Viewing and Editing Employee Schedules

Last Modified on 02/09/2022 2:06 pm EST

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

 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.

3B 🔫		×	wü	irk					SCHED	DULE				0
Search	م *	← We		ched		pro the in/o	ofile. What consti a days and hours out come from th	tutes an excep when they car le Daily Rules	hedule assigned t tion on their times n schedule shifts a and Work Schedu ator in Company	sheet and and clock		1	PLACE SCHEDULES) Export
My Team	>		ee Filter:							🛏 Set a date rar	0		c days	_
) Time	>	Extra Se	ettings:	Sho	w Time (Off Show Cost Cen Employee Id	ter Name 🔲 Show Cost	t Center Path 🗹 Hig Last Name	nlight Last Opened Schedule Employee EIN	e Group by Scheduled (Employee Status	Cost Center Show He Schedule Mon Sep 16	adcount Schedule Tue Sep 17	Schedule Wed Sep 18	-
Accruals	>					starts with 🗸	starts with 🗸	starts with	starts with	1= v	= v	= v	= v	
Schedule Basic Scheduling	~ ,		E	в	P	00122	Katie	Waters	D&D	or to apply pre	ach schedule ent -defined schedule IEDULES or RE I	es from your adn	ninistrator,	
Team Schedule View	$\overline{}$			Ø	P	00126	Harold	Larkin	D&D	Active		L		
Overview	,		E	8	P>	00127	Lauren	Dubois	D&D	Active	9AM - 5PM	Grow Daily Schedule	9AM - 5PM	G
Weekly/Daily Schedule	$\overline{}$		1	ð	₽¥.	00128	Kenton	Clarkson	D&D	Active		9AM - 5PM	Grow Daily Schedule	
Daily Schedule			E	8	P.	00130	Ashley	Nelson	D&D	Active				
Weekly Schedule	1			Ø	P	00131	Tomas	Turner	D&D	Active				
<u> </u>	,		R	Ø	P	00132	Cathy	Jones	D&D	Active				
Schedule Entries			R	8		00133	Michael	Donaldson	D&D	Active				
Reports	>			ð	P	00134	Nicholas	Reagan	D&D	Active				
Benefits	>		E	Ø	P	00135	Jennifer	Jones	D&D	Active				
HR	>	Page Tot	tal				1							
Learning	>										8.00	17.00	17.00	9.0
Recruitment	> .													
🖈 Home 🔊 Dash	board	4												•

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.

Availabili	ty/Prefere	ences			
Available:				Prefer:	
Shift(s)					
Shift Type				Start Date *	
9AM - 5PM			Ŧ	Tue	
From *		To *			
09:00	am (2)	05:00	pm 🕗		
Meal Adjustr	ment				
			~]	

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	Si Ti
	starts with 🗸	starts with 🗸	starts with 🗸	starts with 🗸	!= V Terminated		= ~		-
E 8 D	00122	Katie	Waters	 D&D	Active				
lick the Employee formation icon to v	vork	Harold	Larkin	D&D	Active				
ith the employee pro	ofile ₂₇	Lauren	Dubois	D&D	Active	9AM - 5PM	Grow Daily Schedule	9AM - 5PM	Gro
- 🖪 🖉 🖻	00128	Kenton	Clarkson	D&D	Active		9AM - 5PM	Grow Daily Schedule	
□	00130	Ashley	Nelson	D&D	Active				
Edit Employee Employee: Kenton Clarkson (D Employee Setup	efault) (00128) Employee Time	Employee Payroll	Employee HR			SAVE	ADD NOTE UT	TILITIES DOWNLO/	AD PDF
Account Information	n			1	Managers				
Personal Informatio	n			1	Manager 1* Test Admin (D Manager 2	efault)	22 ×		

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

кс - 🗶	× würk MY SCHEDULE	P
Search Q	← Schedule Navigate to see	
	tother days	
🛓 My Information 🔹 💙	SUN MON TUE WED THU FRI SAT	^
② My Time >	1 2 3 4 5 6 7 Shift Working Total Start Date 08:00a - 06:00p 10.00 hrs Mon	
My Schedule	8 9 10 11 12 13 14 Scheduled V DETAILS	
Schedule	15 16 17 18 19 Work days Sep 17 TUE	
ৰু My Benefits >	22 23 24 25 26 27 28 Shift Working Total Start Date 29 30 1 2 3 4 5 08:00a - 06:00p 10:00 hrs Tue	
📲 My Pay 🔰	Company	- 61
■ My Company >	holiday Sep 18 WED	
	Not Scheduled	
	Sep 19 THU	
	Not Scheduled	
	Sep 20 FRI	
	Not Scheduled	
n Home n Dashboard	Sep 21 SAT	*

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 *or* menu).

← т	Timeshee	t Edit					SAVE	UNDO	APPROVE	DOCS	UTILITIES	SHOW MAP	INFO
	yee: ∂ Harok tra Pay & Co										em exc sch	nen you review ployee's times ceptions to the neduler are hlighted here	heet,
	Date			Department	Time Off	In Date	From		то	Raw Total	Calc. Total	Schedule	Exceptions
C,	SUN 8	0	×	CannaLive Corporate/West Hollywood Warehouse/Trimmer - 280E 🗸	~ 🖸	Sun 8 🗸					0.00	N/A	
									Day Total:	0.00	0.00		
a	MON 9	0	×	CannaLive/Wabash Ave/Joint Rolling - 280E 🧹 🔣	~ 🖸	Mon 9 🧹					0.00	08:00a - 04:20p	AB
									Day Total:	0.00	0.00		
G	TUE 10	0	×	CannaLive/Wabash Ave/Joint Rolling - 280E 🗸 🔣	~ 🖸	Tue 10 🧹					0.00	08:00a - 04:20p	AB
									Day Total:	0.00	0.00		
G	WED 11	0	×	CannaLive/Wabash Ave/Joint Rolling - 280E 🧹 🔣	~ 🖸	Wed 11 🧹					0.00	08:00a - 04:20p	AB
									Day Total:	0.00	0.00		
C,	THU 12	0	×	CannaLive Corporate/West Hollywood Warehouse/Grow Technician - 280E 🧹	~ 🖸	Thu 12 🗸					0.00	07:00a - 02:00p	AB
									Day Total:	0.00	0.00		
C7	FRI 13	0	×	CannaLive/Wabash Ave/Budtender - Non 280E 🗸 🔀	~ 🖸	Fri 13 🗸					0.00	08:00a - 05:00p	AB
									Day Total:	0.00	0.00		
Cļ	SAT 14	0	×	CannaLive/Wabash Ave/Joint Rolling - 280E 🧹 🔀	~ 🖸	Sat 14 🖌					0.00	08:00a - 04:20p	AB
									Day Total:	0.00	0.00		
C,	SUN 15		×	CannaLive Corporate/West Hollywood Warehouse/Trimmer - 280E 🗸	~ 🖸	Sun 15 🗸	e 7:36a	e	11:208	3.73	3.73	08:00a - 04:20p	
		0	×	CannaLive Corporate/West Hollywood Warehouse/Trimmer - 280E 🗸	~ 🖸	Sun 15 🗸	e 12:13p	e	3:08p	2.92	2.92		
									Day Total:	6.65	6.65		
C,	MON 16	0	×	CannaLive Corporate/West Hollywood Warehouse/Trimmer - 280E 🗸	~ Eq.	Mon 16 🗸	e 7:45a	e	4:08p	8.38	8.38	N/A	
									Day Total:	8.38	8.38		
4	TUE 17	0	×	CannaLive Corporate/West Hollywood Warehouse/Trimmer - 280E 🗸	~ 🖪	Tue 17 🧹					0.00	N/A	

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

← Timesh mployee:∂ Tes		er	up with the err ntries, use the	Calc Detail tab y 29, 2020 - March 13, 20))20 >			SAVE UNDO	SUBMIT FOR APPROV	AL APPROV	VE DOCS U	ITILITIES SHOW MAP	INFO
	Date		Raw From	Raw To		Raw Total	Schedule	Exceptions	Calc. Total	Weekdy	Pay Period	Rate Table 1 Rate	
											Calc. Running Total		
Diff. TS	Mon 02/24/2020					8.00	N/A	Lunch	8.00	8.00		18.00	
Diff. TS	Tue 02/25/2020					8.00	N/A	Lunch	8.00	16.00		18.00	
Diff. TS	Wed 02/26/2020					8.00	N/A	Lunch	8.00	24.00		18.00	
Diff. TS	Thu 02/27/2020	- F				8.00	N/A	Lunch	8.00	32.00		18.00	
Diff. TS	Fri 02/28/2020					8.00	N/A	Lunch	8.00	40.00		18.00	
	Sat 02/29/2020												
	Sun 03/01/2020								_				
	Mon 03/02/2020						6am-2:30pm	Absent					
	Tue 03/03/2020						6am-2:30pm	Absent					
	Wed 03/04/2020						6am-2:30pm	Absent					
	Thu 03/05/2020						6am-2:30pm	Absent					
	Fri 03/06/2020						6am-2:30pm	Absent					
	Sat 03/07/2020												
	Sun 03/08/2020												
	Mon 03/09/2020						6am-2:30pm	Absent					
	Tue 03/10/2020						6am-2:30pm	Absent					
	Wed 03/11/2020						6am-2:30pm	Absent					
	Thu 03/12/2020						6am-2:30pm		_				
	Fri 03/13/2020						6am-2:30pm						