

## Select-A-Shift

### Overview

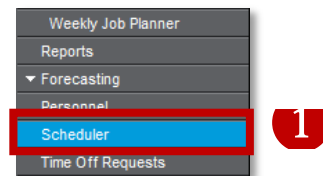
For the weekly schedule you will need to create a report of available shifts for employees to choose from as part of the **Select-A-Shift** process.

### Process

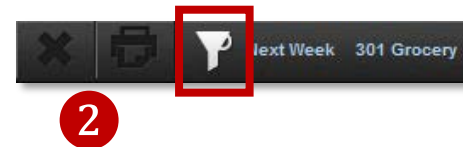
All roles that are eligible for **Select-A-Shift**, whether manual or auto-scheduled will appear in a report for employees to choose from. You will then take the employee chosen shifts and move them into your weekly schedule

#### From the main screen:

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



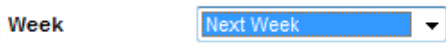
2. Go to the toolbar and select **Filter**. A selection window will appear.



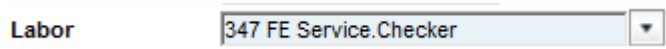
For working with **Select-A-Schedule** you can view all schedules at the same time by choosing "Select-A-Schedule" for **Labor** or you can choose each job independently.

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

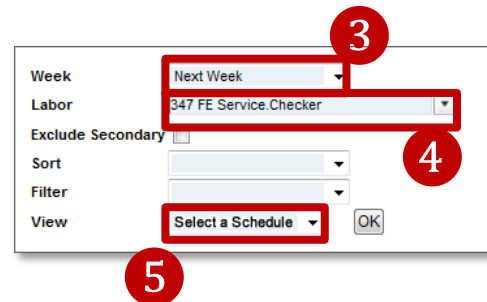
3. Select "Next Week" or "Two Weeks Ahead" from the drop-down for **Week**



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

## 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   | 6-2            | 6-2            | 6-2            | 6-2            |                |                |                |
| P Chavez       | Checker       | 0.00    | 0.00    | 12:00p-7:30p   | 6:30a-3:15p    |                |                |                |                |                |                |
| 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    | 3:00a-2:00p    |                |                |                |                |                |                |                |
| P Griffin      | Checker       | 0.00    | 0.00    | 3:00a-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 the following data:

| Name              | Primary Labor | Sch Hrs | Est.TOR | Sat 10/24/2015 | Sun 10/25/2015 | Mon 10/26/2015 |
|-------------------|---------------|---------|---------|----------------|----------------|----------------|
| P Bailey, Lycea   | 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   |                |                |

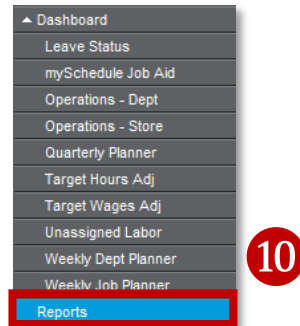
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## Select-A-Shift (continued)

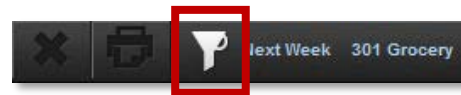
10. You now need to print a copy of the report with all the **Select-A-Shift** available shifts for employees to choose from.

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**

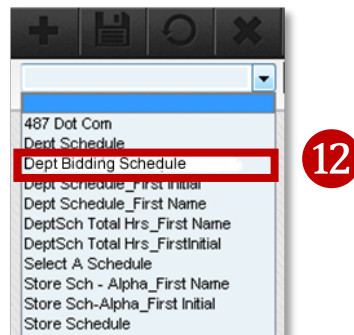


11. From the drop-down select **Store Schedules**



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.

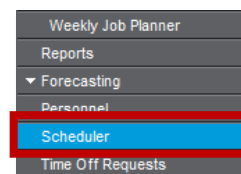
**Note that "locked" shifts will also appear on the report, users should manually flag these shifts as assigned so employees cannot select them as an available SAS shift.**

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

14. Once all shifts are chosen by employees, take the report with employee selections.

Go to **Scheduler**

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## Select-A-Shift (continued)

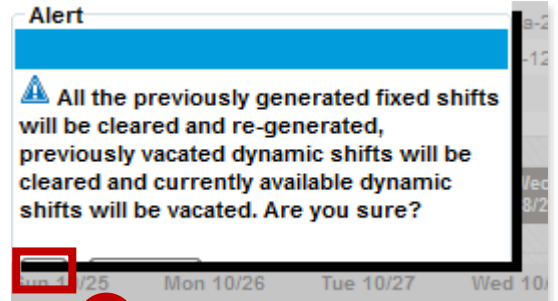
15. Vacate all **unlocked** shifts by clicking the **Vacate template shifts** button



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

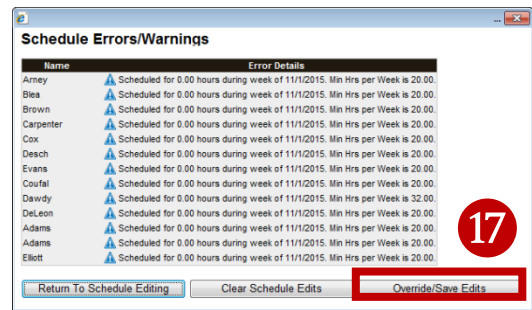
*\*The **OK** button is currently difficult to see at the bottom of the alert, but you can click on it.*



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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.



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

*\*The vacated 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    |                |               |               |               |               |               |               |               |

| 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-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   |

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## 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    |                |               | 6:30a-8:30p   | 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   |

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## 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.



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|   | 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!**