



Timeclock Plus Employee Scheduling Guide

October 2020 V1.0

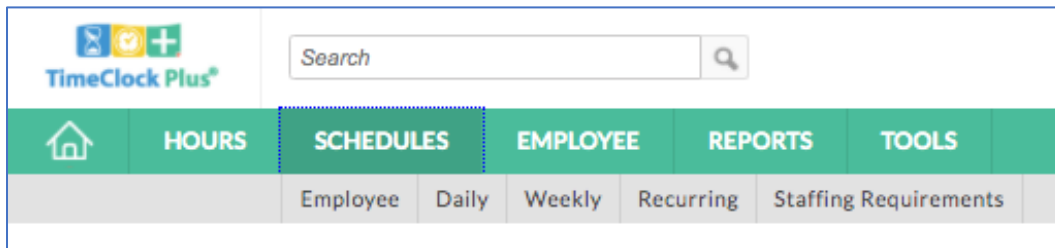
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Overview

The Scheduler in TimeClock Plus allows for a seamless integration of employee shifts and timecards. It allows Supervisors to view availability reports, timecard exceptions, and prepare employee schedules efficiently. This document will show how to use the basic tools of the TimeClock Plus Schedule functions, and offer some best practices for scheduling Supervisors.

Schedules



The Schedules tab offers access to several scheduling operations and views to assist in the time management of a department and its employees.

Employee Schedule allows managers to add or edit schedules for an individual employee.

Daily Schedule displays the department schedule for the day in a graphical view.

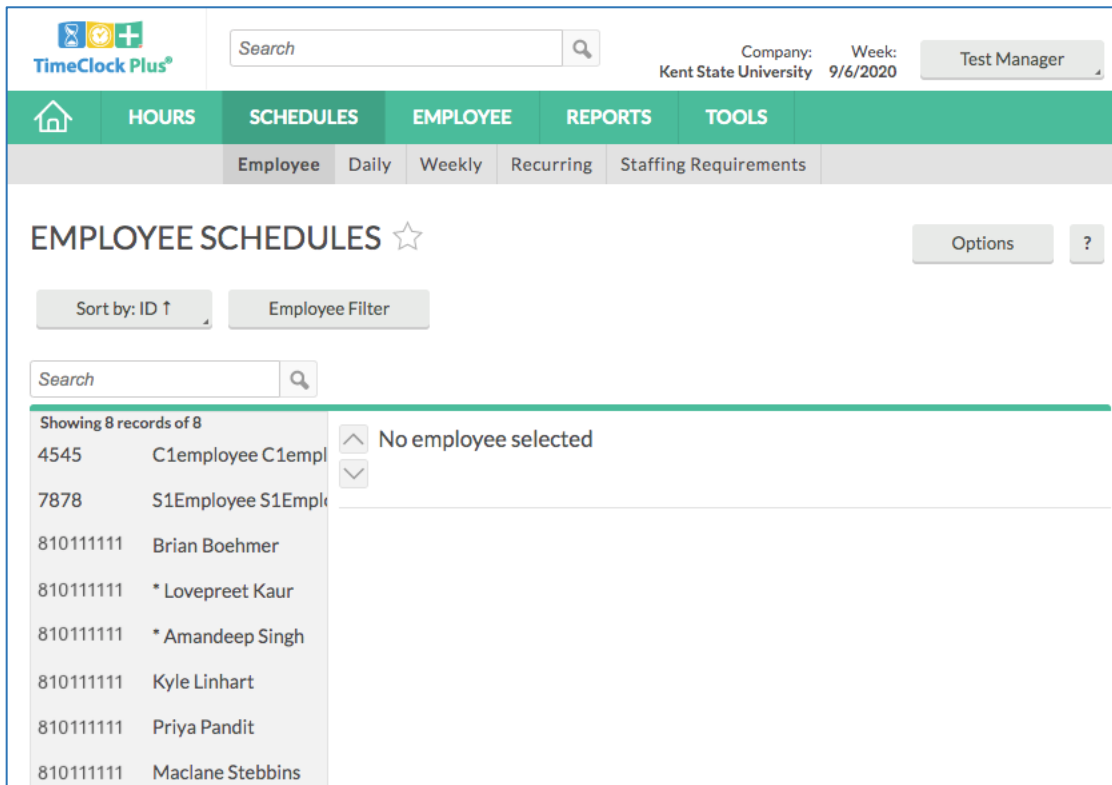
Weekly Schedule allows for the schedule creation for a week at a time, adding multiple employees to varied shifts.

Recurring Schedule allows supervisors to utilize shift templates to build consistent schedules.

Staffing Requirements Scheduling enables the creation of minimums of required employees needed for certain dates and times, and monitor and fill those minimums by scheduling employees as needed.

Creating Employee Schedules

Schedules for individual employees can be created using the Schedule Tab and Employee section. This will display a list of all employees reporting to that Supervisor.



TimeClock Plus

Search

Company: Kent State University Week: 9/6/2020 Test Manager

Home HOURS SCHEDULES EMPLOYEE REPORTS TOOLS

Employee Daily Weekly Recurring Staffing Requirements

EMPLOYEE SCHEDULES ☆ Options ?

Sort by: ID ↑ Employee Filter

Search

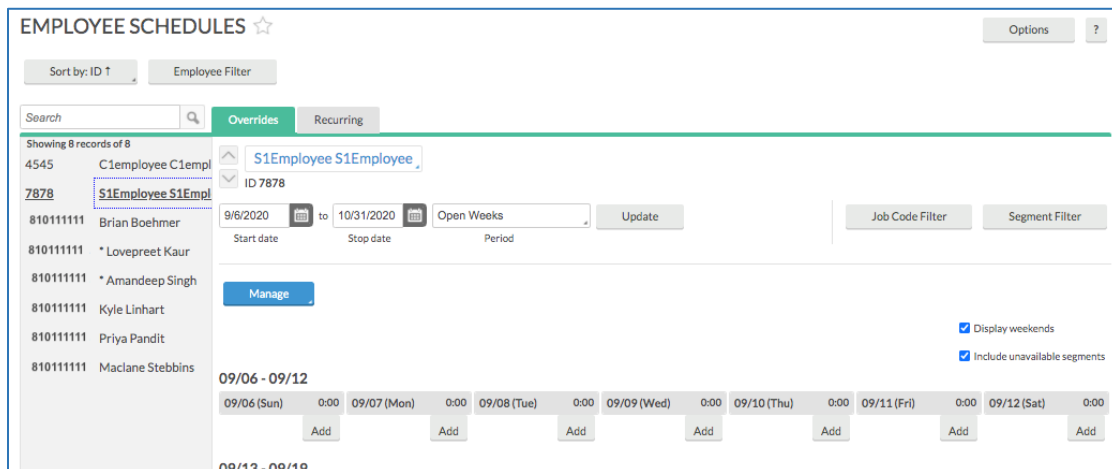
Showing 8 records of 8

ID	Name
4545	C1employee C1empl
7878	S1Employee S1Empl
81011111	Brian Boehmer
81011111	* Lovepreet Kaur
81011111	* Amandeep Singh
81011111	Kyle Linhart
81011111	Priya Pandit
81011111	Maclane Stebbins

If the number of employees on the menu is too large, the list can be limited using the **Employee Filter** button. This allows the supervisor to restrict the list by categories such as Job Code, Classification, Location, and much more.

Individual Shift

Clicking on an employee name from the list will display the scheduling page and allow for many scheduling options for the individual using the **Overrides** schedule section.



EMPLOYEE SCHEDULES ☆ Options ?

Sort by: ID ↑ Employee Filter

Search

Overrides Recurring

Showing 8 records of 8

ID	Name
4545	C1employee C1empl
7878	S1Employee S1Empl
81011111	Brian Boehmer
81011111	* Lovepreet Kaur
81011111	* Amandeep Singh
81011111	Kyle Linhart
81011111	Priya Pandit
81011111	Maclane Stebbins

9/6/2020 to 10/31/2020 Open Weeks Update

Start date Stop date Period

Job Code Filter Segment Filter

Manage

Display weekends Include unavailable segments

09/06 - 09/12

Day	Time	Action
09/06 (Sun)	0:00	Add
09/07 (Mon)	0:00	Add
09/08 (Tue)	0:00	Add
09/09 (Wed)	0:00	Add
09/10 (Thu)	0:00	Add
09/11 (Fri)	0:00	Add
09/12 (Sat)	0:00	Add

09/13 - 09/19

09/06 - 09/12													
09/06 (Sun)	0:00	09/07 (Mon)	0:00	09/08 (Tue)	0:00	09/09 (Wed)	0:00	09/10 (Thu)	0:00	09/11 (Fri)	0:00	09/12 (Sat)	0:00
	Add		Add		Add		Add		Add		Add		Add

Click on **Add** beneath one of the days on the schedule to access the **Add Schedule** menu.

Add Schedule ?

Segment Length: 8:00

Segment type: Regular

Time in

9/7/2020 09:00 AM

Time out

9/7/2020 05:00 PM

Break type

<< NONE >>

Job Code

99261000 - 99261000

Description

Days

1

Extra

Cancel

Save

Select the type of segment you would like to create for the day. The different types of segments are below:

- **Regular:** A regular segment is one that is worked normally by the employee
- **Off:** An off segment is one that an employee will not be working, such as if the employee has school or the shop closes down at that time.
- **Open:** An open segment is one where the employee is not scheduled but is available to work.
- **On-Call:** An on-call segment is one where the employee is not working but can be expected to be called in.
- **Unavailable:** An unavailable segment lets other managers know that these hours are blacked out for the employee.

For the selected date, the time in and out for the shift is entered. The break type and job code may be changed if any edit needs made. A meal break is coded into each appropriate job code and time will automatically be deducted from the shift as necessary. An option to disable the automatic deduction is available by clicking the **Extra** button at the bottom of the window.

09/06 - 09/12 ☑ Include unavailable segments

09/06 (Sun)	0:00	09/07 (Mon)	8:00	09/08 (Tue)	0:00	09/09 (Wed)	0:00	09/10 (Thu)	0:00	09/11 (Fri)	0:00	09/12 (Sat)	0:00
	Add	<input type="checkbox"/> Select Schedule 8:00 09:00 AM - 05:00 PM 99261000 - 992610... Add		Add		Add		Add		Add		Add	

The shift will display on the day in the schedule. Multiple shifts for the same day may be added as necessary by repeating the steps using the **Add** button.

09/07 (Mon)

☒ Select Schedule

09:00 AM - 05:00 PM
99261000 - 992610...

Edit
 Delete
 Copy
 Paste
 Paste from Template
 Revert to Recurring Schedule

The shift may be duplicated across the week if needed, by right-clicking on the day with the shift added, selecting the **Copy** option, and then right-clicking the next desired day and selecting **Paste**.

Repeating this process is an easy way to fill in consistent shifts throughout a scheduling period. Similarly, once a week is completed, all days in the week can be selected and a right-click

will allow for the copy and paste of the schedule of the entire week. This can also be accomplished by building a Recurring Schedule.

Availability

For those supervising student workers, unavailable times can be created for each employee to block time based upon the student class schedule. Add student classes in as a shift with the Segment Type as Unavailable. This will allow Availability Reports to display correct data.

10/25 - 10/31

10/25 (Sun)	0:00	10/26 (Mon)	0:00	10/27 (Tue)	0:00	10/28 (Wed)	0:00	10/29 (Thu)	0:00	10/30 (Fri)	0:00	10/31 (Sat)	0:00
	Add	<input type="checkbox"/> Select Schedule Unavailable 8:00 12:00 AM - 08:00 AM Unspecified Job Code ItTraiOutr	<input type="checkbox"/> Select Schedule Unavailable 8:00 12:00 AM - 08:00 AM Unspecified Job Code ItTraiOutr	<input type="checkbox"/> Select Schedule Unavailable 8:00 12:00 AM - 08:00 AM Unspecified Job Code ItTraiOutr	<input type="checkbox"/> Select Schedule Unavailable 8:00 12:00 AM - 08:00 AM Unspecified Job Code ItTraiOutr	<input type="checkbox"/> Select Schedule Unavailable 8:00 12:00 AM - 08:00 AM Unspecified Job Code ItTraiOutr	<input type="checkbox"/> Select Schedule Unavailable 8:00 12:00 AM - 08:00 AM Unspecified Job Code ItTraiOutr	<input type="checkbox"/> Select Schedule Unavailable 8:00 12:00 AM - 08:00 AM Unspecified Job Code ItTraiOutr	<input type="checkbox"/> Select Schedule Unavailable 8:00 12:00 AM - 08:00 AM Unspecified Job Code ItTraiOutr	<input type="checkbox"/> Select Schedule Unavailable 8:00 12:00 AM - 08:00 AM Unspecified Job Code ItTraiOutr	<input type="checkbox"/> Select Schedule Unavailable 8:00 12:00 AM - 08:00 AM Unspecified Job Code ItTraiOutr		Add
		<input type="checkbox"/> Select Schedule Unavailable 3:00 10:00 AM - 01:00 PM Unspecified Job Code ItTraiOutr	<input type="checkbox"/> Select Schedule Unavailable 1:15 02:15 PM - 03:30 PM Unspecified Job Code ItTraiOutr	<input type="checkbox"/> Select Schedule Unavailable 3:00 10:00 AM - 01:00 PM Unspecified Job Code ItTraiOutr	<input type="checkbox"/> Select Schedule Unavailable 1:15 02:15 PM - 03:30 PM Unspecified Job Code ItTraiOutr	<input type="checkbox"/> Select Schedule Unavailable 1:15 02:15 PM - 03:30 PM Unspecified Job Code ItTraiOutr	<input type="checkbox"/> Select Schedule Unavailable 1:15 02:15 PM - 03:30 PM Unspecified Job Code ItTraiOutr	<input type="checkbox"/> Select Schedule Unavailable 1:15 02:15 PM - 03:30 PM Unspecified Job Code ItTraiOutr	<input type="checkbox"/> Select Schedule Unavailable 3:00 05:30 PM - 08:30 PM Unspecified Job Code ItTraiOutr	<input type="checkbox"/> Select Schedule Unavailable 3:00 10:00 AM - 01:00 PM Unspecified Job Code ItTraiOutr	<input type="checkbox"/> Select Schedule Unavailable 3:00 10:00 AM - 01:00 PM Unspecified Job Code ItTraiOutr		Add

Recurring Shifts

If an employee is scheduled to work a common shift, those dates and times may have been added to a Recurring Shift Template. Using the template, the employee can be scheduled for a period of time for the same shifts in simpler steps.

The screenshot shows the 'EMPLOYEE SCHEDULES' interface. At the top, there's a title 'EMPLOYEE SCHEDULES' with a star icon. Below it are 'Sort by: ID ↑' and 'Employee Filter' buttons. A search bar is present. The 'Recurring' tab is selected, and the 'Overrides' tab is also visible. The main area shows a list of employees with their IDs and names. On the right, there's a section for 'S1Employee S1Employee' with a dropdown for 'ID 7878'. Below this, there's a checkbox for 'Override role settings' which is checked, and a '+ Assign' button. At the bottom, there's a table with columns 'Edit', 'Unassign', 'Start Date', 'Stop Date', and 'Description', and a message 'No records found'.

In the Employees Schedule page, selecting the Recurring schedules tab display the option to override the role settings and **Assign** the templated shift.

The screenshot shows the 'Assign Recurring Schedules' dialog box. It has a date range selector with '9/6/2020' and '12/26/2020' and a checkbox for 'to'. Below this, there are two radio buttons: 'Use company wide recurring schedule' and 'Use recurring schedule'. The 'Use recurring schedule' option is selected. A dropdown menu is open showing a list of predefined shift templates: '7:30a-4p', '7:30a-4:30p', '7:30a-4p', '7a-3:30p', '8a-4:30p m-f', and '8a-5p'. At the bottom right, there are 'Cancel' and 'Assign' buttons.

The schedule range will require a start date, and the end date may be left open, or added if there may be a change at the end of the period.

Selecting the option to **Use recurring schedule**, allows the supervisor to pick from the predefined shift templates, as found in the **Recurring Schedules tab**, and schedule the employee consistently throughout the chosen time frame.

Weekly Overall Schedule

The Weekly option allows for the scheduling of multiple employees in multiple shifts to create coverage for the time needed by the department or business over the course of a single week. The page lists the employees, which can be filtered as needed, and offers options of adding shifts viewed vertically by day.

Prior to creating a schedule, it is advisable to run the Availability Report for the timeframe. This will show any regularly scheduled unavailable time as well as any approved time off, listed by individual day.

Availability Monday Nov 2, 2020																
Number	Name	7a	8a	9a	10a	11a	12p	1p	2p	3p	4p	5p	6p	7p	8p	9p
4545	C1Employee C1Employee															
7878	S1Employee S1Employee															
810111111	Brian Boehmer						X	X	X	X		X	X	X		
810111111	* Lovepreet Kaur	X	X			X	X	X	X	X						
810111111	* Amandeep Singh															
810111111	Kyle Linhart															
810111111	Priya Pandit															
810111111	Maclane Stebbins															

Home

Hours

Schedules

Employee

Reports

Tools

EmployeeDailyWeeklyRecurringStaffing Requirements

WEEKLY OVERALL SCHEDULE ☆

Options?

11/01/2020 - 11/07/2020

Navigate Week

<11/1/2020>

PrevNext

Employee FilterJob Code FilterSegment FilterAvailability Filter

Manage

☒ Display weekends

Some unavailable segments are hidden☐ Include unavailable segments

4545 - C1Employee C1Employee Hours: 0:00

11/01 (Sun) 0:0011/02 (Mon) 0:0011/03 (Tue) 0:0011/04 (Wed) 0:0011/05 (Thu) 0:0011/06 (Fri) 0:0011/07 (Sat) 0:00

AddAddAddAddAddAddAdd

7878 - S1Employee S1Employee Hours: 0:00

11/01 (Sun) 0:0011/02 (Mon) 0:0011/03 (Tue) 0:0011/04 (Wed) 0:0011/05 (Thu) 0:0011/06 (Fri) 0:0011/07 (Sat) 0:00

AddAddAddAddAddAddAdd

Like the individual employee schedule, clicking the **Add** button below the appropriate date opens a shift window to add details. This page, however, lists all associated employees vertically to view each day with multiple employees and shifts.

810111111 - * Lovepreet Kaur
Hours: 15:00

11/01 (Sun) 0:00	11/02 (Mon) 7:00	11/03 (Tue) 3:00	11/04 (Wed) 0:00	11/05 (Thu) 5:00	11/06 (Fri) 0:00	11/07 (Sat) 0:00
Add	<input type="checkbox"/> Select Schedule 7:00 2:00 PM - 9:00 PM 99261000 - 992610... ItTrailOutr	<input type="checkbox"/> Select Schedule 3:00 11:00 AM - 2:00 PM 99261000 - 992610... ItTrailOutr	Add	<input type="checkbox"/> Select Schedule 5:00 9:00 AM - 2:00 PM 99261000 - 992610... ItTrailOutr	Add	Add
	Add	Add		Add		

810111111 - * Amandeep Singh
Hours: 16:00

11/01 (Sun) 5:00	11/02 (Mon) 0:00	11/03 (Tue) 1:45	11/04 (Wed) 1:45	11/05 (Thu) 3:30	11/06 (Fri) 4:00	11/07 (Sat) 0:00
<input type="checkbox"/> Select Schedule 5:00 12:00 PM - 5:00 PM 99261000 - 992610... ItTrailOutr	Add	<input type="checkbox"/> Select Schedule 1:45 9:00 AM - 10:45 AM 99261000 - 992610... ItTrailOutr	<input type="checkbox"/> Select Schedule 1:45 9:00 AM - 10:45 AM 99261000 - 992610... ItTrailOutr	<input type="checkbox"/> Select Schedule 3:30 5:30 PM - 9:00 PM 99261000 - 992610... ItTrailOutr	<input type="checkbox"/> Select Schedule 4:00 1:00 PM - 5:00 PM 99261000 - 992610... ItTrailOutr	Add
Add		Add	Add	Add	Add	

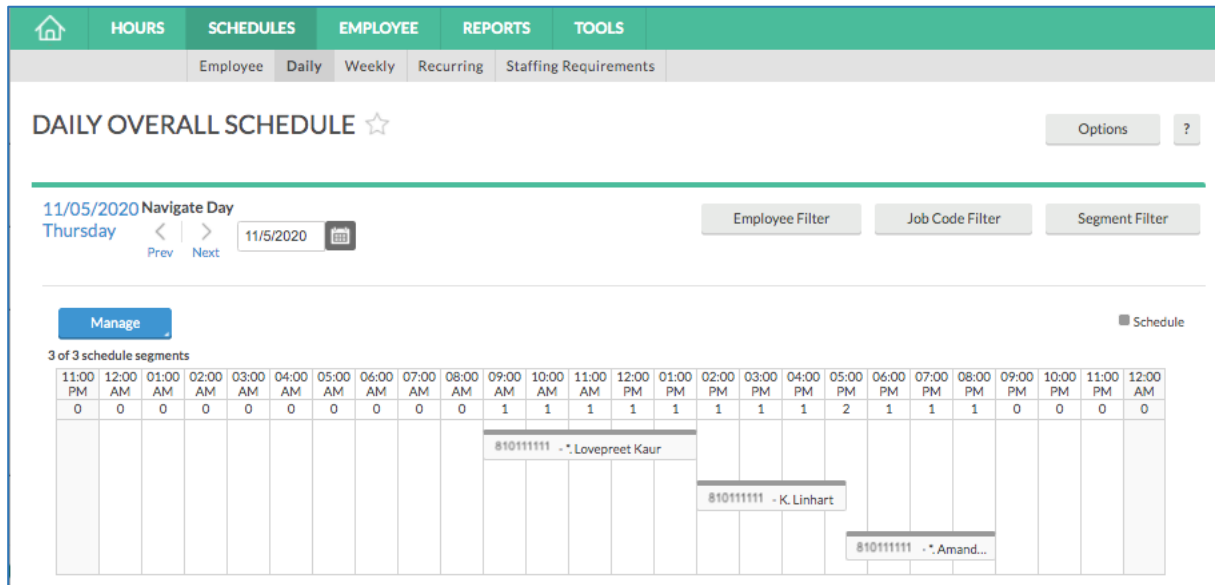
810111111 - Kyle Linhart
Hours: 7:00

11/01 (Sun) 0:00	11/02 (Mon) 0:00	11/03 (Tue) 0:00	11/04 (Wed) 3:30	11/05 (Thu) 3:30	11/06 (Fri) 0:00	11/07 (Sat) 0:00
Add	Add	Add	<input type="checkbox"/> Select Schedule 3:30 10:30 AM - 2:00 PM 99261000 - 992610... ItTrailOutr	<input type="checkbox"/> Select Schedule 3:30 2:00 PM - 5:30 PM 99261000 - 992610... ItTrailOutr	Add	Add
			Add	Add		

A completed schedule will show the shifts and coverage in the Weekly Overall Schedule and a listing of employees covering the shifts. Changes can be made by clicking in the box to **Select Schedule** for a shift and clicking the **Manage** button, or using a right-click on the shift. This will display the shift entry pane for editing.

Daily Overall Schedule

The Daily Overall Schedule, accessed from the Schedule tab in the Daily option, provides a graphical view of the schedule, which is often easier to view to assure department coverage.



Though from the Daily Overall Schedule, shifts cannot be added, they can be viewed and edited. A double-click on a displayed shift will open a display of the shift where the information can be updated as needed.

The 'Edit Schedule' dialog box is shown, allowing for the modification of a schedule segment. It includes a 'Segment Length' of 5:00 and a 'Segment type' dropdown set to 'Regular'. The 'Time in' is set to 11/5/2020 at 09:00 AM, and the 'Time out' is set to 11/5/2020 at 02:00 PM. The 'Break type' is set to '<< NONE >>'. The 'Job Code' is 99261000 - 99261000. There is a 'Description' field and an 'Extra' field. 'Cancel' and 'Save' buttons are at the bottom right.

Time in	Time out	Break type	Job Code	Description
11/5/2020 09:00 AM	11/5/2020 02:00 PM	<< NONE >>	99261000 - 99261000	

Time Off Requests

Employees may request time off using the **Request Manager** in the TimeClock Plus application. This tool allows the user to view and approve any time-off requests that have been submitted by employees. Additionally, employee time-off requests can be manually added through this feature. The Request Manager is accessed from the Tools tab, in the Requests section.

The screenshot shows the 'Request Manager' interface. At the top is a navigation bar with tabs: HOME, HOURS, SCHEDULES, EMPLOYEE, REPORTS, and TOOLS. Under the TOOLS tab, there are sub-tabs: Employee Status, Requests (selected), and Other Tools. Below these is a 'Request Manager' sub-tab. The main area is titled 'REQUEST MANAGER' with a star icon and an 'Options' button. There are two view tabs: 'Calendar' (selected) and 'List'. Below the view tabs are filters: 'Status' (dropdown), 'Employee Filter', and 'Job Code Filter'. A 'Requests per calendar day' field is set to '10' with an 'Apply' button. The main display is a calendar for December 2020. A pop-up menu is visible over the 30th of December, showing 'Pending (1)' and details for 'C1employee C1employee' with a start time of '08:00 AM 8:00' and a description of '430 - Unpaid Leave w/ Benefits'. The calendar grid shows days from Sunday to Saturday with dates 29, 30, 1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12.

The requests can be viewed by calendar or list by selecting the desired view tab at the top of the page. Buttons are included on the page to filter items by request approval status, employee, or job code.

When an employee has entered a request for time off, it will appear in the Request Manager for review. The request can be approved or declined by selecting the Pending request and clicking the **Manage** button, or by using a right-click and select the appropriate option from the pop-up menu.

The screenshot shows the 'Add Employee Request' form. It has a title bar with the text 'Add Employee Request' and a question mark icon. On the left is a 'Templates' section with a 'No records found' message. The main form area contains the following fields: 'Employee' (dropdown menu showing '<< NONE >>'), 'Date requested' (calendar icon showing '10/30/2020'), 'Start time' (clock icon), 'Hours' (text input showing '24:00'), 'Days' (dropdown menu showing '1'), and 'Description' (text input). At the bottom are two checkboxes: 'Approve request' and 'Send user notification'. At the very bottom are 'Cancel' and 'Save' buttons.

Supervisors can also add time off on behalf of employees if needed by clicking the **Add** button and entering the leave data. Items in red are required.

