# Scheduler Essentials

TimeClock Scheduler has been redesigned from the ground up to provide intuitive tools for scheduling employee segments and tracking employee attendance. Creating and viewing schedules, schedule templates, and reports is all done through **TimeClock Scheduler**.

Logging into Scheduler

1. Navigate to the **Scheduler** page for your company.
2. If your company does not show up in the **Select Company** field, select it from the drop down list.
3. Enter in your **User ID number**, and **Password** then click on **Log On**.

Creating an Employee Schedule

1. Select **Employee** from the **Schedules** menu.
2. Click on **Add** beneath one of the days on the schedule to access the **Add Schedule** menu.
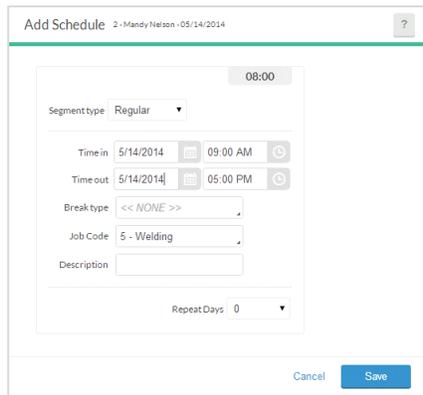
3. Select the type of segment you would like to create for the day. The different types of segments are below:
   - **Regular**: A regular segment is one that is worked normally by the employee
   - **Off**: An off segment is one that an employee will not be working, such as if the employee has school 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.
4. Create a **Date** and **Time in** as well as a **Date** and **Time out** for the segment.

Scheduler Essentials

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5. If this segment ends in a break, select the **Break** type from the dropdown menu.
6. Select the **Job Code** this segment will be worked under. Enter any notes about the shift in the **Description** field.
7. 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 **Repeat 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 **Repeat Days** field.
8. Click **Save**.
9. To delete a segment, select it then select **Delete** from the **Manage** menu. You can also right click on the segment and select **Delete**.
10. To copy a segment, select it then select **Copy** from the **Manage** menu. You can also right click on the segment and select **Copy**.
11. 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**.

Scheduler Essentials

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. 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. On the **Manage Recurring Schedule** feature, click on **Add** in the upper right corner.
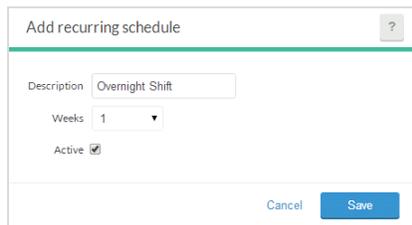
3. Enter a **Description** for the recurring schedule. This is how users will select the recurring schedule from a list to assign to employees or edit.
4. Select how many **Weeks** the recurring schedule will consist of. This determines how many weeks the recurring schedule will consist of before repeating. For example, a two week recurring schedule assigned on February 1st will repeat two weeks later, on February 15th.
5. 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.
6. 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.
2. Select an **Employee** from the list, then select the **Recurring** tab.
3. Click on **Assign**.
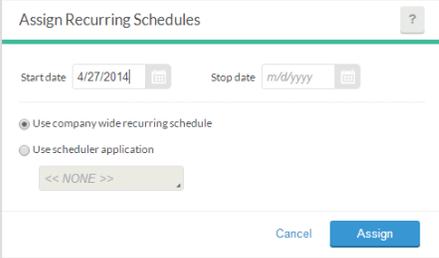
4. Enter the **Start date** for when you would like the schedule to take effect. If you'd like the schedule to stop being applied to this employee at a certain date, enter in a **Stop date** as well.
5. Select the **Use scheduler application** radio button, select a recurring schedule from the dropdown menu, and click **Assign**. Click **Save** to save the contents of the **Hour** tab.

Using Global Scheduler
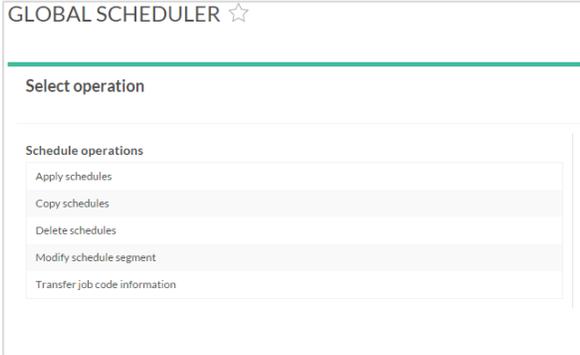
The **Global Scheduler** feature allows users to add or modify scheduled segments for multiple employees at once. **Global Scheduler** provides users with the tools to:

- **Apply schedules** to several employees across multiple days.
- **Copy scheduled segments** from one date range to another
- **Delete all scheduled segments** from a selected date range
- **Modify all scheduled segments** within a selected date range
- **Transfer scheduled segments** from selected job codes into **TimeClock Manager** as hours worked.