

Borrowing Employees (Job Aid 5)

Overview

Stores are able to borrow an employee from another store for a given period of time that is mutually agreed upon by both stores. The home store will add the borrowing store in the employee's information and borrowing store will manually enter the schedule.

Process

Prior to the starting the process described below, it is important that the borrowing store communicate the coverage need(s) BEFORE running the auto-schedule.

Borrowing Employees From Stores Using mySchedule:

In this exercise, Store 1703 is asking a full time Grocery Clerk from Store 2984 Steve Stevens, to cover shifts for a person on vacation. Store 1703 contacted the Schedule Writer from Store 2984 to specify the following coverage needs:

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
	8a to 5p		8a to 5p	8a to 5p	8a to 5p	8a to 5p

Home Store - the employee needs to have the borrowing store added to their employee profile:

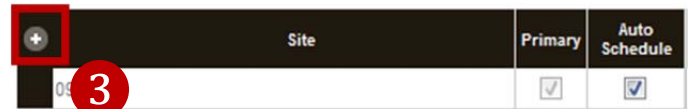
1. Go to the **Personnel** tab.



2. From the **Employee Information** tab choose the employee from the drop-down list by selecting the arrow.



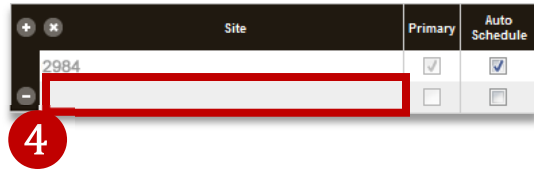
3. In the **Site** menu click on the **Plus Sign** to include another store location to the employee's file.



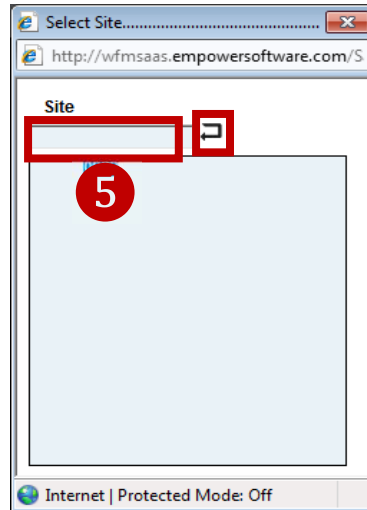
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Borrowing Employees (continued)

4. Click in the new row that appears to enter the **borrowing store number**.

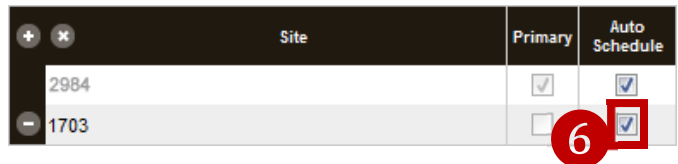


5. From the menu that pops up, enter the **borrowing store number** and press the **Submit** button.



*The **borrowing store** has now been added to the employee's file.*

6. Check the **Auto Schedule** box.

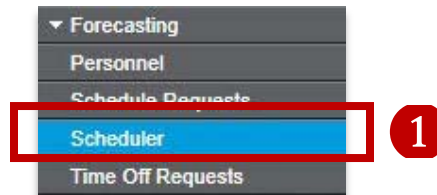


Borrowing Store - there are two steps to this process:

1. Enter the employee's schedule manually in the Scheduler tab.
2. Change the site to the borrowing store in the employee's schedule.

From the main screen:

1. Go to the **Scheduler** tab.



2. Click on the **Filter** icon. A selection window will appear.



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Borrowing Employees (continued)

3. Select the correct week (Next Week) by using the drop down menu.



4. Locate the desired department (Labor field) by using the drop down menu. Another selection window will appear.



5. Highlight the department where the employee is assigned (Grocery) then click the **checkmark** icon. The selection window will close.



6. Click on **OK**. The screen will return to the Scheduler tab.



7. Locate the employee (Steve Stevens) on the scheduler grid and enter the day(s) and time(s) of the coverage need(s).



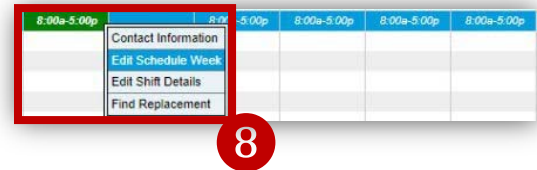
	Name	Primary Labor	Sch Hrs	Est. Benefit Tr	Sat 9/27/2014	Sun 9/28/2014	Mon 9/29/2014	Tue 9/30/2014	Wed 10/1/2014	Thu 10/2/2014	Fri 10/3/2014	Sat 10/4/2014
P	Alpha, Employee	Dairy	0.00	0.00	8:00a-4:30p							
F	Aro, Mary	Day Stock	0.00	0.00								
F	Bank, Charles	Frozen	0.00	0.00	2:00a-12:00p							
F	Chain, Lana	Night Crew Manager	0.00	0.00	4:00a-1:00p							
P	Doggett, Rose	Night Stock	0.00	0.00	Vac/Week							
F	Stevens, Steve	Night Stock	0.00	0.00	6:00a-3:00p		8-17		8-17	8-17	8-17	8-17
F	Nesmith, Peter	Day Stock	0.00	0.00	Vac/Week							
P	O'Connel, Jane	Night Crew Manager	0.00	0.00	LOA							
P	Panama, Jack	Night Crew Manager	0.00	0.00	8:00a-2:00p							

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Borrowing Employees (continued)

8. Right-click inside one of the employee's shifts and select **Edit Schedule Week**. *The Edit Schedule Week window will appear.*

Now you will change the store to the borrowing store.



9. Click on the **Site** field on the first scheduled row and select **Your Location**. A selection window will appear.



10. Click on **Close** from the toolbar. The Edit Schedule window will close and go back to the Scheduler tab.



F	Morales, Eliza	Checker	40.00	0.00	<i>8:00a-3:00p</i>	<i>8:00a-5:00p</i>	<i>8:00a-5:00p</i>	<i>8:00a-5:00p</i>	<i>8:00a-5:00p</i>	<i>8:00a-5:00p</i>
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The employee's schedule will be in italics and gray to indicate a change in primary site. Communicate the changes to the borrowing store and confirm the transfer.