# Table of Contents

## Foreword

### Part I Getting Started

1. Quick Start for Scheduling ........................................................................................................... 6
   - Step 1: Initialize the current week .......................................................................................... 7
   - Step 2: Make adjustments to the current week ....................................................................... 9
   - Step 3: Post the schedule ........................................................................................................ 10

## Part II Overview

1. Logging in .................................................................................................................................. 11
2. Browser Compatibility ................................................................................................................. 13
3. Understanding time blocks ...................................................................................................... 14
4. Double scheduling .................................................................................................................... 16

## Part III Manager Area

1. Main Work Area for scheduling ................................................................................................. 18
2. Setup Menu ................................................................................................................................ 20
   - Users Setup ............................................................................................................................ 21
   - Categories ............................................................................................................................... 23
     - Understanding Categories ................................................................................................. 23
     - Categories Setup .................................................................................................................. 24
   - Departments .......................................................................................................................... 27
   - Areas ........................................................................................................................................ 31
   - Tasks ....................................................................................................................................... 34
   - Time of day ............................................................................................................................ 37
   - Time off ................................................................................................................................... 40
   - Time Off Accounts ................................................................................................................... 43
   - User Defined Categories ........................................................................................................ 45
   - General Options ....................................................................................................................... 48
   - Template Setup ...................................................................................................................... 56
   - Rules ....................................................................................................................................... 58
   - Clock IPs ................................................................................................................................. 61
3. Managing users .......................................................................................................................... 62
   - User account .......................................................................................................................... 63
   - Modifying many users at once ............................................................................................... 76
   - Modifying qualifications for many users .............................................................................. 77
4. Scheduling .................................................................................................................................. 85
   - How to create the schedule .................................................................................................... 85
     - Setting up the recurring schedule ...................................................................................... 86
     - Initializing the current schedule ......................................................................................... 86
     - Modifying the current schedule ......................................................................................... 88
     - Posting the current schedule ............................................................................................. 89
   - Templates .................................................................................................................................. 91
5. Attendance .................................................................................................................................. 94
   - Initializing from the schedule .............................................................................................. 94

© 2020 Program Works, Inc.
Using the time clock .......................................................................................................................... 96
Modifying the attendance .................................................................................................................... 96
Exporting to Quickbooks ..................................................................................................................... 96
Finalize Attendance ............................................................................................................................... 98

6 Availability ...................................................................................................................................... 99
Recurring Availability .......................................................................................................................... 99
Current Availability .............................................................................................................................. 100

7 Using the time block editors ........................................................................................................... 104
Views .................................................................................................................................................... 104
Cross-sections...................................................................................................................................... 105
Sorting .................................................................................................................................................. 107
Navigating through time........................................................................................................................ 109
View range.......................................................................................................................................... 109
Show Conflicts/ Show all Main Groups............................................................................................... 111
Color schemes..................................................................................................................................... 114
Other View Settings.............................................................................................................................. 115

Manipulating time blocks .................................................................................................................. 117
Properties of a time block..................................................................................................................... 117
Simple click to edit a time block............................................................................................................ 119
Entering dates and times......................................................................................................................... 120
Adding time blocks................................................................................................................................. 121
Adding - Single Employee, Single Day............................................................................................... 121
Adding - Single Employee, Multiple Days......................................................................................... 121
Adding - Multiple Employees, Multiple Days.................................................................................... 123
Adding - Multiple Employees, Single Day......................................................................................... 125
Adding - Open (unassigned) time blocks............................................................................................ 126
Selecting time blocks............................................................................................................................. 127
Selecting and unselecting individual time blocks............................................................................... 127
Selecting and unselecting a day............................................................................................................ 128
Selecting and unselecting a group.......................................................................................................... 130
Selecting all time blocks in view.......................................................................................................... 132
Unselecting all time blocks.................................................................................................................... 133
Editing time blocks............................................................................................................................... 133
Removing time blocks........................................................................................................................... 135
Copying time blocks.............................................................................................................................. 137
Moving time blocks................................................................................................................................. 140
Assigning employees............................................................................................................................. 143
Drag-and-Drop Employees................................................................................................................. 145
Changing properties of many time blocks at once.............................................................................. 145
Changing Selection Mode..................................................................................................................... 148
Instant Schedule Alert Button.............................................................................................................. 149
Suppress Double Scheduling................................................................................................................ 149
Undo .................................................................................................................................................... 150

Shift Information Box ........................................................................................................................ 151
Time block information......................................................................................................................... 153
Employee information........................................................................................................................... 153
Get best fit............................................................................................................................................. 154
Time block history................................................................................................................................. 156
Check double scheduling.................................................................................................................... 156

8 Automation ...................................................................................................................................... 157
Setting up Rules .................................................................................................................................... 158
Eliminating rules................................................................................................................................... 162
Max hours rule...................................................................................................................................... 163
Daily hours .......................................................... 164
Qualification rule .................................................. 166
Schedule only when declared available .................. 169
Do not schedule when declared unavailable ............ 172
Separation rule ....................................................... 174
Max days in a row ............................................... 175
Separation rule if different locations ...................... 176
Only Schedule Bidders .......................................... 178
Preference rules ................................................... 179
Factor of Importance ............................................. 180
Grades ................................................................. 180
Employee preference ............................................ 183
Least hours so far ............................................... 185
Least hours so far by category .............................. 186
Employee rank (low est) ....................................... 188
Employee rank (highest) ....................................... 189
Employee rank by category .................................. 191
Employees by lowest pay rate ............................... 194
Employees by lowest pay rate for the category item .. 196
Custom rules ....................................................... 199
Using rules to restrict swap and sign up .................. 199
Auto-schedule feature ........................................ 201
Show conflicts feature ......................................... 203
Best Fit feature .................................................... 203

9 Scheduling time off .......................................... 205
Setting up time off features .................................. 206
Approving and declining requests for time off ......... 207
Manually scheduling time off ............................... 211
Modify time off types ......................................... 213
Time Off Cancellation Requests ........................... 214
Time Off Accounts .............................................. 216
Setting up time off requests ................................. 217
Time off ledgers .................................................. 219
Balance Transfer ............................................... 222

10 Other communication with employees .............. 223
Creating help for Employees ................................. 223
Using the billboard .............................................. 224
Emailing employees ............................................. 225

11 Reports ........................................................ 227
User Report ........................................................ 228
Phone Number Report ....................................... 229
Time Off Report ................................................ 230
Who’s On Report ............................................... 232
Hours Report ...................................................... 233
Cost Report ......................................................... 235
Customizable Reports ......................................... 236
Custom Time Block Report ................................. 237
Custom User Report .......................................... 239
Custom Category Item Report .............................. 241

12 Printing and Exporting ................................. 242

13 Payroll Export ............................................. 245

14 Exporting Raw Data .................................... 247
Part IV Employee Area 249
Part V FAQ 251
1 Getting Started

Welcome to WorkSchedule.Net Version 8! Now faster, easier to use, and more powerful!

WorkSchedule.Net is an intelligent, fast, feature-rich online employee scheduling solution. The system has now expanded to include attendance capabilities, including an online time sheet and time clock. Employees can check their schedules 24 hours a day, 7 days a week.

To quickly start creating your schedule, click here.

To understand the main building block of your schedule, the time block, click here.

Within the WorkSchedule.Net system, there are two major areas: The employee area and the manager area. Managers control what employees can see and do in their accounts, and therefore, it's highly advisable to review the employee's area section of this manual to see how the options that managers set will affect their employees' accounts.

1.1 Quick Start for Scheduling

This topic is designed to get you started scheduling quickly with the most basic features. We have intentionally left out many of the advanced features to get you up and running right away. Also for simplicity we have chosen to show scheduling only one week at a time, but you can schedule several weeks at once using these same basic steps.

**IT'S ALL ABOUT THE TIME BLOCKS!**

Before you get started, please take a quick moment to understand what a time block is in WorkSchedule.Net.

**You build a schedule by adding time blocks.** Generally, a time block is a block of time that a single employee, who may or may not be specified, is scheduled to work. Each time block also specifies the start and end times of the shift, and the department to which the time block belongs. In addition, a time block normally also specifies the task being performed, the general time of day when the work will be done (day, evening, overnight, etc.), and can hold notes as well. All of these details are called the properties of the time block. Some of these properties may or may not be present, depending on what options you chose in your setup wizard. In cases where several employees work simultaneously, you would add a time block for each of those employees. This is not as much work as it might seem at first, since WorkSchedule.Net gives you many quick and easy ways to add many time blocks all at once in different ways, so you can get your schedule entered in no time.

There are three major steps to create and post your first week's schedule in WorkSchedule.Net:

**STEP 1: INITIALIZE YOUR CURRENT WEEK**

Go to the current schedule and click the icon. This starts you with your typical week. From the current schedule, you can click a button, and import or "pull in" all the time blocks or "shifts" into the current week in one simple click. This defaults the current week to what is typical. In the next step, you can make any necessary changes to the current week. This will not pull in any time blocks if you do not have any time blocks in your "typical" or recurring schedule. If you do not
use a recurring schedule, you should skip this step.

How to initialize your current week.

**STEP 2: VERIFY AND CUSTOMIZE YOUR CURRENT WEEK’S SCHEDULE**

After initializing your current week, you can do any necessary changes to your shifts. For example, if you started your schedule with open "unassigned" shifts, you can assign employees to your shifts. You may also want to add new shifts, copy shifts from one employee to another, or add information "like a specific task" to many shifts at the same time.

How to manipulate time blocks.

**STEP 3: POST YOUR SCHEDULE**

Posting your schedule will allow your employees to view it online once they login to their WorkSchedule.Net account. Upon posting your schedule employees receive a notification that their schedule is posted if you entered their emails.

How to post the schedule.

Congratulations! You have scheduled your first week. Now you can start exploring all the powerful features of WorkSchedule.Net.

**Related Topics**

- What is a time block
- Get familiar with the workarea
- Setup multiple locations or tasks "categories"
- Update/Add employee accounts
- Change general account settings

**1.1.1 Step 1: Initialize the current week**

**INITIALIZE THE CURRENT WEEK**

After you have created your recurring schedule, the next step is to initialize the current week. If you do not use a recurring schedule or do not have a typical schedule, you may skip to step 2.

**CURRENT SCHEDULE VS. RECURRING SCHEDULE**

At this point it is important to understand the difference between the current schedule and the recurring schedule. Up until now, we have been defining the "typical" week, which is what the recurring schedule contains. Now we are about to enter the **current schedule**. Unlike the recurring schedule which is only a template, the **current schedule holds the actual schedule that**
employees can view online. The current schedule is the heart of the scheduling system, where schedules are adjusted for specific weeks/months/dates, posted, and viewed by employees. It is the main work area of the system where most managers do the majority of their day to day scheduling. You will notice that the current schedule shows actual dates at the top of each day column, as opposed to the days of the week shown in the recurring schedule.

Now let's start scheduling the current week.

1. OPEN THE CURRENT SCHEDULE

On the far left hand side of the screen, click on Current Schedule in the Time Block Editors menu.

The current schedule will open with the Starting Day defaulting to the current week date.

2. CHOOSE MENU OPTION TO INITIALIZE THE CURRENT WEEK

Click on Edit | Initialize this view with time blocks from Recurring Schedule.
3. CONFIRM

Confirm that you want to initialize from the Recurring Schedule.

![Initialize Schedule]

You are about to copy the time blocks from your recurring schedule into this week of the current schedule. Are you sure you want to do this?

Yes  Cancel

THE RECURRING SCHEDULE HAS BEEN COPIED INTO THE CURRENT WEEK

Now each day in your view of the Current Schedule has been populated with copies of the time blocks from each corresponding day of your Recurring Schedule.

![Current Schedule]

What's Next?

(1) I want to modify some time blocks before posting my schedule for employees to view
(2) I want to post my schedule.

1.1.2 Step 2: Make adjustments to the current week

MANY WAYS TO MAKE ADJUSTMENTS

Still in the current schedule after initializing the week, you can now make any necessary adjustments. You can automatically assign any open time blocks you may have in the week, or you can manually assign them without any hints from WorkSchedule.Net. You can add, remove, or change time blocks. You can copy time blocks from day to day or group to group. See Using the time block editors, and especially it's subtopic, Manipulating time blocks for all the ways you can
ASSIGNING EMPLOYEES TO TIME BLOCKS

If you have created your recurring schedule with open time blocks, this is the step where you can instruct WorkSchedule.Net to assign employees to these time blocks before you post your schedule. Optionally you can manually assign employees, or you can even do some of both.

How do you want to assign employees?

1. **Manually**: To assign employees manually you can either select the time blocks and then click on the desired employee in the far left menu Users drill down (see Assigning employees). Optionally you can use the edit functions, or change properties of many time blocks at once.

2. **Manual Assist (with hints)**: There are two manual assist functions. The first one allows you to simply click on a time block, and see your employee choices in a pop-up list, which orders them for you, best to worst, and shows you which ones would violate your rules. You can click on an employee in the list to instantly assign that employee to the time block. This is called the Best Fit feature. WorkSchedule.Net can also detect any violations of your rules in the time blocks that you have already assigned using the Show Conflicts mode.

3. **Automatic**: With the auto-scheduling feature, WorkSchedule.Net automatically assigns the open time blocks you select to the best employee according to your rules.

What's Next?

After you finish all your modifications, go to step # 3: Post the schedule

1.1.3 Step 3: Post the schedule

POSTING THE SCHEDULE FOR THE FIRST TIME

Once you have finished adjusting your week (STEP 2), you are ready to post the week's schedule so that your employees can view it by logging into their accounts (see below). This is a very easy two click process. Posting the week makes it "official", but does not limit you from changing it after it's been posted. The posted portion of the schedule is a date range that starts on the current date, and continues forward to the post date. The employees can only view the posted portion of the schedule. Anything before the current date is history, and anything after the post date is still considered "under construction".

To post the schedule, you must simply tell WorkSchedule.Net what the post date is. There is no way for you to specify the start date of the posted schedule, since WorkSchedule.Net uses the current date. You do this by clicking on the date at the top of the day column of the date you want the schedule posted through, and choosing the Post the schedule thru this day from the pop-up menu. The link below gives more detail on posting.

How to post your schedule

GIVING YOUR EMPLOYEES ACCESS TO VIEW THEIR SCHEDULES AND ACCOUNTS
Your employees will need their usernames and passwords to login to their accounts. You can view or modify this information in the users account section. The user accounts that were automatically created for you in the setup wizard will have user IDs based on the first and last names, and random numeric passwords. You should also provide the login link you were given in your welcome email from WorkSchedule.Net to your employees. It may be helpful to provide them with their company ID too, also located in the welcome email from WorkSchedule.Net.

More information about logging in can be found here.

2 Overview

Logging In

Browser Compatibility

Understanding Time Blocks

Double Scheduling

2.1 Logging in

LOGIN PAGE

This generic login page is available directly from www.workschedule.net. Usually it is better to use the company login page, but this will work if you or one of your employees does not have the link to the company login page handy.
This page takes:

Company ID: The unique number for your company that was supplied to you on creation.
User ID: The unique login ID that you have created or was given to you by your employer.
Password: The password to your account that you have created or was given to you by your employer.

**COMPANY LOGIN PAGE**

You can use the link provided to you in the welcome email to login to your company account or through your companies unique subdomain. Since the company ID is embedded in that link, WorkSchedule.Net does not ask you for a company ID from this page, as it is already aware of which company account you are attempting to login to.
2.2 Browser Compatibility

**BROWSER COMPATIBILITY FOR MANAGER AREA**

WorkSchedule.Net is compatible with most modern web browsers. We support the latest version of Google Chrome, Microsoft Internet Explorer, Mozilla Firefox, Safari, and Opera.

However we do not support Internet Explorer versions below 9 and we do not support fixed day headers in the time block editor (They will move up and out of view when scrolling down vertically on the schedule).

**BROWSER COMPATIBILITY FOR EMPLOYEE AREA**

The employee area, because it is simpler, is more compatible with a wide range of browsers. We officially support all major browsers.
2.3 Understanding time blocks

**THE BUILDING BLOCKS OF YOUR SCHEDULE ARE TIME BLOCKS**

A time block is the smallest unit of your schedule. By adding and manipulating time blocks, you build a schedule. A single time block consists of a specific start date, a start time, and an end time. Each time block represents a period of time that **one employee** is scheduled to do something. A time block can have at most one employee assigned to it, and can never be greater than 24 hours.

Time blocks can cross midnight thus bleeding over into the next day, but will always show in the day column of the day on which they start. Time blocks can be viewed, added, deleted, or modified in the time block editors.

Each white box in the image below represent a time block in the current schedule:

---

**ATTACHING TIME BLOCKS TO CATEGORY ITEMS**

By attaching time blocks to different category items, such as department, area, task, etc, WorkSchedule.Net allows you to group, sort, and filter your view by any of these criteria. See Categories for more information.

Here’s a closer view of a time block:
For more information on how to add or edit category items on the time block, click here.

**OPEN TIME BLOCKS**

An open time block is a time block that has no employee assigned to it. Open time blocks can be combined to indicate to WorkSchedule.Net the needed coverage. Ultimately, under normal circumstances, open time blocks will eventually be assigned to employees, manually, using the auto-scheduler, or by employee sign up if that feature is allowed.
2.4 Double scheduling

WorkSchedule.Net PROTECTS YOU FROM DOUBLE SCHEDULING CONFLICTS

A double scheduling error is defined as the condition of two or more time blocks that have the same employee and have any period of overlap time between them.

This is generally not permitted. However, WorkSchedule.Net will allow you to make the error, but will
give you the above glaring warning at the top until you fix it. The conflicting time blocks are outlined in red, so you can see them easily to make the correction. You may allow double scheduling and suppress the warning for certain shifts. For more information on this, see Suppress Double Scheduling.

3 Manager Area

The conflicting time blocks are stated at the top of the page, listing the name of the Shift ID, employee name, date, and time. You can also use the time block pop-up info box to get a list of all time block, if any, that conflict with the time block you are looking at. For more information on this, see Check double scheduling.

The manager area is the control panel for those in charge of scheduling.

The left menu gives you access to all the different sections of your manager area. This menu stays with you as you navigate the manager area, so you can easily jump from one place to any other.
ALERTS

At the top of your manager home page, WorkSchedule.Net informs you of any alerts or action you might need to take. Some alerts are:

- Your free trial is expiring soon.
- You have pending time off requests
- You have not posted the schedule

3.1 Main Work Area for scheduling

MAIN WORK AREA

Managers do most of the day to day scheduling tasks in the Current Schedule screen. Here's an explanation for the work area with all its features and functionalities.

<table>
<thead>
<tr>
<th>Menu Bar</th>
<th>Basic Functionalities</th>
</tr>
</thead>
<tbody>
<tr>
<td>File Menu</td>
<td>Allows you to print the schedule.</td>
</tr>
<tr>
<td>Edit Menu</td>
<td>Allows you to perform manipulations of time blocks on the screen (for example, delete, add, change properties..etc)</td>
</tr>
<tr>
<td>Select Menu</td>
<td>Allows you to select or clear time blocks</td>
</tr>
<tr>
<td>View Menu</td>
<td>Allows you to change the view (weekly, monthly, or daily). It also allows you to view or hide the cross-section and the sort bars, change color schemes, show or hide conflicts..etc.</td>
</tr>
<tr>
<td>Help Menu</td>
<td>Links you to the help files</td>
</tr>
</tbody>
</table>

CROSS-SECTION BAR

The cross section bar allows you to filter your displayed results based on your selections in the available drop down menus. This bar displays menus for your categories, and accordingly, you can
choose your options. For example, if you want to display the time blocks for employee A only, you go to the Employee drop down menu and you choose employee A, and then click **Update**. The screen then will be refreshed, and only time blocks assigned to employee A will be displayed. Similarly, you can choose any category item.

To hide or show the cross-section bar, use the View Menu.

**SORT BAR**

The sort bar allows you to sort your time blocks according to your categories. Like the cross-section bar, you can choose your options from the drop-down menus, and then click Update to change the view on your screen accordingly.

To hide or show the sort bar, use the View Menu.

**ICONS**

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
<th>Menu Alternative</th>
</tr>
</thead>
<tbody>
<tr>
<td>🔄</td>
<td>Fill this week with time blocks from recurring schedule</td>
<td>Edit Menu</td>
</tr>
<tr>
<td>🔄</td>
<td>Add time blocks</td>
<td>Edit Menu</td>
</tr>
<tr>
<td>🔄</td>
<td>Add open time blocks</td>
<td>Edit Menu</td>
</tr>
<tr>
<td>🔄</td>
<td>Remove selected time blocks</td>
<td>Edit Menu</td>
</tr>
<tr>
<td>🔄</td>
<td>Edit selected time blocks</td>
<td>Edit Menu</td>
</tr>
<tr>
<td>🔄</td>
<td>Change properties for selected time blocks all at once.</td>
<td>Edit Menu</td>
</tr>
<tr>
<td>🔄</td>
<td>Select all</td>
<td>Select Menu</td>
</tr>
<tr>
<td>🔄</td>
<td>Clear all</td>
<td>Select Menu</td>
</tr>
<tr>
<td>🔄</td>
<td>Change selection mode</td>
<td>-</td>
</tr>
<tr>
<td>📦</td>
<td>Send Schedule Alert</td>
<td>-</td>
</tr>
<tr>
<td>🔄</td>
<td>Automatically assign employees to open shifts</td>
<td>Edit Menu</td>
</tr>
<tr>
<td>📦</td>
<td>Show/Hide conflicts</td>
<td>View Menu</td>
</tr>
<tr>
<td>🔄</td>
<td>Refresh the screen</td>
<td>-</td>
</tr>
<tr>
<td>🔄</td>
<td>Post schedule</td>
<td>Edit Menu</td>
</tr>
<tr>
<td>📦</td>
<td>Print schedule</td>
<td>File Menu</td>
</tr>
<tr>
<td>🔄</td>
<td>Help</td>
<td>Help Menu</td>
</tr>
</tbody>
</table>
3.2 Setup Menu

SETUP MENU

The setup menu is on the left side of your screen at all times. You use this menu to add, edit, or remove different categories and category items.

Users Setup:
The menu where you manage all of your users.

Categories:
Where you can edit or define new categories.

Departments Setup:
Where you can edit or define new departments.

Areas Setup:
Where you can edit or define new areas.

Tasks Setup
Where you can edit or define new tasks.

Time of day Setup
Where you can edit or define new time of days.

Time Off Ledgers
Where you approve time off and cancel requests.

Time Off Account Setup:
Where you can add or edit Time Off Accounts.

User defined categories Setup
Where you can create your own categories.

General Options
Where you can set options that affect the entire account.
Template Setup
Where you can set up multiple recurring rotations

Rules
Where you can instruct WorkSchedule.Net exactly how to decide which employees can be assigned to specific time blocks.

Clock IPs
Where you can set Clock IPs if you want to where you restrict where your employees can clock in from.

3.2.1 Users Setup

1. To add or edit a user, click on Users link in the left menu under Setup

2. This will open the following window. Here, you can Add, Edit, Remove, or Copy existing users.
MANAGING USERS

Add new user:
You can add a new user by clicking the button to create a new user. For information about how to set up the new user, see User Account.

Edit a user:
You can edit a user by clicking the button next to the user you would like to edit. For information about editing the user records, see User Account.

Invite Selected Users:
Since you cannot view your employees’ passwords, you will want to email each employee with their login credentials for their first login or if they ever forget their password. To do this you simply have to select the users whom you want to email their individual login information and select the button next to “Invite Selected Users”. This will open a window where you can edit the email message and send the email to the selected users.

Remove a user:
You can remove a user by clicking the button next to the user you would like to delete. Be aware that you cannot undo this.

**Copy user information:**
If you would like to create a new user with the same information and settings as another user, click the button next to the user you would like to duplicate. This will copy all user information minus the General Information tab and you will then be able to create a new user.

### 3.2.2 Categories

The following sections explain what categories are, what types of categories are available, why are categories used and the particular features associated with some of the standard categories supplied by WorkSchedule.Net. It is highly recommended that you think thoroughly about your company’s structure and the best ways to divide your employees or time blocks before setting up your categories.

WorkSchedule.Net provides six standard categories: departments, areas, tasks, times of day, time on/off, and time off accounts. The administrator may also add up to 3 additional user defined categories.

#### 3.2.2.1 Understanding Categories

**WHAT ARE CATEGORIES**

A category is a general division, group, or classification in your business or company. A category item is a specific division, group, or classification inside a category.

Examples:
If you run a restaurant, a category could be Departments, and a category item can be Bakery, Deli, Seafood...etc.
If you run a national daycare, a category could be Location, and a category item can be New York, Chicago, Dallas...etc.
If you run a hospital, a category could be Divisions and a category item can be Medical, Surgical, Psychiatric...etc.

**WHAT CATEGORIES ARE USED FOR**

In WorkSchedule.Net, all scheduling and attendance data can be divided into categories. All time blocks have some basic information such as employee, start date and time, and end time. Categories are used to add extra information to the individual time blocks, and to divide your schedule into groups.

**COMMON FEATURES THAT ALL CATEGORIES HAVE**

- All categories allow the user to create category items, which can be attached to time blocks in the time block editors.
All categories allow the user to rename them with the word or phrase that applies to their specific business. For example, an emergency medical service might rename the category "Areas" to "Ambulances", as that might make better sense for this particular business type.

Time blocks can be sorted by any category, in the time block editors. All categories have a sort order for their category items, that can be adjusted by you. See Sorting.

In the time block editors, you can choose to view only the time blocks that are attached to a specific category item. See Cross-sections.

All categories allow their category items to be color coded. These colors will show up in the time block editors, when using the appropriate color scheme.

FEATURES PARTICULAR TO SPECIAL CATEGORIES

To be able to see categories on your schedule, you should setup your categories. Make sure to understand the particular functionality associated with the Departments category before completing your categories setup. Also, times of day and time on/off categories have special functionality beyond the common features mentioned above.

3.2.2 Categories Setup

CATEGORIES SETUP

NOTE: Changes to Category Setup may not affect the left menu until logging out and back in again.

In the Categories Setup section, you can configure a number of things. You can...

- Change the name of a category (EX: You may want to change "Department" to "Location")
- Disable a category
- Add a new user-defined category
- Delete a user-defined category
- Change the properties of a category

To add a new user-defined category, click the button to the left of Add new category
To edit a category, click the checkbox to the left of the category you wish to edit.
PROPERTIES OF A CATEGORY

Category Name: In this text box, enter the name of this category as you would call it in your particular industry or company.

Category Name (Plural): In this text box, enter the plural version of the above Category Name.

Disable Category: Check this box to remove the selected category from the system for all users, except the administrator. If this option is checked, all other options under it in this screen are considered deactivated. Department category can not be disabled.

Show in cross-section: Check this box to allow users to choose items in this category in the cross-section toolbar of the time block editors. NOTE: The Department category is always shown in the cross-section.

Can use to qualify employees: Check this box if you want to be able to qualify employees for items in this category in their user records. NOTE: The Department category is always qualifiable.

Add on the fly: Check this box to allow users to add category items for the selected category while adding or modifying time blocks in the time block editor. If this option is selected, the users will see the following new item in the drop down menu of the selected category when using the time block editor: **Use New Entry Below**. The following section gets added to the screen, and the user can then create a new category item "on the fly".

<table>
<thead>
<tr>
<th>NEW</th>
<th>Task:</th>
</tr>
</thead>
</table>

The Department category can not be added on the fly.

Rank: Check this box to allow ranking for each employee per item in this category.

Multiple: Check this box allow time blocks to be attached to more than one item in this category at a time.

Do not show in time blocks: Check this box to hide the item description for any items in this category inside the time blocks when in weekly view.

Payroll: Check this box to allow users to set a pay rate per item in this category.

Allow Notes: Check this box if you want to be able to maintain notes related to each category item.

REMOVE A USER-DEFINED CATEGORY

To remove a user-defined category, click the 🚭 to the left of the user-defined category you wish to remove. NOTE: You can not delete any of the standard categories: Departments, Areas, Tasks, Times of day, or Time on/off.
Departments divide both your employees and time blocks into stronger divisions than other categories, because managers can be locked out of departments they don't manage. You always must have at least one department in your account. Managers can be assigned by the administrator to manage specific departments. Both employees and managers can be assigned to be a member of one main department. Both employees and managers can be qualified to work in a number of departments. Managers can post the schedule for either one department at a time, or all of their departments together.

To setup departments, click on the Departments tab in the left-side menu.

The following screen is displayed:
ADDING A NEW DEPARTMENT

To add a new department, click the ☑️ to the left of Add new Department.

EDITING A DEPARTMENT

To edit a department, click the ☑️ to the left of the department you wish to edit.
Background Color: When the color scheme is changed to Color by Department, the background color specified will be the background color of the shift, if left blank, the background color will be the default color.

Foreground Color: When the color scheme is changed to Color by Department, the foreground color specified will be the text color of the shift, if left blank, the text color will be the default color.

Changing Department Managers: To add or remove department managers, click on the Managed Departments tab and click Add.
To remove Department Managers, click on one or more checkboxes next to an existing department managers name and click remove.
Changing Employees Qualified for a Department: To add employees that are qualified for a department (but that department is not necessarily their main or 'home' department), click on the Qualified Users tab and click Add. Then move the employees you want to add to the right side and click OK. By clicking on the symbol you will move all users to the right and by clicking on the you will move all users to the left. Qualifying a user for a department is more significant than qualifying an employee for any other category. Managers can only schedule those employees who are qualified for the departments that they manage. This means that if an employee is not linked (through his or her department qualification) to a given manager, that manager can not even see the employee to schedule.

To remove employees qualified for a department, click on one or more checkboxes next to an existing employee in that department and click remove.

Qualifying an employee for a category item can be used in conjunction with the qualification rule, to ensure that employees are only scheduled where they are qualified. You can enter a rank which can be used in conjunction with the rank rule, to prefer employees who are better suited for certain tasks, departments, areas, etc. when using auto-scheduling features. Qualifications and ranks have no effect unless the corresponding rule has been added in the Rules section.

You can also add a pay rate to these employees to change their hourly wage when working in this department. This feature will only work if payroll is selected for that category item.
REMOVING A DEPARTMENT

To remove a department, click the ✗ to the left of the department you wish to remove.

3.2.4 Areas

AREAS

To setup Areas, click on the Areas tab in the left-side menu
The following screen is displayed:

**ADDING A NEW AREA**

To add a new area, click the checkmark to the left of **Add new Area**.

**EDITING AN AREA**
To edit an area, click the button to the left of the area you wish to edit.

**Background Color:** When the color scheme is changed to Color by Area, the background color specified will be the background color of the shift, if left blank, the background color will be the default color.

**Foreground Color:** When the color scheme is changed to Color by Area, the foreground color specified will be the text color of the shift, if left blank, the text color will be the default color.

**Changing employees qualified for an Area:** To add employees qualified for an area, select the Qualified Users tab and click Add. Then move the employees you want to add to the right side and click OK. By clicking on the symbol you will move all users to the right and by clicking on the symbol you will move all users to the left.

To remove employees qualified for an area, select one or more checkboxes next to the employees names and click Remove.

Qualifying an employee for a category item can be used in conjunction with the qualification rule, to ensure that employees are only scheduled where they are qualified. You can enter a rank which can be used in conjunction with the rank rule, to prefer employees who are better suited for certain tasks, departments, areas, etc. when using auto-scheduling features. Qualifications and ranks have no effect unless the corresponding rule has been added in the Rules section.

You can also add a pay rate to these employees to change their hourly wage when working in this area. This feature will only work if payroll is selected for that category item.
REMOVING AN AREA

To remove an area, click the ✕ to the left of the area you wish to remove.

3.2.5 Tasks

To setup tasks, click on the Tasks in the left-side menu
The following screen is displayed:

**Editing a Task**

To add a new task, click the ⬇️ to the left of Add new Task.

**Editing a Task**
To edit a task, click the 🔄 to the left of the task you wish to edit.

**Background Color:** When the color scheme is changed to Color by Task, the background color specified will be the background color of the shift, if left blank, the background color will be the default color.

**Foreground Color:** When the color scheme is changed to Color by Task, the foreground color specified will be the text color of the shift, if left blank, the text color will be the default color.

**Changing employees qualified for a Task:** To add employees qualified for a task, select the **Qualified Users** tab and click Add. Then move the employees you want to add to the right side and click OK. By clicking on the 🔄 symbol you will move all users to the right and by clicking on the ⬅️ you will move all users to the left.

To remove employees qualified for a task, select one or more checkboxes next to the employees names and click Remove.

Qualifying an employee for a category item can be used in conjunction with the qualification rule, to ensure that employees are only scheduled where they are qualified. You can enter a rank which can be used in conjunction with the rank rule, to prefer employees who are better suited for certain tasks, departments, areas, etc. when using auto-scheduling features. Qualifications and ranks have no effect unless the corresponding rule has been added in the Rules section.

You can also add a pay rate to these employees to change their hourly wage when working in this task. This feature will only work if payroll is selected for that category item.
REMOVING A TASK

To remove a task, click the icon to the left of the task you wish to remove.

3.2.6 Time of day

TIMES OF DAY

To setup Time of Day, click on the Time of Day tab in the left-side menu.
The following screen is displayed:

**Time Of Day** • Add, modify, or remove Time of Day

**Add new Time of Day**

<table>
<thead>
<tr>
<th>Name</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Morning</td>
<td></td>
</tr>
<tr>
<td>Day</td>
<td></td>
</tr>
<tr>
<td>Evening</td>
<td></td>
</tr>
<tr>
<td>Overnight</td>
<td></td>
</tr>
</tbody>
</table>

**ADDING A NEW TIME OF DAY**

To add a new time of day, click the + to the left of Add new Time of Day.
EDITING A TIME OF DAY

To edit a time of day, click the checkmark to the left of the time of day you wish to edit.

**Background Color:** When the color scheme is changed to Color by Time of Day, the background color specified will be the background color of the shift, if left blank, the background color will be the default color.

**Foreground Color:** When the color scheme is changed to Color by Time of Day, the foreground color specified will be the text color of the shift, if left blank, the text color will be the default color.

**Changing employees qualified for a Time of Day:** To add employees qualified for a Time of Day, select the Qualified Users tab and click Add. Then move the employees you want to add to the right side and click OK. By clicking on the symbol you will move all users to the right and by clicking on the symbol you will move all users to the left.

To remove employees qualified for a Time of Day, select one or more checkboxes next to the employees names and click Remove.

Qualifying an employee for a category item can be used in conjunction with the qualification rule, to ensure that employees are only scheduled where they are qualified. You can enter a rank which can be used in conjunction with the rank rule, to prefer employees who are better suited for certain tasks, departments, areas, etc. when using auto-scheduling features. Qualifications and ranks have no effect unless the corresponding rule has been added in the Rules section.

You can also add a pay rate to these employees to change their hourly wage when working at this Time of Day. This feature will only work if payroll is selected for that category item.
REMOVING A TIME OF DAY

To remove a time of day, click the ❌ to the left of the time of day you wish to remove.

3.2.7 Time off

TIME OFF

To setup Time Off, click on the **Time Off** tab in the left-side menu
The following screen is displayed:

**ADDING A NEW TIME OFF**

To add a new time off, click the ✚ to the left of *Add new Time Off*. 
EDITING A TIME OFF

To edit a time off, click the ▶ to the left of the time off you wish to edit.

Background Color: When the color scheme is changed to Color by Time Off, the background color specified will be the background color of the shift, if left blank, the background color will be the default color.

Foreground Color: When the color scheme is changed to Color by Time Off, the foreground color specified will be the text color of the shift, if left blank, the text color will be the default color.

REMOVING A TIME OFF

To remove a time off, click the ✗ to the left of the time off you wish to remove.
3.2.8 Time Off Accounts

To setup time off accounts, click on Time Off Account on the left-side menu.

The following screen is displayed:
### ADDING A NEW TIME OFF

To add a new time off account, click the + to the left of **Add new Time Off Account**.

<table>
<thead>
<tr>
<th>General</th>
<th>Qualified Users</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>2015</td>
</tr>
<tr>
<td>Monthly View Name</td>
<td>15</td>
</tr>
<tr>
<td>Start Date</td>
<td>1/1/2015</td>
</tr>
<tr>
<td>End Date</td>
<td>12/31/2015</td>
</tr>
<tr>
<td>Background Color</td>
<td>#000000</td>
</tr>
<tr>
<td>Foreground Color</td>
<td>#000000</td>
</tr>
<tr>
<td>Active</td>
<td></td>
</tr>
<tr>
<td>Show to employee</td>
<td></td>
</tr>
</tbody>
</table>

Specify the start and end date.

**Background Color**: When the color scheme is changed to Color by Time Off Account, the background color specified will be the background color of the shift, if left blank, the background color will be the default color.

**Foreground Color**: When the color scheme is changed to Color by Time Off Account, the foreground color specified will be the text color of the shift, if left blank, the text color will be the default color.

Choosing **Active** means that managers can use this account to grant days off from this account, approve or decline days off for employees from this account, and that the transactions made will be shown in the time off report. If you don't click on the box next to active, this account will not show on any screen, as if it doesn't exist.

Click on **Show to employee** if you want the created account to be visible to employees, where they use it to request time off.

### EDITING A TIME OFF ACCOUNT

To edit a time off account, click the + to the left of the time off account you wish to edit.

### REMOVING A TIME OFF ACCOUNT
To remove a time off account, click the 'X' to the left of the time off account you wish to remove.

### 3.2.9 User Defined Categories

**USER DEFINED CATEGORIES**

To setup a user defined category, click on name of the category on the left-side menu. *(NOTE: "Groups" in this example is our user defined category)*

The following screen is displayed:
ADD NEW GROUP

To add a new group, click the icon to the left of **Add new Group**.

EDITING A GROUP

To edit a group, click the icon to the left of the group you wish to edit.
**Background Color**: When the color scheme is changed to the defined category, the background color specified will be the background color of the shift, if left blank, the background color will be the default color.

**Foreground Color**: When the color scheme is changed to the defined category, the foreground color specified will be the text color of the shift, if left blank, the text color will be the default color.

**Changing employees qualified for a Group**: To add or remove employees qualified for a Group, select the **Qualifications** tab and click Add.

To remove employees qualified for a Group, select one or more checkboxes next to the employees names and click Remove.

Qualifying an employee for a category item can be used in conjunction with the qualification rule, to ensure that employees are only scheduled where they are qualified. You can enter a rank which can be used in conjunction with the rank rule, to prefer employees who are better suited for certain tasks, departments, areas, etc. when using auto-scheduling features. Qualifications and ranks have no effect unless the corresponding rule has been added in the Rules section.
REMOVING A GROUP

To remove a group, click the to the left of the group you wish to remove.

3.2.10 General Options

- General Settings
- Schedule
- Recurring Schedule
- Attendance
- Time Block Preferences
- Overtime
GENERAL OPTIONS SCREEN

In General options you can set options that affect the entire account. Only a user with admin rights can change general settings.

NOTE: Many of the options that used to reside in the General Options screen have changed to per-user settings. To see more information about these settings, see the User account page.

GENERAL INFORMATION

Company Name: Enter the name of your company, or company division if you are using multiple accounts for your company.

Administrator Email: This is the main admin email address for the entire account.

Company Logo: Click the “Browse…” button to browse on your computer for a graphic file of your company logo to upload. Once the file path loads into the text box, click on the “Upload” button to upload the file to WorkSchedule.Net. This logo will be shown in the manager area on your home page, and in the employee area at the top.

SCHEDULE

Use schedule: Check this box if you are using the scheduling module, i.e., all the employee scheduling capabilities of the system. You may want to uncheck this, if you are using WorkSchedule.Net as an attendance solution only, for example.
Use recurring schedule: Check this box if you want to use the recurring schedule.

Indicate shifts that are not regular: Check this box if you want WorkSchedule.Net to highlight those time blocks in the current schedule that do not have a match in the recurring schedule, and thus, are "not regular". These time blocks are highlighted with a yellow background color, when in the standard color scheme. See Color Schemes for more info.

Use Confirm / decline feature: Check this box to allow your employees to confirm and decline shifts. When they login to their employee accounts, they will see links for "CONFIRM" and "DECLINE" on each time block in the My Schedule area. The employee can click on one of the links to either confirm or decline the time block.

CAUTION: Changing the following two settings after the Setup Wizard is not recommended without the assistance of a scheduling specialist. You can call 866-846-3123 for support.

Number of days in schedule period: Enter the number of days in your recurring schedule pattern. We recommend using a number divisible by 7. NOTE: This can be tricky. We recommend speaking with a scheduling specialist at 866-846-3123 for assistance if you are unsure.

Scheduling period begins on: This is the date that corresponds with Day 1 of your recurring schedule. Use this date to align your recurring schedule to the real calendar, and thus to the current schedule. NOTE: This can be tricky. We recommend speaking with a scheduling specialist at 866-846-3123 for assistance if you are unsure.

ATTENDANCE

Use Attendance: Check this box if you want to use the Attendance capabilities of the system.

QuickBooks Pro Create Time: If you want to export your attendance data to Quickbooks Pro ® or Premiere ® for payroll, enter the QuickBooks Create Time number into this text box. See Exporting to Quickbooks for information on how to find this number, and how to export to QuickBooks.
TIME BLOCK PREFERENCES

Use notes in time blocks: Check this box if you want to be able to store notes inside each time block.

Use category sort field: Check this box to allow yourself to manually order your departments, tasks, time of day, etc.

Use Drag And Drop: Check this box to allow the drag and drop feature.

Color for open shifts: This option allows you to override the default color scheme for open shifts. See Color Schemes for more information.

Color for unusual shifts: This option allows you to override the default color scheme for unusual shifts. See Color Schemes for more information.

OVERTIME

Overtime Multiplier: This number will be multiplied by the employee's regular pay rate to calculate the overtime rate. If you do not want overtime pay, enter 1 into this box.

Weekly Overtime Threshold (in hours): Any hours worked past this amount in a given week will be counted as overtime and will use the overtime pay rate.

NOTE: WorkSchedule.Net only handles a single weekly overtime threshold amount. We do not handle any other overtime laws or rules, such as a daily threshold. Please check with your state government for any additional overtime laws to ensure full compliance with state and federal regulations.

TOTALING HOURS
Day begins at a time other than midnight / Starts at: Check this box and enter a time in the box if you want to set a time other than 12:00 am that each day ends and begins, *for the purpose of totaling hours only.*

**TIME OFF**

Use Time Off: check this box if you want to activate the Time Off category.

Use Time Off Accounts track days off: check this box if you want to activate the Time Off Accounts category. If you uncheck this box, the system will disable the category automatically. When you check this box, the system tracks how many days off your employees are taking per time off account. If an employee requests time off more than allowed for a certain account, the following warning will be displayed on your screen when approving time off:

Account / Year: 2008

Days Used: 0 / Allowance for Year: 0 / Days Left: 0

Caution: Approving this time off may cause employee to go over allowed days off for 2008

Checking this option also shows the employees how many hours they have taken off so far on the time off screen and warns them if they are requesting more than the allowed time off for every account created by the manager.

Use finalized attendance for historical time off: When checked, this box has the following effects on manager and employee sides:

On the manager side, the time off report would retrieve the data from both, the finalized attendance screen, and the posted current schedule (as opposed to only pulling data from the schedule when this box is unchecked).

On the employee side, a new link would show under the Time Off tab called Time Off History. This tab retrieves data from the attendance screen.
Paid Hours Default Method:
You have the option to set how you want the hours to be defaulted for each time off request. You can manually change the number of hours to whatever you want. The number of hours defaulted is the number of hours that will be deducted from a user's time off ledger for the specified time off account. There are 5 different options for each company to choose the one you find the most suitable for your needs:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>From start time to end time</td>
<td>This sets the number of hours that the employee requested off to the exact number of hours between the specified times they requested to have off. For example, if they request off from 9am to 4pm on Monday, their Time Off Account will be deducted 7 hours.</td>
</tr>
<tr>
<td>By employee request</td>
<td>This option allows employees to specify the number of hours they feel should be deducted from their time off ledger. For example, they could take off 24 hours, but request 8 hours to be deducted from their Time Off Account. Of course, the manager can override this value.</td>
</tr>
<tr>
<td>Based on user default</td>
<td>This option allows the manager/admin to set the amount of hours each employee will have deducted by default. Meaning, an employee can request off 24 hours, but the amount of hours that is deducted in their Time Off Account will be their default paid hours from their user record, which can be different for every employee.</td>
</tr>
<tr>
<td>Based on Time Off Reason</td>
<td>This choice allows the manager/admin to edit Time Off Reasons so that when an employee requests time off for that specific reason, it will default to a set number of hours for that reason, regardless of the employee.</td>
</tr>
<tr>
<td>Legacy Default</td>
<td>This is the default option. When selected, the number of hours requested by an employee will be rounded to either their total Hours Per Day under their Time Off in their User Account, or to half of these total hours. If the number of hours an employee requested off is greater than 75% of their total Hours Per Day then the number of hours deducted from their Time Off Account will be the total number of hours. However, it the number of hours the employee requested off is less than or equal to 75% of their total Hours Per Day, then the number of hours will round to half of their total Hours Per Day. For example, if an employee's Hours Per Day is 8 and they request 6.5 hours off then the hours deducted from his/her Time Off Account will be rounded to 8. However, if the same employee requests off 5.5 hours, then the hours deducted from his/her Time Off Account will be 4.</td>
</tr>
</tbody>
</table>
Use employee availability features: Check this box if you want to use the employee availability features, where employees can indicate their availability to you, so that you may schedule around it.

Allow categories in availability: Check this box if you want to use the employee to attach category items to their availability time blocks.

Allow availability time blocks to cross midnight in availability: Check this box if you want the employees to be able to create availability time blocks that cross midnight, which otherwise is prohibited. **NOTE:** It is not recommended to check this option without speaking first with support.

**SWAP & SIGN UP**

Swap Method: This option allows you to change the swap method of approving employee's shift swaps.

Use Bidding Feature: Check this box if you want employees to request to work a particular shift before the manager assigns the shift to a requesting employee. Allow employees to sign up for open shifts must be checked as well for this feature to be enabled. This feature is used in conjunction with the Only Schedule Bidders rule, which limits acceptable employees to bidders only, and can be combined with other rules to assign based on other factors.

**BREAKS**

Schedule shift breaks: Check this box if you want to be able to schedule breaks for your employees.
Ignore breaks when calculating total hours worked: *(Applies only if Schedule shift breaks is checked.)* Check this box if you want break time in the time blocks to add into the total number of hours worked.

**Maximum number of breaks per shift:** *(Applies only if Schedule shift breaks is checked.)* Enter the maximum number of breaks you foresee having on any time block.

**ALERTS**

Send email alerts to employees when there is a change in the Current Schedule: If you check this box, the system will send an automatic email to the affected employee when the manager changes the posted portion of his/her current schedule, alerting the employee of the change. It will also alert employees when the schedule is posted or un-posted.

Send email alerts to managers when there is a change in the Current Availability: If you check this box, the system will send an automatic email to the manager when the employees change their current availability, alerting the manager of the change.

Send email alerts to managers when there is a change in the Recurring Availability: If you check this box, the system will send an automatic email to the manager when the employees change their recurring availability, alerting the manager of the change.

Allow reminders: If you check this box, a new section will appear in the User Account screen that will allow managers to set reminders to be sent to employees before their scheduled shifts.

**DATE AND TIME INFORMATION**

Local time zone: Choose your local time zone from the drop down list. **NOTE:** If your time zone is not on the list, contact support at 866-846-3123 and we can set up your time zone for you.

Use daylight savings time: Check this box if you abide by daylight savings time in your area.

Time format: Choose either Standard Time (am/pm) or Military Time. This format will be used in...
most areas where times are displayed or input by the user.

**Date format:** Choose either American or European Standard Time date format. This format will be used in most areas where dates are displayed or input by the user. The American date format is "MM/DD/YYYY". The European date format is "DD/MM/YYYY".

### 3.2.11 Template Setup

For a description of what templates are used for, see Templates.

**ADDING TEMPLATES**

1. To add or edit a template click on Templates link in the left menu under Setup options

![Setup menu](image)

2. This will open the following window. Here, you can Add, Edit, or Remove existing templates.
3. If you click on Add new template button, The following window will appear.

4. Click submit when done.

   NOTE: If you do not see the template under Recurring Schedule. You need to re-log on.
3.2.12 Rules

UNDERSTANDING RULES

There are two different types of rules WorkSchedule.Net: **eliminating rules** and **preference rules**.

By adding rules, you can instruct WorkSchedule.Net exactly how to decide which employees can be assigned to specific time blocks (eliminating rules), and also what make one employee "better" for a time block than another employee (preference rules).

See **Eliminating Rules** and **Preference Rules** for a list of currently available rules in WorkSchedule.Net that you can choose to add.

SETTING UP RULES

To setup rules, click on **Rules** on the left-side menu.

The following screen is displayed: (please note that only the rules that you have previously added or chosen in the setup wizard show on the screen)
Click on the drop down menu to display and setup Eliminating and/or Preference rules:

**ADDING A NEW RULE**

To add a new rule, make sure the drop down menu displays the type of rules that you want to add, then click the ‣ to the left of Add new Rule.

Choose the rule you want to add from the drop down menu, and specify the options you want.
(Note: For an explanation of the options in every rule’s screen, please find the corresponding rule’s topic under Eliminating or Preference Rules section)

EDITING A RULE

To edit a rule, click the ✧ to the left of the rule you wish to edit.

REMOVING A RULE

To remove a rule, click the ❌ to the left of the rule you wish to remove.
3.2.13 Clock IPs

CLOCK IPs

An IP address (Internet Protocol Address) is a logical address of a network adapter. The IP address is unique and identifies computers on a network. You use Clock IPs feature if you want to limit your employees' access to the system to certain computers. You can enter all the IPs that are allowed to access your account, thus limiting access to the system.

HOW TO ADD IPs

1. Click on Clock IPs in the Setup Section
2. Click on the clock icon to add new IPs. Enter the IP address, and then Click Submit.

3.3 Managing users
For information on how to setup users, click here.

User Account:
The user account contains the information associated with each user.

Modifying many users at once:
You can modify properties of selected user accounts at the same time.

Modifying qualifications for many users
Add or remove qualifications to selected user accounts at the same time.
3.3.1 User account

The user account contains the information associated with each user in WorkSchedule.Net.

General Information
User Permissions
Attendance
Managed Departments
Manager Settings
Default View
Time Off Settings
Auto-Schedule Settings
Home Department Settings
Payroll
Qualifications
Reminders and Alerts
Miscellaneous

GENERAL INFORMATION

In the General Information section, you can set the user's name, logon info, email address, and other contact info, as well as free-text notes about the user. Free-text notes section is ideal location to put the employee's address, emergency contact information, certifications or other important information about the employee that you need to keep track of. The password must be at least 6 characters long. Some of this information can be changed by the user via the employee area, including the email address, phone numbers, and the password.
USER PERMISSIONS

In the User Permissions section, you choose the level of access this user has. You have three choices: employee, manager, or admin.

**Employee:** Can only access the employee area. Employees generally can not change their schedules, except through sign up and swap features if those features are allowed by the manager.

**Manager:** Can access either the employee area or the manager area. A manager can not set global settings such as setup for categories, rules, and departments. Managers can be restricted to specific departments (See Managed departments) below.

**Admin:** Can access anything in the system, including all setup areas.

**Allow employees to see schedule history:** Indicate whether or not you want your employee to be able to view scheduled shifts that are in the past

**Allow employees to indicate their availability online:** Indicate whether or not you would like your employee to indicate their Availability.

**Restriction of schedule view for employees:** This set of options controls how much an employee can see in the schedule view in the employee portal. You can set these options to allow them to see the schedule for the entire company, only employees in the departments they are qualified for, or only the time blocks assigned to them.

**Do not schedule:** Check this box if the user is a manager or admin who would never be scheduled themselves. This eliminates the user from being chosen in the auto-scheduling and best fit features, and also excludes the employee from being shown in the drop down menu on the availability screen.

**Disable user from logging on:** Check this box to lock the user out of WorkSchedule.Net.
ATTENDANCE

In the Attendance section, you can allow an employee to use features such as clocking in, and only allowing them to clock in from a certain IP address (such as in the office so they could not clock in at home).

You can also allow employees to edit their attendance, or disallow this option and have a scheduling manager take care of issues related to the time clock, such as an employee forgetting to clock in or out.

MANAGED DEPARTMENTS

In the Managed Departments section, you can choose which departments a manager has authority over. This section will only show up if the user is set to be a manager since employees do not manage at all and administrators can manage all departments.
In order to add departments to a Manager account, click on the add button and select one or more departments (multiple selection can be done by holding CTRL and left-clicking more than one department) and moving them over to the destination box on the right side using the control buttons in the middle of the boxes shown below. Once you are satisfied with the departments you want to add, click the blue Submit button to add those departments to that user.
MANAGER SETTINGS

In the Manager Settings section, you can change alert settings for Managers/Admins.

DEFAULT VIEW

In the Default View section, you can change settings for users regarding how their time block editor/schedule view appears by default.
**Time block font and size:** Changes the Font face and size

**Show hours inside time blocks:** In the schedule view, this setting will display how many hours a time block is for (08:00 - 12:00 will display 4 hours)

**Employee name format:** Change how the employee's names are displayed in the time block editor view. (ex. First Initial Last Name: D Brown)

**Sort by:** Change the default sorting categories for time block and schedule views. This will conveniently partition the schedule view into different categories and make it easier to read.

**Employee color scheme:** Change how the time block editor and schedule views are color coded. This only applies if you have set colors for various categories.

---

**TIME OFF SETTINGS**

In the **Time Off** section, you can change settings that govern a user's time off activities in WorkSchedule.Net.
**Default Paid Hours will only show up if you have the option "Based on user default" selected in the general options for Time Off. See Time Off for more information.

**Time Off Ledger:** Go directly to the Time Off Ledger of the specific employee

**Time Off Manager:** This option gives you the ability to allow a manager outside of the user's main department to approve/deny time off requests submitted by the user.

**Allow employee to request/cancel time off:** Turning these options on will allow a user to create or destroy (respectively) time off requests in their employee portal view.

**Employee time off request form:** Allows you to change how a user puts in a time off request in the employee portal.

**Basic Time Off Request Form:**
Request the following days/times off:

<table>
<thead>
<tr>
<th>Type</th>
<th>FROM</th>
<th>TO</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Notes to manager:

Continue

Advanced Time Off Request Form:

Request the following days/times off:

<table>
<thead>
<tr>
<th>Type</th>
<th>FROM</th>
<th>TO</th>
<th>Start Time</th>
<th>End Time</th>
<th>Account/Yr</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>12:00 AM</td>
<td>11:59 PM</td>
<td>2007</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>12:00 AM</td>
<td>11:59 PM</td>
<td>2007</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>12:00 AM</td>
<td>11:59 PM</td>
<td>2007</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>12:00 AM</td>
<td>11:59 PM</td>
<td>2007</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>12:00 AM</td>
<td>11:59 PM</td>
<td>2007</td>
</tr>
</tbody>
</table>

Notes to manager:

Continue
**Year Hired:** This is only for record keeping purposes and is not used elsewhere in the system.

**Hours per day:** Since time off requests are recorded as days in the system, and the time blocks are in hours, a time off request will be divided by this number of hours. While this should generally be set to 8, make sure you set it to how many hours is equal to one day off for that employee. This affects reporting features such as the time off ledgers.

*Default Paid Hours:* See Time Off for more information.

**AUTO-SCHEDULE SETTINGS**

In the Auto-scheduling information section, you can set the properties of this user that affect how the user can be chosen with the auto-schedule and best fit features. The only values here that will take any effect are those that pertain to some rules that you have added in the Rules area. See Automatic scheduling for information on how each of these settings effect the auto-schedule process.

---

**Employee Record: Bailey, Thomas**

---

**HOME DEPARTMENT ITEMS**

In the Home Department Items section, you can assign the user a main category item in each category. These settings are used for the following purposes:

- Only managers who are authorized to manage this user’s main department, can edit this user’s record.
- If using the Attendance module, when this user clocks in, in the case that no time block is found in the current schedule, these properties will be used to attach category items to the time block which is created to record the time worked. See Attendance for more information.
PAYROLL

In the Payroll section, the Payroll ID must be set if you would like to use Payroll Export.

Payroll ID: If you wish to export your payroll information, this number must match the Payroll ID for your payroll service. **This number must be unique between users.

QUALIFICATIONS

In the Qualifications section, you can qualify users for departments, as well as any of your other categories that you have indicated are "qualifiable" in the Categories Setup. Qualifying an employee for a category item can be used in conjunction with the qualification rule, to ensure that employees are only scheduled where they are qualified. You can enter a rank which can be used in conjunction with the rank rule, to prefer employees who are better suited for certain tasks, departments, areas, etc. when using auto-scheduling features. Qualifications and ranks have no effect unless the corresponding rule has been added in the Rules section.

DEPARTMENT QUALIFICATION: Qualifying a user for a department is more significant than
qualifying an employee for any other category. **Managers can only schedule those employees who are qualified for the departments that they manage.** This means that if an employee is not linked (through his or her department qualification) to a given manager, that manager can not even see the employee to schedule.

**Adding Qualifications:** Adding qualifications for a user is easy. Select the category you want to add qualifications for and click **Add**. You can select more than one category by holding down **CTRL** and left-clicking multiple categories. Use the control buttons to move the categories you want to add to the right side box, then click Submit.
REMINDERS AND ALERTS

In the Reminders and Alerts section, you can set the system to send automatic reminders about the shifts to employees. To use this feature, you have to check the option Allow Reminders in the General Options screen.

Check Remind this employee if you want the system to send at least one reminder. You can choose to remind the employee before all the shifts, or only unusual shift (shifts that don't occur in the recurring schedule). Specify the number of hours before the shift on which the system should send the reminder to the employee.

If you want the system to send more than one reminder, check the box on the second line in the Reminders section, specify how many ADDITIONAL reminders you want to be sent, and how often the system should send them.

Please note that the system will send a maximum of 5 reminders per shift per employee, and the reminders should be at least an hour apart.

Specify the email that the employee should receive the reminder to. If you don't enter an email in this section, the system will ignore the reminder and will NOT use the default email address that you already provided for the employee.
You can use the Reminders feature to send the reminders to your employees' cellular phones as SMSs. Here are the email addresses for the 6 most popular cellular phone carriers:

- **T-Mobile**: phonenumber@tmomail.net
- **AT&T**: phonenumber@txt.att.net
- **Sprint**: phonenumber@messaging.sprintpcs.com
- **Verizon**: phonenumber@vtext.com
- **Virgin Mobile**: phonenumber@vmobl.com
- **Nextel**: phonenumber@messaging.nextel.com

where 'phonenumber' is your 10 digit phone number

### SWAP/SIGN UP

**Allow employees to swap shifts**: Check this box if you want your employees to be able to swap shifts with each other, within the restrictions of the applicable rules and swap method.

**Swap Method**: This option allows you to change the swap method of approving employee's shift swaps.

**Allow employees to sign up for open shifts**: Check this box if you want your employees to be able to sign up for open shifts, within the restrictions of the applicable rules, but without manager approval. Once the employee signs up for the shift, the shift is immediately assigned to the
Use Bidding Feature: Check this box if you want employees to request to work a particular shift before the manager assigns the shift to a requesting employee.

Allow employees to sign up for partial shifts: (Applies only if above option is checked.) Check this box if you want your employees to be able to sign up for partial open shifts, leaving as many as two fragments of a shift leftover for other employees to possibly take.

Email upon sign up success: Check this box if you want the employee to receive an email upon successfully signing up for a time block.

Email upon sign up failure: Check this box if you want the employee to receive an email upon failure to sign up for a time block.

MISCELLANEOUS

In the Miscellaneous section, you can set a user's session time-out setting. This setting (in minutes) will allow you to change how long a user can be idle on WorkSchedule.Net before they have to return to the sign-in screen and log back in.

3.3.2 Modifying many users at once

MASS EDITING USERS

You can modify properties of many user accounts at the same time, by selecting the users you want to modify in the check boxes on the left, and then clicking on the Mass Edit Selected Users icon at the top of the user records.
In the form on the next page, select the properties that you want to modify for the selected users and click **Add Property**. You can then change the options of the selected properties on that page. To remove a property you have added, simply click the remove button. Once you are satisfied with the properties you want to edit for the selected users, simply click the **Submit** button and the user records will be modified.

### 3.3.3 Modifying qualifications for many users

You can Add or Remove qualifications (categories such as Departments, Areas, Tasks, etc.) for many users at the same time by navigating to the Users page, selecting edit on any user record, and then selecting the Qualifications tab.

Getting to the Mass Qualifications Edit
Adding Mass Qualifications
Removing Mass Qualifications

**Getting to the Mass Qualifications Edit page**

First, navigate to the Users records page.

Select any users (they do not have to be the users you will be adding qualifications for).

Then click the **Mass Edit Qualifications** icon on the top of the form.
Adding Qualifications for many users

After selecting Mass Edit Qualifications, you will see this screen. Select the action you would like to accomplish, here we will demonstrate add qualifications to multiple users.

Next, select the category you would like to add many users to. This can be Departments, Areas,
Qualifications - Add or remove rules qualifications

Add Qualification

Select type of the category: Department

Select the users you would like to qualify for this selection.

<table>
<thead>
<tr>
<th>First Name</th>
<th>Last Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Thomas</td>
<td>Bailey</td>
</tr>
<tr>
<td>Maryellen</td>
<td>Green</td>
</tr>
<tr>
<td>Anne</td>
<td>Harper</td>
</tr>
<tr>
<td>Regina</td>
<td>Howard</td>
</tr>
<tr>
<td>Sam</td>
<td>Huntington</td>
</tr>
<tr>
<td>toolbox</td>
<td>her</td>
</tr>
<tr>
<td>Dobes</td>
<td>Kine</td>
</tr>
</tbody>
</table>

Select the category items (in this example, Departments) you want to qualify the selected users for.
You can also edit the rank (for auto-scheduling purposes) for the selected users in these category items.

Finally, confirm that the employees and category items are in the list and click Finish.
Removing Qualifications for many users

After selecting **Change qualifications for many employees**, you will see this screen. Select the action you would like to accomplish, here we will demonstrate removing qualifications from multiple users.

Select the category you want to remove qualifications from for multiple users.

Next, select the users we are removing qualifications for.
Then select the category items we are removing qualifications from these users.
Finally, confirm that the employees and respective category items you are removing qualifications for are in the list, and click **Finish**.
3.4 Scheduling
How to create the schedule

Templates

3.4.1 How to create the schedule

In WorkSchedule.Net it could be better said that you are "creating more schedule". As time passes, you can add a few weeks, or a few months, each time you schedule to the end of the posted portion. Your employees can only see the posted portion of the schedule. Everything before the posted portion of your schedule is history, and everything after it is under construction. It is normally this "under construction" area that you add to, although you are permitted to change the posted area. But keep in mind that some of your employees may have already checked their schedules. So if you are not using Schedule Alerts, you may need to email them to let them know that the schedule changed. See Emailing employees.

THE THREE BASIC STEPS TO SCHEDULING

Before completing step 1, make sure that you have updated the recurring schedule, user records, and any rules that might need to be revised.

1. IN CURRENT SCHEDULE: Initialize the schedule to default your new week or weeks to the "normal" week(s) in your recurring schedule. This gives you a starting point.

2. IN CURRENT SCHEDULE: Make modifications that adjust the schedule to what makes sense for the actual week(s) you are scheduling. This may involve auto-scheduling to fill in open time blocks, manual adjustments, or both.

3. IN CURRENT SCHEDULE: Post the schedule by indicating the new post date, which limits how far into the future your employees can see the schedule.
3.4.1.1 Setting up the recurring schedule

The first time you view the recurring schedule, it will be empty, looking something like this:

TIPS ON HOW TO SET UP YOUR RECURRING SCHEDULE

You should add time blocks, representing the times your employees generally work on a typical basis. If some employees do not have a set schedule, you should add just the employees that do have some regularity to their schedule. If there is no regularity to who works, but the shifts are always the same, you should add open time blocks, which can be assigned later in the process in the current schedule, on a week by week basis. If there is absolutely no regularity to either when your employees work or what times you need coverage, then you do not need to use the recurring schedule at all. The employees can not view the recurring schedule. The recurring schedule is a manager tool, which allows you to default your current schedule on a weekly basis, thus giving you a "starter" schedule each time you begin the process of creating the schedule. See Initializing from the current schedule.

3.4.1.2 Initializing the current schedule

HOW TO INITIALIZE THE CURRENT SCHEDULE WITH DATA FROM THE RECURRING SCHEDULE

Once you are sure that the recurring schedule is up-to-date, the next step in the process of creating the schedule, is to initialize the schedule. This will default your "under construction" weeks, to
whatever your recurring schedule is for each corresponding week.

1. First, enter the Current Schedule.

2. Choose which week(s) you want to initialize, as well as which cross-section. See Cross-sections, and Navigating through time. You can choose to only initialize a certain cross-section of your schedule, such as one department or task at a time, or you can initialize all of them together.

3. Then click on Edit | Initialize this view with time blocks from Recurring Schedule

4. Confirm that you want to initialize from the Recurring Schedule.

5. Now each day in your view of the Current Schedule has been populated with copies of the time blocks from each corresponding day of your Recurring Schedule.
DEALING WITH SCHEDULED TIME OFF WHEN INITIALIZING

Initializing takes into account scheduled time off, which is normally tracked in the Current Schedule. Normally, time off blocks would be the only time blocks existing in the Current Schedule before initialization, as time off can be scheduled far out into the future. If you have any time off blocks in the Current Schedule that would cause a double scheduling error with the recurring time blocks coming in, the time blocks coming in are automatically changed to an open (unassigned) status. In this way the system shows that there is some task that needs to be filled with a replacement for the employee that is out. The time off block that was originally in the Current Schedule remains, to record the employee's time off for reporting purposes.

RE-INITIALIZING THE SCHEDULE

Re-initializing the schedule can be a helpful tool, especially if the recurring schedule has changed dramatically, and you have initialized the schedule many weeks out. You can reinitialize the schedule, but you should take caution as you may not get the result you envision. When initializing the schedule, WorkSchedule.Net will first automatically remove any time blocks in the Current Schedule that (a) came from a previous initialization from the Recurring Schedule to begin with, and (b) have not been modified since then.

3.4.1.2.1 Modifying the current schedule

MODIFYING THE CURRENT SCHEDULE

After initializing the current schedule, you will probably need to make adjustments in the Current Schedule that reflect the circumstances of the week(s) you are scheduling. Some employees may be off. You may have open time blocks that need to be assigned to employees. Or you may have slight changes in the start and end times or other properties of your time blocks.

You can choose from a variety of ways to adjust your schedule at this point in the scheduling process. Sometimes the answer may be a combination of more than one method.
MANUAL ADJUSTMENTS

The simplest way to modify the current schedule is through manual changes. See Manipulating time blocks.

BEST FIT

Using the best fit feature, is sort of a manual assist or partially automated scheduling function. This feature allows you to use the intelligence of the system, based on your rules, to determine which employee is the best fit for any given time block. For instruction on how to use this feature, see Best Fit.

AUTO-SCHEDULING

The auto-scheduling feature automatically assigns employees to open shifts in the schedule, based on your rules. See Auto-schedule.

3.4.1.3 Posting the current schedule

HOW POSTING THE CURRENT SCHEDULE WORKS

The posted portion of the schedule is the part of the schedule visible to your employees. You control the end date of this time window for your employees by setting a post date in the system for each department (or all departments together). The posted portion of the schedule always ranges from the current date (today) through the post date for each department. So as days pass, the start date of the posted portion moves forward, but you should never allow the posted portion to disappear. You should always keep plenty of posted area. You can post anywhere from a few days ahead up to a year ahead. Normally a few weeks to a month of posted schedule works well.

In the Current Schedule, when in a single department, the posted days of the schedule are marked with a light blue background in the header of each day column. Days that have fallen into history have column headers with a gray background. Days that are un-posted and therefore still "under construction" have column headers with a white background.

THE SIMPLE WAY: POSTING ALL DEPARTMENTS TO THE SAME DATE

Posting the schedule means simply telling WorkSchedule.Net what the new post date is. If you always want to post all departments to the same date, posting is very simple. Make sure you are viewing All Departments (keep in mind you may have renamed "Departments" to something else). Then choose the day you want the schedule posted through. Click the date at the top of that day column. You will get a pop-up menu. Click the option "Post the schedule thru this day". Then you will notice that all the day column tops have an aqua color from the current date through the new
post date that you just set. Those aqua days now represent the **posted** portion of the schedule. Your employees can now see their schedules through the new post date.

**Posting to a specific date**

This will post the schedule from the current date through Thursday, October 12th.

**CAUTION:** When you make changes to the posted portion of the schedule, you do not need to post again to make those changes effective. As soon as you make a change, it is effective. If you attempt to re-post the week to the last day of the week, you may inadvertently UN-POST, everything after that week, if it had been posted beyond the week’s end. See UN-POST below.

**CAUTION: STRIPED BLUE AND WHITE PATTERN IN DAY COLUMN TOPS**

**CAUTION:** When you see the striped pattern at the top of the day column, it means that some of the time blocks below in that day column are not posted, and therefore not visible to the employees. This can happen when you have set different post dates for different departments, which you are allowed to do. It also can happen when you add a new department without posting it, because by default that new department is not posted. For more information on what the striped pattern means see THE ADVANCED WAY: POSTING EACH DEPARTMENT TO ITS OWN POST DATE below.
THE ADVANCED WAY: POSTING EACH DEPARTMENT TO ITS OWN POST DATE

NOTE: Keep in mind that you could have renamed the "Departments" category to something else (EX: “Locations”), but these same procedures still apply to the category of type "Department".

POSTING INDIVIDUAL DEPARTMENTS

Each department in WorkSchedule.Net can have its own post date. This can be useful when you want a particular department's schedule posted further ahead, but another department's schedule is not ready to be posted that far ahead yet. To do this, first choose one department in the cross-section toolbar. Now you are viewing only the one department, for example, Department A. Because you are only viewing Department A, you can post using the same method described above in the simple method above. However, this time, you will only be posting Department A's schedule. Then you can choose Department B, from the cross-section toolbar, and post Department B to a different post date, etc.

VIEWING ALL DEPARTMENTS, WHEN EACH DEPARTMENT IS POSTED TO A DIFFERENT DATE

When you are viewing ALL Departments, you may see a striped aqua and blue pattern on some days. This indicates that for these days, the schedule is posted for some departments, but not for others. Be careful here, as this means that you as a manager or admin may see time blocks on these days that the employees cannot see because the department of those time blocks are not yet posted for that day. Remember, employees only see time blocks that are on or before the post date of the department.

EXAMPLE: Dept A is posted through Monday, but Dept B is posted through the following Wednesday. There is a time block in Dept A on the Tuesday in between. Since Dept A is only posted through Monday, that time block is not visible to the employee, because it is on Tuesday. When viewing ALL Departments, on the manager side, you will see the striped aqua / white pattern at the top of the Tuesday and Wednesday columns, indicating that not all time blocks below are visible to the employee, because they contain a possible mix of posted, and un-posted time blocks.

UN-POSTING THE CURRENT SCHEDULE

Although uncommon, you may have posted to the wrong date or simply want to reverse the posting of your schedule. You can move the post date backward to a date before the current post date. This effectively un-posts some or all of the schedule in such a case. To do this, simply post to a date before the current post date (i.e., move it backward).

EXAMPLE: If the schedule is posted through 12/19/08, and you click on the date header for 12/15/08, and then click "Post the schedule thru this day", you will effectively have un-posted 12/16, 12/17, 12/18, and 12/19, because the post date has been moved backward.

3.4.2 Templates

GENERAL INFORMATION

Templates allow you to set up multiple recurring rotations (patterns). Each template can be any number of days, and can be aligned to the real calendar by assigning the start date
(Day #1) to a real date in Template Setup. Once you have set up a template, you can then copy the data into the Current Schedule by Initializing the schedule.

**EDITING TEMPLATES**

You can view and edit templates that you have set up from the left menu under Recurring Schedule.

Here is an example of a template. The number of days in this template is set to 3, which means that the pattern repeats itself every three days.

**COPYING RECURRING SCHEDULE TO TEMPLATE / TEMPLATE TO TEMPLATE**

After creating a new blank template, you have the option of filling that template with the recurring schedule, or another template.

To do initialize from the recurring schedule, go to the top bar Edit > Initialize this view with time blocks from Recurring Schedule.
INITIALIZATION FROM A TEMPLATE

To initialize from a template:

1. Go to the Current Schedule and choose the time period (view) that you want to initialize.
2. Click on Edit, choose Initialize this view with time blocks from a template.
3. Choose the template.
4. Confirm when asked to proceed with the initialization.
The Schedule is now initialized. As you can see, the pattern started on Tuesday. This happened because we set the start date of the template to be on Tuesday January 30th.

3.5 Attendance

In addition to its rich scheduling features, WorkSchedule.Net allows you to track actual attendance as well, separately from the schedule. This is handled by the attendance module. Like the current schedule and recurring schedule, the attendance modules utilizes a time block editor, which manipulates time blocks in almost exactly the same way.

Generally, you have two ways to utilize the attendance module: through initialization or through use of our time clock feature.

Initialize from the current schedule
Populate the attendance data by copying the time blocks from the same dates in the current schedule each week, or several weeks at a time.

Use the time clock
Employees will be able to click in and clock out from their employee area.

Modifying the attendance
Make edits to attendance through a time block editor.

Exporting to Quickbooks
You can use all the time data you have tracked with WorkSchedule.Net, and move it into QuickBooks Pro® for payroll.

Finalize Attendance

3.5.1 Initializing from the schedule

You can populate the attendance data by copying the time blocks from the same dates in the current schedule each week, or several weeks at a time.

To initialize a week or number of weeks, choose your view, and then choose Initialize this view with time blocks from Current Schedule.
Confirm that you want to initialize the attendance data.

Initialize Time Sheet

You are about to copy the time blocks from your current schedule into this week of the time sheet. Are you sure you want to do this?

Yes  Cancel

Then you will see the data is copied over from the current schedule. Then you can make changes in Attendance, or you may allow your employees to edit their own attendance date (time sheets) in the employee area.
3.5.2 Using the time clock

You can choose to use the time clock as a way to populate your attendance data. Normally the time clock method would not be used with the initialization method.

If you enable the time clock in General Options, your employees will be able to clock in and clock out from their employee area. See Employee Area. Whenever an employee clocks out, a time block is generated in the attendance module, which represents the time block that the employee just worked for. For more in-depth information on how these time blocks are created, click here.

Attendance data can be reported on, or exported to Quickbooks or to other payroll systems using our export feature.

3.5.3 Modifying the attendance

Modifying data in the attendance module is virtually the same as in the other time block editors like the current and recurring schedules.

See Using the time block editors for more information.

3.5.4 Exporting to Quickbooks

Using the Export to QuickBooks Pro® or QuickBooks Premiere®, you can use all the time data you have tracked with WorkSchedule.Net, and move it into QuickBooks Pro® for payroll.

**SETTING UP FOR EXPORTING**

There are several things you must make sure of before attempting to export the time sheet information from WorkSchedule.Net into Quickbooks Pro®:

1) Ensure that in each employee record, the names are spelled exactly the way they are in QuickBooks Pro®, INCLUDING CAPITALIZATION! The trick here is in realizing that QuickBooks Pro® combines the first and last name into one, whereas WorkSchedule.Net separates them into two fields. Upon exporting, WorkSchedule.net will combine the First Name and Last Name fields into one, with a space in between. **You must ensure that the spellings of the names in WorkSchedule.Net are EXACTLY as they are in QuickBooks Pro® for the export to work.** If you have a middle initial used in QuickBooks Pro®, simply append it to the first name. **EXAMPLE:** If you have an employee entered into QuickBooks Pro® as "John Q. Smith", the corresponding WorkSchedule.Net employee record should be as follows: First Name: "John Q.", Last Name: "Smith".

2) In Company Settings, you must have an entry for "QuickBooks Pro® Create Time." There is a number that you must enter here, and you can find using the following method:

(a) Open QuickBooks Pro®.

(b) Go to File | Timer | Export lists for Timer.
(c) Give the file a name and save it somewhere you will remember, like your Desktop. It will default to making the file end in ".iif" which is fine. You can change it to a ".txt" file if you wish, but it is not necessary.

(d) Open Wordpad, Notepad, Word, or any basic word processor. From there, open the file you just exported out of QuickBooks Pro®.

(e) The top two lines should look something like this:

```
!TIMERHDR VER REL COMPANYNAME IMPORTEDBEFORE FROMTIMER
COMPANYCREATETIME
TIMERHDR 6 0 My Company Name N Y 933234334
```

(f) The number you need for "QuickBooks Pro® Create Time" in Company Settings is the rightmost number on the second line. The number above is only an example. Do not use the number given here in the help, rather the number in the file you just opened. In the above example, we have colored it in red. If you are comfortable with copy and paste, you can copy the number to the clipboard, and then paste it right into Company Settings.

**EXPORTING OUT OF WORKSCHEDULE.NET**

1) In WorkSchedule.Net, go to the Time Sheet section. Then choose File | Export to QuickBooks Pro®.

2) You will be presented with a date range, which you can change to anything you want. *It will be defaulted to your current schedule period.* Make sure the date range indicates the time period of time data that you wish to export into QuickBooks Pro®. Then click "Export Now".

3) You should then be presented with a link that says "Right click here to download your export file. Then choose Save Target As". As it says, RIGHT click the link, and then when the pop up window appears, click "Save Target As".

4) At this point you should be asked where to save the file. It is recommended that you save it to your Desktop, but you can save it anywhere you like as long as you remember where you saved it.

**IMPORTING INTO QUICKBOOKS PRO®**

(a) Open QuickBooks Pro®.

(b) Go to File | Timer | Import Activities from Timer.

(c) Choose the file you just saved from WorkSchedule.Net, and open it.

(d) At this point, if everything was set up correctly (above), Quickbooks Pro® should indicate that the import was successful. It should also give you the opportunity to see a report of what you just imported.

(e) If for any reason you have problems, contact a technical support representative at 866-846-3123
(press 4).

For support on running payroll and any other internal functions of QuickBooks Pro®, contact Intuit (http://www.intuit.com) for support.

* QuickBooks Pro® is a registered trademark of Intuit.

### 3.5.5 Finalize Attendance

**HOW FINALIZING THE ATTENDANCE WORKS**

To finalize the attendance, click on the column header of the date you want to mark as the final day, then click on Finalize the time sheet through this day.

In the example above, the attendance will be finalized from the current date through Friday November 23rd.
3.6 Availability

The best way to schedule around your employees’ availability is to allow your employees to give you their availability requirements online in their employee area. However, as a manager, you have the ability to view, and if need be, manipulate some or all of your employee's availability.

**HOW AVAILABILITY WORKS IN WorkSchedule.Net**

There are two time block editors that allow manipulation of availability time blocks for managers: Recurring Availability and Current Availability. The relationship between these two time block editors is much like the relationship between the Recurring Schedule and the Current Schedule.

**Recurring availability** stores the typical week of availability for all employees. It contains the availability data in each employee's My Typical Week section in their employee view, all employees combined together. It always contains exactly one week of availability data.

In contrast the **current availability** contains a virtually infinite number of weeks, as it represents a real calendar. In current availability each week for each employee has a status which is either normal or override. If an employee's week is normal status, then it means that the availability data in their recurring availability (called My Typical Week on the employee side) will be used for that week. An employee's week with a normal status can not be changed in the current availability, only in recurring availability. If an employee's week is set to override status, it means that the availability data in the current availability (Override Specific Weeks on the employee side) will be used for that week, and it can be changed in current availability.

In summary, WorkSchedule.Net allows employees (or manager on their employees’ behalf) to set up a typical week of availability. This typical week of availability can be scheduled around in the auto-scheduler, unless a week is overridden by the manager or employee.

<table>
<thead>
<tr>
<th>Manager section</th>
<th>Employee section</th>
</tr>
</thead>
<tbody>
<tr>
<td>Recurring Availability</td>
<td>My Typical Week</td>
</tr>
<tr>
<td>Current Availability</td>
<td>Override Specific Weeks</td>
</tr>
</tbody>
</table>

3.6.1 Recurring Availability

Make sure you understand the concepts in How Availability Works in WorkSchedule.Net before reading this topic.

**Recurring Availability**

1. The Recurring Availability screen always shows exactly one week of availability data.
2. On the Recurring Availability screen, the manager sees availability data for all employees, reflecting the "My Typical Week" data from each employee's account.
3. Managers can do all time block manipulation in the Recurring Availability screen, like any other time block editor.
4. Changes made by a manager on this screen will be reflected on the normal availability week (or Typical week) on the employee side.
3.6.2 Current Availability

Make sure you understand the concepts in How Availability Works in WorkSchedule.Net before reading this topic.

Current Availability

1. When showing All Employees, Current Availability screen always shows the availability data reflecting the "My Typical Week" data from each employee's account.
2. When showing All Employees, managers cannot do any time block manipulation for the Current Availability screen (Notice how Edit, Select, and View menus are not available in the image below)
3. In Current Availability screen, it's only possible to modify the data for **one employee at a time**. To do so:

First, choose that employee from the drop down list at the top in the cross-section toolbar. Second, click on **Override this employee's normal availability this week below**. In the following example, we choose to override Sarah Johnson's availability for the week of Wednesday, January 2nd.
Now, managers will be able to do any time block manipulation (Notice how Edit, Select, and View menus are once again available on the screen)

Example

In this example, we want to add a time block to declare Sarah Johnson Unavailable on Saturday January 5th.
Categories are usually not very important to change in this context, so make sure to click on the "Add this new time block to Current Availability" box if you did not do any changes or else the time block will not be created.

Click Submit, then this week will be different from the typical week for Sarah.
3.7 Using the time block editors

WHAT ARE TIME BLOCK EDITORS

On the left hand side of the screen, a section titled Time Block Editors contains all the Time Block Editors in WorkSchedule.Net: They are screens that display the Current Schedule, Recurring Schedule (including Templates), Attendance, Current Availability, and Recurring Availability.

In all of those editors, you change the views of the screen, manipulate time blocks, and view the shift information box in exactly the same way.

3.7.1 Views

Cross-sections

Sorting

Navigating through time

View range
3.7.1.1 **Cross-sections**

**OPENING CROSS-SECTIONS**

1. From the top menu, go to View | Cross-sections.

2. Cross-sections bar is now on.

**FILTER BY DEPARTMENT**

1. Pull down the drop list.
2. Choose department to filter by.
3. Click update.
FILTER BY OTHER CATEGORIES

1. Choose employee to filter by.

2. Click update when done.

3. Click the time block editor shows only chosen employee:

FILTER BY MULTIPLE CATEGORIES
The time block editor now shows only time blocks that are assigned to the chosen Employee: Colette MacKay in the chosen department: Downtown:

3.7.1.2 Sorting

Opening sort

1. From the top menu, go to View | Change Sort/Week/View.

2. Sort bar is now on.
The time block editor now shows time blocks sorted by Employee (the category we have chosen).

Sort by multiple categories

The time blocks are sorted first by department and then by employee name:
3.7.1.3 Navigating through time

Going to the previous or next week

1. From the top menu, go to View | Change Sort/Week/View.

2. From the Sort bar, select the Starting Day for the week you want to view, then update the view.

Jumping to the desired week

1. From the top menu, go to View | Change Sort/Week/View.

3.7.1.4 View range

CHANGING THE VIEWING RANGE

1. From the top menu, go to View | Change Sort/Week/View.
2. From the sort bar, go to view and select the new range you would like to view, then update the schedule.

If you choose the range to be more than 7 days, the whole schedule will not fit in one page. Here is how shift your view to the desired part of the schedule:

Daily view
3.7.1.5 Show Conflicts' Show all Main Groups

In the Views Menu, you can choose to show conflicts, and/or show all main groups.

UNDERSTANDING "SHOW ALL MAIN GROUPS" VIEW

This feature causes the time block editor to show main rows for ALL groups that exist, regardless of whether any time blocks in the view range are attached to the group. By main rows, we mean the first level sort that you chose in the sort section. For example, if your first sort was by department, and you choose to show all main groups, all the departments available in your company will show on the view, even if some of them don't have any attached time blocks.

Setting this feature on, will often result in showing many blank rows. This allows easy copying of selected time blocks from one group to another, since the blank row now exists -- and therefore you can click the left group link to get the pop-up menu and copy the time blocks to the row. For example, if the view is sorted by employee, you could easily copy Employee A's schedule to Employee B without Employee B needing to have had at least one time block scheduled already.

Note that Show all main groups only takes effect when you have one level of sorting, not two or three.

USING SHOW ALL MAIN GROUPS
1. Make sure that there is only one level of sorting on the sort bar.

2. On the view menu, click Show all main groups:

   - Weekly View (Refresh)
   - Monthly view
   - Daily coverage

   - Cross-sections
   - Change Sort/Week/View

   - show conflicts
     - Show all main groups

   - Color Scheme

   Make this view the default for 89521

**EXAMPLE**

Here’s an example of how the current schedule looks like when sorted by task, and show all main groups is off - only the tasks that have time blocks associated with them are displayed:

If we set show all main groups on, all other tasks are shown on the left hand side, so the manager can easily copy time blocks from one row to another.
Here's another example of how the schedule will look like when sorted by employee - all employees names will show in the left column, even if they don't have time blocks associated to them.
3.7.1.6 Color schemes

Changing the coloring scheme

1. From the top menu, go to View | Color Scheme.

Coloring schemes

- Standard

- Color by Category
3.7.1.7 Other View Settings

ACCESSING OTHER VIEW SETTINGS

For those who need further customization in their schedule, Other view settings contain features which are not usually used, but could be useful to schedulers on occasion. These can be accessed under the View drop-down.

1. From the top menu, go to View | Other view settings.
OTHER VIEW SETTINGS OPTIONS

Day column width:
This option will change the width of each day of the week in pixels when the week is viewed in 14 days or higher.

Suppress time block time:
By default, start and end times will both show on the time block. With this option, you can modify to only show the start time, or do not show a time on the time block.

Use Fixed Left Column:
This option will lock the sort columns from moving when scrolling. This option does not work with Firefox.

Show Viewed Time Blocks:
When an employee views their schedule, "Viewed" will appear in the time block that they have viewed.

Suppress Total Hours:
This will suppress the total hours column on the right.

Show Hours In Time Blocks:
This option will enable viewing the total number of hours inside of the time block.

Show Double Scheduling Alert:
This option will show the red double scheduling banner at the top of the schedule.
3.7.2 Manipulating time blocks

Properties of a time block

Adding time blocks

Selecting time blocks

Modifying time blocks

Removing time blocks

Changing many time blocks at once

Copying time blocks

Moving time blocks

Properties of a time block

3.7.2.1 Properties of a time block

Each time block has several properties. Collectively, these properties define the time block. They determine how the time blocks are grouped, sorted, and colored. To change the properties of a time block, select the time block, and click on edit, the following screen will be displayed:

You can choose which employee is assigned to the time block. You also choose "OPEN
(unassigned)" from the list, which will leave the time block with no employee assigned to it at this point. The list of employees includes only those that you have permission to schedule (ie, that are qualified for your managed departments)

**TIME OF DAY / DATE AND TIME**

**Time of Day:** You can choose from one of your predefined times of day. See Times of Day. Choosing the time of day here defaults the **To** and **From** times below to the preset start time and end time associated with the time of day you choose.

**From:** This is when the time block starts. Enter a valid time here. See Entering times and dates for valid formats.

**To:** This is when the time block ends. Enter a valid time here. See Entering times and dates for valid formats. **If the To time is earlier in the day than the From time, the system assumes that the time block ends on the following day. A time block can not be greater than 24 hours.**

**Date:** This is the date on which the time block **starts. The time block does not necessarily end on the same day.** Choose from the drop down if you want to modify the date, from the list of dates in your current view.

**NUMBER OF MAN-HOURS**

The correct number of man-hours is important in computing total hours in the time block editors, and in several reports including the Time Off Report.

**Auto calc # hrs:** This option is normally chosen by default. When this option is chosen for the time block, WorkSchedule.Net calculates the number of man-hours that should be credited to the time block.

**Use this # hrs:** This option is an override. When this option is chosen for the time block, WorkSchedule.Net credits the number of man-hours entered into the text box for reporting purposes.

**DEPARTMENT**

You can choose the department in which this time block is being scheduled. The drop down list only includes those departments that you are authorized to manage.

**OTHER CATEGORIES**

In this general area, you can choose the Area and Task associated with this time block, if enabled in setup. Also you can choose the category items for any user defined categories you may have defined in setup.

**TIME ON / OFF**

Time blocks can be used to schedule time on, as well as time off. Time off blocks normally show up inverted in color (white on black). Here you can answer the question, **Is this time working, or time**
off?

**Working (Time on):** Choose this option if the time block indicates time that the employee (or an unknown employee) is working.

**Time off - Reason:** Choose this option is the time block indicates time that the employee (or an unknown employee) is scheduled to be off. Then choose the reason for the time off from the list of time off reasons in the drop down to the right.

**NOTES**

You can enter any notes to be associated with the time block here in free form text. These notes will normally show up in the weekly view.

**MANAGER NOTES**

You can enter notes that won't appear in the time block itself. These notes can be seen through the Shift Information Box. Employees will not be able to see these notes.

**COLOR**

You can edit the color of the individual shift through this option. This overrides all other coloring options.

3.7.2.1.1 Simple click to edit a time block

The easiest way to display and edit the properties of a time block is to click on the words inside the time block in any time block editor:

![Time block editor](image)

Click anywhere on the text inside the time block to display its properties.

After you click, the properties of the time block are displayed in the lower part of the screen:
For explanations of what each of the above time block properties mean, go to Properties of a time block.

3.7.2.1.2 Entering dates and times

**DATE FORMATS**

In most places where you choose a date, you are either given a drop down list, or a calendar pop up which will format the date for you. If you are entering a date somewhere that is free text, use dashes to separate the day, month and year. Use the format `mm-dd-yyyy` for American or `dd-mm-yyyy` for European.

**TIME FORMATS**

WorkSchedule.Net allows flexible entry of times.

**Standard Time:**

For standard "am/pm" time, the entry is not case sensitive, and you can just use a "p" or an "a" to indicate "am" or "pm". If no "am" or "pm" indication is given, WorkSchedule.Net assumes you mean am.

Examples of valid formats: "6 pm", "6:00 pm", "6:00p", "6"
Examples of invalid formats: "600"

**Military Time:**
WorkSchedule.Net handles military time slightly differently from the common way of denoting military, in that WorkSchedule.Net uses a colon to separate the hours from the minutes. This is done for readability. You must use a colon or the time will not be recognized as valid.

Examples of valid formats: "11:00", "11"
Examples of invalid formats: "1100"

3.7.2.2 Adding time blocks

There are a variety of ways to add time blocks into a time block editor.

- Adding time blocks: Single Employee, Single Day
- Adding time blocks: Single Employee, Multiple Days
- Adding time blocks: Multiple Employees, Single Day
- Adding time blocks: Multiple Employees, Multiple Days
- Adding open (unassigned) time blocks

3.7.2.2.1 Adding - Single Employee, Single Day

To add time blocks, one at a time:

Click on Edit | Add time block(s) from the top menu

In the frame below, fill in the properties for each time block you want to add, in the green shaded boxes. You can add just one time block, or continue to add more time blocks down the page. For explanations of each time block property, see Properties of a time block.
Click any submit button on the page to add the time blocks. Click any cancel button to cancel and go back to the full weekly view without making any changes.

3.7.2.2 Adding - Single Employee, Multiple Days

**To add time blocks assigned to one employee, to multiple days at once:**

Click on **Edit | Add time block(s) (Special) | Add time block(s) (Single Employee, Multiple Days)** from the top menu.

In the frame below, fill in the properties for each time block you want to add, in the green shaded boxes. You can add just one time block, or continue to add more time blocks down the page. For explanations of each time block property, see Properties of a time block.
3.7.2.2.3 Adding - Multiple Employees, Multiple Days

To add time blocks assigned to multiple employees, to multiple days all at once:

Click on Edit | Add time block(s) (Special) | Add time block(s) (Multiple Employees, Multiple Days) from the top menu or you may click the symbol.
In the frame below, fill in the properties for each time block you want to add, in the green shaded boxes. You can add just one time block, or continue to add more time blocks down the page. For explanations of each time block property, see Properties of a time block.
Click any submit button on the page to add the time blocks. Click any cancel button to cancel and go back to the full weekly view without making any changes.

3.7.2.2.3.1 Adding - Multiple Employees, Single Day

**To add time blocks assigned to multiple employees, to a single day:**

Click on **Edit | Add time block(s) (Special) | Add time block(s) (Multiple Employees, Single Day)** from the top menu.

In the frame below, fill in the properties for each time block you want to add, in the green shaded boxes. You can add just one time block, or continue to add more time blocks down the page. For explanations of each time block property, see Properties of a time block.
Click any submit button on the page to add the time blocks. Click any cancel button to cancel and go back to the full weekly view without making any changes.

3.7.2.2.4 Adding - Open (unassigned) time blocks

**There are two ways to add open (unassigned) time blocks:**

1. Click on **Edit | Add time block(s) (Special) | Add open time block(s)** from the top menu

2. Or, simply click on the blue Add icon on the top of the schedule ( )

In the frame below, fill in the properties for each time block you want to add, in the green shaded boxes. You can add just one time block, or continue to add more time blocks down the page. For
explanations of each time block property, see Properties of a time block.

Click any submit button on the page to add the time blocks. Click any cancel button to cancel and go back to the full weekly view without making any changes.

3.7.2.3 Selecting time blocks

Selecting time blocks allow you to grab a group of time blocks. Then you can command WorkSchedule.Net to do something with them. There are a wide variety of ways to select time blocks. You can select one at a time, select all time blocks in your view, or a single day or group at once. You can also un-select one time block at a time, all time blocks, or a single day or group at once.

- Selecting and unselecting individual time blocks
- Selecting and unselecting all time blocks in a day
- Selecting and unselecting all time blocks in a group
- Selecting all time blocks in view
- Unselecting all time blocks
- Changing selection mode

3.7.2.3.1 Selecting and unselecting individual time blocks

**SELECTING INDIVIDUAL TIME BLOCKS**

To select time blocks, one at a time, simply click on the diamond in the upper left corner of the desired time blocks.
### UNSELECTING INDIVIDUAL TIME BLOCKS

You can unselect time blocks that are selected by clicking on the same diamond. It acts as a toggle to select and unselect.

- **3.7.2.3.2 Selecting and unselecting a day**

### SELECTING ALL TIME BLOCKS IN A DAY

To select all time blocks in a day, click on the day column header. A pop up menu for that day will appear. Choose **Select all time blocks in this day.**
Then all time blocks in the day you chose will be selected.

UNSELECTING ALL TIME BLOCKS IN A DAY

To unselect all time blocks in a day, click on the day column header. A pop up menu for that day will appear. Choose Unselect all time blocks in this day.
Then all time blocks in the day you chose will be unselected.

### SELECTING ALL TIME BLOCKS IN A GROUP

To select all time blocks in a group, click on the group title in the left column for the group you want to select. A pop up menu for that group will appear. Choose **Select all time blocks in this group.**
Then all time blocks in the group you chose will be selected.

**UNSELECTING ALL TIME BLOCKS IN A GROUP**

To unselect all time blocks in a group, click on the group title in the left column for the group you want to unselect. A pop up menu for that day will appear. Choose *Unselect all time blocks in this group*. 
Then all time blocks in the group you chose will be unselected.

### 3.7.2.3.4 Selecting all time blocks in view

To select all time blocks in view go to **Select** | **Select all time blocks in view** or click on the symbol.

Then all time blocks in your current view will be selected.
### 3.7.2.3.5 Unselecting all time blocks

To unselect all time blocks in the system go to **Select | Clear entire selection** or click on the 🌟 symbol.

Then there will be no time blocks in the entire system selected, **including those out of your view**.

---

### 3.7.2.4 Editing time blocks

**MODIFYING TIME BLOCKS**

1. Select the time blocks you want to modify. See Selecting time blocks.
2. From the top menu, go to Edit | Edit Selected time block(s).

3. Make the modifications to the time blocks
4. Click on one of the Submit buttons

3.7.2.5 Removing time blocks

REMOVING TIME BLOCKS

1. Select the time blocks you want to modify. See Selecting time blocks.
2. From the top menu, go to Edit | Remove selected time block(s) or click on the 😞 symbol.

3. On the verification page below, click Yes, Remove.
4. The time blocks are removed.

3.7.2.6 Copying time blocks

COPYING BY GROUP

1. Select the time blocks you want to copy. See Selecting time blocks.
2. Click on the group title in the left column for the group you want to copy to. A pop up menu for that group will appear. Choose Copy selected time blocks to this group.

3. Copies of the selected time blocks were added to Lakeside department.
COPYING BY DAY

1. Select the time blocks you want to copy. See Selecting time blocks.

2. Click on the day column header to copy selected time blocks to the desired day. A pop up menu for that day will appear. Choose copy time blocks to this day.
3. Copies of the selected time blocks were added to Thursday.

3.7.2.7 Moving time blocks

MOVING BY GROUP

1. Select the time blocks you want to move. See Selecting time blocks.
2. Click on the group title in the left column for the group you want to move the time blocks to. A pop up menu for that group will appear. Choose Move selected time blocks to this group.

3. The previously selected time blocks were moved to Lakeside department.
1. Select the time blocks you want to move. See Selecting time blocks.

2. Click on the day column header to move selected time blocks to the desired day. A pop up menu for that day will appear. Choose Move time blocks to this day.
3. The previously selected time blocks were moved to Thursday.

3.7.2.8 Assigning employees

**USERS MENU**

To assign employees to time blocks, use the Users menu on the left side of your screen, under Setup.

1. Click on the icon next to Users. **IMPORTANT: DO NOT CLICK THE WORD "USERS" ITSELF**
2. A list of all available employees will be shown:

ASSIGNING THE EMPLOYEES

1. Select the time block or time blocks to which you wish to assign an employee.

2. Click the employee’s name, or Open (Unassigned) in the user list (shown above)

That’s it! The employee is now instantly assigned to the selected time blocks. Read the hints below to help avoid accidentally re-assigning when repeating assignments to different employees.

USING SELECTION MODES TO MAKE ASSIGNING EASIER

By default, when selecting time blocks you are in regular selection mode. This means that as you select more and more time blocks, your previous selections do not go away. In this manner you accumulate a selection, until you clear the selection using the clear selection button ( 
). However, when assigning employees, you may not want your previously selected time blocks to remain selected each time you select a new time block. You may find it easier to have WorkSchedule.Net automatically clear any previous selection every time you select. This is called single selection mode. You can easily toggle between these two modes by clicking the ( icon at the top. See changing the selection mode.
ASSIGNING AN EMPLOYEE TO ONE TIME BLOCK AT A TIME

Make sure **single selection mode** is ON. The mouse icon near the top of the screen should **not** have a star (like this 🌟). The single selection mode is a very handy feature if you want to make a number of assignments to several employees. More on changing the selection mode.

1. Select the time block.
2. Click on the employee that you want to assign from the Users menu.
3. The time block will be instantly updated and assigned to that employee.

ASSIGNING AN EMPLOYEE TO SEVERAL TIME BLOCKS

Make sure **regular selection mode** is ON. This mode is the default mode, where the mouse icon near the top of the screen has a star (like this 🌟). The regular selection mode is a handy feature if you want to assign a single employee to many time blocks. More on changing the selection mode.

1. Select the time blocks.
2. Click on the employee that you want to assign from the Users menu.
3. The time blocks will be instantly updated and assigned to that employee.

3.7.2.9 Drag-and-Drop Employees

**Drag-and-Drop to Assign Employees**

Drag-and-Drop is a new feature that allows you to assign employees to shifts by simply dragging the employee's name onto the time block. The option can be enabled in General Options.

1. Sort by Employee

To use this feature, you must sort by employee. The sort can be any of the three sorts, however one of them must be employee.

2. Drag from the Employee sort column to the time block.

You can drag any employee's name, including open, onto any time block. This will then assign that employee to that specific time block.

3.7.2.10 Changing properties of many time blocks at once

**CHANGING MANY TIME BLOCKS AT ONCE**

WorkSchedule.Net allows you to modify several properties on several time blocks at once. To do
1. Select the time blocks you want to modify. See Selecting time blocks.

2. From the top menu, go to Edit | Change properties for selected time block(s).

3. Make the modifications to the time blocks
4. Click the Replace button. The time blocks have been modified.

Now the start and end times on all three time blocks have been changed to 5:30 am and 11:30 am respectively.
3.7.2.11 Changing Selection Mode

In WorkSchedule.Net, there are two different selection modes. The mouse icon on top of the screen shows which mode is on.

**REGULAR SELECTION MODE**

The first selection mode is the **regular selection mode**, where you click a time block to select it and add it to the already selected time blocks (allows you to hold on to your selection). When the system is in this selection mode, the mouse icon will look like this with a star shape on top.

**SINGLE SELECTION MODE**

The other selection mode, called **single selection mode**, allows you to select one time block and unselect all others with a single click. If the single selection mode is turned on, you click to select one time block, and this will instantly unselect all other time blocks anywhere, including those out of view. In this mode, the mouse icon will look like this without the star shape. Single selection mode can be very helpful if you want to assign a number of employees to different time blocks.

**NOTE:** To select more than one time block while in single selection mode, press on CTRL key while clicking.

**CHANGE SELECTION MODE**

If you want to toggle between the two modes, just click on the icon, and the system will switch to the opposite mode.
3.7.2.12 Instant Schedule Alert Button

We added the ability to easily send schedule alerts to multiple employees from selected time blocks. Schedule alerts (for events such as schedule changes) normally occur automatically, but not instantly.

**USING INSTANT SCHEDULE ALERTS**

In the time block editor, select one or more time blocks, then click the Send Alert button.

In this example, Maryellen Green and Carrie Huntington would instantly receive email alerts of the shifts for the selected time blocks (in blue) on this schedule.

To utilize this feature, make sure that your employees have email addresses in their user records.

3.7.2.13 Suppress Double Scheduling

**ALLOW DOUBLE SCHEDULING**

WorkSchedule.Net will warn users of double scheduling that occurs in a schedule. Selected time blocks can be allowed to be double scheduled in the schedule through the Suppress Double Scheduling feature.

1. Select the time blocks you would like to allow double scheduling for, then click the Mass Change button.
2. Scroll to the bottom of the list and check "Allow Double Scheduling", and also check "Allow double scheduling for these time blocks"

Be sure to check both boxes.

3.7.2.14 Undo

WorkSchedule.Net allows managers and administrators to undo their last action in the schedule. Time blocks that have been added, removed, or modified by the user will be restored to their previous version.

A user is only allowed to undo modifications to the schedule that he/she made within their current WorkSchedule.Net login session. After logging out or starting a new login session, the user will no longer be able to undo schedule actions from the previous session.

Please be aware that the undo will be available for any actions that have modified time blocks including those done outside of a schedule, including approving time off requests or changes to time blocks as a result of deleting a user.

1. Navigate to the Edit drop-down menu at the top of the time block editor and select the option Undo
2. Verify that the information listed is correct and click **Submit** when you are ready to start the Undo

3.7.3 **Shift Information Box**

**OPENING SHIFT INFORMATION BOX**

1. In order to open the **Shift Information** box, click on the info button on the time block.
2. A pop up window titled “Shift Information” for the chosen time block will appear.

![Shift Information Window]

**FEATURES**

On the Shift Information Box, you can click any of the following icons:

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
<th>Topic Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>🌐</td>
<td>Time block information</td>
<td>Time block information</td>
</tr>
<tr>
<td>📈</td>
<td>Get Best fit</td>
<td>Get best fit</td>
</tr>
<tr>
<td>👤</td>
<td>Employee information</td>
<td>Employee information</td>
</tr>
<tr>
<td>📊</td>
<td>Time block history</td>
<td>Time block history</td>
</tr>
<tr>
<td>📜</td>
<td>Check double scheduling</td>
<td>Check double scheduling</td>
</tr>
</tbody>
</table>
3.7.3.1 Time block information

**OPENING TIME BLOCK INFORMATION**

When you open Shift Information box, the time block information is displayed by default. It shows you all available information about the currently selected time block, like the assigned employee, time, and area, etc..

If you clicked on any other icon on the Shift Information box, and would like to get back to the Time Block Information, click 🔄.

![Shift Information](image1.png)

3.7.3.2 Employee information

**OPENING EMPLOYEE INFORMATION**

On the 'Shift Information' box, click 🔄 to get all available employee information

![Shift Information](image2.png)

**EMPLOYEE INFORMATION**
3.7.3.3 Get best fit

WHAT IS BEST FIT

Best Fit is a quick easy way to find the best employee for any time block. This feature allows you to use the intelligence of the system, based on your rules, to determine which employee is the Best Fit for any given time block. It can be used to help managers find an employee to cover a time block without using the automatic scheduling.

For example, if an employee can't cover his/her normal shift, the manager can click the time block, and then use Best Fit to find a suitable replacement.

OPENING BEST FIT

To open the Shift Information Box, you must click on the ( ) on the chosen time block.

In the Shift Information Box, click the icon of the employee with the magnifying glass ( ) to get Best Fit.
FINDING BEST FIT FOR THE TIME BLOCK

After clicking the icon, you will see a list of your employees. Those employees who can be assigned to this time block according to your Rules will float to the top, and will show a green check mark next to their names (✔). Those employees who could not be assigned to this time block without breaking a rule, will fall to the bottom, and will show a red icon (❌).

Each row has four columns in the table:

1. The first column shows a green check mark or a red X sign:

<table>
<thead>
<tr>
<th>Sign</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>✔</td>
<td>Employee can be assigned to the time block without breaking any rule</td>
</tr>
<tr>
<td>❌</td>
<td>Manager will be breaking a rule by scheduling the employee to the time block</td>
</tr>
</tbody>
</table>

2. The second column contains all the employee names that the manager has permission to access. See Permissions for details.

3. The third column has the score calculated based upon rules set by the managers. It is sorted in descending order, that is, highest score on top of the list. See Preference Rules to understand scoring.

4. The fourth column displays the rule that will be broken if the employee is scheduled for the time block, otherwise, it displays OK.

ASSIGNING AN EMPLOYEE TO THE TIME BLOCK USING BEST FIT

Click on any name on the list, and the system will assign that employee to the time block immediately. Managers can choose any employee, even if they will be breaking a rule.
3.7.3.4 Time block history

OPENING TIME BLOCK HISTORY

On the 'Shift Information' box, click to get the shift id, last user to modify the time block, last time the time block got modifies, and the last action.

TIME BLOCK HISTORY

3.7.3.5 Check double scheduling

OPENING DOUBLE SCHEDULING

On the 'Shift Information' box, click to check if there is a double scheduling conflict.
3.8 Automation

AUTOMATION FEATURES IN WorkSchedule.Net

WorkSchedule.Net's automated scheduling features include:

1. Auto-schedule: Automatically assigns employees to all the open time blocks in your schedule.

2. Show Conflicts: A viewing mode that automatically detects scheduling conflicts in your schedule.

3. Best Fit: This feature allows you to use the intelligence of the system to determine which employee is the Best Fit for any given time block. The system grades your employees and lets you choose an employee to make the actual assignment.

You are required to declare your open shifts, by building your schedule, and then set up your rules to be able to use these automation features correctly.

In addition, WorkSchedule.Net uses your eliminating rules to manage:
1. Sign up: This feature allows your employees to sign up for open time blocks in the posted schedule, also called job bidding.

2. Swap: This feature allows your employees to offer or accept offered shifts, also called shift trading.

To know more on how you can optimize your rules for swap and sign up, please click here.

**RULES-BASED AUTOMATION**

Managers and scheduling administrators configure rules to setup scheduling conditions in WorkSchedule.Net. Setting up your rules correctly eliminates scheduling errors, minimizes any unnecessary overtime, and allows you to build the schedule based on your employees’ preference, rank, qualifications, and/or pay rate. Rules are customizable to provide unlimited flexibility to optimize your schedule based on your company policies.

Rules fall into one of two categories: eliminating or preference. It is important to know which type of rule you are dealing with.

- **Eliminating Rules:** When you add an eliminating rule, you are restricting your schedule by eliminating employees from being allowed on any given time block. For example the maximum hours rule, tells the system that if an employee reaches the maximum hours allowed in a time range, he or she must NOT be considered for further scheduling during that time range.

For a list of all available eliminating rules, please check the Eliminating Rules topic.

- **Preference Rules:** When you setup preference rules, you build a hierarchy of rules to show WorkSchedule.Net which rules matter the most to you. Based on your preference (the rules that matter most to you), the system will grade each employee for each time block of your schedule.

For a list of all available preference rules, please check the Preference Rules topic.

In addition, if your company has specific needs for more rules, our scheduling consultants are always ready to discuss creating Custom Rules for you.

**Related Topics**
- Setting up rules
- Using rules to restrict swap and sign up
- Eliminating rules
- Preference rules
- Auto-schedule feature
- Show conflicts feature
- Best Fit feature

### 3.8.1 Setting up Rules

**UNDERSTANDING RULES**

There are two different types of rules WorkSchedule.Net: **eliminating rules** and **preference rules**.

By adding rules, you can instruct WorkSchedule.Net exactly how to decide which employees can be assigned to specific time blocks (eliminating rules), and also what make one employee “better” for a
time block than another employee (preference rules).

See Eliminating Rules and Preference Rules for a list of currently available rules in WorkSchedule.Net that you can choose to add.

**SETTING UP RULES**

To setup rules, click on Rules on the left-side menu.

The following screen is displayed: *(please note that only the rules that you have previously added or chosen in the setup wizard show on the screen)*
Click on the drop down menu to display and setup Eliminating and/or Preference rules:

**ADDING A NEW RULE**

To add a new rule, make sure the drop down menu displays the type of rules that you want to add, then click the + to the left of Add new Rule.

Choose the rule you want to add from the drop down menu, and specify the options you want.
EDITING A RULE

To edit a rule, click the to the left of the rule you wish to edit.

REMIXING A RULE

To remove a rule, click the to the left of the rule you wish to remove.
3.8.1.1 Eliminating rules

UNDERSTANDING ELIMINATING RULES

Eliminating Rules restrict your schedule, by eliminating employees from being allowed on any given time block. Any eliminating rule can be broken by a manager, but not by the auto-scheduler, and not by an employee attempting a swap or sign up. When time block editors are in show conflicts mode, any eliminating rules that are being broken will show in red on each time block with such a conflict.

ELIMINATING RULES OVERVIEW

Here's a general description of how you can use eliminating rules to create scheduling conditions that fit your needs:

The following rules allow you to restrict # of working hours for your employees:
- Max hours rule: when you add this rule, you restrict employee's working time to his/her maximum weekly hours per week, or per view range.
- Daily hours rule: when you add this rule, you restrict employee's working time to his/her maximum daily hours per day.

Maximum weekly hours, and maximum daily hours can be setup in each user's account.

The following rule enforces qualifications:
- Qualification rule: when you add this rule, an employee will not be considered for scheduling in a certain task/department/area etc... if he/she is not declared qualified for that category.

You can set qualifications in each user's account.

The following rules allow you to set the schedule around employee's availability:
- Schedule only when declared available rule: when you add this rule, only employees who are declared AVAILABLE will be considered for scheduling.
- Do not schedule when declared unavailable rule: when you add this rule, employees who are declared UNAVAILABLE will not be considered for scheduling.

Please note that you should never add both rules together in the system, you should determine which one to go by and add it. Employees can declare their availability in the My Availability page.

The following rules allow you to control how often, and for how long the employee can work:
- Separation rule: when you add this rule, you enforce a number of non-working hours between any two time blocks assigned for a certain employee.
Separation rule if different locations: when you add this rule, you enforce a number of non-working hours between any two time blocks assigned for a certain employee for separate category items.

Max days in a row rule: when you add this rule, you can set a maximum number of days that the employee can work on in a row.

3.8.1.1.1 Max hours rule

**OVERVIEW**

When you add the rule, *No employee should be scheduled for more than his/her maximum hours*, you restrict employee's working time to his/her maximum weekly hours per week, or per view range.

**RULE IDENTIFICATION**

<table>
<thead>
<tr>
<th>Shows in rules as:</th>
<th>No employee should be scheduled for more than his/her maximum hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>If rule is broken, show conflicts feature displays:</td>
<td>OVER MAX HOURS</td>
</tr>
<tr>
<td>Type:</td>
<td>Eliminating</td>
</tr>
<tr>
<td>Parameter:</td>
<td>Per week</td>
</tr>
</tbody>
</table>

**EDITING THE RULE**

Click here for more information on how to edit this rule.
RELATED SETTINGS

To set your employees’ maximum weekly hours, you fill it in the “Auto-Schedule” tab in the User Account of the each employee.

TECHNICAL NOTES

For the purposes of this rule, weekly hours are calculated from midnight to midnight by default. If the “Day begins at a time other than midnight” option is checked in General Options, the 24 hour period calculation begins with the time entered in that option is used.

The rule is broken when the time block contributes hours to either the day it starts on, or the day it ends on, that results in a total number of hours for either day exceeding the maximum, except when following day is out of view. When the following day is out of view, a total hours for that following day exceeding the maximum will not cause the time block on the day before to be in violation of this rule.

3.8.1.2 Daily hours

OVERVIEW

When you add the rule, **No employee should be scheduled for more than his/her maximum DAILY hours**, you restrict employees working time to his/her maximum daily hours for every day in the schedule. If a time block is assigned to an employee who already has their maximum daily hours, then this rule is broken.

RULE IDENTIFICATION

| Shows in rules as: | No employee should be scheduled for more than his/her maximum DAILY hours |
**EDITING A RULE**

Click here for more information on how to edit this rule.

**PARAMETERS EXPLANATION**

This rule has no parameter(s).

**RELATED SETTINGS**

To set your employees’ maximum daily hours, you fill it in the "Autoscheduling Information" section in the User Account of the each employee.
TECHNICAL NOTES

For the purposes of this rule, daily hours are calculated from midnight to midnight regardless of the "Day begins at a time other than midnight" option in General Options. This rule is broken when the time block contributes hours to either the day it starts on, or the day it ends on, that result in a total number of hours for either day exceeding the maximum.

3.8.1.1.3 Qualification rule

OVERVIEW

When you add the rule Only schedule employees who are qualified for the shifts, an employee will not be considered for scheduling in a certain task/department/area etc... if he/she is not declared qualified for that category. If a time block with different category items is assigned to an employee who's not qualified for one or more of these category items, then this rule is broken.

RULE IDENTIFICATION

<table>
<thead>
<tr>
<th>Shows in rules as:</th>
<th>Only schedule employees who are qualified for the shifts</th>
</tr>
</thead>
<tbody>
<tr>
<td>If rule is broken, show conflicts displays:</td>
<td>NOT QUALIFIED</td>
</tr>
<tr>
<td>Type:</td>
<td>Eliminating</td>
</tr>
<tr>
<td>Parameter:</td>
<td>-</td>
</tr>
</tbody>
</table>

EDITING THE RULE

Click here for more information on how to edit this rule.
PARAMETERS EXPLANATION

This rule has no parameter(s).

RELATED SETTINGS

How to specify employees' qualifications:

To set your employees' qualifications, you fill it in the "Qualifications" section in the User Account of the each employee. In the box below, all your categories are listed, and you can choose which category item the employee is qualified for by checking the box next to it:
How to make a category unqualifiable:

If you want to remove any of the categories in your system from the qualifications section on the user account, or if you want your employees to be qualified for all the category items in one of your categories, you should specify that in the properties of that category. To do so:

1. Click on Categories on the left hand side of the screen.
2. Click edit icon next to the category. This step is explained in details in the category setup topic.
3. Uncheck Can use to qualify employee box.
4. Click Submit.
3.8.1.1.4 Schedule only when declared available

OVERVIEW

When you add the rule All employees must be scheduled within the time declared AVAILABLE for each employee, only employees who are declared AVAILABLE will be considered for scheduling. This rule should not be added with the "Do not schedule when declared unavailable" rule to the system.

RULE IDENTIFICATION

<table>
<thead>
<tr>
<th>Shows in rules as:</th>
<th>All employees must be scheduled within the time declared AVAILABLE for each employee</th>
</tr>
</thead>
<tbody>
<tr>
<td>If rule is broken, show conflicts displays:</td>
<td>UNAVAIL</td>
</tr>
<tr>
<td>Type:</td>
<td>Eliminating</td>
</tr>
<tr>
<td>Parameter:</td>
<td>-</td>
</tr>
</tbody>
</table>

EDITING A RULE

Click here for more information on how to edit this rule.
PARAMETERS EXPLANATION

This rule has no parameter(s).

RELATED SETTINGS

**Configure Availability:**

To tell the system that you want to use the availability features, and to specify if you want your employees to be able to indicate their availability, you should

1. Check the "Allow employees to indicate their availability online" box in the "Permissions" section on the Employee's user account.

2. Add the availability rule to your list of rules. If you didn't add the rule, the following warning will
be displayed in the Current and Recurrent Availability to remind you that you should add it:

WARNING: You have not set any rules for availability. Please add an availability rule in the Rules section.

Also, the following warning will be displayed on your employee's screen:

Your availability has not yet been configured by your employer. Please relay this message to your manager.

Ways to declare employees' availability:

1. Employees can declare their availability in the "My Availability" screen: when you add this rule, the system assumes that employees are unavailable at times when they don't explicitly declare that they are available.

2. Managers can view/modify availability time blocks for one or all employees in the Current or Recurring Availability screens.
OVERVIEW

When you add the rule **No employee should be scheduled during any time declared UNAVAILABLE for the employee**, employees who are declared UNAVAILABLE will **not** be considered for scheduling. If a time block is being added to an employee who is declared unavailable, the rule will be broken.

This rule should not be added with the "**schedule only when declared available**" rule to the system.

RULE IDENTIFICATION

<table>
<thead>
<tr>
<th>Shows in rules as:</th>
<th>No employee should be scheduled during any time declared UNAVAILABLE for the employee</th>
</tr>
</thead>
<tbody>
<tr>
<td>If rule is broken, show conflicts displays:</td>
<td>UNAVAIL</td>
</tr>
<tr>
<td>Type:</td>
<td>Eliminating</td>
</tr>
<tr>
<td>Parameter:</td>
<td>-</td>
</tr>
</tbody>
</table>

EDITING A RULE

Click here for more information on how to edit this rule.

PARAMETERS EXPLANATION

This rule has no parameter(s).

RELATED SETTINGS

Configure Availability:
To tell the system that you want to use the availability features, and to specify if you want your employees to be able to indicate their availability, you should

1. Check the "Allow employees to indicate their availability online" box in the "Permissions" section on the Employee’s user account.

2. Add the availability rule to your list of rules. If you didn’t add the rule, the following warning will be displayed in the Current and Recurrent Availability to remind you that you should add it:

   ![Employee Record: Green, Maryellen](image)

   **WARNING:** You have not set any rules for availability. Please add an availability rule in the Rules section.

   ![Current Availability](image)

   Also, the following warning will be displayed on your employee’s screen:

   ![Your availability has not yet been configured](image)

   **Ways to declare employees’ availability:**

   1. Employees can declare their availability in the "My Availability" screen: when you add this rule, the system assumes that employees are available at times when they don’t explicitly declare that they are unavailable.
2. Managers can view/modify availability time blocks for one or all employees in the Current or Recurring Availability screens.

3.8.1.6 Separation rule

**OVERVIEW**

When you add this rule, you enforce a number of non-working hours between any two time blocks assigned for a certain employee. If the number of hours between the end time of the first time block and the start time of the second time block is less than the number of hours that you specify on this rule's setting, this rule will be broken.

For example, if you specify that no employee should be scheduled if he/she just worked 8 hours ago, and you try to assign an employee to a time block that starts at 6pm, while they are already assigned to a time block that ends at 5pm, both time blocks will be considered breaking the rule and will display the warning "SEPARATION" when you show conflicts.

**RULE IDENTIFICATION**
Shows in rules as: | No employee should be scheduled if he/she just worked this number of hours ago
---|---
If rule is broken, show conflicts feature displays: | SEPARATION
Type: | Eliminating
Parameter: | Number of hours

**EDITING A RULE**

Click here for more information on how to edit this rule.

**PARAMETERS EXPLANATION**

This rule has the following parameter(s):

1. **Number of hours**: in the blue box above, enter the number of hours that you want to enforce as non-working time between any two time blocks for all employees.

**OVERVIEW**

When you add the rule "**No employee should be scheduled for more than this number of days in a row**", you can set a maximum number of days that the employee can work on in a row. If an employee is assigned to a number of time blocks on consecutive number of days totaling to more than the number you specify on this rule's setting, the rule will be broken on all these time blocks.

*For example, if you setup the rule so that no employee should be scheduled for more than 3 days in a row, and you assign an employee 4 time blocks on four consecutive days, all these time blocks*
will be considered breaking the rule, and will display the warning "MAX DAYS IN ROW" when you show conflicts.

RULE IDENTIFICATION

<table>
<thead>
<tr>
<th>Shows in rules as:</th>
<th>No employee should be scheduled for more than this number of days in a row</th>
</tr>
</thead>
<tbody>
<tr>
<td>If rule is broken, show conflicts feature displays:</td>
<td>MAX DAYS IN ROW</td>
</tr>
<tr>
<td>Type:</td>
<td>Eliminating</td>
</tr>
<tr>
<td>Parameter:</td>
<td>Number of days in a row</td>
</tr>
</tbody>
</table>

EDITING A RULE

Click here for more information on how to edit this rule.

PARAMETERS EXPLANATION

This rule has the following parameter(s):

1. **Number of days:** in the blue box above, enter the number of consecutive days that your employee can work on.

OVERVIEW

When you add this rule, you enforce a different number of non-working hours between any two time blocks assigned for a certain employee depending on the department. If the number of hours
between the **end time** of the first time block and the **start time** of the second time block is less than the number of hours that you specify on this rule’s setting and the two shifts take place in different locations, this rule will be broken.

For example, if you specify that no employee should be scheduled if he/she just worked 8 hours ago at a different location, and you try to assign an employee to a time block that starts at 6pm at location B, while they are already assigned to a time block that ends at 5pm location A, both time blocks will be considered breaking the rule and will display the warning “SEPARATION” when you show conflicts.

**RULE IDENTIFICATION**

<table>
<thead>
<tr>
<th>Shows in rules as:</th>
<th>No employee should be scheduled within X hours if different locations</th>
</tr>
</thead>
<tbody>
<tr>
<td>If rule is broken, show conflicts feature displays:</td>
<td>SEPARATION</td>
</tr>
<tr>
<td>Type:</td>
<td>Eliminating</td>
</tr>
<tr>
<td>Parameter:</td>
<td>Category, Min # of hours at the same location, Min # of hours at the different location</td>
</tr>
</tbody>
</table>

**EDITING A RULE**

Click here for more information on how to edit this rule.

**PARAMETERS EXPLANATION**

This rule has the following parameter(s):
1. **Category:** The category that will be seen as a location. Time blocks with this category will follow this rule.

2. **Min # of hours at the same location:** Enter the number of hours that you want to enforce as non-working time between any two time blocks with the same location for all employees.

3. **Min # of hours at the different location:** Enter the number of hours that you want to enforce as non-working time between any two time blocks with different locations for all employees.

### 3.8.1.1.9 Only Schedule Bidders

#### OVERVIEW

*Only Schedule Bidders* is used in conjunction with the Use Bidding Feature in General Options. This allows for employees to bid on specific shifts that they would want. For more information about the bidding feature, see Use Bidding Feature in General Options.

#### RULE IDENTIFICATION

<table>
<thead>
<tr>
<th>Shows in rules as:</th>
<th>Only Schedule Bidders</th>
</tr>
</thead>
<tbody>
<tr>
<td>If rule is broken, show conflicts feature displays:</td>
<td>NO BID</td>
</tr>
<tr>
<td>Type:</td>
<td>Eliminating</td>
</tr>
<tr>
<td>Parameter:</td>
<td>-</td>
</tr>
</tbody>
</table>

#### EDITING A RULE

Click here for more information on how to edit this rule.
### 3.8.1.2 Preference rules

#### WHAT ARE PREFERENCE RULES

Preference Rules are an important part of automatic scheduling. They allow you to set your schedule based on employees' preference, pay rate, rank in general or rank in a certain category (area, task, department, etc...), or on how many hours they have worked so far. Preference rules give managers a lot of scheduling flexibility, and allow them to make automatic scheduling optimized to fit the company's specific policies.

Based on your particular preference rules, the system grades each employee for each time block of your schedule, by performing a calculation which determines that employee's suitability for that particular time block. To understand how WorkSchedule.Net generates the grades, refer to the Grades topic.

#### HOW THE SYSTEM USES YOUR PREFERENCE RULES

When you have only one preference rule, it's easy for the system to determine which employee is the best match for an open time block because there is only one rule to go by. For example, if you only have set the rule "Schedule employee who have the lowest pay rate", then the system will always look at the lowest paid employee and gives him/her the priority in scheduling.

When you have two or more preference rules, the factor of importance for each preference rule gives higher or lower importance to that particular rule in the overall system. The factor of importance is a parameter, which determines how important this rule is with respect to all other preference rules that may exist in the list of rules. The more preference rules that you setup, the more complicated the calculations become.

For example, if you set the preference rule “Schedule employee with the highest rank first” with a factor of 10, and “Schedule employee who have the lowest pay rate” with a factor of 1, the system knows that it should schedule highest ranked employees first. In the case of a tie between two employees, the system evaluates the employees based on the second rule, which basically serves as a tie breaker, and assigns the time block to the employee with the lower pay rate.

#### PREFERENCE RULES LIST

This rule allows you to schedule based on employees' preference:
- Employee preference rule: when you add this rule, employees who declared that they would prefer to work would be considered for scheduling first. Employees declare their preference in the My Availability screen.

These rules allow you to try to even out the number of working hours for all employees:
- Least hours so far rule: when you add this rule, the system looks at all employees' scheduled time so far, and gives priority of scheduling for the employee who has the least number of hours.
- Least hours so far by category: when you add this rule, the system looks at all employees’ scheduled time so far, and gives priority of scheduling for the employee who has least number of hours in a certain department/area/task or any other category.

These rules allow you to schedule based on employees' rank:
- Employee rank (highest): when you add this rule, employees who have highest rank will be considered for scheduling first.
- Employee rank (lowest): when you add this rule, employees who have lowest rank will be
considered for scheduling first.
- Employee rank by category: when you add this rule, employees who have the highest rank in a certain department/area/task or any other category, will be considered for scheduling first.

These rules allow you to schedule based on employees' pay rate:
- Employees by lowest pay rate: when you add this rule, the lowest paid employee will be considered for scheduling first. You set the pay **Hourly Rate** for every employee in his/her User's Account.
- Employees by lowest pay rate for the category: when you add this rule, the lowest paid employee in a certain department/area/task or any other category, will be considered for scheduling first.

### 3.8.1.2.1 Factor of Importance

**WHAT IS THE FACTOR OF IMPORTANCE**

For all your preference rules, you are required to enter at least one parameter value called the **factor of importance**. Simply put, the factor of importance defines how important this particular rule is compared to all other preference rules that you are setting. The number is multiplied by the grade (between 0 and 100%) to get a subtotal for the employee / rule being graded. The higher the factor, the more importance WorkSchedule.Net gives to the rule.

See Grades for a full explanation of how the factor of importance is used in the calculation of grades for preference rules.

### 3.8.1.2.2 Grades

**HOW THE GRADE IS CALCULATED**

The system uses your preference rules to do calculations that will help the auto-scheduler determine the best employee to be assigned to a time block, and to order the employees in the best fit feature. To do so, WorkSchedule.Net will give a grade for each employee for every preference rule that you entered. Usually, this grade will be between 0% and 100%. Next, this grade is multiplied by the **factor** of importance for that specific rule. To generate a TOTAL GRADE for each time block, per employee, the system will add the grades of all the rules. Then, employees are generally sorted by their total grade for the time block. Accordingly, the system chooses the employee with the highest score to be assigned to that particular time block.

**EXAMPLE**

*Let's take a single time block that we want to determine the best employee for.*

The following information is assumed:
- The system has two preference rules: Employee rank (lowest) and Employee preference.
- Employee rank has a factor of importance = 2, and employee preference has a factor of importance = 1 (So, we know directly that employee rank is more important to the manager than employee preference)

WorkSchedule.Net will look at every employee in the system, and rate them on both of these rules for this one time block. But for simplicity, let's only look at two employees. The calculation may look like this:

**Employee A**
<table>
<thead>
<tr>
<th>Grade</th>
<th>Factor</th>
<th>Subtotal</th>
</tr>
</thead>
<tbody>
<tr>
<td>80%</td>
<td>2</td>
<td>1.6</td>
</tr>
<tr>
<td>10%</td>
<td>1</td>
<td>0.1</td>
</tr>
</tbody>
</table>

**Employee B**

<table>
<thead>
<tr>
<th>Grade</th>
<th>Factor</th>
<th>Subtotal</th>
</tr>
</thead>
</table>

1.7
<table>
<thead>
<tr>
<th>40%</th>
<th>2</th>
<th>0.8</th>
</tr>
</thead>
<tbody>
<tr>
<td>70%</td>
<td>1</td>
<td>0.7</td>
</tr>
</tbody>
</table>

1.5

So, Employee A is the best choice for the time block, because he/she has the highest total grade. As you can see, although Employee B had indicated a strong preference for the time block online (70%), the rules show that Employee Rank is the most important, with a factor of 2, whereas employee preference only has a factor of 1. So, in this configuration, because the employee rank is substantially different between employee A and B, the employee preference did not have a big impact on the final grade. But, if both employees had a close rank, employee preference would have made a greater impact on the grade.
OVERVIEW

You can allow employees to specify if they prefer to work certain times or days using the Employee Preference rule. If you set up this rule, the employee will be able to choose one of the following options for a certain time period that they specify in their availability area. These two choices are automatically added to their list of options when adding or modifying availability time blocks in the employee area:

- **I would prefer to work**
- **I am available but prefer not to work**

When auto-scheduling, the system will generate the grade for each employee according to the option they choose. To better understand how the system uses grades to choose the best employee, please refer to Grades section.

For example, if the manager added an open time block between 12:00pm and 5:00pm, and employees A and B, chose the 2 listed options above respectively for that same time, and employee C did not add any time block at all for that time, the grades would be as follows: Employee A (who would prefer to work) will be graded 100% for the time block, employee B (who would prefer not to work) will be graded 0%. Employee C, who gave no information on it one way or the other, will be graded 50% for the time block.

Note that an employee can choose his/her availability for any period of time, so the employees may have chosen their preference for only part of the time block specified by the manager. In this case, the system will take into consideration the percentage of the time block covered and will calculate the grade accordingly.

RULE IDENTIFICATION

<table>
<thead>
<tr>
<th>Shows in rules as:</th>
<th>Schedule employees who prefer to work first</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type:</td>
<td>Preference</td>
</tr>
<tr>
<td>Parameter(s):</td>
<td>Factor of Importance</td>
</tr>
</tbody>
</table>

EDITING A RULE

Click here for more information on how to edit this rule.
PARAMETERS EXPLANATION

This rule has the following parameter(s):

1. **Factor of importance**: Enter here a number that specifies how important this rule is with respect to other preference rules.

RELATED SETTINGS

Settings on the manager’s side to add the preference options:

1. Check the "Allow employees to indicate their availability online" box in the "Auto-Schedule" section on the Employee’s user account.

2. Add the availability rule that you want: Schedule only when declared available, or Do not schedule when declared unavailable.
3. Add the preference rule to your list of rules so that the preference options show on the employee’s screen.

How does the employee declare preference:

After the manager adds the setting described above to allow proper functioning of the preference rule, employees can declare their preference in the “My Availability” screen. Employees click on **Add time** on a certain day in the Availability screen, and choose one of the three options shown in the screen below:

Here’s how the time blocks look like in all three cases:

<table>
<thead>
<tr>
<th>Employee</th>
<th>Monday</th>
<th>Tuesday</th>
<th>Wednesday</th>
</tr>
</thead>
<tbody>
<tr>
<td>Carter, Amanda</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**OVERVIEW**

When you add this rule, the system looks at all employees’ scheduled time so far, and gives priority of scheduling for the employee who has least number of hours, by giving him/her the highest grade for a time block. The system tries to even out all employees’ number of hours so that all employees have a fair turn.

For example, if the maximum hours that employees usually work on a week is 40 hours, and employee A has worked 5 hours while employee B has worked 30 hours, employee A will have a higher grade, and will be considered a better candidate for assignment on an open time block.
RULE IDENTIFICATION

<table>
<thead>
<tr>
<th>Shows in rules as:</th>
<th>Schedule employees with the least hours already scheduled first</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type:</td>
<td>Preference</td>
</tr>
<tr>
<td>Parameter(s):</td>
<td>Factor of Importance, Number of hours equal to 100%</td>
</tr>
</tbody>
</table>

EDITING A RULE

Click here for more information on how to edit this rule.

PARAMETERS EXPLANATION

This rule has the following parameter(s):

1. **Factor of importance**: Enter here a number that specifies how important this rule is with respect to other preference rules.

2. **Number of hours equal to 100%**: Enter here the maximum number of hours your employees can work in a specific time period. For example, if you enter '40', the system compares '40' to the number of hours each employee has worked so far, and will give the highest grade for the employee who worked least.

OVERVIEW

When you add this rule, the system looks at all employees’ scheduled time so far in a certain
department/area/task or any other category, and gives priority of scheduling for the employee who has least number of hours by giving him/her the highest grade for a time block. The system tries to even out all employees’ number of hours so that all employees in a certain department, task, area, etc. have a fair turn.

**RULE IDENTIFICATION**

<table>
<thead>
<tr>
<th>Shows in rules as:</th>
<th>Schedule employees with the least hours scheduled so far, per category item</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type:</td>
<td>Preference</td>
</tr>
<tr>
<td>Parameter(s):</td>
<td>Category, Factor of Importance, and Number of hours equal to 100%</td>
</tr>
</tbody>
</table>

**EDITING A RULE**

Click here for more information on how to edit this rule.

**PARAMETERS EXPLANATION**

This rule has the following parameter(s):

1. **Category**: Enter here the category that you want to enforce this rule in.

2. **Factor of importance**: Enter here a number that specifies how important this rule is with respect to other preference rules.

3. **Number of hours equal to 100%**: Enter here the maximum number of hours your employees can work in a specific time period in the specified category.
For example, let's assume you chose the Department category and entered the number 40 for number of hours equal to 100%. If employee A has worked for department 'X' 10 hours, he/she will be graded 25%. Employee B has worked for department 'X' 30 hours, so he/she will be graded 75%. Employee A has a lowest grade, so he/she will have higher priority in scheduling than employee B.

3.8.1.2.6 Employee rank (lowest)

**OVERVIEW**

When you add this rule, the system will consider employees who have the LOWEST rank for scheduling before other employees, by giving them the highest grade. This rule should not be added in conjunction with the Employee rank (highest) to your list of rules.

**RULE IDENTIFICATION**

<table>
<thead>
<tr>
<th>Shows in rules as:</th>
<th>Schedule employees with the lowest rank, first</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type:</td>
<td>Preference</td>
</tr>
<tr>
<td>Parameter(s):</td>
<td>Factor of Importance, Rank equal to 100%</td>
</tr>
</tbody>
</table>

**EDITING A RULE**

Click here for more information on how to edit this rule.

**PARAMETERS EXPLANATION**

This rule has the following parameter(s):
1. **Factor of importance**: Enter here a number that specifies how important this rule is with respect to other preference rules.

2. **Rank equal to 100%**: Highest rank available in your company. This can be any number you wish.

   For example, you run a company with 40 employees. For simplicity reasons, we will assume that every employee belongs to a different rank. So, your company can have 40 different ranks. Rank equals to 100% in this case will be set to 40, and an employee with a rank of 20, will be given a grade of 50% on this particular preference rule.

**RELATED SETTINGS**

To set your employees’ ranks, you fill it in the “Autoscheduling Information” section in the User Account of each employee.

**OVERVIEW**

When you add this rule, the system will consider employees who have the HIGHEST rank for scheduling before other employees, by giving them the highest grade. This rule should not be added in conjunction with the Employee rank (lowest) to your list of rules.

**RULE IDENTIFICATION**

<table>
<thead>
<tr>
<th>Shows in rules as:</th>
<th>Schedule employees with the highest rank, first</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type:</td>
<td>Preference</td>
</tr>
<tr>
<td>Parameter(s):</td>
<td>Factor of Importance, rank equal to 100%</td>
</tr>
</tbody>
</table>
EDITING A RULE

Click here for more information on how to edit this rule.

REQUIRED PARAMETERS

This rule has the following parameter(s):

1. Factor of Importance: Enter here a number that specifies how important this rule is with respect to other preference rules.

2. Rank equal to 100%: Highest rank available in your company. This can be any number you wish.

To better understand Ranking, we will provide the following example. Suppose you run a company with 40 employees. For simplicity reasons, we will assume that every employee belongs to a different rank. So, your company can have 40 different ranks. Rank equals to 100% in this case will be set to 40, and an employee with a rank of 20, will be given a grade of 50% on this particular preference rule.

RELATED SETTINGS

To set your employees’ ranks, you fill it in the “Autoscheduling Information” section in the User Account of the each employee.
3.8.1.2.8 Employee rank by category

OVERVIEW

When you add this rule, the system will consider employees who have the HIGHEST rank for scheduling in the before other employees, by giving them the highest grade. This rule should not be added in conjunction with the Employee rank (lowest) to your list of rules.

RULE IDENTIFICATION

<table>
<thead>
<tr>
<th>Shows in rules as:</th>
<th>Schedule employees who have highest rank for the category item</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type:</td>
<td>Preference</td>
</tr>
<tr>
<td>Parameter(s):</td>
<td>Category, Factor of Importance, Rank equal to 100%</td>
</tr>
</tbody>
</table>

EDITING A RULE

Click here for more information on how to edit this rule.
PARAMETERS EXPLANATION

This rule has the following parameter(s):

1. **Category:** Enter here the category that you want this rule to be enforced on.

2. **Factor of importance:** Enter here a number that specifies how important this rule is with respect to other preference rules.

3. **Rank equal to 100%:** Highest rank available in your company. This can be any number you wish.

RELATED SETTINGS

To set your employees' ranks, you fill it in the "Auto-scheduling Information" section in the User Account of each employee:

To setup a category so that you can use it for ranking, you check the Rank box in that category's setup screen:
To enter the rank of each employee per a category item, you fill it in the "Qualifications" section under the User Account of each employee:
3.8.1.2.9 Employees by lowest pay rate

**OVERVIEW**

When you add this rule, the lowest paid employee will have the highest grade and will be considered for scheduling first.

**RULE IDENTIFICATION**

<table>
<thead>
<tr>
<th>Shows in rules as:</th>
<th>Schedule employees who have the lowest pay rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type:</td>
<td>Preference</td>
</tr>
<tr>
<td>Parameter(s):</td>
<td>Factor of Importance, Pay rate equal to 100%</td>
</tr>
</tbody>
</table>
EDITING A RULE

Click here for more information on how to edit this rule.

PARAMETERS EXPLANATION

This rule has the following parameter(s):

1. **Factor of importance**: Enter here a number that specifies how important this rule is with respect to other preference rules.

2. **Pay rate equal to 100%**: Highest salary you pay your employees. This can be any number you wish.

RELATED SETTINGS

To set your employees’ hourly rate, you fill it in the "Autoscheduling Information" section in the User Account of the each employee.
3.8.1.2.10 Employees by lowest pay rate for the category item

OVERVIEW

When you add this rule, the lowest paid employee for the category item will have the highest grade and will be considered for scheduling first.

RULE IDENTIFICATION

<table>
<thead>
<tr>
<th>Shows in rules as:</th>
<th>Schedule employees who have the lowest pay rate for the category item</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type:</td>
<td>Preference</td>
</tr>
<tr>
<td>Parameter(s):</td>
<td>Factor of Importance, Pay rate equal to 100%</td>
</tr>
</tbody>
</table>

EDITING A RULE

Click here for more information on how to edit this rule.
PARAMETERS EXPLANATION

This rule has the following parameter(s):

1. **Factor of importance**: Enter here a number that specifies how important this rule is with respect to other preference rules.

2. **Pay rate equal to 100%**: Highest salary you pay your employees. This can be any number you wish.

RELATED SETTINGS

To set your employees' hourly rate, you fill it in the "Autoscheduling Information" section in the User Account of each employee.
To setup a category so that you can use it for payroll, you check the Payroll box in that category's setup screen:

![Edit Category Screen](image)

To enter the Pay Rate of each employee per a category item, you fill it in the "Qualifications" section under the User Account of each employee:
3.8.1.3 Custom rules

We recognize that every scheduling situation is unique. That's why we have an expert team of scheduling consultants who can develop a custom solution for your particular needs. If you can't find a rule that fits your needs, we can create a customized rule for you. Please call 866-846-3123 to speak to one of our sales representatives and get a quote.

3.8.1.4 Using rules to restrict swap and sign up

RULES-BASED SWAP AND SIGN UP

When WorkSchedule.Net is managing swap and sign up features, it looks for the eliminating rules that you have set up to figure out if an employee has the right to signup for a shift, or accept an offered shift. If a sign up or swap request will break any of the enforced rules that you added, the employee will not be allowed by the system to perform that signup or swap operation.

Note: Only eliminating rules can be enforced upon swap and signup, preference rules are not used for these features.

ENFORCE RULES UPON SWAP AND SIGN UP

When adding an eliminating rule, keep in mind that you can enforce that rule when employees try to
swap or sign up for shifts. This way, you can limit any employees activity to your company’s needs and policies.

To enforce a rule upon swap and/or sign up:

1. Click on Rules in the left hand side menu, the following screen will be displayed:

2. If you haven’t done so yet, add the eliminating rule that you want. Or, if have the rule added, click on the edit button to the left of the rule.

3. If you want to enforce the rule upon sign up, check the box next to Enforce this rule when employees sign up for shifts.

4. If you want to enforce the rule upon swapping, check the box next to Enforce this rule when employees switch shifts.
5. Click Submit.

Related Topics
- Setting up rules
- Eliminating rules
- Activate Swap and Sign up features in the system

3.8.2 Auto-schedule feature

WorkSchedule.Net has a powerful auto-schedule feature that will automatically assign the best employee for each open shift in your schedule according to your rules. It is important to understand how to configure your rules in order to use this feature.

To auto-schedule, follow these steps:

1. Make sure your rules are configured properly. See Rules.

2. Choose your view. See Views.

Your time blocks will be auto-scheduled in the order of your sort.

3. Select the open time blocks you want to be auto-scheduled.

4. Choose Edit | Automatically assign employees to selected time blocks, or click the quick icon.
Verify that you want to auto-schedule the selected shifts in view.

![Verify auto-schedule](image)

You are about to allow WorkSchedule.Net to automatically assign the best employee, according to your Rules, to each open (unassigned) shift in the schedule. Are you sure you want to do this?

Yes  Cancel

5. Check your results.
3.8.3 Show conflicts feature

Show Conflicts is a viewing mode that allows you to see any conflicts in the schedule. You can toggle this mode on and off. To do this, go to View | Show Conflicts.

When show conflicts is turned on, you will see any and all applicable rules that are being broken on each time block abbreviated in red. See Rules for abbreviations. If there are no conflicts with a given time block, the word "GOOD" is shown in green, indicating all is good according to your rules.

Note that turning Show Conflicts on slows performance. The extent to which performance slows will vary greatly with the number of rules, the types of rules, the number of time blocks in the view, and the number of employees.

3.8.4 Best Fit feature

WHAT IS BEST FIT

Best Fit is a quick easy way to find the best employee for any time block. This feature allows you to use the intelligence of the system, based on your rules, to determine which employee is the Best Fit for any given time block. It can be used to help managers find an employee to cover a time block without using the automatic scheduling.
For example, if an employee can't cover his/her normal shift, the manager can click the time block, and then use Best Fit to find a suitable replacement.

**OPENING BEST FIT**

To open the Shift Information Box, you must click on the ( ) on the chosen time block.

In the Shift Information Box, click the icon of the employee with the magnifying glass ( ) to get Best Fit.

**FINDING BEST FIT FOR THE TIME BLOCK**

After clicking the icon, you will see a list of your employees. Those employees who can be assigned to this time block according to your Rules will float to the top, and will show a green check mark next to their names ( ). Those employees who could not be assigned to this time block without breaking a rule, will fall to the bottom, and will show a red icon ( ).
Each row has four columns in the table:

1. The first column shows a green check mark or a red X sign:

<table>
<thead>
<tr>
<th>Sign</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>☑</td>
<td>Employee can be assigned to the time block without breaking any rule</td>
</tr>
<tr>
<td>❌</td>
<td>Manager will be breaking a rule by scheduling the employee to the time block</td>
</tr>
</tbody>
</table>

2. The second column contains all the employee names that the manager has permission to access. See Permissions for details.

3. The third column has the score calculated based upon rules set by the managers. It is sorted in descending order, that is, highest score on top of the list. See Preference Rules to understand scoring.

4. The fourth column displays the rule that will be broken if the employee is scheduled for the time block, otherwise, it displays OK.

**ASSIGNING AN EMPLOYEE TO THE TIME BLOCK USING BEST FIT**

Click on any name on the list, and the system will assign that employee to the time block immediately. Managers can choose any employee, even if they will be breaking a rule.

### 3.9 Scheduling time off

WorkSchedule.Net allows you to schedule time off for your employees. You can track the number of hours and days that your employees have taken off, ensure that employees are replaced when they take time off. In addition, WorkSchedule.Net will give warnings upon approving time off for employees who are at their maximum allowed time off for the year.

Before using time off, make sure time off features are enabled in the General Options screen.

Setting up time off features

There are two ways to schedule time off, by employee request, or manually.

Approving and declining employee requests for time off

Manually requesting time off

You can also modify time off types, or create Time off accounts.
3.9.1 Setting up time off features

**MANAGE THE LIST OF TIME OFF TYPES**

On the left menu, click **Time Off**.

Then you will be able to add, modify, or remove types of time off. See Time On/Off for more information on managing the list of reasons for time off.
3.9.2 Approving and declining requests for time off

WorkSchedule.Net provides a way for employees to request time off online from their employee area (see Requesting time off). Then managers can approve or decline those requests, and WorkSchedule.Net will email the decision to the employee who requested the time off. If approved, the time off will be schedule in the current schedule.

EMPLOYEE REQUESTS TIME OFF

The employee requests the time off in the employee area. See Requesting time off.

MANAGER APPROVES OR DECLINES REQUEST FOR TIME OFF

Pending time off requests from employees show up in the Requests section on your Home page under Time Off Requests.
You will then see a list of all pending time off requests from your employees. Click on the time off request you want to handle.

WorkSchedule.Net looks at the option you have selected for Time Off in the general options and calculates the number of hours for each request. You can adjust the times on each day to be scheduled off, if desired. You can also change other information like the reason, Department, or Task. In the Paid Hours column you can indicate the number of hours to count against the employees hours off (which can be translated into days off), as well as the number of hours/days to pay the employee for. See User Account for setting the number of hours that equal one day per user.

When any time off request is approved or declined, an email is sent to the employee informing them of the decision. This email is carbon copied to the manager (you can change this setting from the General Options screen). You can see notes written by employee when requesting this time off, or add any message to pass on any note to the employee, as it will be added to the text of the email.
### Amanda Carter's Time Off Request

<table>
<thead>
<tr>
<th>Reason</th>
<th>Account/Yr Date</th>
<th>Time blocked off</th>
<th>Approve Paid Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vacation</td>
<td>2007</td>
<td>Fri 01/06/2007 12:00 am to 12:00 am</td>
<td>✓ 8.5</td>
</tr>
</tbody>
</table>

### Department Area Task Time of Day
- **Hillview**: None Selected Stocking None Selected

<table>
<thead>
<tr>
<th>Reason</th>
<th>Account/Yr Date</th>
<th>Time blocked off</th>
<th>Approve Paid Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vacation</td>
<td>2008</td>
<td>Sat 02/06/2007 12:00 am to 12:00 am</td>
<td>✓ 8.5</td>
</tr>
</tbody>
</table>

### Department Area Task Time of Day
- **Downtown**: None Selected Stocking None Selected

<table>
<thead>
<tr>
<th>Reason</th>
<th>Account/Yr Date</th>
<th>Time blocked off</th>
<th>Approve Paid Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vacation</td>
<td>2008</td>
<td>Sun 03/05/2007 12:00 am to 12:00 am</td>
<td>✓ 8.5</td>
</tr>
</tbody>
</table>

### Department Area Task Time of Day
- **Lakeside**: None Selected Stocking None Selected

---

Check the Approve box to approve the request, or uncheck to decline it.

Change the number of hours that employee gets paid for.
Click Approve chosen days above to approve all days above that have been checked. Click Decline entire request to decline all days, regardless of what has been checked under Approve column.

WHAT HAPPENS WHEN TIME OFF IS APPROVED

Then enter the current schedule and go to the area of the calendar for which the time has been approved off. You will see the time off blocks (normally inverted in color - i.e., white text color on black background) indicating that this is scheduled time off. In all other ways they are normal time blocks, and can be manipulated just like other time blocks.
3.9.3 Manually scheduling time off

Since time off blocks are just like regular time blocks, you can simply add time off blocks in the current schedule. This is done the same way as you would add time blocks for time on, but instead you would indicate that the time block represents time off, as shown below.

Enter the properties of the time block, as you would for any other time block, but take note of two differences.

1. You will probably want to force the number of hours credited for the time off block, by choosing the "Use this # hrs" option. This way you can block off any time range you want, without affecting the number of hours credited for the time block.

2. Choose "Time off" where asked "Is this time working, or time off?". Then make sure you choose which type of time off to the right.

3. Choose Time Off Account
After submitting the new time off block, you will see it appear in the schedule.
3.9.4 Modify time off types

On the left menu, click the Time Off link.

Click on the edit button for the type of time off that you want to modify.

Modify your time off category item as desired.
If you decide to keep the default color, the time off time blocks will be created with black background. Note that if you decided to change the color for any category item, it's recommended that you choose dark colors since the text font is light.

### 3.9.5 Time Off Cancellation Requests

WorkSchedule.Net provides a way for employees to request cancellation of scheduled time off from their employee area (see Canceling Time Off). Then managers can approve or decline those requests, and WorkSchedule.Net will email the decision to the employee who requested the cancellation.

#### EMPLOYEE REQUESTS TIME OFF CANCELLATION

The employee requests the time off in the employee area. See Canceling Time Off.

#### MANAGER APPROVES OR DECLINES CANCELLATION REQUEST

Pending requests to cancel time off from employees show up in the Requests section under "Cancel Requests".
You will then see a list of all time off cancellation requests from your employees. Click on the time off cancellation request you want to handle.

Pending Cancellation Time Off Requests - Approve or decline time off cancellation requests

<table>
<thead>
<tr>
<th>Requested On</th>
<th>First Name</th>
<th>Last Name</th>
<th>Starting On</th>
<th>Main Dept</th>
</tr>
</thead>
<tbody>
<tr>
<td>04/24/2014</td>
<td>Carrie</td>
<td>Huntington</td>
<td>04/30/2014</td>
<td>Lakeside</td>
</tr>
</tbody>
</table>

Review the cancellation request, and click **Cancel Chosen Days Above** if you want to cancel the time off (you will be approving the employee's request to cancel the time off). Click **Decline entire request** to decline all days, regardless of what has been checked under Approval column. If you want to decline only a part of the request, uncheck the box under the Approval column.

Carrie Huntington's Time Off Cancellation Request

<table>
<thead>
<tr>
<th>Reason</th>
<th>Date</th>
<th>Time blocked off</th>
<th>Approval</th>
</tr>
</thead>
<tbody>
<tr>
<td>PTO</td>
<td>Wed, 04/30/2014</td>
<td>From 12:00 am to 11:59 pm</td>
<td>✓ OK to Cancel</td>
</tr>
<tr>
<td>PTO</td>
<td>Thu, 05/15/2014</td>
<td>From 12:00 am to 11:59 pm</td>
<td>✓ OK to Cancel</td>
</tr>
</tbody>
</table>

Employee Notes:

Manager Notes:

If you clicked **Cancel Chosen Days Above**, the following message will be displayed:
If you clicked **Decline entire request**, the following message will be displayed:

**You have declined this request for canceling time off**

When any time off cancellation request is approved or declined, an email is sent to the employee informing them of the decision. This email is carbon copied to the manager (you can change this setting from the General Options screen).

### 3.9.6 Time Off Accounts

**TIME OFF ACCOUNTS**

If you choose to track employees' time off using time off accounts in the General Options section, a new tab will appear in the left menu under setup called Time Off Accounts.

Time Off accounts allow you to create and manage several independent time off accounts where
you can add, take off, or transfer days just like performing transactions in your bank accounts.

### 3.9.6.1 Setting up time off accounts

**MANAGE THE LIST OF TIME OFF ACCOUNTS**

On the left menu, click *Time Off Accounts*.

Then you will be able to add, modify, or remove types of time off accounts.
ADD NEW TIME OFF ACCOUNT

To add a new time off account, click the button next to Add new time off account. Fill in the name of the time off account and the start and end date for the account. If you want to declare the account as active, check the box next to Active, and check Show to employee so that employees can ask time off from the created account.
MODIFY OR DELETE A TIME OFF ACCOUNT

If you want to modify a time off account, click on the "edit" icon next to the account name, and if you want to delete it, click on the "delete" icon.

3.9.6.2 Time off ledgers

UNDERSTANDING TIME OFF LEDGERS

In the time off ledgers screen, you perform your actual transactions where you can add, take off, or modify time off days in different accounts. Under Time Off Accounts Tab in the Setup menu on the left side, click on Time Off Ledgers.
Then you will be able to view all the transactions (all the time off days that were given to the employee by the manager, and all the days off taken by the employee) per account. You can also add new transactions to all or specific number of employees in one transaction.

**ADD A NEW TRANSACTION**

To add a new transaction to a certain employee, choose the account and the employee name and then click.

Choose a description for the transaction, and specify how many days you want to be added, and then click Submit.
ADD TO ALL

If you want to add a transaction to more than one employee, or to all employees at the same time, click on Add to all, and then on the list of employees, choose all the employees that you want by holding the CTRL key on your keyboard and clicking individual employee names. You also can click on the first employee name and hold down the SHIFT key then click on the last employee to select all employees.

VIEW TRANSACTIONS

To view all the transactions for an employee, choose the account and the employee name from the drop down menus. The screen below shows an example of the time off account 2014 for Thomas Bailey. The days given by the manager are credited to his account (positive value in the #Days column) while the days off taken by the employee are deducted from his account (negative value in the #Days column). The balance column shows how many days are left in his account. Older transactions are presented at the bottom, and newer ones are at the top. So, the first row in the ledger reflects the most recent balance in his 2014 account.
3.9.6.3 Balance Transfer

UNDERSTANDING AND USING BALANCE TRANSFER

Balance transfer is used to transfer all the remaining days in one time off account to another. This is done for every employee you manage. To do so, click on Balance Transfer under Time Off Accounts.

Then, fill in the following screen:

**Effective date**: When do you want your transfer to occur. This allows you to schedule balance transfer ahead of time, while keeping the effective day to a specific day in the future.
**Account to transfer from**: Choose the account that you want the time off days transferred from (subtracted from).
**Account to transfer to**: Choose the account that you want the time off days transferred to (added to).
**Max # of days to transfer**: You can specify here the maximum number of days to transfer. For example, some companies only carry over 10 days from one year to another, if an employee has more than 10 time off days available, not all of them will be transferred. If you leave this field empty, all days will be transferred.
Once you click submit, the system will go through every employee in your company, and will take off the unused time off days from their older account and move them to the newer account, and will not exceed the maximum number that you specified.

3.10 Other communication with employees

Creating help for employees

Using the billboard

Emailing employees

3.10.1 Creating help for Employees

Using Employee Help

You can create a custom employee help for your company. Since every scheduling situation is unique, you may find that it’s best to provide detailed help or specific instructions for your employees. The Employee Help section allows you to do that.

Create Employee Help

Click on employee Help in the general section. You will get a familiar interface where you can add text, images, hyperlinks, and do all sorts of editing to your text file. After you create your help. Click Submit, and the file will be available in the employee area online.
3.10.2 Using the billboard

You can use the billboard to announce information to your employees, or just add information that will be useful for your employees.
After you save the billboard, the employees will be notified that the billboard has changed, and will receive the following alert on the main screen.

### 3.10.3 Emailing employees

To email your employees, click on Users menu on the left hand side or you can click on Email Users, then check all the employees that you want to email. On the upper left hand corner, click on Email Selected Users:
<table>
<thead>
<tr>
<th>First</th>
<th>Last Name</th>
<th>Permissions</th>
<th>Max Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>Thomas</td>
<td>Bailey</td>
<td>Manager</td>
<td>0</td>
</tr>
<tr>
<td>Maryellen</td>
<td>Green</td>
<td>Employee</td>
<td>0</td>
</tr>
<tr>
<td>Anne</td>
<td>Harper</td>
<td>Admin</td>
<td>0</td>
</tr>
<tr>
<td>Regina</td>
<td>Howard</td>
<td>Manager</td>
<td>0</td>
</tr>
<tr>
<td>Carrie</td>
<td>Huntington</td>
<td>Employee</td>
<td>0</td>
</tr>
<tr>
<td>Delores</td>
<td>Isler</td>
<td>Employee</td>
<td>0</td>
</tr>
<tr>
<td>John</td>
<td>King</td>
<td>Employee</td>
<td>0</td>
</tr>
<tr>
<td>Jacquelin</td>
<td>Long</td>
<td>Employee</td>
<td>0</td>
</tr>
<tr>
<td>Rob</td>
<td>McDaniel</td>
<td>Employee</td>
<td>0</td>
</tr>
<tr>
<td>Andy</td>
<td>Saunders</td>
<td>Employee</td>
<td>0</td>
</tr>
<tr>
<td>Billie</td>
<td>Whipple</td>
<td>Manager</td>
<td>0</td>
</tr>
</tbody>
</table>
3.11 Reports

Following is a list of all available exportable reports in WorkSchedule.Net:

- User Report
- Phone Number Report
- Time Off Report
- Who’s On Report
- Hours Report
- Cost Report
Customizable Reports

Customizable Reports allow you to change the columns shown on the report that you may not be available using the default reports.

Available customizable reports in WorkSchedule.Net:

Custom Time Block Report
Custom User Report
Custom Category Item Report

Generate Reports

3.11.1 User Report

After you generate the report, a document titled "User Report" will be generated with the following column fields:

- Employee ID
- Last Name
- First Name

You can use the User Report to get a list of all employees
### 3.11.2 Phone Number Report

After you generate the report, a document titled "**Phone Number Report**" will be generated with the following column fields:

- Last Name
- First Name
- Home Phone
- Work Phone
- Cell Phone

You can use the Phone Number Report to get a list of all employees, and their respective phone numbers.

---

**User Report**

**My Company**

<table>
<thead>
<tr>
<th>Employee ID</th>
<th>Last Name</th>
<th>First Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>ThomasBailey</td>
<td>Bailey</td>
<td>Thomas</td>
</tr>
<tr>
<td>MaryellenGreen</td>
<td>Green</td>
<td>Maryellen</td>
</tr>
<tr>
<td>AnneHarper</td>
<td>Harper</td>
<td>Anne</td>
</tr>
<tr>
<td>ReginaHoward</td>
<td>Howard</td>
<td>Regina</td>
</tr>
<tr>
<td>CarrieHuntington</td>
<td>Huntington</td>
<td>Carrie</td>
</tr>
<tr>
<td>DeloresIser</td>
<td>Iser</td>
<td>Delores</td>
</tr>
<tr>
<td>JohnKing</td>
<td>King</td>
<td>John</td>
</tr>
<tr>
<td>JacquelineLong</td>
<td>Long</td>
<td>Jacqueline</td>
</tr>
<tr>
<td>RobMcDaniel</td>
<td>McDaniel</td>
<td>Rob</td>
</tr>
<tr>
<td>AndySaunders</td>
<td>Saunders</td>
<td>Andy</td>
</tr>
<tr>
<td>BillieWhipple</td>
<td>Whipple</td>
<td>Billie</td>
</tr>
</tbody>
</table>

10/29/2014 12:09:22 PM
3.11.3 Time Off Report

When you click on the Time Off Report, the following screen will be displayed.

To future filter your results, you may specify the time off account and check the "Use date range for the report" option and enter a date range.
After you choose your input, click on Create Report. A document titled "Time Off Report" will be generated with the following column fields for the selected time period:

- Last Name
- First Name
- Description
- Date
- Days
- Days Left

REPORT SAMPLE
3.11.4 Who's On Report

After you generate the user report, a document titled "Who's On Report" will be generated with the following column fields:

- User ID
- Last Name
- First Name
- Clock In Time

You can use the Who's On report to see which employees are currently clocked in, and what time they clocked in.
3.11.5 Hours Report

When you click on the Hours Report, the following screen will be displayed.

You can use this screen to input information that will make your report more specific. In addition to the start and end date, you can choose to display information relative to a particular department, area, task, or any other category that you defined. You can also narrow down the report by selecting "choose time" and editing the time for the specific hours necessary for your report (defaults to 12:00AM of the start date to 11:59PM of the end date if not selected). The options that you choose will act as filters, and therefore the report will only display a subset of your data, based on what you have chosen.

After you choose the options, click on Create Report. A document titled "Hours Report" will be generated with the following column fields for the selected time period:
- Last Name, First Name
- Hours

You can use the Hours report to know how many hours your employees worked in the selected time period.

**REPORT SAMPLE**

**Hours Report**

My Company  
10/19/2014 12:00:00 AM to 10/26/2014 12:00:00 AM  
Current Schedule

<table>
<thead>
<tr>
<th>Name</th>
<th>Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>Harper, Anne</td>
<td>36.00</td>
</tr>
<tr>
<td>Iser, Delores</td>
<td>35.00</td>
</tr>
</tbody>
</table>

**Total Hours:** 71.00
3.11.6 Cost Report

When you click on the Cost Report, the following screen will be displayed.

You can use this screen to input information that will make your report more specific. In addition to the start date of week, you can choose to display information relative to a particular department, area, task, or any other category. You can also narrow down the report by selecting "choose time" and editing the time for the specific hours necessary for your report (defaults to 12:00AM if not selected). The options that you choose will act as filters, and therefore the report will only display a subset of your data, based on what you have chosen.

You also have the option to select how you want employees cost to be reported, either by their general hourly pay rate or by each employees qualifications which can both be edited in the user record.

After you choose your input, click on Create Report. A document titled "Cost Report" will be generated with the following column fields for the selected time period:

- Name
- Regular Hours
- Overtime Hours
- Total Hours
- Cost

NOTE: WorkSchedule.Net only handles a single weekly overtime threshold amount. We do not handle any other overtime laws or rules, such as a daily threshold. Please check with your state government for any additional overtime laws to ensure full compliance with state and federal regulations.

REPORT SAMPLE
Customizable Reports

Customizable Reports allow you to change the columns shown on the report that you may not be available using the default reports.

The type of the report is changed through the Report Type drop-down menu. After choosing a Report Type, the filter options shown may change based on the type.

The title shown at the top of the generated report can be modified by entering a Report Title.

Available customizable report types in WorkSchedule.Net:

- Custom Time Block Report
- Custom User Report
- Custom Category Item Report

Custom User Report Example
3.11.7.1 Custom Time Block Report

To start a Custom Time Block Report, click Create a customized report and change the Report Type to “Time Blocks.”

The Report Title option is used to change the Title that is shown at the top of the generated report. If a title is not entered, “Customized Report” will be shown.

Report Columns are the fields that will be shown on the generated report. The columns available for a time block report are:

- Employee
- Date
- Start Time
- End Time
- Hours
- All enabled categories

The **Hours** column will calculate the length of the entire shift and will include times that cross different days.

Using the **Employees** drop-down list, you can choose to include or exclude certain employees from the report. Employees are grouped by their assigned Home Department.

Options such as Include Open Time Blocks, Employees, etc are used to filter the report to make your report more specific. In addition to the start and end date, you can choose to display information relative to a particular department, area, task, or any other category that you defined. You can also narrow down the report by selecting "choose time" and editing the time for the specific hours necessary for your report (defaults to 12:00AM of the start date to 11:59PM of the end date if not selected). The options that you choose will act as filters, and therefore the report will only display a subset of your data, based on what you have chosen. Start Date and End Date will not be shown if a template or the Recurring Schedule are selected for the **From** option.

After you choose the options, click on **Create Report**. A document will be generated with the specified filter and columns.

**REPORT SAMPLE**
3.11.7.2 Custom User Report

To start a Custom User Report, click Create a customized report and change the Report Type to "Users."

The Report Title option is used to change the Title that is shown at the top of the generated report. If a title is not entered, "Customized Report" will be shown.

Report Columns are the fields that will be shown on the generated report. The columns available for
a time block report are:

- First Name
- Last Name
- Username
- Permission
- Email Address
- Home Phone
- Work Phone
- Cell Phone
- Notes
- Reminder Email
- Schedule Alert Email
- Max Weekly Hours
- Max Daily Hours
- Rank
- Year Hired
- Payroll ID
- Hourly Rate

Using the Employees drop-down list, you can choose to include or exclude certain employees from the report. Employees are grouped by their assigned Home Department.

REPORT SAMPLE
3.11.7.3 Custom Category Item Report

To start a Custom Category Item Report, click **Create a customized report** and change the **Report Type** to "Category Items."

The **Report Title** option is used to change the Title that is shown at the top of the generated report. If a title is not entered, "Customized Report" will be shown.

**Report Columns** are the fields that will be shown on the generated report. The columns available for a time block report are:
Using the **Category** drop-down list, choose the category you wish to retrieve category items for.

### REPORT SAMPLE

<table>
<thead>
<tr>
<th>Name</th>
<th>Background Color</th>
<th>Foreground Color</th>
</tr>
</thead>
<tbody>
<tr>
<td>Area 1</td>
<td>DCFFDC</td>
<td>00232D</td>
</tr>
<tr>
<td>Area 2</td>
<td>CFFFFF</td>
<td>3366FF</td>
</tr>
<tr>
<td>Area 3</td>
<td>FF99CC</td>
<td>800000</td>
</tr>
</tbody>
</table>

### 3.12 Printing and Exporting

**WorkSchedule.Net** allows you to convert your schedule data into two printable formats: an XLS spreadsheet or a PDF file. To open and print the XLS file you will need either Microsoft Excel ® or OpenOffice.org ®. To open and print the PDF file, you must have Adobe Acrobat Reader ®.

OpenOffice.org ® can be downloaded for free from [www.openoffice.org](http://www.openoffice.org).

Adobe Acrobat Reader ® can be downloaded for free from [www.adobe.com/products/acrobat/readstep2.html](http://www.adobe.com/products/acrobat/readstep2.html).
Microsoft Excel ® is not free, but you can find information about how to buy it at www.microsoft.com/excel.

To get a printable view of your schedule data, go to File | Print from the top menu.

Then below you will see that you have the option to open this data as an XLS file, or a PDF file. Click on the button of your choice, and assuming you have the appropriate software loaded on your computer as explained above, you should see the file pop up in the chosen format.
You will see an XLS file that may look something like this, in a new window. (Actual appearance may vary.) At this point you can print or save the file.

PDF PRINTABLE FORMAT

If you click on Open PDF file, you should see something like this is a new pop-up window. (Actual appearance may vary.) At this point you can print or save the file.
3.13 Payroll Export

New to version 8, managers and administrators can now export payroll for use in external payroll systems. Payroll is exported in CSV format which can be preformatted to SurePayroll, Paychex, ADP, or a plain CSV file, with more coming soon.

**SETTING UP PAYROLL**

1. Edit Overtime settings

In General Options, edit the Overtime Multiplier and Weekly Overtime Threshold.

Overtime Multiplier: This number will be multiplied by the employee's regular pay rate to calculate the overtime rate. If you do not want overtime pay, enter 1 into this box.

Weekly Overtime Threshold (in hours): Any hours worked past this amount in a given week will be counted as overtime and will use the overtime pay rate.
NOTE: WorkSchedule.Net only handles a single weekly overtime threshold amount. We do not handle any other overtime laws or rules, such as a daily threshold. Please check with your state government for any additional overtime laws to ensure full compliance with state and federal regulations.

2. Add Payroll ID to Employees

Each employee who will have their payroll exported must have a Payroll ID inside their User Account. This is the ID that is designated to the employee in your payroll service.

**Export Payroll Information**

From: Choose the schedule that you would like to export the shifts from.
- Current Schedule will take the time the employee has been scheduled for in the selected date range.
- Attendance will take the time for the shifts that the employee has stated, from clock in or manual attendance.
**Employees:** Select the employees you want to export payroll for. You can select all employees, select specific departments, or select specific employees.

**Start Date:** The beginning date in the date range for the shifts.

**End Date:** The last date in the date range for the shifts.

**Payroll Service:** WorkSchedule.Net will automatically format the CSV in the format required by the payroll providers. Use Generic CSV if you do not have a listed provider.

You can the preview the payroll information after clicking the **Preview** button. When finished, click **Export** to download the CSV file.

### 3.14 Exporting Raw Data

**Opening Export page**

Click on the Export link in the left menu under **General**:

**Generating Excel file**

Choose data to export. Specify the range for the following items: Current Schedule, Recurring Schedule, Current Availability, Recurring Availability, and Time Sheet. If you leave with no specified range (From: and To:) the xls file will contain all data.
Downloading and Opening Excel file

1. After you click on submit, the download link will appear:
   [download]

2. Click on it, a pop up window will appear:
### 3. View generated Excel file:

<p>| | | | | | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>22</td>
<td>26012</td>
<td>1</td>
<td>46</td>
<td>1</td>
<td>10-4-2006</td>
<td>10-4-2006</td>
</tr>
<tr>
<td>23</td>
<td>26012</td>
<td>1</td>
<td>47</td>
<td>5</td>
<td>10-4-2006</td>
<td>10-5-2006</td>
</tr>
<tr>
<td>24</td>
<td>26012</td>
<td>1</td>
<td>48</td>
<td>6</td>
<td>10-4-2006</td>
<td>10-5-2006</td>
</tr>
<tr>
<td>25</td>
<td>26012</td>
<td>1</td>
<td>49</td>
<td>2</td>
<td>10-5-2006</td>
<td>10-5-2006</td>
</tr>
<tr>
<td>26</td>
<td>26012</td>
<td>1</td>
<td>51</td>
<td>2</td>
<td>10-5-2006</td>
<td>10-5-2006</td>
</tr>
<tr>
<td>27</td>
<td>26012</td>
<td>1</td>
<td>52</td>
<td>4</td>
<td>10-5-2006</td>
<td>10-5-2006</td>
</tr>
<tr>
<td>28</td>
<td>26012</td>
<td>1</td>
<td>53</td>
<td>5</td>
<td>10-5-2006</td>
<td>10-6-2006</td>
</tr>
<tr>
<td>29</td>
<td>26012</td>
<td>1</td>
<td>54</td>
<td>5</td>
<td>10-5-2006</td>
<td>10-6-2006</td>
</tr>
<tr>
<td>30</td>
<td>26012</td>
<td>1</td>
<td>55</td>
<td>2</td>
<td>10-6-2006</td>
<td>10-6-2006</td>
</tr>
<tr>
<td>31</td>
<td>26012</td>
<td>1</td>
<td>56</td>
<td>4</td>
<td>10-6-2006</td>
<td>10-6-2006</td>
</tr>
<tr>
<td>32</td>
<td>26012</td>
<td>1</td>
<td>57</td>
<td>2</td>
<td>10-6-2006</td>
<td>10-6-2006</td>
</tr>
<tr>
<td>33</td>
<td>26012</td>
<td>1</td>
<td>58</td>
<td>4</td>
<td>10-6-2006</td>
<td>10-6-2006</td>
</tr>
</tbody>
</table>

### 4. Employee Area

WHERE EMPLOYEE HELP IS LOCATED

The help for the employee area can be accessed by logging into WorkSchedule.Net as an employee. All administrators and managers can login as employees. (See Logging_in)
There is help for each major section of the employee area that has been allowed by the administrator in General Options and Users:

1. **Home Page Help** *(always there)*
2. **Schedule Help** *(if Use Schedule is checked in General Options, Schedule section)*
3. **Availability Help** *(if Use Availability is checked in General Options, Availability section)*
4. **Attendance Help** *(if Use Attendance is checked in General Options, Attendance section)*
5. **Time Off Help** *(if Use Time Off is checked in General Options, Time Off section)*
6. **Sign Up Help** *(if Allow employees to sign up for open shifts is checked in Users, Swap/Sign Up section)*
7. **Swap Help** *(if Allow employees to swap shifts is checked in Users, Swap/Sign Up section)*

**DYNAMIC EMPLOYEE HELP**

The employee help topics in WorkSchedule.Net are dynamic. This means that the help will
automatically change depending on the options you have set in General Options. For example, if you have disabled the use of the time clock by unchecking **Use time clock** then there will be no help given to the employee concerning clocking in or out.

## FAQ

Here is a list of the most frequently asked questions:

- **I have scheduled shifts in the Current Schedule, but my employees can't see their schedule. Instead they get the message "This week is outside of your viewable range." What is wrong?**
  
  You must post your schedule in order for your employees to view it. As you go forward in time, creating new schedules for each week, you don't want your employees to look at the schedule before you are done with those future weeks. Your employees will always see the schedule only from the current date through the date to which you have posted the schedule. For help on how to post, look at the tutorial under "Scheduling each week" in the help.

- **How quickly can my employees see changes to the schedule?**
  
  As soon as you post your schedule your employees can view any changes. All changes to the schedule occur in real time.

- **Is my data secure?**
  
  All access inside your account is secured by SSL technology. Your information is backed up every 10 minutes.

- **I love the idea of automatic scheduling, but I have a situation that's more complicated, and a set of standard rules doesn't do the trick. What can I do?**
  
  We recognize that every scheduling situation is unique. That's why we have an expert team of scheduling consultants who can develop a custom solution for your particular needs. Call us at 866-846-3123 and ask about our consulting services.

- **What if you go down? How will we access our schedule?**
  
  Our servers are located in state of the art data centers that have multiple redundant power backup and redundant internet connectivity to ensure that our servers stay operational all the time, 24 hours a day, 7 days week. We also have several backup servers located throughout the United States that are always standing by in case of an emergency. We do recommend that you print out your schedule often just in case, mainly because you may lose the internet connection in your location. We have virtually no downtime.

- **Can the system handle scheduling breaks?**
  
  Yes. You can schedule up to 10 breaks per shift.

- **I don't want my employees to be able to swap shifts among themselves. Can I disable this feature?**
  
  Yes. Simply go to the employee's user record in your account uncheck the box that says "Allow employee to swap shifts?"
- Can I add notes for my employees to see on their schedule?
  Yes. You can add notes for each shift you post.

- Can the system handle military time?
  Yes. In the setup wizard you can choose to use either the standard am/pm format or military time. You can also change this at any time inside General Options.

- Is there a limit to the number of locations, departments, or tasks I can setup?
  Currently there is no limit to the number of locations, department, and tasks you can enter.

- How long does the system retain schedule and attendance history?
  18 months.
Index

- A -

Add
- cross-sections to screen 105
- sort bar to screen 107
- time block 121
- time block(s) (Special) 122, 123, 125, 126

Additional Features
- custom rules 199

Announcements 224

Approve Time Off 207

Areas
- add 31
- edit 31
- remove 31

Attendance
- export 96
- initialize 94
- initialize using time clock 96
- modify 96

Automatic Scheduling
- show conflicts 203

Automatic Scheduling
- auto-schedule 201

Automation 157

Auto-Schedule 154, 203

Availability
- current 100
- Understanding Availability 99

Availability
- recurring 99

- B -

Backup 247

Balance Transfer 222

Best Fit 154, 203

Billboard 224

- C -

Category 27, 31, 34, 37, 40, 45

- D -

Daily hours 164

DATE 120

DATE FORMATS 120

Decline Time Off 207

Departments
- add 27
- edit 27
- remove 27

Do not schedule when declared unavailable 172

Double Scheduling 156

Download Reports 227, 236

- E -

Edit
- appearance 114
- color scheme 114
- options 48
- template 91
- user account 63

Edit Menu
- Change properties 145
- remove time blocks 135
Edit Menu

selected time blocks 133

Eliminating Rules

Daily hours 164
Do not schedule when declared unavailable 172
Max days in a row 175
Max hours rule 163
Qualification rule 166
Schedule only when declared available 169
separation rule 174, 176
what are eliminating rules 162

Email employees 225
Employee Help 223
Employee Information 153
Employee preference 183
Employee rank (highest) 189
Employee rank (lowest) 188
Employee rank by category 191
Employees by lowest pay rate 194
Employees by lowest pay rate for the category item 196
Enable time off 206
Entering dates and times 120
Excel 242
Export 96, 242
Export to excel 247

Factor of Importance 180
FAQ 251
Filter
    using cross-sections 105
Find best fit 154, 203
Frequently Asked Questions 251

Generate Reports 227, 236
Get Best Fit 154, 203
Grades 180

History 156
Hours Report 233

Icons 18
Importing
    into Quickbooks 96
Initialize
    attendance from recurring schedule 94
    attendance using time clock 96
    from a template 91
    schedule 86

Least hours so far 185
Least hours so far by category 186

Manually schedule time off 211
Mass Qualification edit 78
Mass Qualifications edit add 79
Mass qualifications remove edit 82
Max days in a row 175
Max hours rule 163
Military Time 120
Modify
    many time blocks at once 145
    time blocks individually 133
Move time blocks 140
My Typical Week 99

Navigate
    range view 109
    weekly view 109

Open
    best fit 154, 203
    Shift Information box 151
    Time Block History 156
    Time Block Information 153
Open time block 126
Options 48
<table>
<thead>
<tr>
<th>Options</th>
<th>48</th>
</tr>
</thead>
<tbody>
<tr>
<td>alerts</td>
<td>55</td>
</tr>
<tr>
<td>attendance</td>
<td>50</td>
</tr>
<tr>
<td>availability</td>
<td>53</td>
</tr>
<tr>
<td>breaks</td>
<td>54</td>
</tr>
<tr>
<td>date and time information</td>
<td>55</td>
</tr>
<tr>
<td>general information</td>
<td>49</td>
</tr>
<tr>
<td>overtime</td>
<td>51</td>
</tr>
<tr>
<td>recurring schedule</td>
<td>49</td>
</tr>
<tr>
<td>Schedule</td>
<td>49</td>
</tr>
<tr>
<td>time off</td>
<td>52</td>
</tr>
<tr>
<td>totaling hours</td>
<td>51</td>
</tr>
</tbody>
</table>

- **P** -

<table>
<thead>
<tr>
<th>PDF</th>
<th>242</th>
</tr>
</thead>
<tbody>
<tr>
<td>Phone Number Report</td>
<td>229</td>
</tr>
<tr>
<td>Post Schedule</td>
<td>89</td>
</tr>
<tr>
<td>Preference Rules</td>
<td>183</td>
</tr>
<tr>
<td>Employee preference</td>
<td>183</td>
</tr>
<tr>
<td>Employee rank (highest)</td>
<td>189</td>
</tr>
<tr>
<td>Employee rank (lowest)</td>
<td>188</td>
</tr>
<tr>
<td>Employee rank by category</td>
<td>191</td>
</tr>
<tr>
<td>Employees by lowest pay rate</td>
<td>194</td>
</tr>
<tr>
<td>Employees by lowest pay rate for the category item</td>
<td>196</td>
</tr>
<tr>
<td>factor of importance</td>
<td>180</td>
</tr>
<tr>
<td>Grades</td>
<td>180</td>
</tr>
<tr>
<td>Least hours so far</td>
<td>185</td>
</tr>
<tr>
<td>Least hours so far by category</td>
<td>186</td>
</tr>
<tr>
<td>what are preference rules</td>
<td>179</td>
</tr>
<tr>
<td>Print Schedule</td>
<td>242</td>
</tr>
<tr>
<td>Properties of time block</td>
<td>117</td>
</tr>
</tbody>
</table>

- **Q** -

| Qualification rule | 166 |
| Quickbook | 96 |

- **R** -

| Raw Data | 247 |
| Recurring Schedule | 86 |
| Reminders | 63 |
| Remove | 135 |
| time blocks | 135 |
| Remove time blocks | 135 |

- **Report** -

| time off report | 230 |
| Reports | 237, 241 |
| available reports | 227, 236 |
| hours report | 233 |
| phone number report | 229 |
| user report | 228, 239 |
| who's on report | 232 |

- **Rules** -

| custom rules | 199 |
| eliminating rules | 162 |
| preference rules | 179 |
| understanding rules | 157 |
| what are rules | 58, 158 |

- **S** -

| Schedule only when declared available | 169 |
| Scheduling | 85 |
| create the schedule | 85 |
| initialize from recurring schedule | 86 |
| modify | 88 |
| post | 89 |
| recurring schedule setup | 86 |
| Scheduling time off | 205 |
| Select | 128 |
| all time blocks in a day | 128 |
| all time blocks in a group | 130 |
| all time blocks in a view | 132 |
| day | 128 |
| group | 130 |
| individual time block | 127 |
| selection mode | 148 |
| Select Menu | 132 |
| select all time blocks | 132 |
| unselect all time blocks | 133 |
| Selection Mode | 148 |
| Send Email to employees | 225 |
| Separation rule | 174, 176 |
| Set Time Off | 206 |
| Shift Information Box | 156 |
| check double scheduling | 156 |
| display time block information | 153 |
| Employee Information | 153 |
| get best fit | 154, 203 |
| open box | 151 |
| time block history | 156 |
Shift Report  237
Show all Main Groups  111
Show Conflicts  203
Single Selection mode  148
SMS  63
Sort  107
Sort bar  107
Standard Time  120
Swap and Signup  54

- T -

Tasks
  add  34
  edit  34
  remove  34

Template
  General Information  91
  setup  56

TIME  120

Time Block
  add - multiple employees multiple days  123
  add - multiple employees single day  125
  add - open time blocks  126
  add - single employee multiple days  122
  add - single employee single day  121
  change properties  133
  change properties for many time blocks  145
  clear all selected  133
  copy  137
  edit  133
  modify  133
  move  140
  properties  117
  remove  135
  select all in a day  128
  select all in a group  130
  select all in a view  132
  select individual  127
  Time Block Information  153
  unselect all in a day  128
  unselect all in a group  130
  unselect all time blocks  133
  unselect individual  127

Time block history  156
Time Block Report  237

Time Block, Preference, General Option, Options  51
Time Clock  96
TIME FORMATS  120
Time Off  40, 205
  approve and decline requests  207
  features  206
  manually scheduling time off  211
TIME OFF ACCOUNTS  217
TIME OFF LEDGERS  219
Time Off Report  230
Time On  40
Times of day
  add  37
  edit  37
  remove  37

- U -

Unassigned time blocks  126
Unpost  89

Unselect
  all time blocks in a day  128
  all time blocks in a group  130
  day  128
  group  130
  individual time block  127

User Defined Category  45
User Report  228, 239

Users
  modify many users at once  76
  set user account  63
  set user permissions  63

- V -

View Menu
  change sort/week/view  109
  color scheme  114
  cross-sections  105
  range  109
  show conflicts  203
  sort bar  107
  week  109
- W -
Who's On Report 232
Work Area 18

- X -
XLS file
  print 242