

Basic Scheduling and Templates

Purpose: After completing this training, you will be able to set up basic schedules in Time & Labor and schedule templates for individuals.

If the client indicates that they will have schedules, confirm with them that they will be responsible for establishing their schedules and maintaining their schedules.

Confirmation:

Confirm with client if they will be adjusting employees' schedules on a day-to-day basis or if they want to set up mass templates which will repeat for weeks that employees will adhere to.

- If they say day-to-day, then we will want to show them the individual scheduler.
- If they say templates, then we will show them the schedule templates section as well as how to edit day-to-day if needed.

Configuring Individual Schedules

- Navigate to “Schedules” in Time and Labor

The screenshot shows the 'Schedules' page in the 'Time & Labor' system. The navigation bar includes 'Supervisor Dashboard', 'Employee Time', 'Time Off Calendar', 'Schedules' (highlighted), 'Reports', and 'Configuration'. The main content area is titled 'Schedules' and features a 'View Details By' dropdown set to 'Department'. There are buttons for 'Week View' and 'Today', and a date range selector for '07/27/2025 - 08/02/2025'. A search bar is present with the text 'Search by employee name, number, or badge'. Below the search bar, there are toggle switches for 'Show Availability' and 'Show Time Off', both of which are checked. An 'Active Filters' section shows 'Employee Status: Active'. The main table displays a grid of employee names and their scheduled hours for each day of the week. The employees listed are 'Open Shifts', 'Bleckert, Michael', 'Blanco, Ramon', and 'Blosser, Andrew', all with '0h' scheduled for each day.

Employee Name ^	Sun 07/27	Mon 07/28	Tue 07/29	Wed 07/30
Open Shifts 0h				
Bleckert, Michael 0h / 0h				
Blanco, Ramon 0h / 0h				
Blosser, Andrew				

- Navigate to the Employee Name that needs the schedule
- Click on the date you would like to schedule the employee for and then select “Add Shift”

Schedules

The screenshot shows the 'Schedules' interface. On the left, there are filters for 'View Details By' (Department), 'Show Availability' (checked), and 'Show Time Off' (checked). A search bar is present with the text 'Search by employee name, number, or badge'. Below the search bar, there are active filters: 'Employee Status: Active'. The main area is a calendar grid. The columns represent days from Sunday 07/27 to Wednesday 07/30. The rows represent employees: 'Open Shifts', 'Bieckert, Michael', and 'Blanco, Ramon'. A green box highlights the 'Add Shift' button on the Tuesday, 07/29 cell for Michael Bieckert. A 'Paste Shift' button is also visible below the 'Add Shift' button.

- Enter the start time of the shift and the end time of the shift and click “Add”. Once you click “Add” the shift will populate in a light blue color, this light blue indicates that the shift can be viewed by the manager/admin but not the employee yet.

The screenshot shows a dialog box titled 'Michael on Tuesday 07/29'. It has a close button (X) in the top right corner. The main content area is titled 'Recent Shifts' and contains a smiley face icon. Below the icon, there is a message: 'Seems like there are no recent shifts for you to view right now. No worries though - simply continue using the scheduler tool, and you'll see shifts here soon!'. Below the message, there are two input fields: 'Start Time' with the value '9:00 AM' and 'End Time' with the value '5:00 PM'. Below these fields is a 'Department' dropdown menu with the text '--Select--'. At the bottom of the dialog, there are two buttons: 'Cancel' and 'Add'.

Schedules

The screenshot shows the 'Schedules' interface. On the left, there are filters for 'View Details By' (Department), 'Show Availability' (checked), and 'Show Time Off' (checked). The main area displays a weekly calendar for the period 07/27/2025 - 08/02/2025. A search bar is at the top, and an active filter for 'Employee Status: Active' is shown. The calendar grid has columns for Sun 07/27, Mon 07/28, Tue 07/29, and Wed 07/30. Under the 'Open Shifts' section, a shift for Michael Bleckert is scheduled for Tuesday, July 29, from 9A-5P. The shift duration is listed as 7:50h / 7:50h.

- Once you have established the schedule and are ready to publish it to the employee simply click “publish” in the upper right-hand corner of your screen. When the shift is published it will appear in a dark blue color.

This image is a close-up of a published shift. It shows the date 'Tue 07/29' at the top. Below the date, there is a dark blue rectangular box representing the shift, labeled '9A-5P' with a minus sign below it.

- If you have made a mistake and want to edit the shift, simply click on the shift and then select “Shift actions” you will then have a drop-down menu where you can adjust the shift.

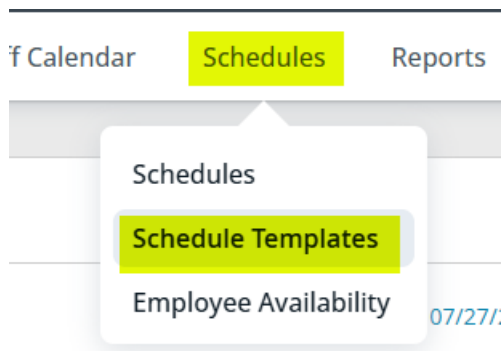
This image shows a pop-up window for a shift. The window title is 'Bleckert, Michael'. It displays the date 'Tue, Jul 29, 2025' and the shift time '9A - 5P (8h)'. A message states 'No Lunches & Breaks have been added.' At the bottom of the window, there are two buttons: 'Publish' (orange) and 'Shift Actions' (blue with a dropdown arrow). The 'Shift Actions' menu is open, showing options: 'Copy Shift', 'Paste Shift', 'Edit Shift', and 'Delete Shift'. The 'Copy Shift' option is highlighted.

- If the schedule for Michael on July 29 is the same schedule time needed for Samantha on July 30, you can click copy shift and then paste will be an option when you choose your shift actions for Samantha.

Configuring the schedule Template

The schedule Template is traditionally used to set up mass amounts of reoccurring schedules which you can then assign to mass groups of employees.

- Navigate to schedules and select “schedule template”



- To build a template simply click “Create Template”



- From here you will need to fill out a couple of critical pieces of information:
 - Name of the template.
 - Input the day you would like the template to start populating
 - Input the number of weeks you would like to populate immediately (this is how many weeks at a time you will see this schedule on the employee’s scheduler page)
 - Click on the day of the week you would like to schedule
 - Once you click add shift you will simply input the start and end time of the shift and then click apply.
 - Assign the shift to the correct individuals.

- Once you have established all the correct individuals and all your shifts are set up simply click the “Save” option in the upper right-hand corner

New Template

Schedules are generated for the employee on the periodic basis according to the Day and Number of Weeks. Any changes will not take effect until the next generated and will be amended to the end of the number of weeks specified. Ex. If you apply a change to a template with your schedule of Weeks set to '3' then your changes will go in to effect 3 weeks from the next Sunday.

Day Number of Weeks

Auto-fill shifts with the assigned employee's home cost center. This option can only be selected if the template shifts below h

Week	Sun	Mon	Tue	Wed	Thu	Fri
1 ...		8A-5P --				

+ Add Week

3 Employees Assigned to This Template

Manage **Assign**

Type to filter...

Available Employees

+ Add All

Selected Employees

<input checked="" type="checkbox"/>	Abdulkarim, Kadhim [333349]
<input type="checkbox"/>	Abdullahi, Noor [30561]
<input checked="" type="checkbox"/>	Adkins, Brad [30748]
<input checked="" type="checkbox"/>	Aguero, Rafael [30902]
<input type="checkbox"/>	Airinos, Renson [30343]

<input checked="" type="checkbox"/>	Abdulkarim, Kadhim [333349]
<input checked="" type="checkbox"/>	Aguero, Rafael [30902]
<input checked="" type="checkbox"/>	Adkins, Brad [30748]

You have now established your schedule template.

Peaks Related:

Article ID: PCTY-123844 **Scheduling Standard**

Article ID: PCTY-68600 **Assign an Employee to a Schedule Template in Time & Labor**

Article ID: PCTY-62388 **Edit a Schedule Template**

Article ID: PCTY-51627 **Configure a Schedule Template**

Article ID: PCTY-69955 **Manage Multiple Schedules in Time & Labor**

Article ID: PCTY-55273 **Manage Scheduler Configuration**

