

ADP Workforce Now

Essential Time & Attendance Supervisor Scheduling Basics

Handout Manual

Need support after training?

To exchange tips and best practices with fellow users, get on The Bridge—an online community built exclusively for ADP clients.

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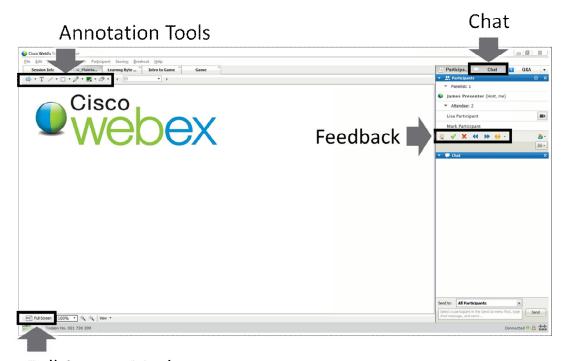


Course Introduction

Welcome

Welcome to *Essential Time & Attendance Supervisor Scheduling Basics for ADP Workforce Now.* This training is based on the AM/PM time format and the 2-decimal (i.e., HH.hh) hours display format. This training includes U.S. spellings and the date construct of month/day/year. You will see your expected spellings and date constructs in your solution back on the job.

Navigating WebEx



Full Screen Mode



Course Purpose

This course prepares you to use the scheduling feature of Time & Attendance to create, assign and unassign, and maintain schedules.

Course Agenda

- Creating Schedules
- Assigning and Unassigning Schedule Templates
- · Viewing and Editing Schedules

■ Materials Overview

Use the job aids in this handout manual when you are back at your job.



Creating Schedules

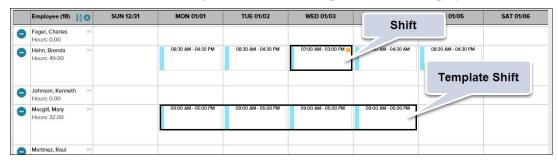
Overview

A schedule contains information about an employee's typical workday. A schedule could include details such as start and end times, the time allocated for a meal, the department in which the employee works, and pay codes.

Types of Schedules

You can create and manage schedules in two ways:

- Shifts—Used to create, edit, or delete a schedule for one or more employees for specific days.
- Templates—Used to create and assign a repeatable schedule to one or more employees for multiple days. Templates are comprised of one or more shifts. When you point to the shift in the schedule grid, the schedule template's name is displayed.



■ Example of a Schedule Shift

Brenda Hahn is assigned to the Hourly schedule template, and works from 8:30 a.m. to 4:30 p.m., Monday through Friday. She is scheduled to attend a training session from 7:00 a.m. to 3:00 p.m. on Wednesday, so she will be assigned a shift change for only that one day.

■ Example of a Schedule Template

Mary Macgill will work a new schedule from 9 a.m. to 5 p.m. from Monday through Thursday, every week. A schedule template will be created and Mary will be assigned to that schedule.

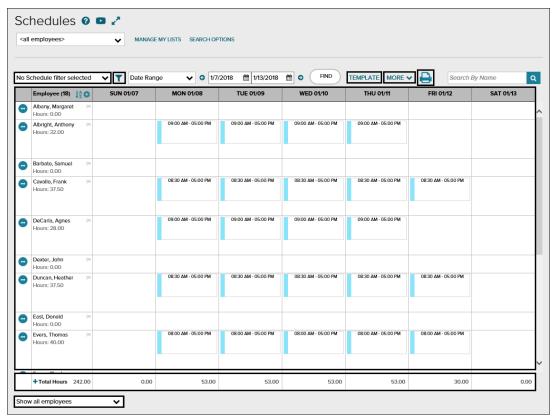
■ Supervisor Responsibilities

All supervisors have access to assign templates and to modify shifts. A supervisor's ability to create, edit, and delete schedule templates is based on access permissions that are granted by your company.



Explore: The Schedules Page

Starting Point: My Team > Time & Attendance > Schedules



■ Elements and Descriptions

Element	Description
(Schedule filter)	When clicked, allows you to refine the group of employees to be displayed, based on schedule criteria.
Template link	Use to create, modify, or assign recurring or repeatable schedules.
More link	Displays additional scheduling options that will allow you to easily access Quick Shifts, Preferences, and the Legend.
Print icon	When clicked, allows you to print schedules for posting or distribution.
Schedules grid	Displays the details of employee schedules within the selected time frame. Allows users to complete many tasks directly in the grid.
Totals row	Displays the total hours for the time frame selected and daily totals.
Show Employees menu	Filters the employees displayed in the Schedules grid by Show all employees, Show employees with schedules, and Show unscheduled employees.



■ Creating Schedule Templates Job Aid

■ Demonstration: Creating Schedule Templates

Scenario

Your company requires a new schedule for employees who work from 6 a.m. to 2 p.m., Monday through Friday.

Instructions: Create a New Schedule Template

Starting Point: My Team > Time & Attendance > Schedules

Step	Action	
1	Above the Schedules grid, click Template .	
	Result: the Templates window opens.	
2	Click Create New.	
	Result: the Add New Template window opens.	
3	In the Name field, enter the name of the new schedule.	
4	In the Description field, enter a description of the schedule.	
5	In the Access field, select Private or Public.	
	Caution: Selecting Private will restrict visibility to the schedule template creator.	
6	In the This template will be available starting on field, enter the date that you want the schedule to start.	
7	Select the cell for each day to be added to the schedule and then click (add).	
	Result: the Add Shift window opens.	
8	In the Start Time and End Time fields, enter the start and end times of the shift.	
9	Enter data in any of the optional fields such as Pay Code, Meal Plan, and Department as needed.	
10	Click Save.	
	Result: The start and end times are populated in the selected days of the week.	
11	Click Save Template.	
	Result: The schedule template is saved. You can now assign it to employees.	

■ Making Changes to Templates

Once saved, if you wish to edit a schedule Template, click its name on the Template page to open the Edit Template window. From there, you can make any changes to the Name, Description, and effective date as needed, or add new shifts in the open cells.

To make changes to existing template shifts in the Edit Template window, click (settings) on the right side of the shift to display the menu. Select **Edit**, **Add**, or **Delete**. Multiple cells can also be selected for editing or deletion.



Assigning and Unassigning Schedule Templates

Overview

You can use the schedule templates that you set up to easily assign employees to schedules, based on predictable, repeating patterns. Employees can be assigned to multiple schedule templates as long as their scheduled times do not overlap. You can also end ongoing schedule assignments as of today or on a specific date.

Assigning a Schedule Template Job Aid

Scenario

Assign Frank Cavallo and Heather Duncan to the 6 a.m. to 2 p.m. schedule template, starting today.

Instructions

Starting Point: My Team > Time & Attendance > Schedules > Template

Step	Action	
1	Locate the desired schedule template in the list of those available. If it isn't displayed, enter the first few letters of its name in the Search by Name field and click Q (search) .	
2	In the row for the desired template, select Manage Assignments . Result: the Manage Assignments window opens.	
3	Select the names of employees you want to assign a schedule template. To quickly locate an employee, enter a name in the Search field above the grid.	
4	Click Next.	
5	Select Set date range for all employees.	
6	Enter a Start Date and click Apply to All.	
7	Click Submit. Result: You are returned to the Templates window.	
8	Click Back. Result: The template is assigned to the selected employees and displays in the schedule grid.	



Ending an Employee's Schedule Assignment Job Aid

Overview

For permanent schedule changes, you can end an employee's schedule template assignment. By ending a schedule template assignment, you preserve the historical information related to that schedule.

Instructions

Starting Point: My Team > Time & Attendance > Schedules > Template

Step	Action	
1	Above the Schedules grid, click Template . Result: the Templates window opens.	
2	In the row for the desired template, click the number in the Assigned Employees column.	
3	Select the names of the employees that you wish to unassign to the template.	
4		
	If You Want To	Then
	Remove assignments immediately:	Click Remove Assignments.
		Select the option that reflects whether you want the shifts removed as of the start of the current pay period, or removed from all future shifts. Note that the shift history prior to either of these options will not be deleted.
		Click OK.
	Remove assignments at a future	Click Next.
	date:	Use the calendar picker to enter a value in the End Date field or select a date range for all employees.
		Click Submit.
5	Click Back on the Manage Assignments and Templates window. Result: the Schedules grid no longer displays the employees' template assignment.	



Learning Activity: What Can You Get Done in 2 Minutes?

Scenario

Starting next month, three employees will stop working their old schedules and start working a new one. You need to remove their existing template assignments so they can be reassigned to a different template.

Learning Byte Questions and Answers

Answer the following questions using what you learned from the learning byte.

1. When would you need to end an employee's schedule assignment?

2. How can you identify which schedule template an employee is assigned?

3. What is the difference between clicking the Remove Assignments button and entering an End Date?



Viewing and Editing Schedules

Overview

To view or edit schedules, you can use a variety of tools to sort, filter, and make edits directly in the scheduling grid.

Demonstration: Filtering the View of the Schedule Grid

Overview

You can filter the view of the scheduling grid to limit the amount of records that will be displayed. Filtering is based on schedule elements, such as start and end times, pay codes, and meal plans. To make it easier to assign schedules and view schedule assignments, you can apply schedule filters. You can also temporarily add employees who do not meet the filter criteria.

Scenario

You need to assign employees to a special inventory project this week. You select the schedule filter for employees who start after 8 a.m. You need to add two employees to the scheduling grid.

Instructions

Starting Point: My Team > Time & Attendance > Schedules

Step	Action	
1	In the schedule filter field, select the applicable filter.	
	Result: Only employees who meet the filter criteria are displayed in the schedule grid.	
2	At the top of the Employee column, click ((add).	
	Result: A Temporarily Add Employees to Employee List is displayed.	
3	Select the desired employees.	
4	Click Add Selected.	
	Result: The selected employees are now displayed in the scheduling grid.	

Tips

- To filter the list by scheduled or unscheduled employees, select an option in the Show all employees menu at the bottom of the schedule grid.
- Select the Employee List menu beneath the Help and Learning Bytes icons to filter the grid by employee list.



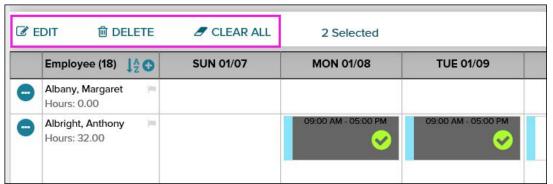
Demonstration: Editing Shifts Job Aid

Overview

For simple edits to the start and end time of a shift, you can double click in the shift and enter the changes. To change existing shifts assigned to one or more employees, you can make the changes using the hover menu.



On the hover menu, the Edit icon and Delete icon allow you to edit or delete single shifts from the grid. The Select icon allows you to select multiple shifts which can then be edited or deleted using the action bar.



Cells with existing shifts have a second row in the hover menu. The Add \odot icon allows you to add a single daily shift to a cell, while the Select \odot icon allows you to select multiple cells to which daily shifts can then be added using the action bar. Added shifts cannot overlap with existing shifts.



Demonstration: Editing Shifts (cont.)

Scenario

The Service department requested Brenda Hahn's assistance for two days this week. Change her schedule on Wednesday and Thursday to 7 a.m. to 3 p.m., and make sure the hours are coded to the right department. Add a note indicating the reason for the change.

Instructions

Starting Point: My Team > Time & Attendance > Schedules

Step	Action	
1	Locate the employee in the scheduling grid and locate the shifts to be modified. To quickly locate an employee, enter a name in the Search field above right hand corner of the grid.	
2	Hover over each shift to activate the hover menu and click (select) in each shift.	
	Result: The Action Bar will launch.	
3	Above the grid in the open Action Bar, click Edit to make changes to the shifts.	
	Result: The Edit Multiple Shifts dialog displays.	
4	Click the toggle switches to activate any fields you wish to change.	
5	Change the Start Time and End Time.	
6	Change the Department .	
7	Enter the contents of the note.	
8	Click Save.	
	Result: A (note) indicator appears in the edited shift cell. Point to it to display the contents. To view all notes on an employee's schedule, click (action) and select View All Notes.	
9	Above the grid under the More Menu, select Preferences .	
10	Select View Labor Charges.	
11	Click Apply.	
	Result: The scheduled department will display in the cell.	

■ Tip

When editing shifts, there is no limit to the number of shifts you can select, and the details of the shifts do not need to match. When shifts are selected with different field values, any changes made on the Edit multiple shifts window will be applied to all selected shifts.

Demonstration: Adding Shifts

Overview

Within the cells of the Schedule grid, the hover menu can be used to add shifts outside of template assignments. Through this menu you can add a temporary single shift to one employee or, by making multiple selections, use the Action Bar to add shifts.

Scenario

You've identified this afternoon as a low coverage time and need to add additional employees to the schedule. Assign Tammy Tuttle and Thomas Evers a shift to work today from 12 p.m. to 6 p.m.

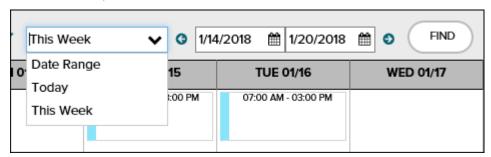
Instructions

Starting Point: My Team > Time & Attendance > Schedules

Step	Action	
1	Locate the employees in the scheduling grid and the cells where shifts need to be added.	
2	Hover over each cell to activate the hover menu and click ⊘ (select) in each cell. Result: The Action Bar will launch.	
3	In the Action Bar, click (add) to open the Add Shift window.	
4	In the Add Shift menu, enter a Start Time and End Time .	
5	Click Save. Result: the shift is automatically added to the selected cells.	

■ Tip

To adjust the schedule grid to a one day, read only view, select Today from the Date Range dropdown. To adjust the date range displayed, use the calendar picker to change the Start and End Date fields, and then click Find.



Once shifts are added to the Schedules grid, the Edit ☑ icon, Delete ☐ icon, and Select ☑ icon are available for use in the hover menu.

Additional Resources

For more information about selecting and adding shifts, review the Copying and Pasting Shifts job aid in the Appendix and view the learning bytes.



Demonstration: Creating and Assigning Quick Shifts

Overview

Quick Shifts are commonly used shifts that can be accessed from the More menu or from the Action Bar when one of more cells are selected. From the Action Bar's Quick Shift panel, you can quickly create and assign a new Quick Shift, or drag and drop an existing shift onto the scheduling grid where it will be applied to all selected cells.

Scenario

Frequently, additional employees need to be assigned to the 3 p.m. to 11 p.m. shift for adequate schedule coverage. Create a Quick Shift that can be used as needed from 3 p.m. to 11 p.m. and assign it to Raul Martinez and Kenneth Johnson on Tuesday and Thursday of the current week.

Instructions

Starting Point: My Team > Time & Attendance > Schedules

Step	Action	
1	Locate the employees in the scheduling grid and the shifts to be modified.	
2	Point to the cells in the grid to activate the hover menu and then click (select) to select the cells.	
	Result: The Action Bar will launch.	
3	Click O Quick Shifts.	
	Result: The Quick Shifts panel will open.	
4	In the Quick Shifts panel, click (add) .	
	Result: The Add Quick Shift window opens.	
5	Enter a Shift Name, Start Time and End Time, and complete other fields, if applicable.	
6	Click Done.	
	Result: The Quick Shift is displayed in the panel.	
7	Drag and drop the Quick Shift into the schedule grid.	
	Result: The Quick Shift is added to the selected cells.	

■ Important Information

Quick Shifts are only available for the user who created them.

The Quick Shift panel will display an arrow on the right side if there are more quick shifts than will display on the page.

■ Tip

To edit or delete Quick Shifts, hover over the shift in the Quick Shift Panel to activate the Edit or Delete icons.





Activity: Printing Schedules for Distribution

Overview

Once the schedule is finalized it can be printed for posting and distribution. The information displayed on the Print Schedule page is based on the view that is displayed on the Schedules page. The printed schedule includes the employees, schedules, holidays, and pending and approved time off based on the date range displayed on the Schedules page.

Scenario

The schedule for the week needs to be printed for posting and distribution.

Instructions

Starting Point: My Team > Time & Attendance > Schedules

Step	Action	
1	Above the Schedules grid, click (print).	
	Result: The Print Preview window opens.	
2	In the Print Preview window, click (print).	
	Result: The print dialogue box opens.	
3	Click Print.	
	Result: The schedule is sent to printer.	



Knowledge Check

- 1. Sally Jimenez has 17 employees assigned to the 9a-4p schedule template. Beginning next week, they will start working a different schedule permanently. What approach should Sally take to make these changes?
 - a. Use the hover menu to select multiple shifts, and then use the action bar to edit them.
 - b. On the Templates page, create a new template and assign it to the employees.
 - c. Create a Quick Shift, and then drag it into the grid to assign the new schedule.
 - d. Use the Manage Assignments link to end the current schedule and then assign a new one.
- 2. Lawrence Williams needs to edit the Hourly schedule template. What is the best way for him to do this?
 - a. Activate the hover menu for any Hourly template shift, then click **(dit)** to edit the template.
 - b. Click the Template link above the scheduling grid to access and edit the template named Hourly.
 - c. Use the hover menu to select multiple Hourly shifts, then use the action bar to edit the template.
 - d. Use the Manage Assignments feature on the Templates page to edit the Hourly template.
- 3. Terry Laroche was notified that one of her employees needs to leave work early for a doctor's appointment. What is the easiest way for Terry to edit the employee's schedule?
 - a. Use the Manage Assignments link on the Templates page to adjust the schedule.
 - b. Delete the employee from the scheduled template and then assign a new schedule.
 - c. On the hover menu, click 🗹 (edit) and change the shift End Time, as needed.
 - d. Create a new schedule template that will automatically replace the scheduled shift.



Course Closing

■ How to Access Support Job Aid

ADP provides various resources to help you perform your tasks after class.

Instructions

Step	Action	
1	At the top of any page, click (support).	
2	In the Search field, enter a topic and then click Q (search). Result : The available online Help and training are displayed.	
3	Review the available resources. United States practitioners:	
	If You Want To	Then
	Read online Help	Click the Documentation tab and select a topic.
	Access a learning byte	In the Learning Resources section, click Just-in- Time Learning.
	Canadian practitioners:	
	If You Want To	Then
	Read documentation	Select Documentation and select a topic.
	View step-by-step instructions	Select Knowledge and select a topic.
	View learning bytes	Select Learning and select a topic.
4	To close the Support page, click Back .	



Additional Resources

Your appendix contains job aids to help you remember how to perform additional tasks.

■ Roles and Additional Training

ADP provides the following resources to support you and the employees in your organization. You can access the Support page by clicking (support) and clicking the Learning tab.

Role	Training	How to Access
Supervisor	 Essential Time & Attendance Supervisor Timecard Basics virtual class Essential Time & Attendance Supervisor 	You will receive an email message after this session with the registration instructions. (U.S.) ADP Canada Client Training Centre (Canada)
	Timecard Basics practice activity Essential Time & Attendance Supervisor	
	Scheduling Basics virtual class	
	Essential Time & Attendance learning bytes for supervisors Time Off learning bytes for managers and supervisors	Support ADP Canada Client Training Centre (Canada)
Employee	 Essential Time & Attendance Employee Basics for ADP Workforce Now job aids Essential Time & Attendance learning bytes for employees Time Off learning bytes for employees 	Support ADP Canada Client Training Centre (Canada)



■ Training Evaluation

Please take a moment to complete the evaluation.

Appendix

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Essential Time & Attendance Supervisor Scheduling Basics for ADP Workforce Now

■ Filtering and Sorting Schedules

Overview

You can filter employees on a schedule to reduce the number of employee records that are displayed. You can sort the employee records to help streamline your scheduling tasks.

Explore: Filtering and Sorting Features



Elements and Descriptions

Element	Description
Employee list field	Use to select a predefined filter, such as Using Time & Attendance. You can also create your own employee list.
Schedule filter field	Use to filter employees against schedule elements such as start or end times, worked or nonworked hours, and so on.
Date range fields	Use to filter employee schedules by date range. The default view is the current week. Click the Previous or Next button to view the previous or next date range. Click (calendar) to select a range of dates.
Search field	Use to enter the first few letters of the employee's first or last name to quickly select the employee from the results that are displayed as you type.
• (add)	Use to add employees to the scheduling grid who otherwise did not meet your list or to filter criteria.
IA (sort)	Click to display a menu of options to sort employees in the grid.



Creating a Schedule Filter Job Aid

Overview

You can limit the amount of records that will be displayed in the scheduling grid by creating a schedule filter, based on elements of the schedule, such as start and end times, meal plans, pay codes, and so on.

Instructions

Starting Point: My Team > Time & Attendance > Schedules

Step	Action	
1	Click ▼ (filter).	
	Result: The Manage My Lists window opens.	
2	Click (add) .	
3	Enter a filter name.	
4	Click Create Criteria Set, click (options), and select Create Schedule Criteria.	
	Result: Additional fields are displayed.	
5	In the Field Name field, select the field on which you want to filter.	
6	In the Comparison field, select a comparison value.	
7	In the Field field, select or enter a value.	
	Example: Scheduled start time is greater than or equal to 8am.	
8	Click Add Criteria to the Set, if applicable.	
9	Select Done.	
10	Click Return.	
	Result: The schedule filter is available for use.	



Copying and Pasting Shifts

Overview

Shifts may also be added using the Copy/Paste functionality. You can copy one or more scheduled shifts and paste them on the schedule, to the same or different employees and for the same or different date range.

Instructions

Starting Point: My Team > Time & Attendance > Schedules

Step	Action			
1	Select the cells in one	Select the cells in one of the following ways:		
	If	Then		
	The shifts you wish	Point to a cell to activate the hover menu.		
	to edit are in non- adjacent cells	 Click ♥ (select) to select the cell, repeating as necessary to select additional cells. 		
	The shifts you wish	1. Point to a cell and click ூ (select).		
	to edit are in adjacent cells	Press the Shift key and press the right, left, up, or down, arrow keys to select adjacent cells.		
	You wish to select shifts in a horizontal or vertical block of cells	1. Point to a cell and click ூ (select).		
		 Press the Shift key and point to the last cell in the block and click (select). 		
2	In the Action Bar, select Copy or press Ctrl + C on your keyboard. All of the shifts in the selected cells are copied.			
3	Select the cell where you want to paste the shifts. If you selected a block of cells, select the upper left cell where you want the block to be pasted.			
	Tip: You may wish to change the date range if you are building schedules for future weeks.			
4	In the Action Bar, select Paste or Ctrl + V on your keyboard.			

Important Information

- You can paste the copied shifts multiple times. The copied shifts are saved until you copy other shifts or log off ADP Workforce Now.
- Pasting does not overwrite existing shifts.
 Example: If you copy an 8:00 AM-3:00 PM shift and try to paste it in a cell containing a 9:00 AM 4:00 PM shift, an error will be generated because the shifts times overlap.
- To remove shifts in error, point to the shift and click (delete) or click **Find** to refresh the schedule grid.