Viewing and Editing Employee Schedules

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Once you have set up Daily Shifts, you need to assign them to your employees.

A **Daily Shift** is set of hours an employee is scheduled to work. For example, a dispensary may have 3 hour shifts for its budtenders on Monday-Friday and 2 hour shifts on weekends. In this situation, you could define the two types of shifts and then assign them to employees who are available to work those shifts.

START HERE

Viewing Team Schedules

1. Start with an overview of the entire team's schedule: from the main menu, search for *Weekly Schedule* or *Daily Schedule* (or navigate to **Teams>Schedule>Team Schedule View>Weekly/Daily Schedule>Daily Schedule** or **Weekly Schedule**). These pages give you an overview of the team's schedule.

Modifying Employee's Schedules On-the-Fly

2. From the Team Schedule views (above), you can modify shifts on the fly. Just click on a shift to adjust the hours.

Availability/Preferences

Available: -   Prefer: -

Shift(s)

Shift Type
9AM - 5PM ▼

Start Date *
Tue

From *
09:00   am ⊙

To *
05:00   pm ⊙

Meal Adjustment
▼

If you have assigned a Schedule Profile to the employee, note that this type of edit does not update the Work Schedule Profile and is a one-off change. This is a good way, however, to change an employee's schedule midweek when there are slight variations to a regular set schedule.

If you change an employee's schedule, either by editing it or associating a different Work Profile or Daily Shift, be aware that if the profile or shift has an Effective date, those changes will apply from that date forward. If they do not, they will apply to the employee's schedule going forward from today's date. This means that the employee can look at his or her schedule and still see what it used to be by changing the calendar dates.

Viewing the Employee Schedule View

Once you have linked an employee to a schedule, you can see what the employees see when they check their schedule. This is a good way to double-check that your settings and edits affect the employee's schedule as needed.

3. Go to the employee record (from the Team Schedule page, you can click the Employee Information icon next to the employee and then click the **Employee Time** tab). The time slots set in the daily shifts you set up will show in the **Schedules** area.

4. Shown below is an example of how the employee would check his or her schedule.

Reviewing Timecard Exceptions

When the employee punches in and out outside of their scheduled shift, exceptions will show on their timesheet (if you have configured these).

5. There are several ways to review whether an employee's actual hours matched the set schedule. The simplest is from the employee's timesheet (available from the Quick Links 🔗 menu).

To compare the employee's time entries to their assigned schedule, you can also use the **Calc. Detail** tab.