



Insperity®

Schedules - User Guide

Reference Guide for Time & Attendance Users

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Introduction

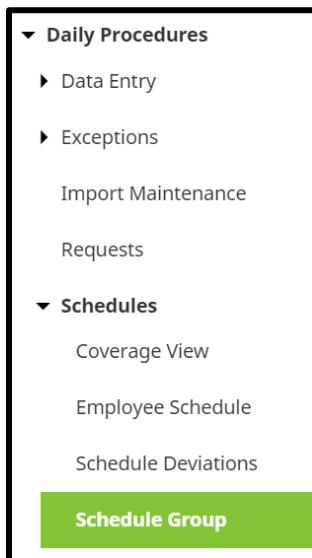
The pages set up in the schedules folder in Time and Attendance are used to set up, maintain, and review employee schedules. Schedules are not only used for planning purposes, but also must be used if a company wishes to track when an employee is absent, working on a non-scheduled day, and/or early and/or late at the start or end of the work day. Access to each page is dependent on company set up and individual security.

Schedule Group

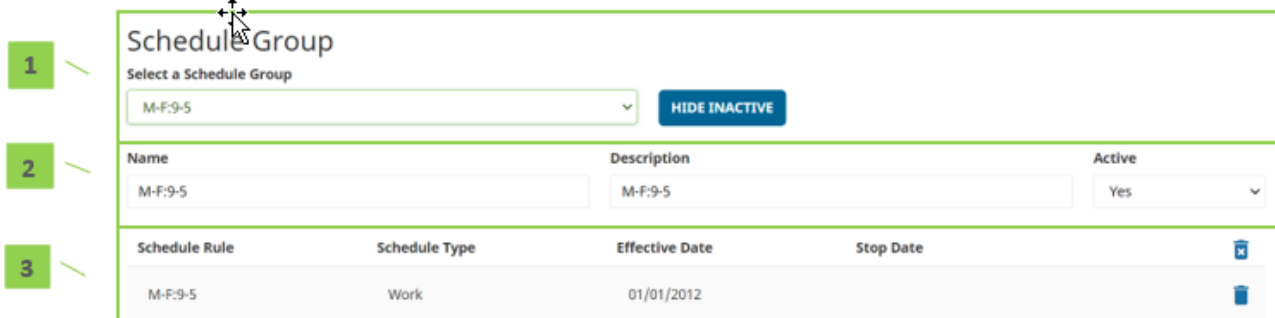
A Schedule Group is used for setting up recurring schedules. Schedule Groups must be created within this page using a set of rules, and then are attached to the employee in a separate area of the system.

Navigating to the Schedule Group Page

1. In the **Main Navigation** menu, open the **Daily Procedures** folder.
2. Open the **Schedules** subfolder.
3. Click on the **Schedule Group** page.



Reviewing the Schedule Group Page





1 Select a Schedule Group



M-F-9-5 **HIDE INACTIVE**

2

Name	Description	Active
M-F-9-5	M-F-9-5	Yes

3

Schedule Rule	Schedule Type	Effective Date	Stop Date	
M-F-9-5	Work	01/01/2012		 

1. Schedule Group Selection
 - a. **Select a Schedule Group** – Created Schedule Groups. Upon selection, schedule rules will be displayed for review/edit/deletion.
 - b. **Hide Inactive/Show Inactive** – Hides or displays schedules from the list that have been marked as inactive
2. Schedule Group Information – Includes the Schedule Group’s Name, Description, and Active indicator
 - a. When **Active** is set to “No”, the inactive groups will disappear from the available options when assigning Schedule Groups to employees
3. Schedule Group Rules – Lists the rules attached to the selected schedule
 - a. **Schedule Rule** – Name of the schedule rule
 - b. **Schedule Type** – Type of schedule attached to the rule
 - c. **Effective Date** – Date that the rule is effective
 - d. **Stop Date** – Date that the rule becomes inactive
 - e. *Unnamed Column*
 - i.  **Audit Log** – View details of the audit log associated with the rule
 - ii.  **Delete** – Delete the rule

Schedule Group Rule Definitions

Below is a list of the fields that will be seen within the Rule Detail pop-up window when editing or adding a rule.

1. **Name** – Name of the rule. Should be detailed enough to highlight what the rule will do (ex. “Mo – Fr 8a-5p”).
2. **Description** – Description of the rule. This field often is a repeat of the information contained in the **Name** field.
3. **Schedule Type** – Type of schedule
4. **Schedule Active** – Should be set to “Yes” unless marking the schedule inactive
5. **Effective Date** – Date that the schedule rule becomes active. When creating a rotating schedule, this field must contain the date that begins within the week that the schedule rule applies.
6. **Stop Date** – Date that the rule becomes inactive. Can be left blank if no end date exists.
7. **In/Out Times**
 - a. **In Time** – Time that the schedule begins on the days of the week within the rule
 - b. **Out Time** – Time that the schedule ends on the days of the week within the rule
 - c. *Unnamed drop down* – Determines if the schedule spans more than one day
8. **Unpaid Minutes** – Total time not worked during the work day (ex. lunch). This field assists with estimating worked hours but does not deduct from actual hours worked unless paying off of schedules.
9. **Lunch Start Time** – Lunch start time. This field is used within actual vs. worked hours reporting
10. **Total Shift Calculation** – Automatic calculation of hours per day
11. **Shift Type** – Shift to apply to the time when paying off of schedules
12. **Pay Type** – Pay type to apply to the time to when paying off of schedules
13. **Occurs Every** – Determines how often the schedule occurs/reoccurs
 - a. *Drop down* – After how many weeks the schedule occurs/reoccurs. For example, if the schedule occurs every other week, this drop down should be set to “2.”
 - b. *Checkboxes* – Day(s) of the week that this schedule occurs
14. **Work week starts on** – Start day of the work week
15. **Specify Org Levels** – Allows specific org levels to be assigned to the time when paying off of schedules. If “Yes”, additional Org Level Item drop downs will appear below for selection.

Creating a Schedule Group

To create a Schedule Group, follow the below steps:

1. Click the **Add** button, located at the bottom of the page.
2. Enter in a **Group Name** and a **Description** that describe what the schedule will do. For example, “Mo – Fr 8a-5p”. Keep the **Active** drop down set to “Yes”.

The information will save and the original Schedule Group page will reappear, with the newly created schedule selected.
3. Click the **New Rule** button, located at the bottom of the page

4. Create the rule(s) to attach to the Schedule Group. Each rule should be determined by the day of the week. For example, if on Monday through Friday hours are 8a-5p, but Saturday is 8a-12p, two rules must be created; one for Mo-Fr 8a-5p, and one for Sa 8a-12p. For definitions of each field, see the section titled "[Schedule Group Rule Definitions.](#)"
5. Click **Save**.
6. Repeat steps 3-5 as needed for any additional rules to complete the Schedule Group.

Once the Schedule Group is created, it will need to be assigned to the employee(s). Steps for this process are contained in the section titled "[Assigning a Schedule Group to an Employee.](#)"

Editing a Schedule Group Page

To edit a Schedule Group, follow the below steps:

1. Select the Schedule Group from the **Select a Schedule Group** drop down.
2. Click on the line of the rule that needs to be edited.
3. Edit the rule as needed. For definitions of each field, see the section titled "[Schedule Group Rule Definitions.](#)"
4. Click **Save**.

Deleting a Schedule Group

To delete a Schedule Group, follow the below steps:

1. Select the Schedule Group from the **Select a Schedule Group** drop down.
2. Click on the **Delete** button, located at the bottom of the page.
3. Click **OK**.

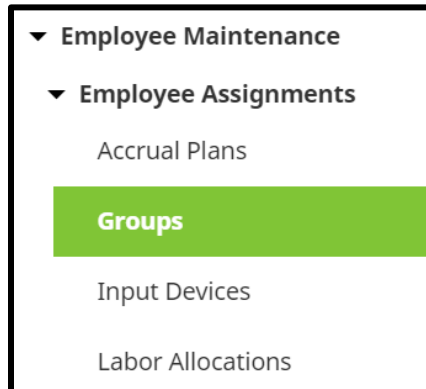
An individual Schedule Group Rule can be deleted, as well using the trash can button on the right of the rule line.

*A Schedule Group can also be inactivated so it is no longer available for selection when assigning to employees but remains available for future reactivation. To do so, set the **Active** drop down at the top of the Schedule Group page to "No".*

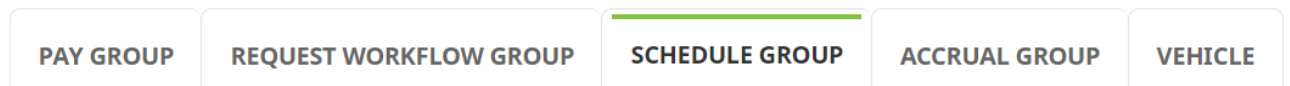
Assigning a Schedule Group to an Employee

Once Schedule Groups are created, they must be assigned to employees. To assign a Schedule Group to a single employee at a time, follow the below steps:

1. In the **Main Navigation** menu, open the **Employee Maintenance** folder.
2. Open the **Employee Assignments** subfolder.
3. Click on the **Groups** page.



4. Move to the **Schedule Group** tab located at the top of the **Groups** page.



The Schedule Groups page opens.

5. Click **Add New**.

The Add New section opens.

6. Select the Schedule Group to apply from the **Schedule Group** drop down.
7. Select the date that the Schedule Group will become effective in the **Effective Date** field.
8. Click **Save**.

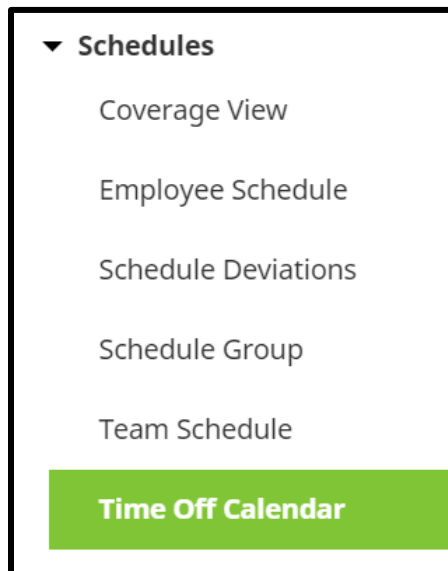
*If the Schedule Group becomes effective in a future pay period, the **Schedule Group** field will remain with a status of "Not Assigned," until the pay period is moved forward.*

Time Off Calendar

The Time Off Calendar displays any approved time off in a calendar view. Depending on company set up and individual security, a user may be able to see only their own time off, their employees' time off, or the entire company's time off.

Navigating to the Time Off Calendar Page

1. In the **Main Navigation** menu, open the **Daily Procedures** folder.
2. Open the **Schedules** subfolder.
3. Click on the **Time Off Calendar** page.



Reviewing and Using the Time Off Calendar Page

Time Off Calendar

Calendar

Time Off
▼

Month

December 2018
▼

SU	MO	TU	WE	TH	FR	SA
						01
02	03	04	05	06	07	08
09	10	11	12	13	14	15
16	17	18	19	20	21 Bob E. (Time Off 8h 0m)	22
23	24 VIJAYAMANI A. (Time Off 8h 0m) MABEL A. (Time Off 8h 0m) MICHEAL F A (Time	25 VIJAYAMANI A. (Holiday 8h 0m) MABEL A. (Holiday 8h 0m) MICHEAL F A	26 VIJAYAMANI A. (Time Off 8h 0m) MABEL A. (Time Off 8h 0m) MICHEAL F A (Time	27 VIJAYAMANI A. (Time Off 8h 0m) MABEL A. (Time Off 8h 0m) MICHEAL F A (Time	28 MABEL A. (Time Off 8h 0m) MICHEALE A. (Time Off 8h 0m) IF NIYA A (Time Off 8h	29
30	31 VIJAYAMANI A. (Time Off 8h 0m) MABEL A. (Time Off 8h 0m) MICHEAL F A (Time					

1. Page View – Selection of time off calendar and month
 - a. **Calendar** – Time off calendar if multiple exist
 - b. **Month** – Month to view in the calendar
2. Calendar of Time Off – Employee time off for the month selected
 - a. With proper security, a user may click on the record to see and/or edit the information of the time off record. For information on editing time off, see the user guide titled “[Hours.](#)”

Team Schedule

The Team Schedule displays the detailed daily schedule in a calendar view. Depending on company set up and individual security, a user may be able to see only their own schedule, their employees’ schedules, or the entire company’s schedules. Supervisors and System Administrators should use this page to make one-off schedule adjustments, as well as to create daily schedules when the schedule is determined from week to week.

Navigating to the Team Schedule Page

1. In the **Main Navigation** menu, open the **Daily Procedures** folder.
2. Open the **Schedules** subfolder.
3. Click on the **Team Schedule** page.

▼ **Schedules**

Coverage View

Employee Schedule

Schedule Deviations

Schedule Group

Team Schedule

Time Off Calendar

The Team Schedule landing page opens for calendar date selection.

4. Select the dates of the schedule to view from the pay period selected. Selecting multiple dates can be done in either of the two following ways:
 - Hold down left mouse button and drag the pointer across the dates. Release the button once all days are selected.
 - Use the **Select Week** link to select an entire week.
5. Click the **Launch Schedule** button, located at the bottom of the page.

LAUNCH SCHEDULE

The Team Schedule opens in a new browser tab or window, depending on browser settings.

Reviewing the Team Schedule Page

1




Employee	Sun 12/06	Mon 12/07	Tue 12/08	Wed 12/09	Thu 12/10	Fri 12/11	Sat 12/12	Totals
AAGESEN, VIJAYAMANI E	0h 0m	9:00 AM 5:00 PM	8h 0m 9:00 AM 5:00 PM	8h 0m 9:00 AM 5:00 PM	8h 0m 9:00 AM 5:00 PM	8h 0m 9:00 AM 5:00 PM	8h 0m	0h 0m 40h 0m
ALIWEWE, MABEL	0h 0m	0h 0m	0h 0m	0h 0m	0h 0m	0h 0m	0h 0m	0h 0m 0h 0m
ALVARO MONZON, MICHEALE A	0h 0m	0h 0m	0h 0m	0h 0m	0h 0m	0h 0m	0h 0m	0h 0m 0h 0m
ARMSTRONG, JR., ANTIJUAN J	0h 0m	9:00 AM 5:00 PM	8h 0m 9:00 AM 5:00 PM	8h 0m 9:00 AM 5:00 PM	8h 0m 9:00 AM 5:00 PM	8h 0m 9:00 AM 5:00 PM	8h 0m	0h 0m 40h 0m
TOTALS	0h 0m	16h 0m	16h 0m	16h 0m	16h 0m	16h 0m	16h 0m	0h 0m




1. Employee Schedules

- a. Rows contain employee names, while columns contain dates. The intersection of the row and column has the schedule for that employee and date.
- b. Schedule totals across employees for each day display at the bottom of the screen, while totals for each employee across many days display at the right of the screen.

Editing or Removing a Schedule from the Team Schedule Page

To make an adjustment to a schedule using the Team Schedule page, follow the steps below:

1. Find the intersection of the employee row and the date column to edit.
2. Schedules can be updated in the following ways:
 - a. Place time directly in to the boxes. If time already exists, highlight the hours and type over them or delete them out. The **Green** box is used for the IN time, while the **Red** box is used for the OUT time. When finished, click **Save**.
 - b. Click the **Pencil** icon  to launch the Detail View pop-up window. Fill out the fields as needed, using the **Down Arrow** button  to place in additional detailed schedule information, and the **Plus** button  to add in additional shifts to the same day. When finished, click **Save**. Field definitions are below:
 - i. **In** – Time that schedule begins

- ii. **Out** – Time that the schedule ends
 - iii. **Unpaid Minutes** – Total time not worked during the work day (ex. lunch). This field assists with estimating worked hours but does not deduct from actual hours worked unless paying off of schedules.
 - iv. **Lunch Start Time** – Lunch start time. This field is used within actual vs. worked hours reporting
 - v. **Name** – Name of the schedule adjustment. Should be detailed enough to highlight what the rule will do (ex. “Mo – Fr 8a-5p”).
 - vi. **Description** – Description of the schedule adjustment. This field often is a repeat of the information contained in the **Name** field
 - vii. **Shift Type** – Shift to apply the time to when paying off of schedules
 - viii. **Pay Type** – Pay type to apply the time to when paying off of schedules
 - ix. **Generate Hours Record** – Generates an hours record when the employee is going to receive pay but not punch.
 - x. **Org Level Item Drop Downs** – Allows specific org levels to be assigned to the time when paying off of schedules
- c. Use the **X** button  to cancel the shift. Click **Save**.
- d. Use the **Trash** button  contained within the **Pencil** icon  to delete the schedule entirely. Click **Save**.

Frequently Asked Questions

How do I set up a schedule?

To set up a schedule for an employee, a Schedule Group must be created and attached. For steps on creating a schedule, see the section titled “[Schedule Group](#).”

How do I edit a schedule?

A schedule can be edited in a few ways, depending on specific needs and access. Editing options are listed below.

- Changing the schedule attached to an employee – When an employee moves to a new schedule long term, their Schedule Group assignment should be changed. For steps on this process, see the section titled “[Assigning a Schedule Group to an Employee](#).”
- Editing the rules within a schedule – To edit the hours within a set schedule long term, a new Schedule Group should be created, or the rules within a current Schedule Group should be edited. A single Schedule Group may be attached to many employees, so editing the rules on the Schedule Group will

change the schedule for everyone it is attached to. For steps on creating or editing a Schedule Group, see the section titled “[Schedule Group](#).”

- Adjusting a single day of an assigned schedule – When a small, one-time adjustment must be made to an employee’s usual schedule (ex. A known late arrival to work because of a doctor’s appointment), it should be done using the **Team Schedule** page. For information on using the Team Schedule, see the section titled “[Team Schedule](#).”

Can I reduce the number of employees that display on my schedule?

A user that can see many employees on the Coverage View, Team Schedule, or Time Off Calendar page may use the filter located on the employee toolbar to reduce the display to a certain specified subset of employees. Alternatively, a filter may also be set using the **Filter** button on the Team Schedule page. For more information on using the filter, see the section titled “Setting an Employee Filter” located in the “[General Navigation](#)” User Guide.

Why doesn’t my employee appear in the list of schedules?

An employee must have a Schedule Group attached to appear in the list of employees with schedules. To attach a Schedule Group, review the section titled “[Assigning a Schedule Group to an Employee](#).”

Why is my employee’s schedule blank?

A Schedule Group without rules will be blank when attached to an employee. It is imperative to assign rule(s) to a Schedule Group for it to function correctly. For steps on creating a Schedule Group, including adding rules, see the section titled “[Creating a Schedule Group](#).”

How do I handle schedule set up for someone who does not have predictable, repeating work hours?

Employees who are not on a predictable schedule can have an “Open” schedule assigned to them. An Open schedule is created by making a Schedule Group with no rules attached. The fluctuating schedule is then filled in from week-to-week by a supervisor or System Administrator using the **Team Schedule** page.