Select-A-Shift

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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**.

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



View

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
 - Week Next Week
- 4. Select "Checker" and "Checker SCO" for Labor

Labor 347 FE Service.Checker

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

Select a Schedule 👻

- 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



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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	8-2	6-2	6-2	4-4		
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		O I					
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 Of	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 loic	Checker	0.00	0.00								
P lafri	Checker	0.00	0.00								Unnaid 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

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9	Name	Primary Labor	Sch Hrs	EstTOR	Sat	Sun	Mon
Q P B	ailey, Lycea	Checker SCO	0.00	0.00	10/24/2015	10/25/2015	10/26/2015
G F C	arpio, Theresa	Bookkeeper	33.00	0.00	10:00a-7:00p	10:00a-7:00p	10:00a-7:00p
Q P C	havez, 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

Companies

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

Week	Next 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	Weekly Job Planner	1
the report with employee selections.		Reports	
		 Forecasting 	
Go to Scheduler	_	Personnel	
		Scheduler	
		Time Off Requests	

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Select-A-Shift (continued)



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

- 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									
				111111111111								
ec	Primary L	abor			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	
c 347 FE Service.Checker	Primary L	abor			Sun 11/1/2015 6:30a-3:15p	Mon 11/2/2015 6:30a-8:30p	Tue 11/3/2015 6:30a-10:30a	Wed 11/4/2015 6:30a-6:30p	Thu 11/5/2015 6:30a-3:30p	Fri 11/6/2015 6:30a-3:30p	Sat 11/7/2015 6:30a-6:30p	~
347 FE Service.Checker	Primary L	abor			Sun 11/1/2015 6:30a-3:15p 6:30a-3:30p	Mon 11/2/2015 6:30a-8:30p 10:30a-7:00p	Tue 11/3/2015 6:30a-10:30a 10:30a-7:30p	Wed 11/4/2015 6:30a-8:30p 7:30a-12:15p	Thu 11/5/2015 0:30a-3:30p 11:00a-8:00p	Fri 11/6/2015 0:30a-3:30p 9:15a-4:15p	Sat 11/7/2015 6:30a-8:30p 9:30a-8:00p	^
347 FE Service.Checker 347 FE Service.Checker 347 FE Service.Checker 347 FE Service.Checker	Primary L	abor			Sun 11/1/2015 6:30a-3:15p 6:30a-3:30p 6:30a-3:00p	Mon 11/2/2015 6:30a-8:30p 10:30a-7:00p 11:15a-6:15p	Tue 11/3/2015 6:30a-10:30a 10:30a-7:30p 11:15a-8:00p	Wed 11/4/2015 6:30a-6:30p 7:30a-12:15p 11:45a-6:45p	Thu 11/5/2015 6:30a-3:30p 11:00a-8:00p 2:00p-9:15p	Fri 11/6/2015 6:30a-3:30p 9:15a-4:15p 10:00a-5:00p	Sat 11/7/2015 6:30a-6:30p 9:30a-6:00p 10:15a-5:15p	Â
347 FE Service.Checker 347 FE Service.Checker 347 FE Service.Checker 347 FE Service.Checker	Primary L	abor			Sun 11/4/2015 6:30a-3:15p 6:30a-3:30p 6:30a-3:00p 8:00a-5:00p	Mon 11/2/2015 6:30a-8:30p 10:30a-7:00p 11:15a-6:15p 2:30p-11:00p	Tue 11/3/2015 8:30a-10:30a 10:30a-7:30p 11:15a-8:00p 2:00p-11:00p	Wed 11/4/2015 6:30a-6:30p 7:30a-12:15p 11:45a-6:45p 2:00p-11:00p	Thu 11/5/2015 6:30a-3:30p 11:00a-8:00p 2:00p-9:15p 3:30p-10:15p	Fri 11/6/2015 6:30a-3:30p 9:15a-4:15p 10:00a-5:00p 11:15a-6:15p	Sat 11/7/2015 6:30a-6:30p 9:30a-6:00p 10:15a-5:15p 10:15a-5:15p	Â
347 FE Service Checker 347 FE Service Checker 347 FE Service Checker 347 FE Service Checker 347 FE Service Checker	Primary L	abor			Sun 11/4/2015 6:30a-3:15p 6:30a-3:30p 6:30a-3:00p 8:00a-5:00p 9:00a-5:15p	Mon 11/2/2015 6:30a-8:30p 10:30a-7:00p 11:15a-8:15p 2:30p-11:00p	Tue 11/3/2015 6:30a-10:30a 10:30a-7:30p 11:15a-8:00p 2:00p-11:00p	Wed 11/4/2015 6:30a-6:30p 7:30a-12:15p 11:45a-6:45p 2:00p-11:00p	Thu 11/5/2015 6:30a-3:30p 11:00a-8:00p 2:00p-9:15p 3:30p-10:15p 4:00p-11:00p	Fri 11/6/2015 6:30a-3:30p 9:15a-4:15p 10:00a-5:00p 11:15a-6:15p 2:15p-8:45p	Sat 11/7/2015 6:30a-6:30p 9:30a-6:00p 10:15a-5:15p 10:15a-5:15p 10:15a-3:15p	*
347 FE Service Checker 347 FE Service Checker	Primary L	abor			Sun 11/1/2015 6:30a-3:15p 6:30a-3:30p 6:30a-3:30p 8:00a-5:00p 9:00a-5:15p 1:15p-8:15p	Mon 11/2/2015 6:30a-8:30p 10:30a-7:00p 11:15a-6:15p 2:30p-11:00p	Tue 11/3/2015 8:30a-10:30a 10:30a-7:30p 11:15a-8:00p 2:00p-11:00p	Wed 11/4/2015 6:30a-6:30p 7:30a-12:15p 11:45a-6:45p 2:00p-11:00p	Thu 11/5/2015 6:30a-3:30p 11:00a-8:00p 2:00p-9:15p 3:30p-10:15p 4:00p-11:00p	Fri 11/6/2015 6:30a-3:30p 9:15a-4:15p 10:00a-5:00p 11:15a-6:15p 2:15p-8:45p 4:00p-11:00p	Sat 11/7/2015 6:30a-6:30p 9:30a-6:00p 10:15a-5:15p 10:15a-5:15p 10:15a-3:15p 11:15a-6:15p	^
347 FE Service.Checker 347 FE Service.Checker 347 FE Service.Checker 347 FE Service.Checker 347 FE Service.Checker 347 FE Service.Checker 347 FE Service.Checker	Primary L	abor			Sun 11/1/2015 6:30a-3:15p 6:30a-3:30p 6:30a-3:00p 8:00a-5:00p 9:00a-5:15p 1:15p-8:15p 3:30p-11:00p	Mon 11/2/2015 8:30a-8:30p 10:30a-7:00p 11:15a-8:15p 2:30p-11:00p	Tue 11/3/2015 0:30a-10:30a 10:30a-7:30p 11:15a-8:00p 2:00p-11:00p	Wed 11/4/2015 8:30a-8:30p 7:30a-12:15p 11:45a-8:45p 2:00p-11:00p	Thu 11/5/2015 0:30a-3:30p 11:00a-8:00p 2:00p-9:15p 3:30p-10:15p 4:00p-11:00p	Fri 11/6/2015 0:30a-3:30p 9:15a-4:15p 10:00a-5:00p 11:15a-0:15p 2:15p-8:45p 4:00p-11:00p	Sat 11/7/2015 6:30a-6:30p 9:30a-6:00p 10:15a-5:15p 10:15a-5:15p 10:15a-3:15p 11:15a-6:15p 11:15a-4:00p	*
co 347 FE Service.Checker 347 FE Service.Checker	Primary L	abor			Sun 11/1/2015 6:30a-3:15p 6:30a-3:30p 6:30a-3:30p 6:30a-3:00p 8:00a-5:05p 9:00a-5:15p 1:15p-8:15p 3:30p-11:00p	Mon 11/2/2015 6:30a-8:30p 10:30a-7:00p 11:15a-8:15p 2:30p-11:00p	Tue 11/3/2015 0:30a-10:30a 10:30a-7:30p 11:15a-8:00p 2:00p-11:00p	Wed 11/4/2015 6:30a-6:30p 7:30a-12:15p 11:45a-6:45p 2:00p-11:00p	Thu 11/5/2015 6:30a-3:30p 11:00a-8:00p 2:00p-9:15p 3:30p-10:15p 4:00p-11:00p	Fri 11/6/2015 6:30a-3:30p 9:15a-4:15p 10:00a-5:00p 11:15a-6:15p 2:15p-8:45p 4:00p-11:00p	Sat 11/7/2015 6:30a-6:30p 9:30a-6:00p 10:15a-6:15p 10:15a-6:15p 10:15a-3:15p 11:15a-6:15p 11:15a-6:15p 11:15a-4:00p 2:00p-9:00p	*

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

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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)

۲	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
Q F	Adams	Checker	0.00	0.00			6:30a-8:30p					
۹F	Adams, M	Checker	0.00	0.00								
Q F	Anna	Checker	0.00	0.00								
QF	Anthony	Checker	0.00	0.00								
QF	Arney	Checker	0.00	0.00				-				
۹P	Blea	Checker	0.00	0.00				10				
QF	Brown	Checker	0.00	0.00				19				
QF	Bruning	Checker	0.00	0.00								
Q F	Campbell	Checker	0.00	0.00								
QF	Carpenter	Checker	0.00	0.00								
•	a	~ •	0.00	0.00								
Rec		Primary L	abor			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
	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 🔺
	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
	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
	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
	347 FE Service.Checker					9:00a-5:15p				4:00p-11:00p	2:15p-8:45p	10:15a-3:15p
	347 FE Service.Checker					1:15p-8:15p					4:00p-11:00p	11:15a-6:15p
	347 FE Service.Checker					3:30p-11:00p						11:15a-4:00p
	347 FE Service.Checker											2:00p-9:00p
	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	
Q P	Adams	Checker	27.00	0.00			6:30a-8:30p	6:30a-10:30a			9:15a-4:15p	10:15a-3:15p	
QP	Adams, M	Checker	29.75	0.00		6:30a-3:15p			6:30a-6:30p	4:00p-11:00p		10:15a-5:15p	
Q F	Anna	Checker	26.50	0.00				10:30a-7:30p	7:30a-12:15p	6:30a-3:30p		2:00p-8:45p	
QF	Anthony	Checker	28.00	0.00		6:30a-3:30p			11:45a-6:45p	11:00a-8:00p		11:15a-6:15p	
Q P	Arney	Checker	27.75	0.00		1:15p-8:15p		11:15a-8:00p			6:30a-3:30p	10:15a-5:15p	
QP	Blea	Checker	22.50	0.00			11:15a-6:15p			3:30p-10:15p	11:15a-6:15p	11:15a-4:00p	
Q P	Brown,	Checker	21.00	0.00		6:30a-3:00p			2:00p-11:00p		2:15p-8:45p		
۹F	Bruning	Checker	23.75	0.00			10:30a-7:00p			2:00p-9:15p		6:30a-6:30p	
Q F	Campbell	Checker	26.50	0.00		3:30p-11:00p		2:00p-11:00p			4:00p-11:00p	2:00p-9:00p	
QP	Carpenter	Checker	21.00	0.00			2:30p-11:00p				10:00a-5:00p	9:30a-6:00p	
-	01 1 P	<u> </u>	0.00	0.00		0.00 5.00							
								1010011200	01011000			0111111111111	
Rec		Primary L	abor			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	
	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	~
	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	
	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	
	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	
	347 FE Service.Checker					9:00a-5:15p				4:00p-11:00p	2:15p-8:45p	10:15a-5:15p	
	347 FE Service.Checker					1:15p-8:15p					4:00p-11:00p	11:15a-6:15p	
	347 FE Service.Checker					3:30p-11:00p						11:15a-4:00p	
	347 FE Service.Checker											2:00p-8:45p	
	347 FE Service.Checker											2:00p-9:00p	-

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Select-A-Shift (continued)

21. If you accidently 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	Sun	Mon	Tue	Wed	Thu	Fri	Sat
D Adams	Charles	27.00	0.00	10/31/2015	11/1/2015	11/2/2015	0.20= 40.20=	11/4/2015	11/5/2015	0:455 4:455	40:45= 2:45=
P Adams M	Checker	27.00	0.00			6.30a-8.30p	6.30a-10.30a	6:20= 6:20=	4:00= 11:00=	9.15a-4.15p	10:15a-5:15p
E Agen	Checker	22.00	0.00				10:205 7:20p	7:20p 12:15p	4.00p-11.00p		2:00n 9:45n
F Anthony	Checker	20.00	0.00		6-20= 2-20=		10.308-7.30p	14:45= 6:45=	11-00= 8-00=		2.00p-0.40p
P Annony	Checker	20.00	0.00		6.308-3.30p		11-15- 8-00p	11.458-6.45p	11.00a-0.00p	6-20- 2-20-	10:15a-6.15p
P Blee	Checker	22.50	0.00		1.100-0.100	11-156-15-	11.10a-0.00p		2-20p-10-15p	11:15a-6:15p	11-15a-4-00n
P Brown	Checker	21.00	0.00		6:30=-3:00p	11.108-0.100		2:00p-11:00p	3.300-10.130	2:15n-8:45n	11.108-4.000
E Bruning	Checker	23.75	0.00		0.000-0.000	10:30a-7:00n		2.000-11.000	2:00p-9:15p	2.100-0.100	6:30a-6:30n
F Campbell	Checker	26.50	0.00		3:30p-11:00p	10.000 1.000	2:00p-11:00p		2.000 0.100	4:00p-11:00p	2:00p-9:00p
P Camenter	Checker	21.00	0.00		0.000	2:30p-11:00p	2.000-11.000			10:00a-5:00p	9:30a-6:00n
n outperment	or i	0.00	0.00		0.00 5.00	2.000				10.000 0.000	0.000 0.000
;	Primary I	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
347 FE Service.Che	ecker				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
347 FE Service.Che	ecker				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
347 FE Service.Che	ecker				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-5:15
347 FE Service.Che	ecker				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-3:15
347 FE Service.Che	ecker				9:00a-5:15p				4:00p-11:00p	2:15p-8:45p	10:15a-5:15
347 FE Service.Che	ecker				1:15p-8:15p					4:00p-11:00p	11:15a-6:15
347 FE Service.Che	ecker				3:30p-11:00p						11:15a-4:00p
347 FE Service.Che	ecker										2:00p-8:45p
347 FE Service.Che	ecker										2.00- 0.00-

The Select-A-Shift process is COMPLETE!

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