

Grid Scheduler

The **Grid Scheduler** is a new feature now available in the back office. It allows you to create a schedule outside of the standard Schedule Editor graph view. You will not see your labor demand in the Grid Scheduler view.

Grid Scheduler: 001 Sauk City - 11/07/11 - 11/13/11																	
Employee Name		Week Totals		Monday 11/07/11		Tuesday 11/08/11		Wednesday 11/09/11		Thursday 11/10/11		Friday 11/11/11		Saturday 11/12/11		Sunday 11/13/11	
		Hours	Shifts	Hours	Shifts	Hours	Shifts	Hours	Shifts	Hours	Shifts	Hours	Shifts	Hours	Shifts	Hours	Shifts
Adank, Joan		8.00		10:45am-6:45pm													
(m) Albright, Ravyn		5.00		5:00pm-10:00pm													
Bennett, Dora		3.75		⚠ 8:00am-11:45am													
(m) Breunig, Molly		5.00		⚠ 4:00pm-9:00pm													
Alt, Julie		0.00															
Alt, Stephanie		0.00															
Bohler, Katie		0.00															
Bowman, John		0.00															
Breunig, Heather		0.00															
(m) Breunig, Savannah		0.00															

Adding a Shift

To add a shift in the Grid Scheduler, locate the employee name from the list of names at the left and the corresponding day to schedule, *double click* on the day in the grid and enter the shift start and end time. When you're finished, *click* the **Apply** button.

Employee Name		Week Totals		Monday 11/07/11		Tuesday 11/08/11		Wednesday 11/09/11		Thursday 11/10/11		Friday 11/11/11		Saturday 11/12/11		Sunday 11/13/11	
		Hours	Shifts	Hours	Shifts	Hours	Shifts	Hours	Shifts	Hours	Shifts	Hours	Shifts	Hours	Shifts	Hours	Shifts
Adank, Joan		8.00		10:45am-6:45pm													
(m) Albright, Ravyn		5.00		5:00pm-10:00pm													
Bennett, Dora		3.75		⚠ 8:00am-11:45am													
(m) Breunig, Molly		5.00		⚠ 4:00pm-9:00pm													

Breunig, Molly - Wednesday 11/09/11

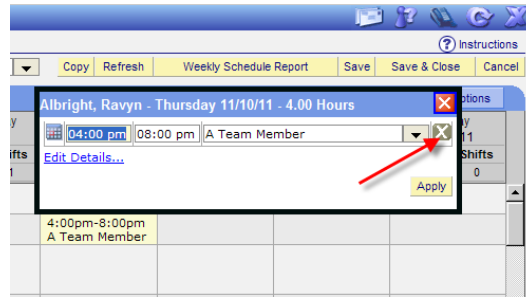
🕒 05:00 pm A Team Member

[Edit Details...](#)

Apply

Deleting a Shift

To delete a shift, *double click* on the shift you wish to remove. *Click* on the “gray” colored “X” on the right hand side of the shift and *click Apply*. This will remove the shift from your schedule.



Availability Warnings and Errors

A yellow yield sign is a warning that the shift is in conflict with the employees defined Availability. If you *click* on the shift in the grid unavailability details for all shifts for the employee will display at the bottom of the page when viewing the **Errors/Warnings** tab.

Employee Name	Week Totals		Monday 11/07/11		Tuesday 11/08/11		Wednesday 11/09/11		Thursday 11/10/11		Friday 11/11/11		Saturday 11/12/11		Sunday 11/13/11	
	Hours	Shifts	Hours	Shifts	Hours	Shifts	Hours	Shifts	Hours	Shifts	Hours	Shifts	Hours	Shifts	Hours	Shifts
	29.75	6	21.75	4	0.00	0	4.00	1	4.00	1	0.00	0	0.00	0	0.00	0
Adank, Joan	8.00		10:45am-6:45pm A Team Member													
(m) Albright, Ravyn	9.00		5:00pm-10:00pm A Team Member					4:00pm-8:00pm A Team Member								
Bennett, Dora	3.75		⚠ 8:00am-11:45am A Team Member													
(m) Breunig, Molly	9.00		⚠ 4:00pm-9:00pm A Team Member				5:00pm-9:00pm A Team Member									
Alt, Julie	0.00															
Alt, Stephanie	0.00															
Bohler, Katie	0.00															
Bowman, John	0.00															
Breunig, Heather	0.00															
(m) Breunig, Savannah	0.00															

Mark for Swap | Cut | Copy | Paste | Unfill

Hide Additional Details

Errors/Warnings | Unfilled Shifts | Availability

Show Errors Only

Type	Employee	Date	Message
⚠	Bennett, Dora	11/07/2011	The employee is unavailable between Mon 12:00 am and Mon 12:00 am due to general availability.
⚠	Breunig, Molly	11/07/2011	The employee is unavailable between Mon 04:00 pm and Tue 11:00 am due to general availability.

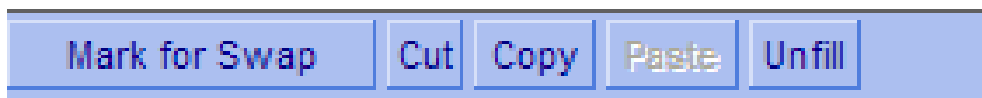
If there is a “red” yield sign displayed for a shift, the team member cannot be scheduled due to minor rule conflicts. The details for this **Error** will also be displayed in the **Errors/Warnings** tab at the bottom of the page.

The screenshot displays the Grid Scheduler interface. At the top, there are tabs for 'My Searches' and 'Search Options'. Below this is a grid with columns for days of the week (Monday through Sunday) and rows for employees. Each cell in the grid contains the employee's name, total hours, and shifts for that day. A red yield sign icon is visible in the Thursday column for (m) Albright, Ravyn, indicating a conflict. Below the grid are buttons for 'Mark for Swap', 'Cut', 'Copy', 'Paste', and 'Unfill'. Below these buttons is a 'Hide Additional Details' button. The 'Errors/Warnings' tab is active, showing a list of messages with columns for 'Type', 'Employee', 'Date', and 'Message'. The messages are:

Type	Employee	Date	Message
⚠️	Albright, Ravyn	11/10/2011	The employee is unavailable between Thu 08:00 am and Thu 04:00 pm due to minor availability.
⚠️	Albright, Ravyn	11/10/2011	The minor daily maximum hours were exceeded. 10 were scheduled where at most 5 are allowed.
⚠️	Bennett, Dora	11/07/2011	The employee is unavailable between Mon 12:00 am and Mon 12:00 am due to general availability.
⚠️	Breunig, Molly	11/07/2011	The employee is unavailable between Mon 04:00 pm and Tue 11:00 am due to general availability.

Grid Scheduler “Action” Buttons

At the bottom of the grid, you will find some “action” buttons to use in editing your shifts.



Mark for Swap – Used to “mark” a shift you would like to switch with another team member. This is done by *clicking* on the shift you would like to swap so it is highlighted. Then *click* on the **Mark for Swap** button at the bottom of the grid and a blue “swap” icon appears on the shift.

(m) Albright, Ravyn	9.00	5:00pm-10:00pm A Team Member	5:00pm-9:00pm A Team Member			
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Then *click* on the shift you want to swap it with so it becomes highlighted. You will notice that the Mark for Swap button has now changed to Perform Swap. *Click* Perform Swap to switch the shifts you have selected for swap.

Employee Name	Week Totals		Monday 11/07/11		Tuesday 11/08/11		Wednesday 11/09/11		Thursday 11/10/11		Friday 11/11/11		Saturday 11/12/11		Sunday 11/13/11	
	Hours	Shifts	Hours	Shifts	Hours	Shifts	Hours	Shifts	Hours	Shifts	Hours	Shifts	Hours	Shifts	Hours	Shifts
Adank, Joan	8.00		10:45am-6:45pm A Team Member													
(m) Albright, Ravyn	9.00		5:00pm-10:00pm A Team Member				5:00pm-9:00pm A Team Member									
Bennett, Dora	3.75		⚠️ 8:00am-11:45am A Team Member													
(m) Breunig, Molly	9.00		⚠️ 4:00pm-9:00pm A Team Member						4:00pm-8:00pm A Team Member							
Alt, Julie	0.00															
Alt, Stephanie	0.00															
Bohler, Katie	0.00															
Bowman, John	0.00															
Breunig, Heather	0.00															
(m) Breunig, Savannah	0.00															

↖ **First Shift**
↖ **Swap Icon Appears**
↖ **Second Shift. Click and Highlight**
↖ **Then Click Here**

Perform Swap | Cut | Copy | Paste | Unfill

Employee Name	Week Totals		Monday 11/07/11		Tuesday 11/08/11		Wednesday 11/09/11		Thursday 11/10/11		Friday 11/11/11		Saturday 11/12/11		Sunday 11/13/11	
	Hours	Shifts	Hours	Shifts	Hours	Shifts	Hours	Shifts	Hours	Shifts	Hours	Shifts	Hours	Shifts	Hours	Shifts
Adank, Joan	8.00		10:45am-6:45pm A Team Member													
(m) Albright, Ravyn	9.00		5:00pm-10:00pm A Team Member						4:00pm-8:00pm A Team Member							
Bennett, Dora	3.75		⚠️ 8:00am-11:45am A Team Member													
(m) Breunig, Molly	9.00		⚠️ 4:00pm-9:00pm A Team Member				5:00pm-9:00pm A Team Member									
Alt, Julie	0.00															
Alt, Stephanie	0.00															
Bohler, Katie	0.00															
Bowman, John	0.00															
Breunig, Heather	0.00															
(m) Breunig, Savannah	0.00															

Mark for Swap | Cut | Copy | Paste | Unfill

Cut – Used to cut out a shift and paste it in on another day. This works great when you want to give someone else a shift that is scheduled. Simply *click* to highlight the shift and then *click* on **Cut** button. You will notice that once you choose **Cut**, a pair of scissors appears.

(m) Breunig, Molly	12.00	4:00pm-9:00pm A Team Member		5:00pm-9:00pm A Team Member		7:00pm-10:00pm A Team Member		
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Next, select the employee that you would like to assign the shift to and *click* to highlight the grid square where you would like to place the shift. Then *click* on the **Paste** button which is now available. The shift is transferred from the original team member to the new team member.

Employee Name	Week Totals		Monday 11/07/11		Tuesday 11/08/11		Wednesday 11/09/11		Thursday 11/10/11		Friday 11/11/11		Saturday 11/12/11		Sunday 11/13/11	
	Hours	Shifts	Hours	Shifts	Hours	Shifts	Hours	Shifts	Hours	Shifts	Hours	Shifts	Hours	Shifts	Hours	Shifts
Adank, Joan	8.00	7	21.75	4	0.00	0	4.00	1	10.00	1						
(m) Albright, Ravyn	15.00		5:00pm-10:00pm A Team Member						10:00am-8:00pm A Team Member							
Bennett, Dora	3.75		8:00am-11:45am A Team Member													
(m) Breunig, Molly	12.00		4:00pm-9:00pm A Team Member				5:00pm-9:00pm A Team Member				7:00pm-10:00pm A Team Member					
Alt, Julie	0.00															
Alt, Stephanie	0.00															
Bohler, Katie	0.00															
Bowman, John	0.00															
Breunig, Heather	0.00															
(m) Breunig,	0.00															

Mark for Swap **Cut** Copy **Paste** Unfill

Employee Name	Week Totals		Monday 11/07/11		Tuesday 11/08/11		Wednesday 11/09/11		Thursday 11/10/11		Friday 11/11/11		Saturday 11/12/11		Sunday 11/13/11	
	Hours	Shifts	Hours	Shifts	Hours	Shifts	Hours	Shifts	Hours	Shifts	Hours	Shifts	Hours	Shifts	Hours	Shifts
Adank, Joan	11.00	8	21.75	4	0.00	0	4.00	1	10.00	1	6.00	2				
(m) Albright, Ravyn	15.00		5:00pm-10:00pm A Team Member						10:00am-8:00pm A Team Member							
Bennett, Dora	3.75		8:00am-11:45am A Team Member													
(m) Breunig, Molly	9.00		4:00pm-9:00pm A Team Member				5:00pm-9:00pm A Team Member									
Alt, Julie	0.00															
Alt, Stephanie	0.00															
Bohler, Katie	0.00															
Bowman, John	0.00															
Breunig, Heather	0.00															
(m) Breunig,	0.00															

Mark for Swap **Cut** Copy **Paste** Unfill

Copy – Similar to the **Cut** function but used to **Copy** a shift without removing the original shift. Simply choose the shift you wish to Copy by *clicking* to highlight the shift. The copy icon appears on the shift alerting you that it is ready to **Copy**. From here simply **Paste** it, in whatever square on the grid you wish. In fact, you can **Paste** it into multiple squares on the grid by *clicking* Paste as many times as you want to.

Employee Name	Week Totals		Monday 11/07/11		Tuesday 11/08/11		Wednesday 11/09/11		Thursday 11/10/11		Friday 11/11/11		Saturday 11/12/11		Sunday 11/13/11	
	Hours	Shifts	Hours	Shifts	Hours	Shifts	Hours	Shifts	Hours	Shifts	Hours	Shifts	Hours	Shifts	Hours	Shifts
	52.75	12	21.75	4	0.00	0	4.00	1	8.00	2	11.00	3	8.00	2	0.00	0
Adank, Joan	8.00		10:45am-6:45pm A Team Member													
(m) Albright, Ravyn	17.00		5:00pm-10:00pm A Team Member					5:00pm-9:00pm A Team Member	5:00pm-9:00pm A Team Member	5:00pm-9:00pm A Team Member						
Bennett, Dora	3.75		8:00am-11:45am A Team Member													
(m) Breunig, Molly	9.00		4:00pm-9:00pm A Team Member					5:00pm-9:00pm A Team Member								
Alt, Julie	0.00															
Alt, Stephanie	0.00															
Bohler, Katie	0.00															
Bowman, John	0.00															
Breunig, Heather	0.00															
(m) Breunig, Savannah	0.00															

Unfill – Used to leave a shift there, but take away the team member attached to it. *Click* on the shift to highlight it and then *click* on the **Unfill** button at the bottom of the grid. Next, *click* on **OK** to confirm the action.

Employee Name	Week Totals		Monday 11/07/11		Tuesday 11/08/11		Wednesday 11/09/11		Thursday 11/10/11		Friday 11/11/11		Saturday 11/12/11		Sunday 11/13/11	
	Hours	Shifts	Hours	Shifts	Hours	Shifts	Hours	Shifts	Hours	Shifts	Hours	Shifts	Hours	Shifts	Hours	Shifts
	44.75	10	21.75	4	0.00	0	4.00	1	8.00	2	7.00	2	4.00	1	0.00	0
Adank, Joan	8.00		10:45am-6:45pm A Team Member													
(m) Albright, Ravyn	9.00		5:00pm-10:00pm A Team Member					5:00pm-9:00pm A Team Member								
Bennett, Dora	3.75		8:00am-11:45am A Team Member													
(m) Breunig, Molly	9.00		4:00pm-9:00pm A Team Member					5:00pm-9:00pm A Team Member								
Alt, Julie	0.00															
Alt, Stephanie	0.00															
Bohler, Katie	0.00															
Bowman, John	0.00															
Breunig, Heather	0.00															
(m) Breunig, Savannah	0.00															

The shift will then move to the bottom of the grid as an **Unfilled** shift.

Unfilled Schedules									
A Team Member	1.00	0 Unfilled	0 Unfilled	0 Unfilled	1 Unfilled	0 Unfilled	0 Unfilled	0 Unfilled	0 Unfilled
All Jobs	1.00	0 Unfilled	0 Unfilled	0 Unfilled	1 Unfilled	0 Unfilled	0 Unfilled	0 Unfilled	0 Unfilled

In order to fill the shift with a team member, you will need to open the tab at the bottom that says **Unfilled Shifts** (1). Then *click* where **1 Unfilled** shift is displayed (2). This will show any unfilled shifts on your schedule that need to be assigned to a team member. Use the drop down menu of available team members (3) to select team member you would like to assign to the shift.

Grid Scheduler: 001 Sauk City - 11/14/11 - 11/20/11 Instructions

(All Employees) (All Jobs)

Employee Name	Week Totals		Monday 11/14/11		Tuesday 11/15/11		Wednesday 11/16/11		Thursday 11/17/11		Friday 11/18/11		Saturday 11/19/11		Sunday 11/20/11	
	Hours	Shifts	Hours	Shifts	Hours	Shifts	Hours	Shifts	Hours	Shifts	Hours	Shifts	Hours	Shifts	Hours	Shifts
Brenden	0.00	0	0.00	0	0.00	0	0.00	0	0.00	0	0.00	0	0.00	0	0.00	0
(m) Sullivan, Jared	0.00															
Summers, Brandon	0.00															
(m) Thruene, Jason	0.00															
(m) Weitzel, Gina	0.00															
Wilcox, Allison	0.00															
(m) Wipperfurth, Carle	0.00															
Zick, Marlene	0.00															
(u) Aron, Kevin D	0.00															
(s) Burke, Carolyn J	0.00															
(s) Kosa, Joseph	0.00															
(s) Russell, Robert	0.00															
(n) Gnetz, Scott	0.00															

Unfilled Schedules

A Team Member	1.00	0 Unfilled	0 Unfilled	1 Unfilled	0 Unfilled	0 Unfilled	0 Unfilled	0 Unfilled	0 Unfilled
All Jobs	1.00	0 Unfilled	0 Unfilled	1 Unfilled	0 Unfilled	0 Unfilled	0 Unfilled	0 Unfilled	0 Unfilled

Slide Additional Details

Errors/Warnings **Unfilled Shifts** Availability

11/16/11 - A Team Member				Search Options	
Day Of Week	Start	End	Job	Employee	Assign
Wednesday	05:00 pm	10:00 pm	A Team Member	[None]	<input type="button" value="Assign"/>
End of data.				Adank, Joan	
				Albright, Rayn	
				Bohler, Katie	
				Bowman, John	
				Braunig, Molly	
				Braunig, Savannah	
				Braunig, Scott	

You can also add an **Unfilled Shift** by *clicking* on the yellow **Add Unfilled Shift** button at the lower left corner of the page.