



Quick Reference Guide: Creating & Assigning Schedules

In TimeStar™, Schedules allow important features like rounding to schedules and system alerts such as Tardies and Absences to function.

There are three primary methods of scheduling employees. [Method One](#) is to create schedule groups and assign each employee to the appropriate group. This method is most commonly used when multiple employees work the same days and times each week. [Method Two](#) is to create an employee schedule for an individual employee. This method is used when employee schedules are unique to the individual, while maintaining a definable repeating pattern such as a weekly or bi-weekly rotation. [Method Three](#) is to manually maintain employee schedules on a daily or weekly basis. This method is used for employees whose schedules do not have a definable pattern.

Lastly, regardless of the method used to schedule your employees, TimeStar™ allows [Schedule Deviations](#) to be made on an individual or group basis to any employee schedule on any day in the past or future.

Method One: Schedule Groups

There are three steps that need be followed to create a new schedule and then assign that schedule to your employees.

1. **Create the Schedule Group.** Go to *Daily Procedures* → *Schedules* → *Schedule Group*. You will be prompted to enter the schedule group name and description. (The name and description may be the same). If you have multiple companies, select the company this schedule is to be assigned to, verify the status is set to active, and click on "Save".
2. **Create the Schedule Rule.** After the Schedule Group has been created, you need to assign the schedule rules to that group. On the *Daily Procedures* → *Schedules* → *Schedule Group* page select the schedule you just created from the "Select schedule group to administer" drop-down menu.
 1. To make a new rule, click on the "New Rule" button. Enter a name and description, verify the schedule type is "Work", and verify the schedule is active.
 2. The next section is where the rule is assigned an *Effective Date*. This is the date when the rule becomes active. A Stop Date may be entered if this schedule will expire on a specific day. After this date, the schedule will no longer be in effect and will not display in TimeStar™.



3. In the Schedule In/Out Times section, define the *In Time* and *Out Time*. Enter the appropriate start and end times, and if the hours of the shift fall on the same day, leave the "same day" drop down menu as it is. If the shift spans midnight, then the same day option should be changed to "next day". The *Unpaid Minutes* field is used to enable Scheduled vs. Actual Hours reports and Team Schedules to display accurate scheduled times. The *Total Shift Calculation* will display the time used for these areas. **NOTE** - This field does not affect lunch rules in any way and is purely used for display purposes.
4. In the Pay Information section, fill out shift and/or pay type that the schedule should assign. Please note these fields are optional.
5. The Schedule Reoccurrence section allows the selection of the day(s) of the week the schedule times apply. This section also allows the creation of rotating shifts (where one week's schedule differs from the next). TimeStar™ allows for schedules that do not repeat themselves for up to a year. Most schedules repeat themselves each week.
6. The *Work week starts on* drop-down menu directly should be set to the first day of your work week, and should match the setting in your Pay Group configuration.

Below are examples of Schedule Reoccurrence settings:

- Example 1:
Weekly Schedule: Monday-Friday 8am to 5pm, beginning 10/31/2013
 - Name the Rule: M-F 8am – 5pm.
 - Set effective date to 10/31/2013.
 - Set IN time to 8:00 am and OUT time to 5:00pm (set lunch duration accordingly).
 - Set the schedule to occur every 1 week, and check the boxes for Monday through Friday.
- Example 2:
Weekly Schedule: Monday 8am to 5pm, Tuesday-Friday 7am to 4pm, beginning 10/31/2013. In this case, two schedule rules are needed:
 - Name the first Rule: Monday 8am – 5pm.
 - Set effective date to 10/31/2013.
 - Set IN time to 8:00 am and OUT time to 5:00pm (set lunch duration accordingly).
 - Since this is a weekly schedule, set it to occur every 1 week, but only check the box for Monday.
 - Click 'New Rule' from Schedule Group page.
 - Name the second Rule: Tuesday-Friday 7am – 4pm.
 - Set effective date to 10/31/2013



- Set IN time to 7:00 am and OUT time to 4:00pm (set lunch duration accordingly).
 - Since this is a weekly schedule, set it to occur every 1 week, and check the boxes for Tuesday through Friday.
- Example 3:
Bi-Weekly Schedule: Week 1 – Monday-Friday 7am to 3:00, Week 2 – Monday-Thursday 7am – 5pm, beginning 10/31/2013. Once again, in this case, two schedule rules are needed:
 - Name the first Rule: Week 1 – M-F 7am to 3pm.
 - Set effective date to 10/31/2013.
 - Set IN time to 7:00 am and OUT time to 3:00pm (set lunch duration accordingly).
 - Since this is a bi-weekly schedule, set it to occur every 2 weeks, and check the boxes for Monday through Friday.
 - Click 'New Rule' from Schedule Group page.
 - Name the second Rule: Week 2 – M-F 7am to 5pm.
 - Since this is the second week of a bi-weekly schedule, set the effective date to 11/07/2013.
 - Set IN time to 7:00 am and OUT time to 4:00pm (set lunch duration accordingly).
 - Since this is a bi-weekly schedule, set it to occur every 2 weeks, and check the boxes for Monday through Friday.
7. The Organization Level section allows for scheduling of Org Level assignments. If this section is not changed (set to No), the Org Levels will default to the employees home org levels. However, by using this feature employees can be forced into different Org levels automatically when they work this schedule. **NOTE**- Forcing Org level changes in schedule overrides prevents the ability of an employee to change Org levels outside of that schedule. Therefore, Org Level changes at the clock or web punch screens will not be effective.

After all settings have been configured, click the "Save" button to save the schedule rule. Once you have created a rule, it will appear under the schedule group in **Daily Procedures → Schedules → Schedule Group**.

3. **Assign the Schedule to an Employee.** Once the schedule has been created, it is ready to be assigned to employees. This can be done on an employee-by-employee basis or to multiple employees at the same time via Global Update.
 1. To assign a schedule group to an individual employee, go to **Employee Maintenance → Employee Assignments → Groups**. In the Schedule Group tab of this page, select the Add New option. A drop-down list labeled Schedule Group will



display all active Schedule Groups. Choose the desired group, enter the date you would like the schedule to be effective in the Effective Date field, and click "Save".

NOTE- Entering a Stop Date is not necessary when making a change to an existing assignment. When a new schedule group is assigned, the previous assignment will automatically be given a stop date equal to the day before the new schedule group assignment will take effect so only one schedule is active.

2. To assign a group of employees to a schedule group, go to Global Update → Employee Update, and select "Schedule Group" from the 'Select a function' drop-down list.
3. Select the desired schedule group from the associated drop-down list and enter the desired effective date.
4. A list of all currently viewable employees will be displayed in the lower right 'Available' list. Choose the desired employees from this list, either one-at-a-time, or more in groups by holding down the CTRL key while selecting employees. When the desired employees have been chosen, click "Add" to move them to the left hand 'Assigned' list.
5. Click "Save" to save the assignments.

NOTE- To narrow down your list of employees, set your filters prior to entering the Global Update pages. Remember, filters will remain in effect in all TimeStar™ screens until changed, turned off, or the user has logged out.

Method Two: Employee Schedules

There are two steps to create an individual schedule for an employee:

1. **Choose the Employee.** Go to *Daily Procedures* → *Schedules* → *Employee Schedule*. Ensure that the employee drop-down menu at the top is showing the appropriate employee.
2. **Create the Schedule Rule.** Click on the "Add Rule" button. If this button is unavailable and you see the following message: "Employee is not assigned to a schedule group". Please [click here](#) to assign group;" click on the "click here" area and assign the employee to the "Open Schedule" schedule group. Then click the "Add Rule" button.
 1. To make a new rule, click the "Add Rule" button. Enter a name and description, verify the schedule type is "Work", and verify the schedule is active.
 2. The next section is where the rule is assigned an Effective Date. This is the date when the rule becomes active. A Stop Date may be entered if this schedule will expire on a specific day. After this date, the schedule will no longer be in effect and will not display in TimeStar™.



3. In the Schedule In/Out Times section, define the *In Time* and *Out Time*. Enter the appropriate start and end times, and if the hours of the shift fall on the same day, leave the "same day" drop-down menu as it is. If the shift spans midnight, then the same day option should be changed to "next day". The *Unpaid Minutes* field is used to enable Scheduled vs. Actual Hours reports and Team Schedules to display accurate scheduled times. The *Total Shift Calculation* will display the time used for these areas.

NOTE - This field does not affect lunch rules in any way and is purely used for display purposes.

4. In the Pay Information section, fill out shift and/or pay type that the schedule should assign. Please note these fields are optional.
5. The Schedule Reoccurrence section allows the selection of the day(s) of the week the schedule times apply. This section also allows the creation of rotating shifts (where one week's schedule differs from the next). TimeStar™ allows for schedules that do not repeat themselves for up to a year. Most schedules repeat themselves each week.
6. The 'Work week starts on' drop-down menu directly should be set to the first day of your work week, and should match the setting in your Pay Group configuration.

Below are examples of Schedule Reoccurrence settings:

- Example 1:
Weekly Schedule: Monday-Friday 8am to 5pm, beginning 10/31/2013
 - Name the Rule: M-F 8am – 5pm.
 - Set effective date to 10/31/2013.
 - Set IN time to 8:00 am and OUT time to 5:00pm (set lunch duration accordingly).
 - Set the schedule to occur every 1 week, and check the boxes for Monday through Friday.
- Example 2:
Weekly Schedule: Monday 8am to 5pm, Tuesday-Friday 7am to 4pm, beginning 10/31/2013. In this case, two schedule rules are needed:
 - Name the first Rule: Monday 8am – 5pm.
 - Set effective date to 10/31/2013.
 - Set IN time to 8:00 am and OUT time to 5:00pm (set lunch duration accordingly).
 - Since this is a weekly schedule, set it to occur every 1 week, but only check the box for Monday.
 - Click 'New Rule' from Schedule Group page.
 - Name the second Rule: Tuesday-Friday 7am – 4pm



- Set effective date to 10/31/2013
 - Set IN time to 7:00 am and OUT time to 4:00pm (set lunch duration accordingly).
 - Since this is a weekly schedule, set it to occur every 1 week, and check the boxes for Tuesday through Friday.
- Example 3:
Bi-Weekly Schedule: Week 1 – Monday-Friday 7am to 3:00, Week 2 – Monday-Thursday 7am – 5pm, beginning 10/31/2013. Once again, in this case, two schedule rules are needed:
 - Name the first Rule: Week 1 – M-F 7am to 3pm.
 - Set effective date to 10/31/2013.
 - Set IN time to 7:00 am and OUT time to 3:00pm (set lunch duration accordingly).
 - Since this is a bi-weekly schedule, set it to occur every 2 weeks, and check the boxes for Monday through Friday.
 - Click 'New Rule' from Schedule Group page.
 - Name the second Rule: Week 2 – M-F 7am to 5pm
 - Since this is the second week of a bi-weekly schedule, set the effective date to 11/07/2013.
 - Set IN time to 7:00 am and OUT time to 4:00pm (set lunch duration accordingly).
 - Since this is a bi-weekly schedule, set it to occur every 2 weeks, and check the boxes for Monday through Friday.

7. The Organization Level section allows for scheduling of Org Level assignments. If this section is not changed (set to No), the Org Levels will default to the employees home org levels. However by using this feature employees can be forced into different Org levels automatically when they work this schedule.

NOTE- Forcing Org level changes in schedule overrides prevents the ability of an employee to change Org levels outside of that schedule. Therefore, Org Level changes at the clock or web punch screens will not be effective.

After all settings have been configured, click the "Save" button to save the schedule rule. Once you have created a rule, it will appear under Employee Schedule on the Daily **Procedures** → **Schedules** → **Employee Schedule** page.

Method Three: Manual Schedules

There are two steps to manually maintain employee schedules:




1. **Assign Open Schedule Rule.** Employees for whom you plan to manually maintain schedules must be assigned to the Open Schedule Group. Go to **Daily Procedures → Schedules → Schedule Group** and select the schedule entitled "Open Schedule" from the "Select a schedule group" drop-down menu and enter the date in which you would like the schedule to be effective in the *Effective Date* field, and click "Save".
2. **Create Daily Schedules.** Schedules for manually maintained employees are viewed in the Team Schedule screen. Go to **Daily Procedures → Schedules → Team Schedule** and select the dates.




NOTE - The pay period can be changed by choosing the desired period from the drop-down menu at the top right of the screen. Click 'Launch Schedule'.


1. Type the appropriate start and stop times for any employee on any day of the week.
2. An entire day can be scheduled as a day off by clicking on the X at the bottom right of each day entry. Once a day has been scheduled off, the Daily Detail View section can be used to define that time paid with an Hours pay type. (See below for more details).
3. Optionally, the deviations created by typing a time (or adjusting an existing time) on this screen, can be further defined by clicking on the small pencil on the lower left corner. This brings up a Daily Detail View screen from that you can perform several changes:
 - The *Unpaid Minutes* field allows you to enter the number of minutes of this scheduled time that should be considered unpaid lunch time. This amount of time will then be deducted from the total hours on the Team Schedule page, and on Scheduled vs. Worked reports.

NOTE - This entry does NOT affect the lunch rules established in your company setup.

- The  icon seen above and below each schedule section can be clicked to add another shift for that day. This allows for easy scheduling of double or split shifts.

NOTE- When creating a multiple shift, keep the time in a logical progression.

- When adding time before a schedule, click the top , etc.
- The  icon will schedule that time as time off. This is useful when creating a half-day off, allowing the morning to be scheduled as off while keeping the afternoon as scheduled time. Additionally, by clicking the  icon users will be able to enter more information. This will allow time off to be assigned an Hours pay type if it is to be paid time (utilizing PTO or other pay types).

- The  icon will open the *Shift Detail* section. In this section you can give your deviation a name (for viewing purposes on the **Daily Procedures → Schedules → Employee Schedule** page), as well as assign a Pay Type if the hours are unworked, and define Org Level assignments if you want Org Level transfers to occur automatically.
 - The *Save* button will save your changes to the Team Schedule page. (But you still must save your Team Schedule page for any changes to be made effective. See below).
4. **IMPORTANT:** Once the Team Schedule is correct, remember to click on the *Save* button. Failing to do so will cause all changes made in the Team Schedule page to not be saved.

Schedule Deviations:

Schedule deviations can be created for single employees or groups of employees through several methods: Team Deviations, Employee Deviations or Group Deviations.

1. **Team Deviations.** This is the easiest and most used method of creating individual deviations. Utilizing the **Daily Procedures → Schedules → Team Schedule**, as outlined above, allows deviations to be created for large numbers of individual employees while viewing the schedules for an entire “team” of employees. Refer to the above section for details.
2. **Employee Deviations.** Individual Employee deviations can be assigned right from the **Daily Procedures → Schedules → Employee** Schedule menu by clicking on the “*Add Deviation*” button. This will bring up the Schedule Deviation screen for that employee. This screen allows you to create a deviation for any day in the past or future. There are several fields (some optional) that are available on this page:
 1. Name & Description. The name and description entered into these fields will display on the **Daily Procedures → Schedules → Employee Schedule** page.
 2. Deviation Type. There are six options in this drop-down menu.
 - *Additional Scheduled Time* will add the deviation time to the existing schedule for that day. Should the times overlap, both the existing schedule and the new schedule will both be effective, but the overlapping time will be truncated.
 - *Cancel Shift* will create a day off for the defined duration. Any schedule items that overlap the deviation will be cancelled.



- *Override All Schedule items* will overwrite both the schedule rules in place for the specified day, as well as any previously defined deviations.
- *Override Schedule Rules Only* will replace the schedule rules with this new deviation, but any previously defined deviations will remain in effect as well. Users must be aware of overlaps if a previously defined deviation exists. Overlapping deviations will be truncated to eliminate the overlapping time.
- *Override Shift* will apply a specific schedule to the date assigned and checks for overlapping shifts. Only overlapping time for the date entered will be removed.
- *Time Off / Vacation* will create a day off for the day defined. In addition, by using the Auto-Generate Hours section (detailed below), this time can generate an Hours record and be paid at the desired pay type.

NOTE - That Hours entered from within **any** schedule menu, are not compared against any Accrual Balances that the employee may have. Therefore, a prompt will not be given if the employee does not have enough time accrued for the hours paid.

3. Deviation Times & Duration. The fields in this section define the start and stop times, the date(s) on which the event occurs, and the number of minutes that should be considered as unpaid lunch.

NOTE- Deviations are not created for multiple days from this page. A deviation is a single work period. The only time the stop date would differ from the start date is when the employee is working an overnight shift in which he or she punches in on one day and out on another calendar day.

4. Organizational Levels. This area allows the scheduled time to be allocated to a particular Organizational Level. If you would like to specify the Org Level information for this scheduled time, select "Yes" from the drop-down menu next to "Specify Org Levels?" and define your Org Level assignments. As mentioned above, Org Level changes cannot be overwritten at the clock or from the web punch. The schedule takes precedence.
 5. Auto-Generate Other Hours Record. If this is a Time Off / Vacation deviation, the Hours record can be entered from this area by selecting "Yes" next to "Generate Hours Record?" and defining the number of hours to be paid, and the appropriate pay type and shift type.
 6. Assignment Scope. This is where the individual to whom this deviation will be applied is defined. If you came to this screen from the **Daily Procedures → Schedules → Employee** page, the proper employee will default in this area.
3. **Group Deviations**. Group Employee deviations are assigned from the **Daily Procedures → Schedules → Schedule Deviations** menu. This will bring up the Schedule Deviation. This screen allows you to create a deviation for any day in the past or future; for Groups



of employees or individual employees as well. There are several fields (some optional) that are available on this page.

1. Name & Description. The name entered into these fields will display on the **Daily Procedures → Schedules → Employee** page.
2. Deviation Type. There are six options in this drop-down menu.
 - *Additional Scheduled Time* will add the deviation time to the existing schedule for that day. Should the times overlap, both the existing schedule and the new schedule will both be effective, but the overlapping time will be truncated.
 - *Cancel Shift* will create a day off for the defined duration. Any schedule items that overlap the deviation will be cancelled.
 - *Override All Schedule items* will overwrite both the schedule rules in place for the specified day, as well as any previously defined deviations.
 - *Override Schedule Rules Only* will replace the schedule rules with this new deviation, but any previously defined deviations will remain in effect as well. Users must be aware of overlaps if a previously defined deviation exists. Overlapping deviations will be truncated to eliminate the overlapping time.
 - *Override Shift* will apply a specific schedule to the date assigned and checks for overlapping shifts. Only overlapping time for the date entered will be removed.
 - *Time Off / Vacation* will create a day off for the day defined. In addition, by using the Auto-Generate Hours section (detailed below), this time can generate an Hours record and be paid at the desired pay type.

NOTE - That Hours entered from within **any** schedule menu, are not compared against any Accrual Balances that the employee may have. Therefore, a prompt will not be given if the employee does not have enough time accrued for the hours paid.

3. Deviation Times & Duration. The fields in this section define the start and stop times, the date(s) on which the event occurs, and the number of minutes that should be considered as unpaid lunch.

NOTE- Deviations are not created for multiple days from this page. A deviation is a single work period. The only time the stop date would differ from the start date is when the employee is working an overnight shift in which he or she punches in on one day and out on another calendar day.

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5. Auto-Generate Other Hours Record. If this is a Time Off / Vacation deviation, the Hours record can be entered from this area by selecting "Yes" next to "Generate Hours Record?" and defining the number of hours to be paid, and the appropriate pay type and shift type.
6. Assignment Scope. This is where the individual(s), or groups to whom this deviation will be applied, are defined.
 - **All Employees** will assign the deviation to all employees in your current view. Any filters configured prior to entering this page will remain in effect.
 - **Selected Employees** will allow you to choose from a list of the employees in your current view, and assign the deviation to just those employees.
 - **Single Employee** will allow you to assign the deviation to a single employee from a drop down menu.
 - **Schedule Group** will allow you to assign the deviation to all employees currently assigned to a particular Schedule Group.

NOTE- That this will assign the deviation to ALL employees in that Schedule Group. Filters that may be in place will NOT be taken into account for assignment of this deviation.