Scheduling

Employee scheduling begins with the weekly planner. The weekly planner is the template used to create regular weekly scheduled services for each building. Notification services will not work if the buildings are not scheduled.

Creating a schedule in the weekly planner consists of 2 steps:

1. CREATE WEEKLY PLANNER
2. SCHEDULE
3. MONTHLY AUTO SCHEDULER

- Click on **Customers** at the top of the screen and choose **Buildings** from the drop down menu.
- Go to the bottom of the page to the **Weekly Planner** tab.

1. Create Weekly Planner - Fill in the appropriate data fields. Descriptions of each of the fields   are listed below.

- Name – Select an employee name from the drop down menu of active employees. You may also use the building name in the place of the employee name when setting up a schedule, when the employee clocks in and out their name will replace the building name on record. This is good for buildings covered by floaters or in buildings without a permanent employee.

- Begin Time, End Time - The projected clock in and out times for the employee. Clicking the button inside the Begin Time and End Time cells will display the pictured clock dialog. Left click on the clock to set the hour and right click on it to set the minutes. This defaults to "PM" so change it if necessary. and then select AM or PM "Use 5 minute increments"

- Days of the week- When checked, the days the employee is projected to work during the times referenced.

- Time Adjustment - The amount of time in minutes that you want to increase or decrease the employee's actual time. This value is used to adjust employee's worked hours to allow for something they may do that is not applicable to clocking in/out. This can be used to take out lunch breaks such as -30 or can be used to add travel time by adding time such as 30.

- Scheduled Hours - The time scheduled per day for the employee to work. This is automatically calculated based on the begin and end times.
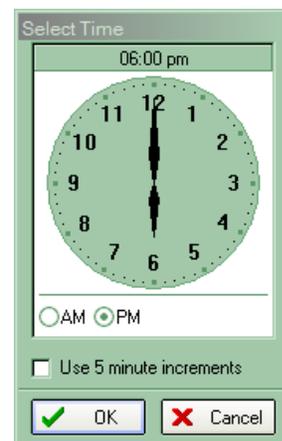
- Budget Hours - The actual hours you budgeted for the employee to work. This value may be equal to, greater or less than the scheduled hours. This value is handy for generating reports to compare budgeted values to actual values.

- Weekly Hours - The total hours scheduled for the employee to work for the week. This value is based on the actual hours scheduled and will post automatically when the record is posted.

- Weekly Budget - This value may be equal to, greater or less than the total weekly hours. This value is handy for generating reports to compare budgeted values to actual values.

- Pay Rate The rate of pay the employee is to receive for the building being scheduled. It will default to the pay rate set in the employee record. The pay rate can be modified to reflect a different rate of pay if applicable, such as a Fixed pay rate. When an employee works an unscheduled service the system takes the pay rate from the employee record, if scheduled, the pay rate in the weekly planner will override of the pay rate in the employee record. This allows for the flexibility of paying an employee a different pay rate per building.

- Payment Method - The method of payment to correspond with the Pay Rate (Hourly or Fixed). Hourly rates are to be paid by the hour and Fixed is a per shift rate regardless of the amount of hours worked.

VERY IMPORTANT: If the employee is scheduled in multiple buildings, pay rate changes must be made in both the Employee Record and the Weekly Planner and then rescheduled to reflect the new pay rate

- Notify if Late - When checked, indicates that the supervisor is to be notified if the employee clocks in later than the minutes specified in the Building Setup. The supervisor is notified with urgent voice mail; therefore, triggering a page and or text. (Also needs to be marked in the Building set up)

- Notify if Short - When checked, indicates that the supervisor is to be notified if the employee clocks out earlier than the minutes specified in the Building Setup.   The supervisor is notified with urgent voice mail; therefore, triggering a page and or text. (Also needs to be marked in the Building set up)

- Service - The service to be performed by the employee while in the building as selected from the Services setup.

Save -To save, or post, the record, click the checkmark (✓). If you have another schedule to add, click on the (+) and repeat the steps above.

NOTE: if you have an employee that works different times on different days you will need to create separate schedules of each. Example below:

2. **Schedule** – After creating your weekly planner you will need to schedule.

After entering your data or making any changes the schedule will appear in RED. This means that the data has not been scheduled. After scheduling the data will turn BLACK.

The weekly planner is the template so after the appropriate data fields have been filled in you will need to schedule the data entered as follows:

To schedule, click on the flashing red Schedule button on the tool bar and a schedule box will appear.

The date range will default to tomorrows date through the end of the month. Choose either "Selected Building" or "All Active Buildings" and click ☑ OK . To **reschedule** for the next month, select ANY building in your list and go to the weekly planner, click on the Schedule button and select your date range and "All Active Buildings", the system will create a new schedule for all of the buildings that you have weekly planners in based on their individual planners.

Scheduling is usually done at the beginning of each month for the entire month on all buildings. However, it can be used when a new building is established or at any time for any period. Although scheduling monthly is recommended, you can change the scheduled "Through Date" as far in advance as you like however it is not recommended because there is no reminder of when the schedule runs out.

ExpressTime uses a single record for every day an employee is scheduled to work in a given building. This provides for maximum integrity checking and reporting. The easiest way to create scheduled services is through the weekly planner. However, scheduled services can be inserted or edited on a record by record basis as well.

3. Monthly Auto Scheduler

Under the "Data Format Settings" you can select **yes** to use the monthly auto schedule feature.

ExpressTime will automatically reschedule your existing weekly planner(s) on or around the 25th of each month.

As suggested individual workstations should be shut down nightly (**Not the Server**), and when the first user logs into their computer the schedules will be updated.
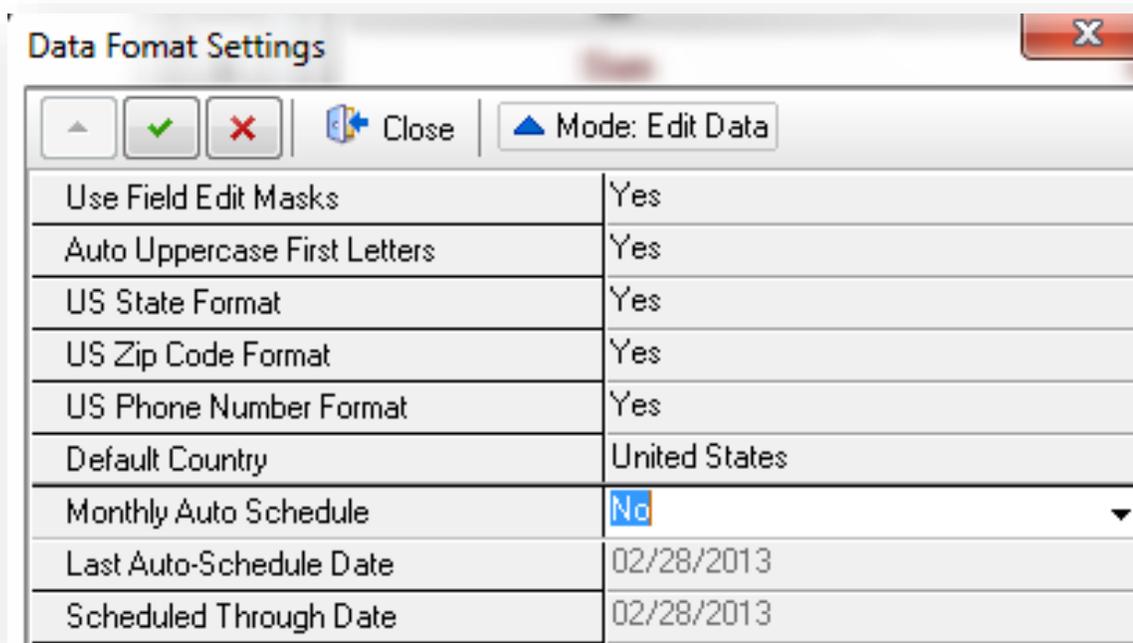
Data Fomat Settings	
Use Field Edit Masks	Yes
Auto Uppercase First Letters	Yes
US State Format	Yes
US Zip Code Format	Yes
US Phone Number Format	Yes
Default Country	United States
Monthly Auto Schedule	No
Last Auto-Schedule Date	02/28/2013
Scheduled Through Date	02/28/2013