Adding a Job Transfer in a Shift (Job Aid 12)

Overview

Employees who are qualified to work in another department or job role other than the primary department/job can be scheduled to perform additional functions or roles in any given shift. Job transfers may consist of multiple shifts in other departments or job roles and start/end times.

Process

Before adding a Job Transfer in any employee shift, make sure that the secondary job roles are correct (*refer to the Adding Secondary Job for details*) and that shifts have been entered for the employee for the week. In this scenario, Marco Robles, a full time Bookkeeper will also be scheduled (transferred) to cover the Service Center on Sunday and Tuesday. Below are the details of his current schedule:

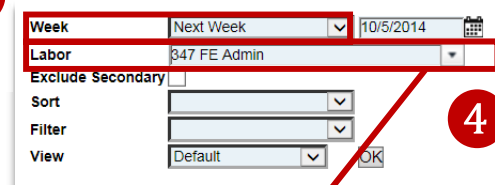| Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
6a-2p	OFF	6a-2p	6a-2p	6a-2p	6a-2p	OFF

From the main screen:

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

2. Select the **Filter** icon to change the settings. A selection window will appear.
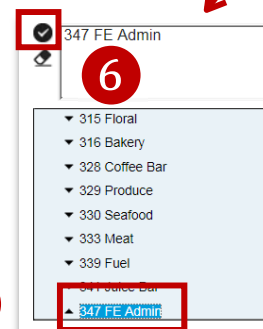
3. Select the correct **Week** (Next Week) by clicking the drop down arrow.

4. Click on the drop down arrow in the **Labor** field. A selection window will appear.

   Note: This field should be blank. If you see another department on the Labor field, highlight the department name and click on the Erase icon
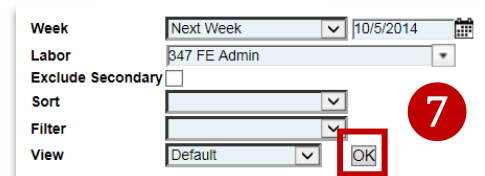
5. Double-click the desired department (FE Admin).

6. Click the **Accept Checkmark** icon.

7. Select **OK**. This will return you to the previous screen.

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Adding a Job Transfer in a Shift (continued)

8. Locate the employee on the scheduler grid and highlight by clicking on any shift cell.

9. Right-click on the shift cell and select Edit Schedule Week. The employee's detailed schedule for the week will appear.

For the first job transfer, the employee will cover the Service Center from 12p to 1p. The rest of the shift, the employee will perform the Primary Job Role (Bookkeeper).

10. Go to the row where the first job transfer will occur and click inside the **Transfer** cell. (Sunday 6a-2p)

11. Enter the time when the employee will switch to the next job role. (12p)

12. Click inside the cell under the **Job** column.

13. Select the job role (Service Center) that the employee

   will transfer to using the drop down arrow.

   Next, you will need to return the employee to the Primary job role (Bookkeeper) for the rest of the shift (1p to 2p).

14. Click the **Add** row icon next to the day of the job transfer (Sunday). A new row will appear.

15. Click inside the **Transfer** column and enter the start time (13 = 1pm) when the employee will return to the Primary Job role (Bookkeeper).

16. Click inside the cell under the Job column and select the Primary Job Role from the drop down option (Bookkeeper).

17. Click the **Save** icon. Review and clear/override any prompts.

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Adding a Job Transfer in a Shift (continued)

The next job transfer will occur on Wednesday. The employee will be scheduled to cover the Service Center for the entire shift.

18. Go to the row where another transfer occurs and click inside the **Transfer** column.

19. Click inside the **Transfer** column and enter the start time (6am).

20. Click inside the cell under the **Job** column.

21. Select the secondary job role (Service Center) from the drop down options.

22. Select **Save**. Review and clear/override any prompts.

Since there are no other job transfers for the day, there is no need to add another row.

23. Leave the remaining shifts for the week blank. This indicates that the employee will perform the Primary Job Role for remaining days.

24. Select the **Close** icon. This will close the Edit Shift window and return to the Scheduler page.

25. View the employee's schedule to validate the changes. When a scheduled job transfer occurs, the shift will be in blue and italicized.

6:00a-2:00p		6:00a-2:00p	6:00a-2:00p	6:00a-2:00p	6:00a-2:00p	

mySchedule

Non-Standard Schedule Job Transfer

Overview

As a default, all employees have these additional schedule jobs added in the Personnel tab, under the Labor table:

- Indirect
- Training

Process

The date and time of the non-standard schedule transfer must be entered manually and BEFORE the auto-schedule is ran for the week. In this scenario, Bob Smith, a 2nd Assistant Store Director will be training on-site on Tuesday from 9am to 12pm.

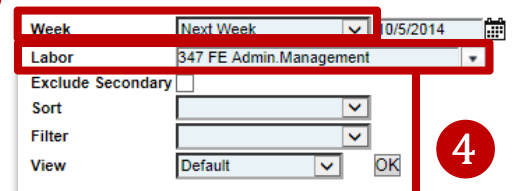**From the main screen:**

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

2. Select the **Filter** icon to change the settings. *A selection window will appear.*

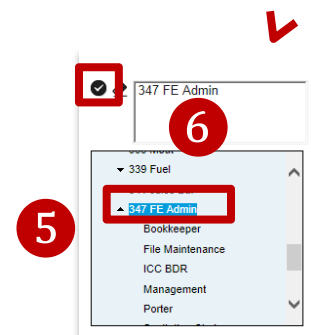3. Select the correct **Week** (Next Week) by clicking the drop down arrow.

4. Click on the drop down arrow in the **Labor** field. A selection window will appear.

   Note: This field should be blank. If you see another department on the Labor field, highlight the department name and click on the Erase icon
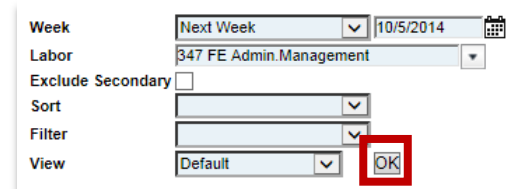
5. Double-click the desired department (FE Admin).

6. Click the **Accept Checkmark** icon.

7. Select **OK**. This will return you to the previous screen.

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Non-Standard Job Transfer (continued)

8. Locate the employee on the scheduler grid and highlight by clicking on any cell.

9. Go to the day where the employee is scheduled for the non-standard transfer (Wednesday) and enter the start and end time (9a to 12p).

10. Select **Save** from the toolbar. Review and override any prompts.

11. Right-click on the shift cell and select **Edit Shift Details**. The employee's detailed schedule for the day will appear.

12. Click inside the cell under **Job** and select the desired non-standard job. (Training)

Job
352 Training.Training

Note: If there is a start or end time other than the entered schedule, type in the start of the non-standard job on under the Transfer column. If the cell is left blank under Transfer, it will default to the entered start time.

13. Click the **Save** icon from the toolbar. Review and override any prompts.

14. Click the **Close** icon. The screen will return to the Scheduler tab.