SCHEDULERS/ MANAGERS - SCHEDULING

Objective	To review the functionality of the Schedule Planner in WFC.
Purpose	All employees will need to be assigned to a schedule. WFC is an exception reporting base application. It's imperative that an employee has a schedule in order for time to be assigned to a timecard. Non-Telestaff employees have been setup to be paid from the schedule – exception based. An employee's schedule should accurately reflect their work day.

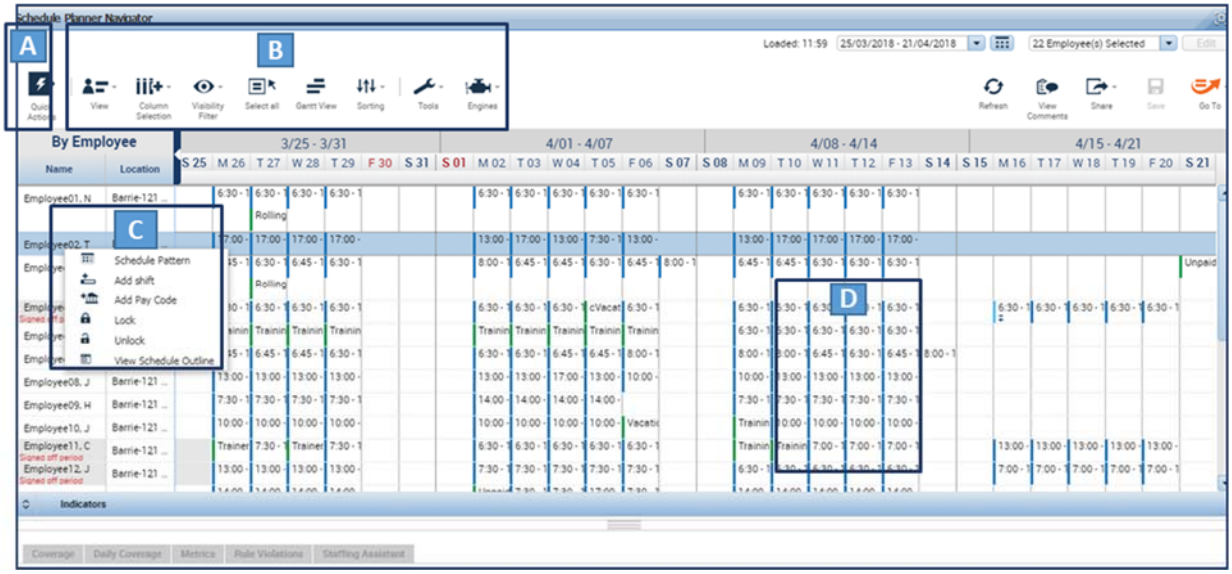
1

Log in to MyCloud Timecard

Manager landing page will default to be **Mgr Reconcile Timecard**. Access the Schedule Planner select employees and Go To **Schedule Planner.**

2

Display

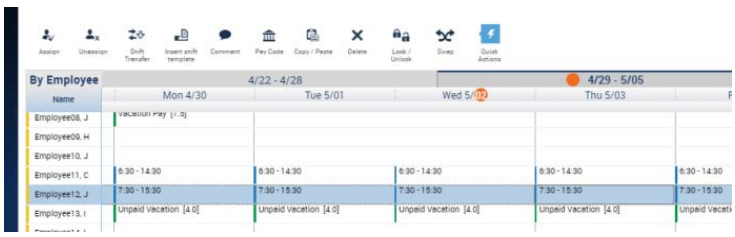


A	**Quick Action Menu** – allows you to make a change to a cell based on the existing shift.
B	**Tool Bar** to allow you to change the display on the Schedule Planner
C	Employee related schedule edit menu. Go here to add/delete/Modify the employee's **schedule pattern**
D	**Edit menu** to edit/delete/modify a shift

3

Quick Action

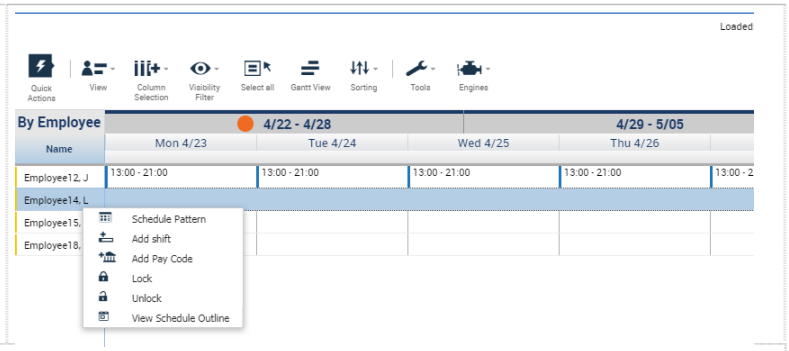
1. Click on **Quick Action** to open up the menu.
2. **Select** function
3. Input required data
4. Click on the various cells to update
5. After completing tasks, close Quick Action by clicking on the function selected.
6. **Save** after completing the tasks.



4 Schedule Pattern

1. Select the applicable time period and employees
2. Right-click the applicable employee name
3. Select Schedule Pattern.
4. Specify the Anchor Date (see below).

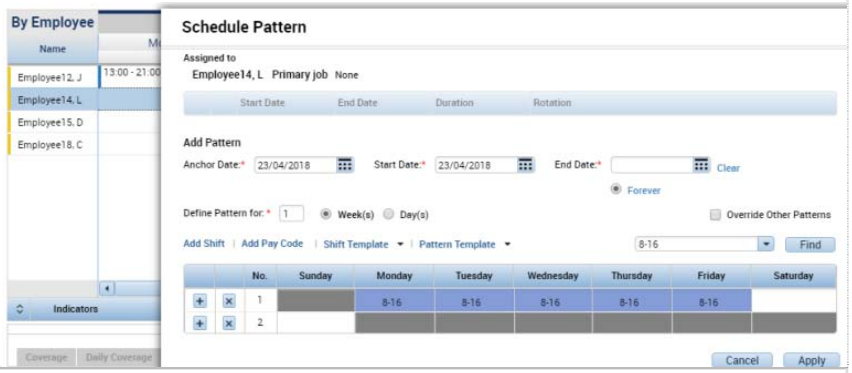
** The anchor date should be the first day of the schedule period, can be in past the last Sign-off date.*



5. In the **Start Date** field, enter the date the employee should start using this pattern.

** This is the date the employee starts using the pattern (must be in the selected period or later).*

6. In the **End Date** field, enter the date the pattern should end, or select **Forever** (preferred date) if there is no end date.

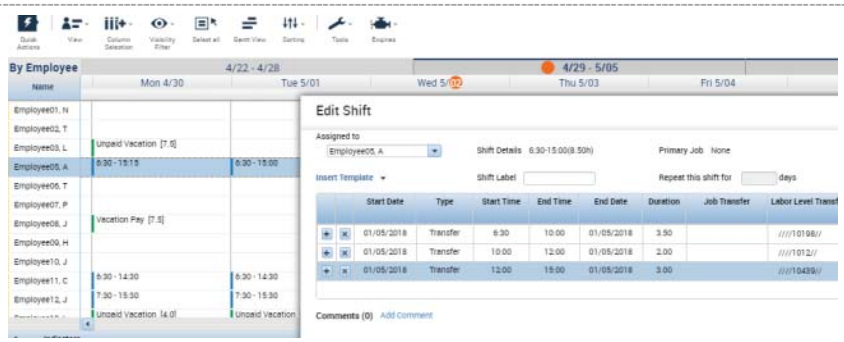


7. Manually define the schedule in the schedule grid by entering the start and stop time separated by a hyphen for each day, using the **Add Shift** option, or inserting a **Shift Template**.
8. Click **Apply**.
9. Click **OK**.
10. Click **Save**.
11. Click **Refresh** to update the Schedules widget view. The Refresh step may need to be repeated until **Applying pattern** no longer appears in the employee name field

5 Editing a Shift

Quick Actions (QA)	Click on the button to expand the QA Tool Bar.
Main Tool Bar	Used primarily for displaying the schedule planner.
Employee Options	Right click on employee selected
Schedule Cell	Click to update time of shift; Right click to display edit function

** Updating a cell does not impact the schedule pattern assigned.*

6 Shift Transfers

1. Right click the cell, select **Edit**
2. Change the **end time**, enter the transfer data
3. Add a line by clicking on the **start time** defaults from previous line end time, enter **end time**, enter **transfer data**
4. Continue entering lines to complete shift
5. Enter **Apply** and then **Save**