

# 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.

**SCHEDULE**

Weekly Schedule

These employees have a work schedule assigned to their profile. What constitutes an exception on their timesheet and the days and hours when they can schedule shifts and clock in/out come from the Daily Rules and Work Schedule

Profiles defined by your administrator in Company Settings>Shift Schedul...

REFRESH ADD SCHEDULES REPLACE SCHEDULES

Rows On Page 10 Showing: 1-10 of 21

Employee Filter: All Employees Date Range: Calendar Range This Week (09/16/2019 - 09/22/2019) Set a date range to see the schedule on specific days

Extra Settings: Show Time Off Show Cost Center Name Show Cost Center Path Highlight Last Opened Schedule Group by Scheduled Cost Center Show Headcount

Employee Id	First Name	Last Name	Employee EIN	Employee Status	Schedule Mon Sep 16	Schedule Tue Sep 17	Schedule Wed Sep 18
00122	Katie	Waters	D&D	Active			
00126	Harold	Larkin	D&D	Active			
00127	Lauren	Dubois	D&D	Active	9AM - 5PM	Grow Daily Schedule	9AM - 5PM
00128	Kenton	Clarkson	D&D	Active		9AM - 5PM	Grow Daily Schedule
00130	Ashley	Nelson	D&D	Active			
00131	Tomas	Turner	D&D	Active			
00132	Cathy	Jones	D&D	Active			
00133	Michael	Donaldson	D&D	Active			
00134	Nicholas	Reagan	D&D	Active			
00135	Jennifer	Jones	D&D	Active			

Page Total 8.00 17.00 17.00 9.00

You can edit each schedule entry manually in these fields, or to apply pre-defined schedules from your administrator, click **ADD SCHEDULES** or **REPLACE SCHEDULES**.

### 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:  Start Date\*:

From\*:  am  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.

All Page	Employee id	First Name	Last Name	Employee EIN	Employee Status	Schedule Mon Sep 16	Schedule Tue Sep 17	Schedule Wed Sep 18	S	T
	starts with	starts with	starts with	starts with	!= Terminated	=	=	=	=	=
<input type="checkbox"/>	00122	Katie	Waters	D&D	Active					
<input type="checkbox"/>	00126	Harold	Larkin	D&D	Active					
<input type="checkbox"/>	00127	Lauren	Dubois	D&D	Active	9AM - 5PM	Grow Daily Schedule	9AM - 5PM	9AM - 5PM	Grow Daily Schedule
<input type="checkbox"/>	00128	Kenton	Clarkson	D&D	Active		9AM - 5PM	Grow Daily Schedule		
<input type="checkbox"/>	00130	Ashley	Nelson	D&D	Active					
<input type="checkbox"/>	00131	Tyler	Turner	D&D	Active					

Click the **Employee Information** icon to work with the employee profile.

**Edit Employee** (Employee: Kenton Clarkson (Default) (00128))

Employee Setup | **Employee Time** | Employee Payroll | Employee HR

Account Information | Personal Information | Managers

Manager 1\*: Test Admin (Default) | Manager 2:

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

The screenshot displays the 'würk MY SCHEDULE' interface. On the left is a dark sidebar with a search bar and a 'MY INFO' section containing links for 'My Information', 'My Time', 'My Schedule', 'My Benefits', 'My HR', 'My Pay', and 'My Company'. The 'My Schedule' link is highlighted with a purple box. The main content area shows a calendar for September 2019. The dates 16 and 17 are highlighted with a purple box and labeled 'Scheduled work days'. A purple arrow points from the calendar to the right-hand panel, which is titled 'MY SCHEDULE' and shows a detailed view for 'Sep 16 MON' and 'Sep 17 TUE'. Each day entry includes 'Shift: 08:00a - 06:00p', 'Working Total: 10.00 hrs', and 'Start Date'. Below each day entry is a 'DETAILS' link. A purple arrow points from the calendar to the 'Sep 17 TUE' entry, with the text 'Navigate to see other days' next to it. A purple arrow points from the 'Sep 16 MON' entry to the text 'Company holiday' below the calendar.

## 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).

