

Select-A-Shift (Task 26.1)

Overview

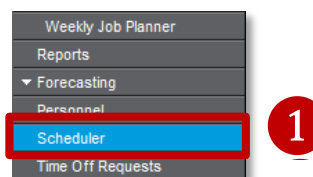
For the weekly schedule you will need to create a report of available shifts for employees to choose from as part of the **Select-A-Shift** process.

Process

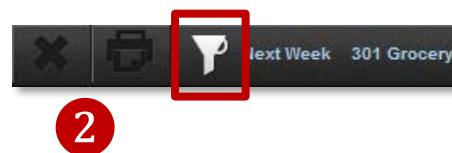
All roles that are eligible for **Select-A-Shift**, whether manual or auto-scheduled will appear in a report for employees to choose from. You will then take the employee chosen shifts and move them into your weekly schedule

From the main screen:

1. Log in to the **Scheduler**.



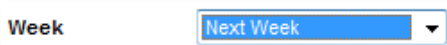
2. Go to the toolbar and select **Filter**. A selection window will appear.



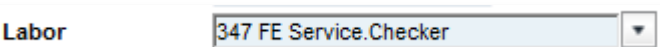
For working with **Select-A-Schedule** you can view all schedules at the same time by choosing "Select-A-Schedule" for **Labor** or you can choose each job independently.

*In this example we will use the job of "Checker" for the **Labor** field.*

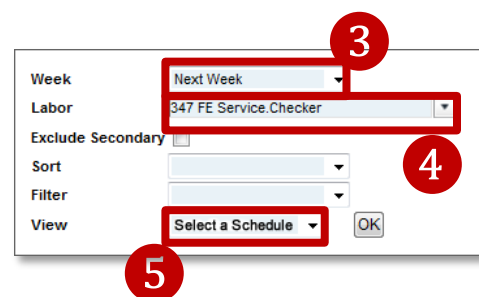
3. Select "Next Week" or "Two Weeks Ahead" from the drop-down for **Week**



4. Select "Checker" and "Checker SCO" for **Labor**



5. Select "Select-A-Schedule" for **View**



6. The view will change to the **Time Sheet** with a few changes. You will see how the following buttons function later in this job aid.



- A. Lock a shift
- B. Generate template shifts **-DO NOT USE-**
- C. Vacate template shifts

Continued on next page

Select-A-Shift (continued)

7. Write the schedules for all departments that are **Select-A-Schedule** eligible in your store.

all other departments and jobs are not in the **Select-A-Schedule process*

Name	Primary Labor	Sch Hrs	Est.TOR	Sat 10/24/2015	Sun 10/25/2015	Mon 10/26/2015	Tue 10/27/2015	Wed 10/28/2015	Thu 10/29/2015	Fri 10/30/2015	Sat 10/31/2015
P Bailey	Checker SCO	0.00	0.00								
F Carpio	Bookkeeper	33.00	0.00	10:00a-7:00p	6:30a-3:15p	6-2	6-2	6-2	6-2		
P Chavez	Checker	0.00	0.00	12:00p-7:30p							
M Collopy	Checker	0.00	0.00								
P Cruz	Checker	0.00	0.00	Unpaid Day Off							
M Dreamer	Checker	0.00	0.00								
P Dunn	Checker	0.00	0.00	4:30p-1:00a							
M Fisher	Checker	0.00	0.00								
P Foret	Checker SCO	0.00	0.00	8:00a-2:00p							
P Griffin	Checker	0.00	0.00	9:00a-3:00p							
P Haider Rizvi	Checker	0.00	0.00								
P Himes	Checker	0.00	0.00	Unpaid Day Off	Unpaid Day Off					Unpaid Day Off	Unpaid Day Off
P Hurtado	Checker	0.00	0.00	4:00p-8:30p							
P Hutson	Checker	0.00	0.00								
M Iodic	Checker	0.00	0.00								
P Jafri	Checker	0.00	0.00								Unpaid Day Off

*Put in all schedules for **manually scheduled** and **auto-schedule** departments that are eligible for **Select-A-Schedule**. (For Example: Produce, Courtesy Clerk, Checkers)

8. **Manually scheduled** shifts will show in *italic* and will be **locked** for **Select-A-Schedule**.

- Non-italics is **unlocked** and eligible for **Select-A-Shift**.

6:30a-3:15p

9. To **unlock** or **lock** a shift, select the shift and then click on the **Lock shift** button

**You can unlock/lock multiple shifts at once by using the CTRL key*

The screenshot shows a toolbar with various icons. A red box highlights the lock icon (a padlock). Below the toolbar is a schedule table with columns for Name, Primary Labor, Sch Hrs, Est.TOR, and days of the week. The shift for 'F Carpio, Theresa' is highlighted in blue, and the time '10:00a-7:00p' is highlighted in green.

Name	Primary Labor	Sch Hrs	Est.TOR	Sat 10/24/2015	Sun 10/25/2015	Mon 10/26/2015
P Bailey, Lyoea	Checker SCO	0.00	0.00			
F Carpio, Theresa	Bookkeeper	33.00	0.00	10:00a-7:00p	10:00a-7:00p	10:00a-7:00p
P Chavez, Mason	Checker	4.00	0.00	12:00p-7:30p		

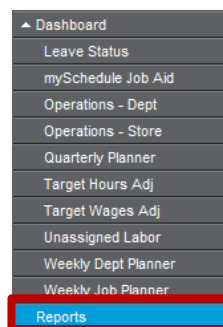
Continued on next page

Select-A-Shift (continued)

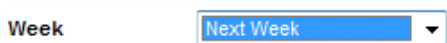
10. You now need to print a copy of the report with all the **Select-A-Shift** available shifts for employees to choose from.

Under **Dashboard** select **Reports**

Go to the toolbar and select **Filter**. A selection window will appear.



Select "Next Week" or "Two Weeks Ahead" from the drop-down for **Week**

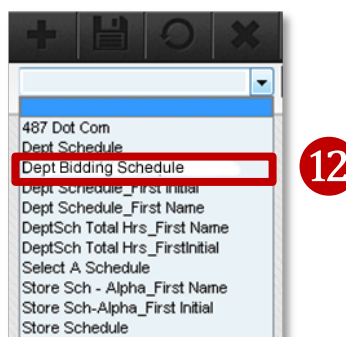


11. From the drop-down select **Store Schedules**



12. From the next drop-down select **Dept Bidding Schedule** from the list.

This report will show all shifts that are available for employees to select from.

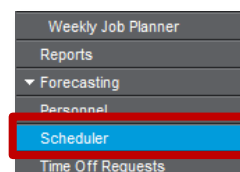


13. Make the schedule available and communicate to employees the available shifts to choose from.

Employees choose, by seniority, the shifts for the week.

14. Once all shifts are chosen by employees, take the report with employee selections back to work in mySchedule.

Go to **Scheduler**



Continued on next page

Select-A-Shift (continued)

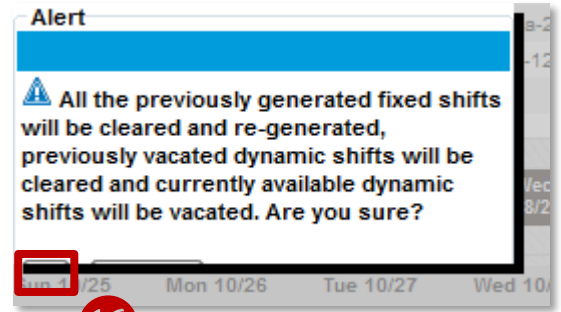
15. Vacate all **unlocked** shifts by clicking the **Vacate template shifts** button



15

16. An alert message will pop-up. To continue, click **OK**.

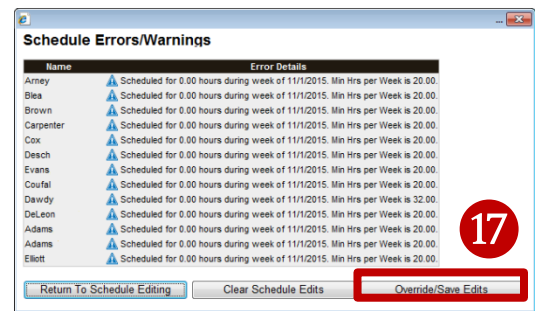
The **OK button is currently difficult to see at the bottom of the alert, but you can click on it.*



16

17. The **Schedule Errors/Warnings** message will pop-up. The message warns that employee hours have dropped to 0.0, which is correct since the shifts are moving to the **Select-A-Shift** menu.

Click on **Override/Save Edits** to clear the message.



17

18. All **unlocked** shifts are gone from the employee schedules and now show in the table below.

**The shifts are listed in chronological order by day.*

Name	Primary Labor	Sch Hrs	Est.TOR	Sat 10/31/2015	Sun 11/1/2015	Mon 11/2/2015	Tue 11/3/2015	Wed 11/4/2015	Thu 11/5/2015	Fri 11/6/2015	Sat 11/7/2015
P Adams	Checker	0.00	0.00								
P Adams, M	Checker	0.00	0.00								
F Anna	Checker	0.00	0.00								
F Anthony	Checker	0.00	0.00								
P Arney	Checker	0.00	0.00								
P Blea	Checker	0.00	0.00								
P Brown	Checker	0.00	0.00								
F Bruning	Checker	0.00	0.00								
F Campbell	Checker	0.00	0.00								
P Carpenter	Checker	0.00	0.00								
P Cox	Checker	0.00	0.00								
F Desch	Checker	0.00	0.00								
F Evans	Checker	0.00	0.00								
F Coufal	Checker	0.00	0.00								
F Davdy	Checker	0.00	0.00								
F DeLeon	Checker	0.00	0.00								
F Adams	Checker	0.00	0.00								
F Adams	Checker	0.00	0.00								
F Elliott	Checker	0.00	0.00								

Rec	Primary Labor	Sun 11/1/2015	Mon 11/2/2015	Tue 11/3/2015	Wed 11/4/2015	Thu 11/5/2015	Fri 11/6/2015	Sat 11/7/2015
<input type="checkbox"/>	347 FE Service Checker	6:30a-3:15p	6:30a-8:30p	6:30a-10:30a	6:30a-6:30p	6:30a-3:30p	6:30a-3:30p	6:30a-6:30p
<input type="checkbox"/>	347 FE Service Checker	6:30a-3:30p	10:30a-7:00p	10:30a-7:30p	7:30a-12:15p	11:00a-8:00p	9:15a-4:15p	9:30a-6:00p
<input type="checkbox"/>	347 FE Service Checker	6:30a-3:00p	11:15a-6:15p	11:15a-8:00p	11:45a-6:45p	2:00p-9:15p	10:00a-6:00p	10:15a-5:15p
<input type="checkbox"/>	347 FE Service Checker	8:00a-5:00p	2:30p-11:00p	2:00p-11:00p	2:00p-11:00p	3:30p-10:15p	11:15a-6:15p	10:15a-5:15p
<input type="checkbox"/>	347 FE Service Checker	9:00a-5:15p				4:00p-11:00p	2:15p-8:45p	10:15a-3:15p
<input type="checkbox"/>	347 FE Service Checker	1:15p-8:15p					4:00p-11:00p	11:15a-6:15p
<input type="checkbox"/>	347 FE Service Checker	3:30p-11:00p						11:15a-4:00p
<input type="checkbox"/>	347 FE Service Checker							2:00p-9:00p
<input type="checkbox"/>	347 FE Service Checker							2:00p-8:45p

18

Continued on next page

Select-A-Shift (continued)

19. Assign shifts to employees by clicking on the shift below and dragging it to the employee.

Shifts must remain in the same day they are created

(EX: Monday moves to an employee on Monday)

Name	Primary Labor	Sch Hrs	Est.TOR	Sat 10/31/2015	Sun 11/1/2015	Mon 11/2/2015	Tue 11/3/2015	Wed 11/4/2015	Thu 11/5/2015	Fri 11/6/2015	Sat 11/7/2015
P Adams	Checker	0.00	0.00			6:30a-8:30p					
P Adams, M	Checker	0.00	0.00								
F Anna	Checker	0.00	0.00								
F Anthony	Checker	0.00	0.00								
P Arney	Checker	0.00	0.00								
P Blea	Checker	0.00	0.00								
P Brown	Checker	0.00	0.00								
F Bruning	Checker	0.00	0.00								
F Campbell	Checker	0.00	0.00								
P Carpenter	Checker	0.00	0.00								

Rec	Primary Labor	Sun 11/1/2015	Mon 11/2/2015	Tue 11/3/2015	Wed 11/4/2015	Thu 11/5/2015	Fri 11/6/2015	Sat 11/7/2015
<input checked="" type="checkbox"/>	347 FE Service Checker	6:30a-3:15p	6:30a-8:30p	6:30a-10:30a	6:30a-6:30p	6:30a-3:30p	6:30a-3:30p	6:30a-6:30p
<input type="checkbox"/>	347 FE Service Checker	6:30a-3:30p	10:30a-7:00p	10:30a-7:30p	7:30a-12:15p	11:00a-8:00p	9:15a-4:15p	9:30a-6:00p
<input type="checkbox"/>	347 FE Service Checker	6:30a-3:00p	11:15a-6:15p	11:15a-8:00p	11:45a-6:45p	2:00p-9:15p	10:00a-5:00p	10:15a-5:15p
<input type="checkbox"/>	347 FE Service Checker	8:00a-5:00p	2:30p-11:00p	2:00p-11:00p	2:00p-11:00p	3:30p-10:15p	11:15a-6:15p	10:15a-5:15p
<input type="checkbox"/>	347 FE Service Checker	9:00a-5:15p				4:00p-11:00p	2:15p-8:45p	10:15a-3:15p
<input type="checkbox"/>	347 FE Service Checker	1:15p-8:15p					4:00p-11:00p	11:15a-6:15p
<input type="checkbox"/>	347 FE Service Checker	3:30p-11:00p						11:15a-4:00p
<input type="checkbox"/>	347 FE Service Checker							2:00p-9:00p
<input type="checkbox"/>	347 FE Service Checker							2:00p-8:45p

20. Assign all employee shifts until all have been moved to employees.

An assigned shift will show as *italic green* on the employees schedule and as gray on the available shifts menu.

Name	Primary Labor	Sch Hrs	Est.TOR	Sat 10/31/2015	Sun 11/1/2015	Mon 11/2/2015	Tue 11/3/2015	Wed 11/4/2015	Thu 11/5/2015	Fri 11/6/2015	Sat 11/7/2015
P Adams	Checker	27.00	0.00			<i>6:30a-8:30p</i>	6:30a-10:30a			9:15a-4:15p	10:15a-3:15p
P Adams, M	Checker	29.75	0.00		6:30a-3:15p			6:30a-6:30p	4:00p-11:00p		10:15a-5:15p
F Anna	Checker	26.50	0.00				10:30a-7:30p	7:30a-12:15p	6:30a-3:30p		2:00p-8:45p
F Anthony	Checker	28.00	0.00		6:30a-3:30p			11:45a-6:45p	11:00a-8:00p		11:15a-6:15p
P Arney	Checker	27.75	0.00		1:15p-8:15p		11:15a-8:00p			6:30a-3:30p	10:15a-5:15p
P Blea	Checker	22.50	0.00			11:15a-6:15p			3:30p-10:15p	11:15a-6:15p	11:15a-4:00p
P Brown	Checker	21.00	0.00		6:30a-3:00p			2:00p-11:00p		2:15p-8:45p	
F Bruning	Checker	23.75	0.00			10:30a-7:00p			2:00p-9:15p		6:30a-6:30p
F Campbell	Checker	26.50	0.00		3:30p-11:00p		2:00p-11:00p			4:00p-11:00p	2:00p-9:00p
P Carpenter	Checker	21.00	0.00			2:30p-11:00p				10:00a-5:00p	9:30a-6:00p

Rec	Primary Labor	Sun 11/1/2015	Mon 11/2/2015	Tue 11/3/2015	Wed 11/4/2015	Thu 11/5/2015	Fri 11/6/2015	Sat 11/7/2015
<input type="checkbox"/>	347 FE Service Checker	6:30a-3:00p	6:30a-8:30p	6:30a-10:30a	6:30a-6:30p	6:30a-3:30p	6:30a-3:30p	6:30a-6:30p
<input type="checkbox"/>	347 FE Service Checker	6:30a-3:30p	10:30a-7:00p	10:30a-7:30p	7:30a-12:15p	11:00a-8:00p	9:15a-4:15p	9:30a-6:00p
<input type="checkbox"/>	347 FE Service Checker	6:30a-3:15p	11:15a-6:15p	11:15a-8:00p	11:45a-6:45p	2:00p-9:15p	10:00a-5:00p	10:15a-5:15p
<input type="checkbox"/>	347 FE Service Checker	8:00a-5:00p	2:30p-11:00p	2:00p-11:00p	2:00p-11:00p	3:30p-10:15p	11:15a-6:15p	10:15a-3:15p
<input type="checkbox"/>	347 FE Service Checker	9:00a-5:15p				4:00p-11:00p	2:15p-8:45p	10:15a-5:15p
<input type="checkbox"/>	347 FE Service Checker	1:15p-8:15p					4:00p-11:00p	11:15a-6:15p
<input type="checkbox"/>	347 FE Service Checker	3:30p-11:00p						11:15a-4:00p
<input type="checkbox"/>	347 FE Service Checker							2:00p-8:45p
<input type="checkbox"/>	347 FE Service Checker							2:00p-9:00p

Continued on next page

Select-A-Shift (continued)

21. If you accidentally assign a shift to the incorrect employee you can simply click on the shift and press **delete** on the keyboard and then click on **Save**. The shift will return to the list of available shifts.



	Name	Primary Labor	Sch Hrs	Est.TOR	Sat 10/31/2015	Sun 11/1/2015	Mon 11/2/2015	Tue 11/3/2015	Wed 11/4/2015	Thu 11/5/2015	Fri 11/6/2015	Sat 11/7/2015
P	Adams	Checker	27.00	0.00			6:30a-8:30p	6:30a-10:30a			9:15a-4:15p	10:15a-3:15p
P	Adams, M	Checker	22.00	0.00					6:30a-6:30p	4:00p-11:00p		10:15a-5:15p
F	Anna	Checker	26.50	0.00				10:30a-7:30p	7:30a-12:15p	6:30a-3:30p		2:00p-8:45p
F	Anthony	Checker	28.00	0.00		6:30a-3:30p			11:45a-6:45p	11:00a-8:00p		11:15a-6:15p
P	Arney	Checker	27.75	0.00		1:15p-8:15p		11:15a-8:00p			6:30a-3:30p	10:15a-5:15p
P	Blea	Checker	22.50	0.00			11:15a-6:15p			3:30p-10:15p	11:15a-6:15p	11:15a-4:00p
P	Brown	Checker	21.00	0.00		6:30a-3:00p			2:00p-11:00p		2:15p-8:45p	
F	Bruning	Checker	23.75	0.00			10:30a-7:00p			2:00p-9:15p		6:30a-6:30p
F	Campbell	Checker	26.50	0.00		3:30p-11:00p		2:00p-11:00p			4:00p-11:00p	2:00p-9:00p
P	Carpenter	Checker	21.00	0.00			2:30p-11:00p				10:00a-5:00p	9:30a-6:00p

Rec	Primary Labor	Sun 11/1/2015	Mon 11/2/2015	Tue 11/3/2015	Wed 11/4/2015	Thu 11/5/2015	Fri 11/6/2015	Sat 11/7/2015
<input type="checkbox"/>	347 FE Service Checker	6:30a-3:15p	6:30a-8:30p	6:30a-10:30a	6:30a-6:30p	6:30a-3:30p	6:30a-3:30p	6:30a-6:30p
<input type="checkbox"/>	347 FE Service Checker	6:30a-3:00p	10:30a-7:00p	10:30a-7:30p	7:30a-12:15p	11:00a-8:00p	9:15a-4:15p	9:30a-6:00p
<input type="checkbox"/>	347 FE Service Checker	6:30a-3:30p	11:15a-6:15p	11:15a-8:00p	11:45a-6:45p	2:00p-9:15p	10:00a-5:00p	10:15a-5:15p
<input type="checkbox"/>	347 FE Service Checker	8:00a-5:00p	2:30p-11:00p	2:00p-11:00p	2:00p-11:00p	3:30p-10:15p	11:15a-6:15p	10:15a-3:15p
<input type="checkbox"/>	347 FE Service Checker	9:00a-5:15p				4:00p-11:00p	2:15p-8:45p	10:15a-5:15p
<input type="checkbox"/>	347 FE Service Checker	1:15p-8:15p					4:00p-11:00p	11:15a-6:15p
<input type="checkbox"/>	347 FE Service Checker	3:30p-11:00p						11:15a-4:00p
<input type="checkbox"/>	347 FE Service Checker							2:00p-8:45p
<input type="checkbox"/>	347 FE Service Checker							2:00p-9:00p

The **Select-A-Shift** process is COMPLETE!

REMINDER: DO NOT CLICK THE "VACATE TEMPLATE SHIFTS" BUTTON AGAIN OR YOU WILL LOSE ALL OF YOUR WORK!