# WhenToWork Online Scheduling - Before you begin Scheduling - - - - - - - - - -

## 3 Step Overview of Setting up Automatic Scheduling

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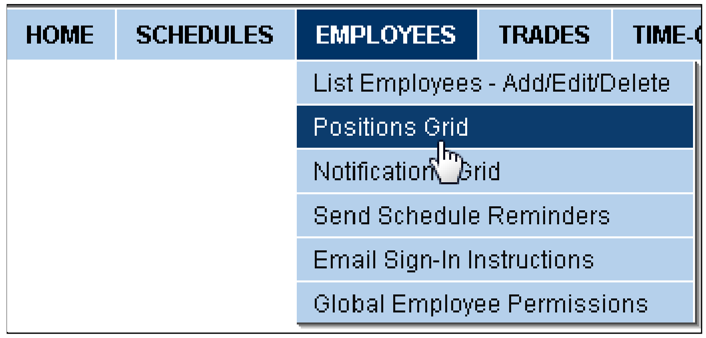
## STEP 1 - Review your Positions (Jobs) & Employees

Verify that you have added the **Positions** (Jobs) that you want to use. **More >**

On the **Positions Grid** you can also check off which Employees can work each position. **More >**

You also can add new Employees. **More >**

You can also control what Employees can see and do when they sign in. **More>**

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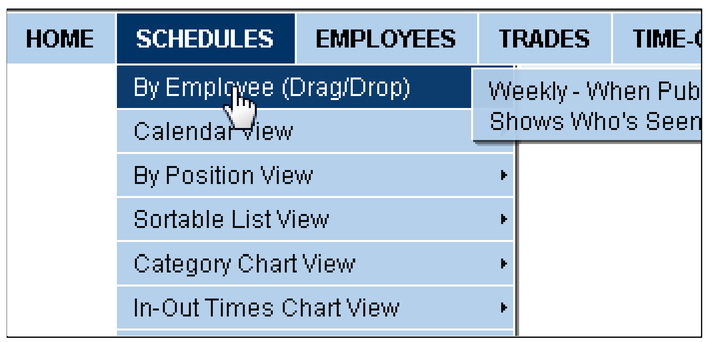
## STEP 2 - Your First Schedule

You are now ready to create your initial schedule. The easiest way to put in your first schedule is to enter the shifts from one of your already prepared schedules. **More >**

After entering your first schedule of shifts - your work is done...all that is left to do is **Publish** if you want at your employees to view it online. **More >**

Your future weeks' scheduling can now be automated.

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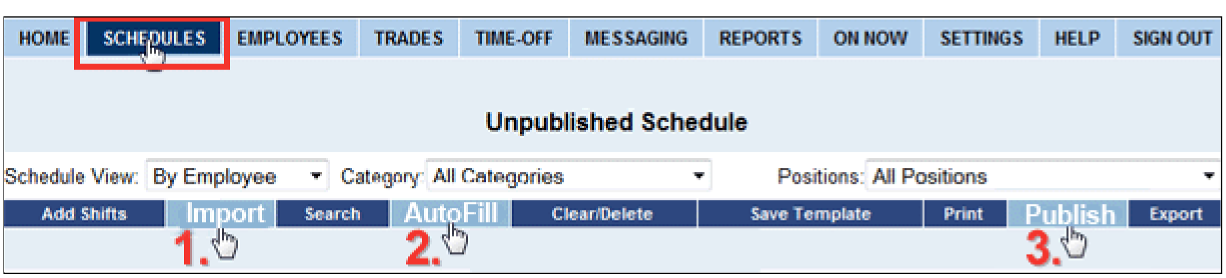
## STEP 3 - Future Weeks - Automatic Scheduling

- Use **Import** (**1.**) to bring in the previous week's schedule, (clearing the work assignments) and make any necessary changes to the shifts.
- Use **AutoFill** (**2.**) to automatically assign the shifts to the best workers for that particular week. AutoFill will use granted time off and any employee work-time preferences along with each employee's maximum hours/shift per day/week to create the best schedule possible.
- **Publish** (**3.**) the schedule to make it viewable by Employees when they sign into their individual employee account. When you **Publish** - Employees can also receive their schedules by e-mail.



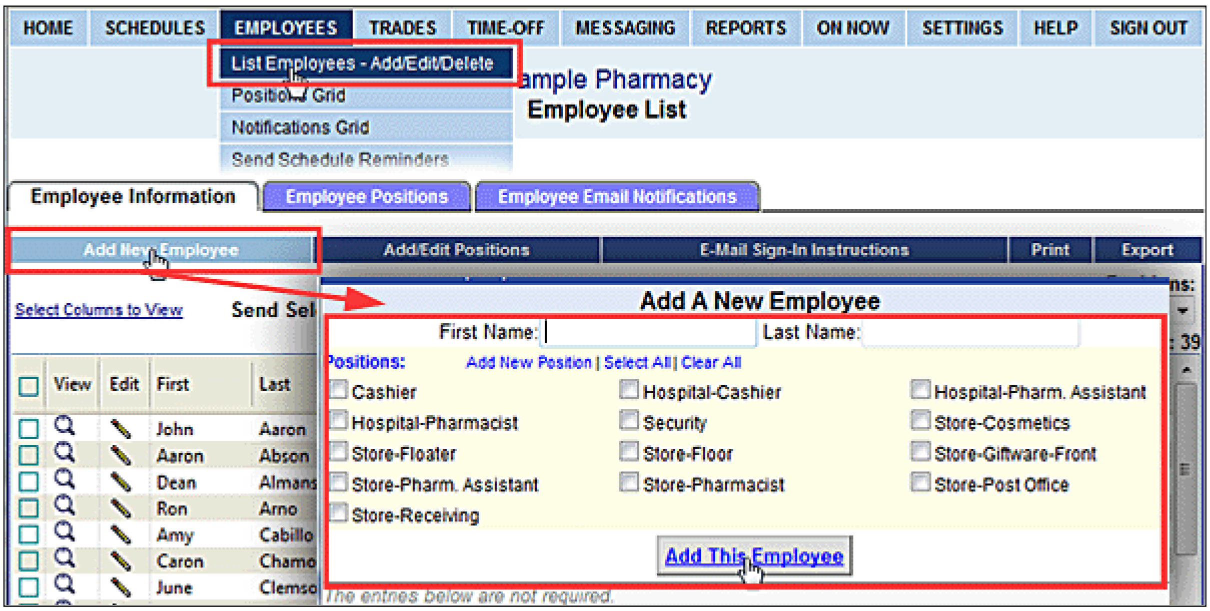
## Add Your Employees

Add your Employees and be sure each one is set as to which Positions they can work. (You can add other Employee details now or later.) All that is required is a **first name** or initials and the **Positions** they can work. All other information is optional.

### To ADD Employees

From any page:

- In the top menu click **EMPLOYEES** to go to the List Employee page
- Click the **Add New Employee** button to open the Add Employee window



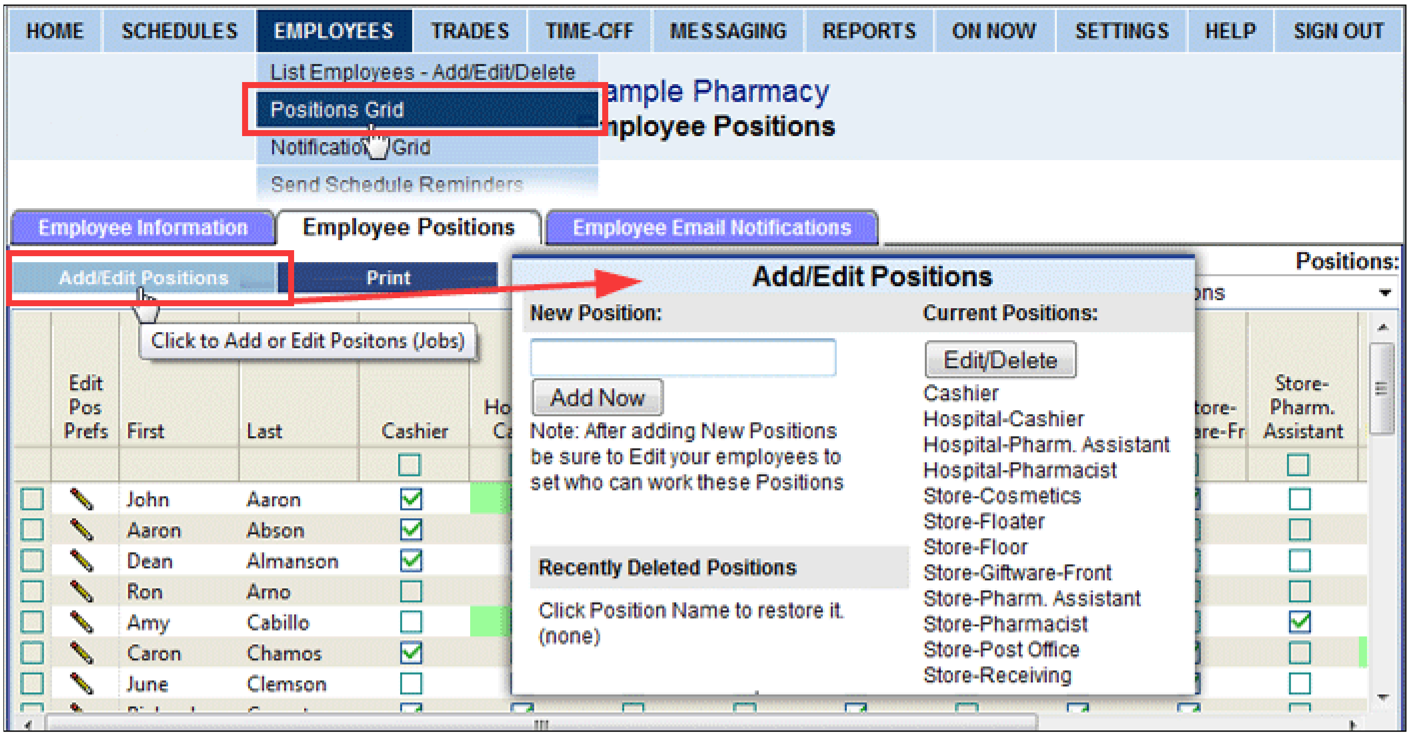

- Type in the Employee's name and check off the Positions they can work (you can also add any other optional information).
- Click **Add this Employee**
- You will see confirmation that the Employee was added and the window will remain up for you to enter another new employee
- Click **Close Window** when you are finished adding employees
- Refresh/Reload the Employee list page to update it with the new employees

## Add your Positions (Jobs)

When you first logged into your account you entered some Positions and Employees. You can always enter more Positions or change your current Positions and set which Employees can work them.

### To Add a New Position

- In the top menu hover over **Employees** and choose **Positions Grid**
- Click the **Add / Edit Positions** button to open the Add/Edit Positions window
- Type a new Position and click the **Add Now** button (the new name will appear in list on the right)
- Continue adding positions until you are done
- Close the window and **reload/refresh the Positions Grid** to update it




**Now in the grid set which Employees can work these new Positions: More>**

**EDIT Positions** (Jobs) (to change the way the position label/name displays on all schedules)

**DELETE Positions** (Jobs) if you make a mistake and enter an unnecessary Position you want to completely remove.

## Special Scheduling Situations - - - - - - - - - - - - - - - - - - - - - - - - -

**Multiple Locations or Departments -**
Two options - use one WhenToWork account or separate accounts (linked for billing purposes).

**IF ANY EMPLOYEE WORKS AT MORE THAN ONE LOCATION OR DEPARTMENT your locations should all be included in one WhenToWork account.** This way employees will never be double-booked across locations.

Locations or departments are added into an account by making location-specific Positions and then you can Group the Positions for quick viewing of each location.

Ex. Create Position names like: Cashier - Dept 1, Cashier - Dept 2, or Dept 1 Sales, Dept 2 Sales

You then have the flexibility of viewing any combination of these Positions (all workers at one store or all Cashiers across all locations etc.) Optional - You also can set each employee's Position Preferences to indicate what Locations you prefer they work or allow employees to choose their preferred positions.

Note: **When locations are included in one account they must be Published at the same time.** Publishing affects all positions and locations. To Publish locations separately use separate WhenToWork accounts if appropriate (see below). Also if you put all locations in one account we currently do not have a way to restrict managers to only edit or view certain positions or employees.

We do not normally recommend having more that 200 employees in one account as it may make some of the displays hard to read. Please contact us for more information if you plan to have more than 200 employees in one account.

**IF NO EMPLOYEE WORKS AT MORE THAN ONE LOCATION OR DEPARTMENT and the department/locations are handled separately** you can create a linked WhenToWork accounts (linked only for billing purposes so you make one payment for your combined total of employees across accounts). This allows you to create and publish totally separate schedules at different times.

Click here for instructions on how to link accounts.

You also may request an "Administrative Account" so that you can view and run reports across multiple linked accounts. There is no extra charge for this added service.

## Your First Schedule

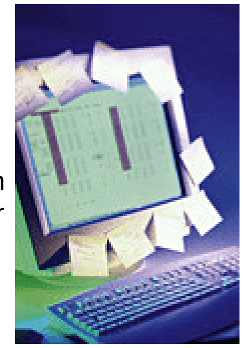
### Enter a Previous Schedule Week - Add Shifts

Once you have entered your Positions and set which Positions each employee can work you are ready to enter your first weekly schedule which will be the basis for future weeks.

Your first schedule takes the longest to set up - once you have defined your shifts for the first week you can copy it into later weeks and make any necessary changes and then use AutoFill to get the best work assignments for the new week.

Optional: if many of your shifts have the same begin & end times (or unpaid lunch breaks or color etc.) you can Create Categories first so that you can choose them when adding shifts to quickly populate those fields as you add your initial shifts).

The easiest way to get your first schedule into our system is to duplicate one of your previously scheduled weeks.



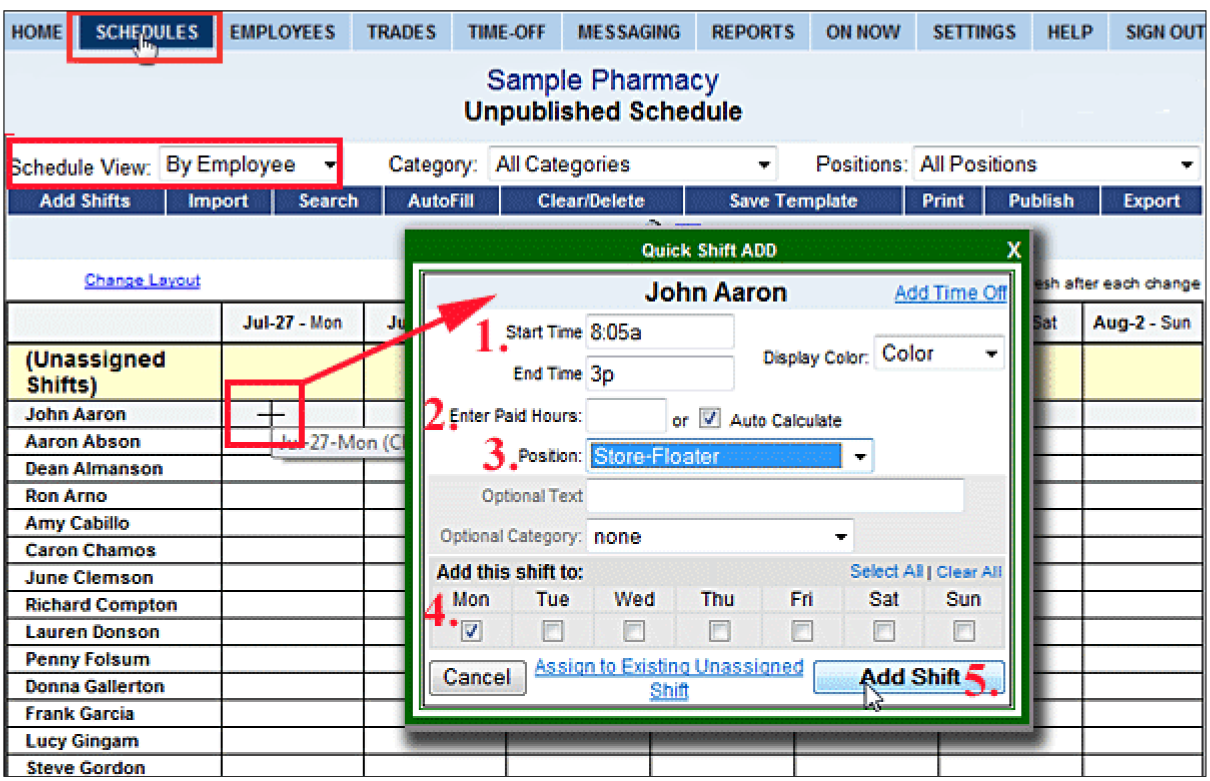
Whether your current schedule is in a spreadsheet on your computer or handwritten on a calendar - you can enter the work assignments into WhenToWork and use that as the basis for future weeks.

Even if your schedule varies from week to week WhenToWork can automate your scheduling and save you hours each week.

**To add your First Shifts use the "By Employee" Schedule View.**
(The "By Employee" view is always recommended for creating and editing your schedule)

From any Page:

- Hover over **SCHEDULES** in the top menu and choose **By Employee**
- Click **Week>** to navigate to the week you want to schedule.
- Click the cell that corresponds to the employee and day you want to add a shift (the cursor turns to plus sign) to open the **Quick Shift ADD** window.




(If you added Categories - choose a category first to automatically enter any of the category default information below)

**1.** Add a **Begin** and **End Time** for the shift - Enter the time with the letter a or p after it to indicate AM or PM. (Ex. 815a), or military time (Ex. 2215). You can enter any times you like down to the minute. (The times can later be changed by a manager to reflect actual time worked if you like)

**2.** **Paid Hours** - (Duration of shift) - if the shift includes unpaid **Lunch period** or break time you can uncheck the **AutoCalc** box and enter the time the employee will be paid for this shift. (Ex. 8am to 5pm with an hour lunch or meal break enter 8 paid hours)

**3.** In the Quick Shift ADD window **Select a Position** that this shift is for

**4.** **Check off any other days of the week to add this shift** - to quickly add the same shift for this employee on those days

**5.** Click **Add Shift** button

Make a mistake? If you need to change any shift you can drag/drop it to another day or employee or click the shift to change the times, position, or employee assigned or to delete it. Or you can use the Multi-Shift Edit view to make changes to more than one shift at a time. To copy a shift use Ctrl drag/drop.

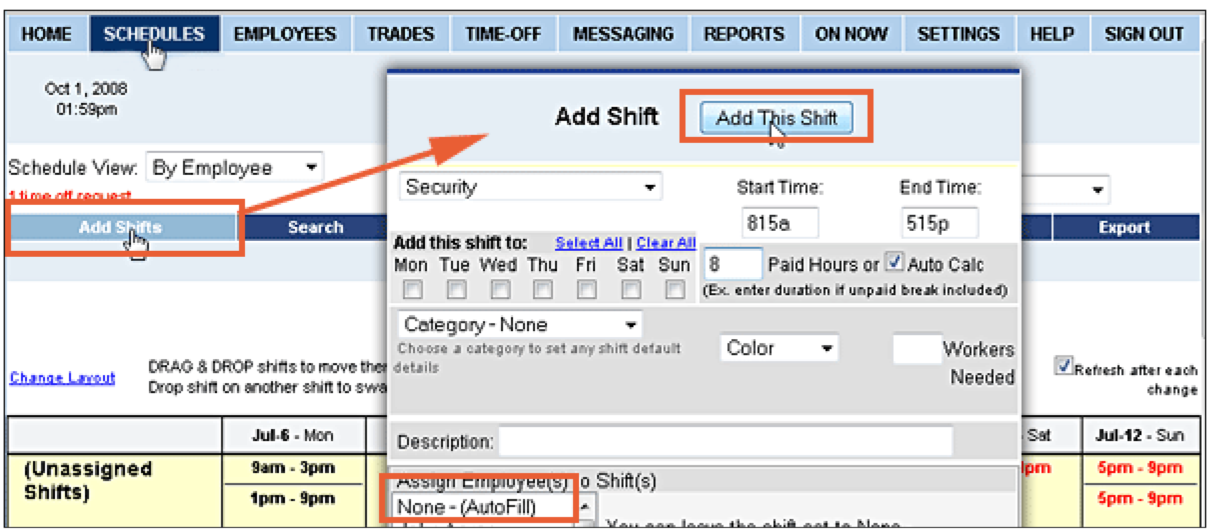
**Note**: After adding the shift(s) the window will close and your schedule is immediately updated without the page reloading.

### *Optional information that can be entered for any shift*

**Optional Text -** can be displayed with the shift on the schedules (Ex. if there are special instructions to the employee, break / lunch times, location notes or meeting times)

**Optional Categories -** If you have shifts with similar begin and end times over multiple Positions, or if you have other reasons to use categories, you can click the Category drop down box and choose Add / Edit Categories to create categories. (Ex. if you have similar night shifts for different positions you can create a NIGHT category and enter and defaults so that when you Add Shifts you can first choose that Category and the fields will be prepopulated (but changeable) for you in the Shift Change window.)

**To add an "Unassigned shift**" - Click the **Add Shifts** button at the top of the schedule (or click on a day in the highlighted unassigned shifts area at the top of the schedule) and leave the worker assigned set to "None - AutoFill."




**Note: you also can have unassigned shifts automatically posted to the tradeboard when you Publish so that employees can pick them up.**