ULTRATIME ENTERPRISE USER'S GUIDE

Schedules Tab (vND1.2)

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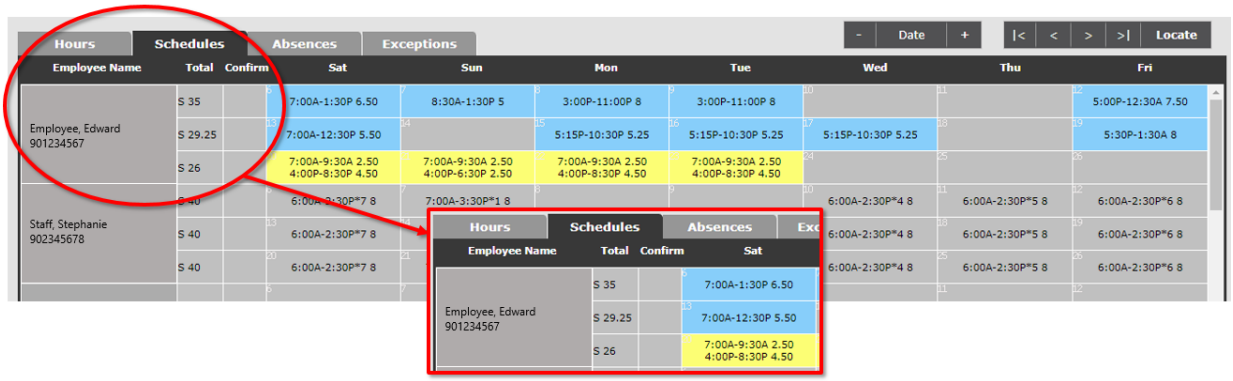
USING THE SCHEDULES TAB

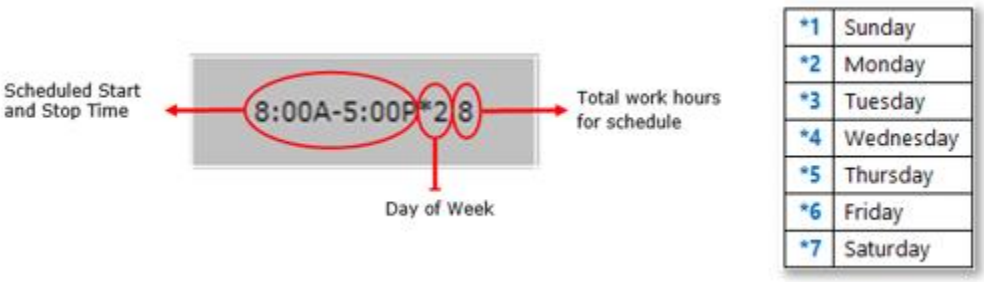
The Schedules tab allows supervisors to create schedules for their employees. Each cell displays the active schedule for that day. The column to the immediate right of the employee's name contains the total number of scheduled hours.



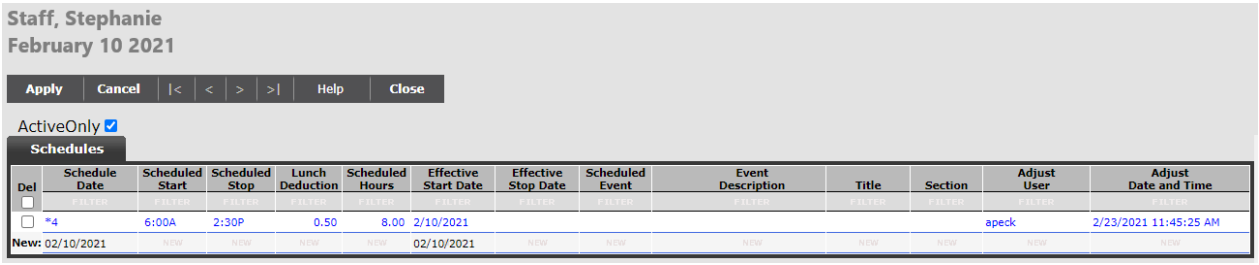
Viewing Information on Schedules Tab

A schedule can be set by a specific date or day of week (DOW). Commonly, a schedule will be set by the day of the week but setting a schedule by date allows for temporary overrides in times of employee absence.

The cells in the Schedules Tab summarize the schedule information:



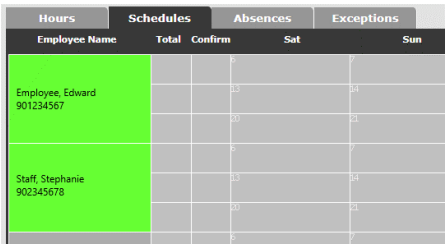
Drilling into the cell provides schedule detail:



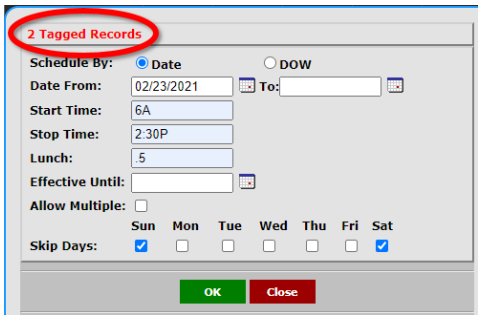
Setting a Schedule – Using the Global Button in the Schedules Tab

The Global button is the quickest way to set a schedule for an employee or group of employees.

Using the Global Button with Tagging *(preferred method)*



1. Tag the desired employees by right-clicking on their names and the cell will turn green.
2. Click on the 'Global' button.
   - In the pop-up box, the number of employees tagged will appear in the top portion of the box.
   - Fill out the remaining scheduling criteria:



     a) **Schedule By:** radio buttons – This determines what type of schedule will be created.
        - **Date:** a temporary or override schedule lasting only for specific date(s).
        - **DOW:** Day of Week, a repeating schedule that goes on until schedule is changed or an Effective Until date is provided.

     b) **Date From:** - Enter the start date corresponding to the first date to apply the schedule.

     c) **To:** - Enter the corresponding stop date for the last date the employee is to be scheduled. If scheduling for a single day leave the 'To:' field blank.

     d) **Start Time:** Enter daily start time in 12 or 24 hour format. Ex: 0800, 8a or 8:00 AM.

     e) **Stop Time:** Enter daily stop time in 12 or 24 hour format. Ex: 1700, 5p or 5:00 PM.

     f) **Lunch:** Enter the length of any applicable scheduled lunch break as a positive number. Ex: .5 = 30 minutes

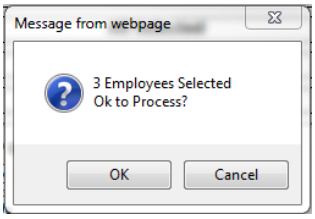
     g) **Effective Until:** Allows the entry of ending date of schedule.

     h) **Allow Multiple:** Allows the creation of multiple, non-overlapping schedules in a single day.

     i) **Skip Days:** Any day of the week that is checked will not have the schedule that is being created assigned to it.

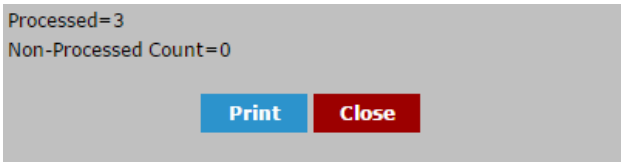
3. Click 'OK'.

4. A dialog box will appear to confirm the number of employees selected. ****Make sure the employee count is correct before you Click 'OK'.**** Once you click 'OK' this cannot be undone.



5. A dialog box will appear confirming the number of employees processed and not processed. Employees not process will have a reason listed for not processing.

6. Click 'Close'.



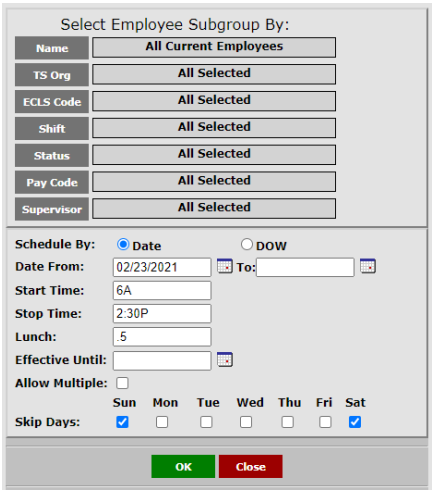
7. Click 'Close' on the first pop up box.

Using the Global Button with Filtering

1. While on the Schedules Tab, Click on the 'Global' button.

2. In the pop-up box, click on the dark gray buttons defining how to filter the employees.

3. When the search criteria box appears, search for the desired filter information by:



   - Typing the title of the desired filter criteria – matches will move to top of listing.
   - Using the navigation arrows to move up and down in the listing by one page.
   - Using the Up and Down arrows on the keyboard to scroll through the data.
   - Select one or many filters.
   - Fill out the remaining scheduling criteria:

      4. **Schedule By:** radio buttons –

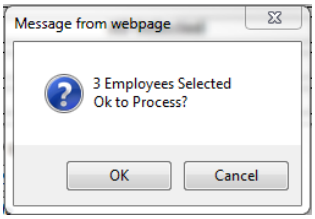
         This determines what type of schedule will be created.

         - **Date:** a temporary or override schedule lasting only for specific date(s).

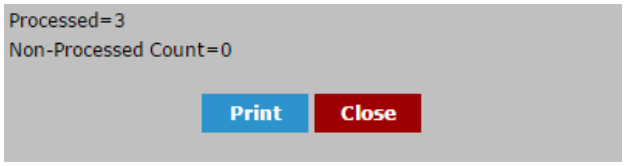
- **DOW:** Day of Week, a repeating schedule that goes on until schedule is changed or an Effective Until date is provided.

5. **Date From:** - Enter the start date corresponding to the day of the week for the schedule.
6. **To:** - Enter the corresponding stop date for the day of the week that the schedule will end. If scheduling for a single day leave the 'To:' field blank.
7. **Start Time:** Enter daily start time in 12 or 24 hour format. Ex: 0800, 8a or 8:00 AM.
8. **Stop Time:** Enter daily stop time in 12 or 24 hour format. Ex: 1700, 5p or 5:00 PM.
9. **Lunch:** Enter the length of any applicable scheduled lunch break as a positive number. Ex: .5 = 30 minutes
10. **Effective Until:** Allows the entry of ending date of schedule.
11. **Allow Multiple:** Allows the creation of multiple, non-overlapping schedules in a single day.
12. **Skip Days:** Any day that is checked will not have the schedule that is being created assigned to it.

13. Click 'OK'.
14. A dialog box will appear to confirm the number of employees selected. ****Make sure the employee count is correct before you Click 'OK'.**** Once you click 'OK' this cannot be undone.



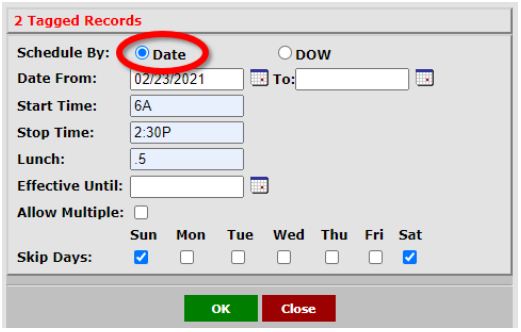
15. A dialog box will appear confirming the number of employees processed and not processed. Employees not process will have a reason listed for not processing.
16. Click 'Close'.



17. Click 'Close' on the first pop up box.

Overriding a Day of Week (DOW) Work Schedule

Often it is necessary to change an employee's schedule for a short period of time, for example a day, week, or month. At the conclusion of that time period, the employee's schedule needs to be reverted back to their default.

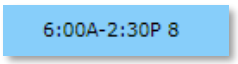


There are two methods in which a DOW schedule can be overridden: 1) Overriding for every day of a specified date range, or 2) Overriding for a specific day(s) of the week.

Overriding DOW Schedule for Specified Date Range:

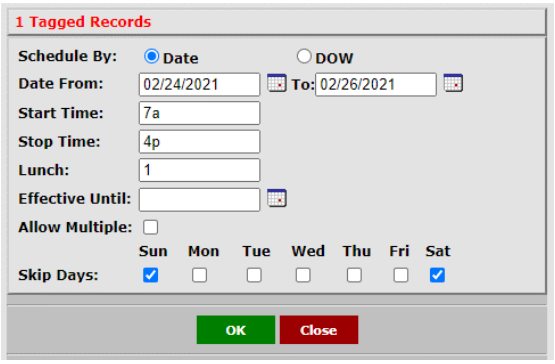
1. Locate the desired employee.
2. Tag the employee by right-clicking on the employee's name and the cell will turn green.
3. Click on the 'Global' button.
    - In the pop-up box, be sure that the 'Date' radio button is selected – this instructs the system to produce an override, date-based schedule.
4. Enter the start date for the override schedule in the 'Date From:' field.
5. Enter the stop date for the override schedule in the 'To:' field.
6. Enter the daily start time and stop times in the correct format (for example 0-23 hours, or 8a or 5:30p) in their respective fields.
7. Enter the length of the scheduled lunch in hours in the 'Lunch:' field if applicable.
8. Check the 'Allow Multiple:' field if you would like to allow multiple, non-overlapping schedules for an employee in a single day.
9. For any days of the week that should not be scheduled, put a check in the corresponding 'Skip Days' field.
10. Click 'OK'.
11. A dialog box will appear confirming the number of employees Click 'OK'.
12. A dialog box will then appear confirming the number of employees processed and not processed.
13. Click 'Close'.
14. Click 'Exit' on the first pop up box.

The cells will appear in light blue on the Schedules Tab to indicate that there has been a schedule override. The Day of Week indicator will no longer show in the cell.



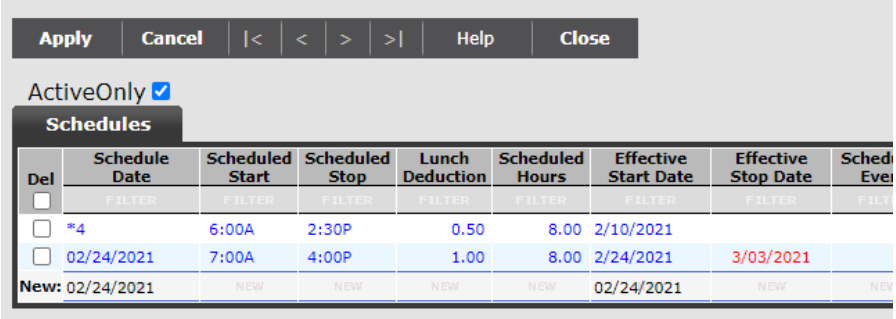
Overriding DOW Schedule for a Specific Day of the Week:

1. Locate the desired employee.
2. Tag the employee by right-clicking on the employee's name and the cell will turn green.
3. Click on the 'Global' button.



   - In the pop-up box, be sure that the Day of Week (DOW) button is selected – this instructs the system to produce an override, day of week based schedule.
   - Enter the start date of the new schedule in the 'Date From:' field.
   - Example: If Wednesday DOW schedule is being overridden, and February 24th is the date of the first Wednesday the override is to be in effect, enter 2/22/2021 in the 'Date From:' field.
   - If the override schedule is for a range of days, like Wednesday through Friday, also enter the 'Date To:' field. For example, 2/26/2021 can be entered in the 'Date To:' field.
4. Enter the daily override start time in the 'Start Time:' field.
5. Enter the daily override stop time in the 'Stop Time:' field.
6. Enter the length of the scheduled lunch in hours and hundredths in the 'Lunch:' field if applicable. For example, a half hour lunch is entered as 0.50, an hour is entered as 1.
7. Enter the date that this override schedule will be effective in the 'Effective Until:' field. If ongoing then leave this field blank.
8. If entering a range of days and there are days within that range that should not be scheduled, put a check in the corresponding 'Skip Days' field.
9. Click 'OK'.
   - A dialog box will appear confirming the number of employees
10. Click 'OK'.
    - A dialog box will then appear confirming the number of employees processed and not processed.
11. Click 'Close'.
12. Click the 'Exit' button.

13. The override schedule can also be modified at any time.
14. Drill into the cell with the DOW override schedule by clicking on it.
15. For example, in the row that contains the override schedule, enter an end date for the override schedule in the 'Effective Stop Date' field. Entering this will allow the regular DOW schedule to resume after this date.



16. Click 'Apply'.
17. Click 'Exit'.

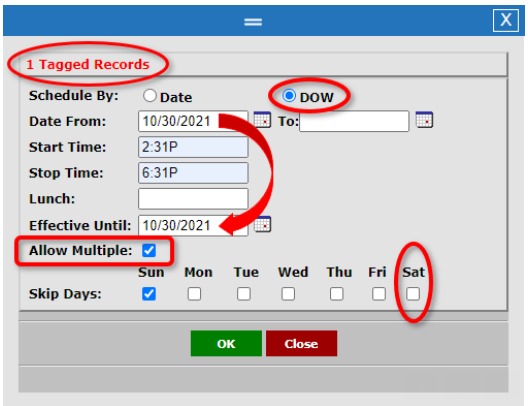
Creating Multiple Schedules in a Day (Split Shifts)

If an existing schedule already exists for a day, a secondary schedule may be added to create a split shift.

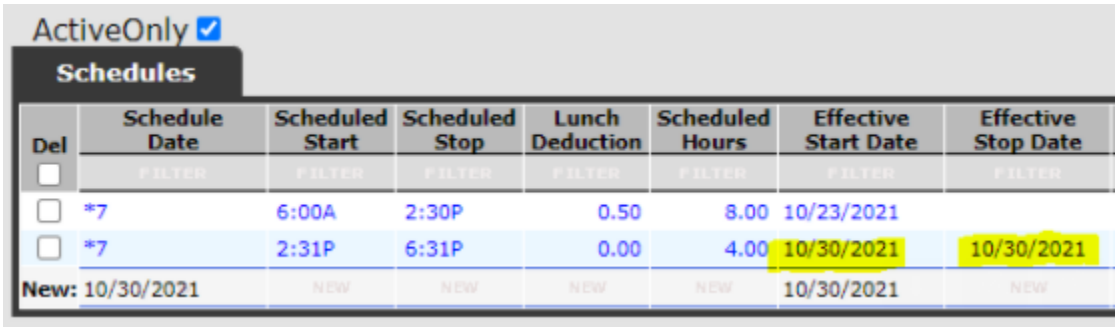
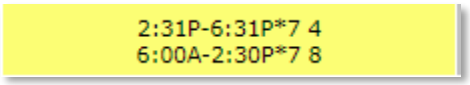
Secondary schedule times must not overlap existing schedule. Ex. 7:00A-3:00P and 10:00A-6:00P.

Note: *The 'Schedule By:' type must match existing schedule type. Choosing a single Date schedule type when existing schedule is DOW will create an override of the current schedule.*

1. Select the employee or group of employees by tagging and using the Global button (see instructions for 'Using the Global Button with Tagging' above).
2. When tagging an employee and selecting the Global Button, it will show the number of employees tagged at the top of the window.
3. Choose the 'Schedule By:' type and make sure that it matches the current schedule type.
4. Fill in the new Start and Stop times.
5. Enter a lunch period, if applicable.
6. If the secondary schedule is for just that day, enter the same 'Effective Until:' date as the 'Date From:' date. If secondary schedule is ongoing and this is a DOW schedule, leave the 'Effective Date:' blank.



7. ****Important and necessary step**** Check the 'Allow Multiple' box.
8. Make sure the day of the week for the schedule does not have a check in the 'Skip Days:' field.
9. Click 'Ok'.
10. A dialog box will appear confirming the number of employees Click 'OK'.
11. A dialog box will appear confirming the number of employees processed and not processed. Click 'Close'.
12. Click 'Close' on the first pop up box.



On the Schedules Tab, the face of the Schedules cell will be highlighted yellow and show both schedules.