriate option from the pop-up menu.

Supervisors can also add time off on behalf of employees if needed by clicking the Add button and entering the leave data. Items in red are required.
Employees will not be able to request time for which they do not have accrued leave available. The earned accruals, however, can be viewed by supervisors in the Hours tab, using the Individual Hours tool, selecting the name from the employee menu, and choosing the Accruals tab from the selection of tabs.

This page will display columns for the total hours accrued and used, any requested and approved but not yet used hours in the **Used Forecast** column, and the final column listing the **Remaining** hours, deducting the Forecasted hours from the Accrued.