



A more human resource.™

ADP Workforce Now

Essential Time & Attendance Supervisor Scheduling Basics

Handout Manual



Need support after training?

To exchange tips and best practices with fellow users, get on The Bridge—an online community built exclusively for ADP clients.

ADP Trademarks

The ADP® logo and ADP® are registered trademarks of ADP, LLC. ADP Workforce Now® is a registered trademark of ADP, LLC. ADP A more human resource.™ is a service mark of ADP, LLC.

Third-Party Trademarks

Global Crossing® and Ready-Access® are registered trademarks of Global Crossing Holdings, Ltd. in the United States and other countries.

Microsoft® is a registered trademark of Microsoft Corporation in the United States and/or other countries.

All other trademarks and service marks are the property of their respective owners.

Copyright © 2015–2016 ADP, LLC. ADP Proprietary and Confidential. All Rights Reserved. These materials may not be reproduced in any format without the express written permission of ADP, LLC. Any repurposing, reposting, or other use of this content (including but not limited to YouTube® or any other social media) is expressly prohibited.

ADP provides the publication “as is” without warranty of any kind, either express or implied, including, but not limited to, the implied warranties of merchantability or fitness for a particular purpose. ADP is not responsible for any technical inaccuracies or typographical errors which may be contained in this publication. Changes are periodically made to the information herein, and such changes will be incorporated in new editions of this publication. ADP may make improvements and/or changes in the product and/or the programs described in this publication at any time without notice.



Contents

Course Introduction

Navigating Live Meeting..... 1
 Course Purpose..... 2
 Course Agenda 2
 Materials Overview 2

Creating Schedules

Overview 3
 Types of Schedules..... 3
 Explore: The Schedules Page 4
 Creating Schedule Templates Job Aid..... 5

Managing Ongoing Schedule Assignments

Overview 6
 Assigning a Schedule Template to Multiple Employees Job Aid 6
 Ending an Employee's Schedule Assignment Job Aid 7
 Learning Activity: What Can You Get Done in 2 Minutes? 8

Editing Schedules

Overview 9
 Explore: The Shifts Tab..... 9
 Editing a Shift Using the Scheduling Grid Job Aid..... 10
 Editing a Shift Using the Shift Panel Job Aid 11
 Learning Activity: What Can You Get Done in 2 Minutes? 12
 Knowledge Check 13

Course Closing

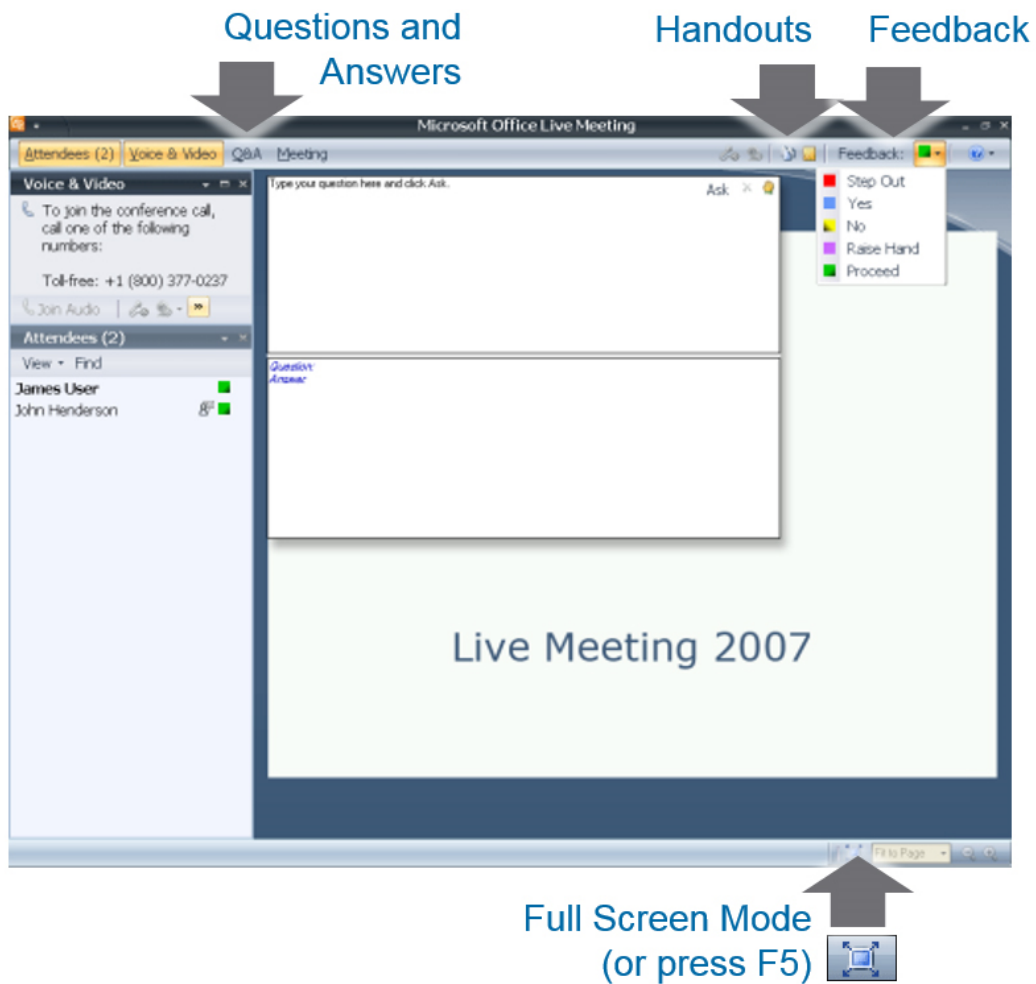
How to Access Support Job Aid..... 14
 Training Evaluation 16
 Essential Time & Attendance Supervisor Scheduling Basics
 for ADP Workforce Now (81003)..... 17

Appendix



■ Course Introduction

■ Navigating Live Meeting





■ **Course Purpose**

This course prepares you to use the scheduling feature of Time & Attendance to create, assign, and maintain schedules.

■ **Course Agenda**

- Creating Schedules
- Managing Ongoing Schedule Assignments
- Editing Schedules

■ **Materials Overview**

Use the job aids in this handout manual when you are back at your job.



■ Creating Schedules

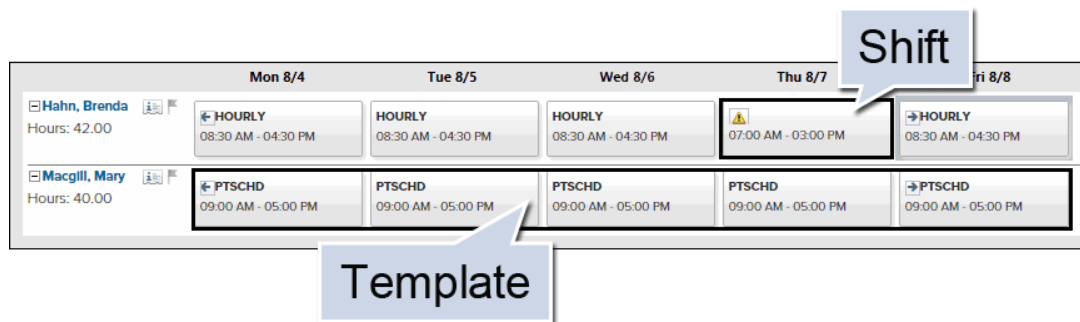
■ Overview

A schedule contains information about an employee’s typical workday. A schedule could include details such as start and end times, the time allocated for lunch, the department in which the employee works, and pay codes.

■ Types of Schedules

You can create and manage schedules in two ways:

- **Shifts:** Used to create, edit, or delete a schedule for one or more employees for specific days. Shifts can be used to override a schedule template or create schedules that are not repeatable.
- **Templates:** Used to create and assign a repeatable schedule to one or more employees for multiple days.



■ Example of a Schedule Shift

Brenda Hahn is assigned a shift of 8:30 a.m. to 4:30 p.m. She is scheduled to attend a training session from 7:00 a.m. to 3:00 p.m. on Thursday, so she will be assigned a shift change for that day only.

■ Example of a Schedule Template

Mary Macgill will work a new schedule from 9 a.m. to 5 p.m. from Monday through Friday, every week. A schedule template will be created and Mary will be assigned to that schedule.

■ Supervisor Responsibilities

All supervisors have access to assign templates and to modify shifts. A supervisor's ability to create, edit, and delete schedule templates is based on access permissions that are granted by your company.





Explore: The Schedules Page

Starting Point: My Team > Time & Attendance > Schedules

The screenshot shows the 'Schedules' page with the following elements highlighted:

- Filter Icon:** A funnel icon in the top left of the filter section.
- Action Icon:** A green arrow icon in the top right of the filter section.
- Scheduling Grid:** The main area displaying employee names and their assigned shifts across days (SUN 2/15 to SAT 2/21).
- Totals Row:** A row at the bottom of the grid showing total hours for each day and a grand total for all employees.

Elements and Descriptions

Element	Description
Shifts tab	Used to create, modify, or delete information such as start and end times or pay codes for individual or multiple shifts.
Templates tab	Used to create, modify, and assign recurring or repeatable schedules.
Scheduling grid	Displays the details of employee schedules within the selected time frame. You can complete many tasks directly in the grid.
Totals row	Displays total hours for the selected time frame and daily totals.
 (filter)	When clicked, used to refine the group of employees to be displayed, based on schedule criteria.
 (action)	When clicked, displays a menu of various shift details and column totals that you can choose to be displayed.
Legend link	Identifies visual indicators that may be displayed in the employee scheduling grid.



■ Creating Schedule Templates Job Aid

■ Scenario

Your company requires a new schedule for employees who work 6 a.m. to 2 p.m., Monday through Friday. You need to create a new schedule template.

Schedule Template Panel

■ Instructions

Starting Point: My Team > Time & Attendance > Schedules > Templates

Step	Action
1	In the schedule template field, click (action) and select Create New . Result: Schedule detail fields are displayed.
2	In the Code field, enter the name of the new schedule.
3	In the Description field, enter a description of the schedule.
4	In the Effective Date field, enter the date that you want the schedule to start.
5	In the Access field, select Private or Public . Caution: Selecting Private will restrict visibility to the schedule template creator.
6	In the Start Time and End Time fields, enter the start and end times of the shift.
7	Enter data in any of the optional fields such as Schedule Template Notes, Pay Code, Lunch Plan, and Department, as needed.
8	While pressing Ctrl, select the days of the week that should be included in the schedule.
9	Click Add Shifts . Result: The start and end times are populated in the selected days of the week.
10	Click Save . Result: The schedule template is saved. You can now assign it to employees.



■ Managing Ongoing Schedule Assignments

■ Overview

You can use the schedule templates that you set up to quickly assign employees to schedules, based on predictable, repeating patterns.



■ Assigning a Schedule Template to Multiple Employees Job Aid

■ Scenario

You need to assign two employees to the same schedule template.

■ Instructions

Starting Point: My Team > Time & Attendance > Schedules > Templates

Step	Action
1	To display a list of available schedule templates, in the Schedule Template field, double-click or click  (search).
2	Select the desired schedule template.
3	Select the start week, if applicable. Tip: If your schedule contains multiple, rotating weeks, you can designate the week in the schedule that you want to start the employees' assignment. If you have a weekly repeating schedule, you do not have to make a selection.
4	In the Start Date field, click  (calendar) and select a date.
5	In the Employee column, select the employees to assign to the schedule. Tip: To select nonsequential employees' cells, press Ctrl and select the employees.
6	Click Apply . Result: The schedule template is applied to the selected employees.



■ Ending an Employee's Schedule Assignment Job Aid

■ Overview

You may need to end an employee's schedule assignment. You can assign employees to more than one schedule, but their schedules cannot overlap. By ending a schedule assignment, you preserve the historical information related to that schedule.

■ Instructions

Starting Point: My Team > Time & Attendance > Schedules > Templates

Step	Action
1	In the scheduling grid, locate and select the employee whose schedule you need to end.
2	Click any day in the employee's schedule that contains his or her current schedule assignment. Result: The employee's schedule name and start date are displayed in the template panel.
3	In the template panel, in the End Date field, enter the date on which the assignment will end.
4	Click Update . Result: The assigned template is displayed through the ending date. A message indicates that the template assignment or assignments have been updated successfully.



■ Learning Activity: What Can You Get Done in 2 Minutes?

■ Scenario

Frank Cavallo was assigned to a part-time schedule (PTSCHED). Because Frank has accepted a full-time position, he is required to work the full-time hourly schedule. You must first end his part-time schedule template assignment.

■ Learning Byte Questions and Answers

Answer the following questions using what you learned from the learning byte.

1. When would you need to end an employee's schedule assignment?

2. You can choose to end or delete an employee's schedule assignment. What are the advantages of ending an assignment rather than deleting it?

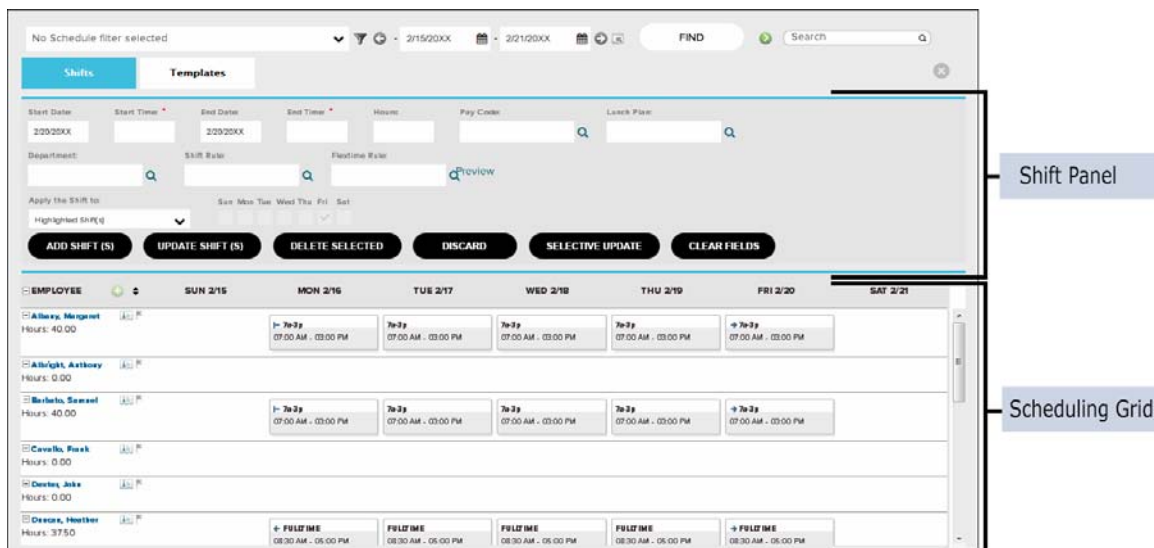


Editing Schedules

Overview

To edit schedules, you can use a variety of fields in the Shift Panel and make simple edits directly in the Scheduling Grid.

Explore: The Shifts Tab



Elements and Descriptions

Element	Description
Schedule filter field	Allows you to filter employees against schedule criteria such as start or end times or worked or nonworked hours.
Shift panel	A group of fields—such as start and end times, department, pay codes, lunch plans, and shift rules—to modify an existing schedule or to create a temporary shift for one or more employees.
(close)	Click to close the shift panel. To reopen the shift panel, click the Shifts tab.
Apply the Shift To field	Allows you to apply the shift details to selected shifts in the scheduling grid or to specific days of the week.
Add Shift(s)	Click to add new shifts in selected cells in the scheduling grid.
Update Shift(s)	Click to update or replace selected shifts in the scheduling grid.
Delete Selected	Click to delete selected shifts.
Discard	Enabled when an action generates an error and allows user to discard that action.
Selective Update	Click to change selected information for multiple shifts at one time.
Clear Fields	Click to clear data from the fields in the shift panel.




■ Editing a Shift Using the Schedule Grid Job Aid

■ Scenario

Brenda Hahn has to attend safety training classes two days this week. Change her schedule for Wednesday and Thursday to 7 a.m. to 3 p.m.

■ Instructions

Starting Point: My Team > Time & Attendance > Schedules > Shifts

Step	Action
1	Locate the employee in the scheduling grid and locate the shift to be modified.
2	Double-click the cell. Result: The start time and end time are displayed in two editable cells.
3	Highlight the start time and enter the new time. Repeat to edit the end time. Tip: It is not necessary to enter a colon or zeros. Result: The new start and end times are displayed. An indicator denotes that this is an override.
4	To add a note to the override, select the cell, right-click, and select Add Note .
5	Enter the contents of the note.
6	Click Save . Result: A  (note) indicator appears in the edited shift cell. You can point to it to display the contents. Clicking the employee name will display all schedule notes for the employee.

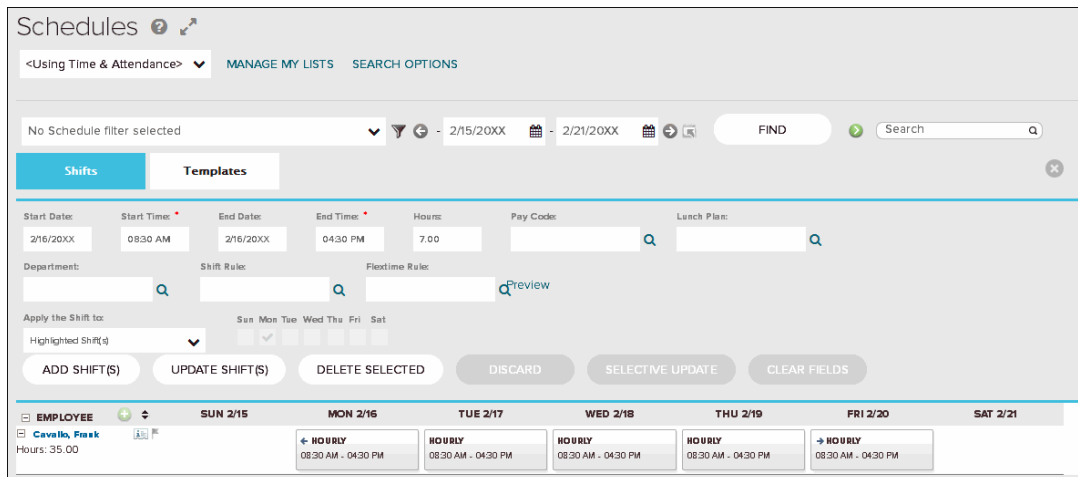


■ Editing a Shift Using the Shift Panel Job Aid

■ Overview

You must complete some changes to schedules, such as labor charges or pay codes, in the shift panel.

Shift Panel



■ Scenario

An employee is required to work in another department for one day this week. You need to override the employee’s existing schedule to include the department assignment for that day.

■ Instructions

Starting Point: My Team > Time & Attendance > Schedules > Shifts

Step	Action
1	Locate the employee in the scheduling grid and select the cells to be modified.
2	Scroll up to the shift panel and enter the appropriate start and end times.
3	Click the Department field and select the department to which you want to assign the hours. Tip: You can modify other schedule feature fields such as Pay Code or Lunch Plan in the same way.
4	Click Update Shift(s) . Result: A "Shifts added successfully" message is displayed.



■ Learning Activity: What Can You Get Done in 2 Minutes?

■ Scenario

The Sales department has requested that Frank Cavallo assist them with a special project on Wednesday and Thursday. We need to edit Frank's usual assigned schedule.

■ Learning Byte Questions and Answers

Answer the following questions using what you learned from the learning byte.

1. How did Frank's changes differ from the schedule changes for Brenda Hahn?
2. You can always use the shift panel to make changes to an assigned schedule. When would you be *required* to make those changes using the shift panel?



■ Knowledge Check

1. Your employee is assigned to the 9 a.m. to 5 p.m. schedule. She asked to work the 7 a.m. to 3 p.m. shift on Thursday. To change this employee's schedule, you access the Schedules page and then do the following:
 - a. Select Shifts and edit the scheduled shift.
 - b. Select Shifts and delete the schedule template for that day.
 - c. Select Templates and edit the scheduled shift.
 - d. Select Templates and edit the schedule template.

2. You created a new schedule template for the night shift that you want to share with other supervisors in your group. Another supervisor cannot find the template that you created. What might you have forgotten to do?
 - a. Set the access to Private.
 - b. Enter an effective date earlier than today.
 - c. Set the access to Public.
 - d. Enter an effective date later than today.
 - e. Enter a description for the template.





■ Course Closing

■ How to Access Support Job Aid

ADP provides various resources to help you perform your tasks after class.

■ Instructions


Step	Action
1	At the top of any page, click  (support).
2	In the Search field, enter a topic and then click  (search). Result: The available online Help and training are displayed.
3	To read online Help, click the Documentation tab and select a topic.
4	To close the Support page, click Back .



■ Additional Resources

Your appendix contains job aids to help you remember how to perform additional tasks.

■ Roles and Additional Training

ADP provides the following resources to support you and the employees in your organization. You can access the Support page by clicking  (support) and clicking the Learning tab.

Role	Training	How to Access
Supervisor	<ul style="list-style-type: none"> • <i>Essential Time & Attendance Supervisor Timecard Basics</i> virtual class • <i>Essential Time & Attendance Supervisor Timecard Basics</i> practice activity 	You will receive an email message after this session with the registration instructions.
	<ul style="list-style-type: none"> • Essential Time & Attendance learning bytes for supervisors • Time Off learning bytes for managers and supervisors 	<ul style="list-style-type: none"> • Access the Support page in ADP Workforce Now. • You will also receive an email message after this session with the links to access the learning bytes.
Employee	<ul style="list-style-type: none"> • <i>Essential Time & Attendance Employee Basics for ADP Workforce Now</i> job aids • Essential Time & Attendance learning bytes for employees • Time Off learning bytes for employees 	Access the Support page in ADP Workforce Now.



■ Training Evaluation

Please take a moment to complete the evaluation.

Essential Time & Attendance Supervisor Scheduling Basics for ADP Workforce Now (81003)

Program Content

Essential Time & Attendance supervisor only: This course prepares participants to use the scheduling feature of Time & Attendance. Topics include creating and editing schedules, and managing schedule assignments.

Objectives

Upon completing this course, participants will be prepared to do the following:

- Create schedules.
- Manage ongoing schedule assignments.
- Edit schedules.

Audience

This course is intended for those who have supervisory responsibilities and need to perform time and attendance tasks.

Prerequisites

Before beginning this course, participants should have a working knowledge of personal computers, Microsoft® Windows®, and Internet navigation.

Advance Preparation

None

Participant Materials

Participants need to print the *Essential Time & Attendance Supervisor Scheduling Basics for ADP Workforce Now* handout manual prior to attending class.

Method of Presentation

Virtual class (VC)

Duration

45 minutes

Recommended Field of Study (NASBA)

Specialized Knowledge and Applications

Cost and Training Policy

Not applicable

V04111681003WFN10

Copyright © 2011–2016 ADP, LLC

Appendix

Contents

Essential Time & Attendance Supervisor Scheduling Basics for ADP Workforce Now	
Filtering and Sorting Schedules.....	1
Creating a Schedule Filter Job Aid.....	2



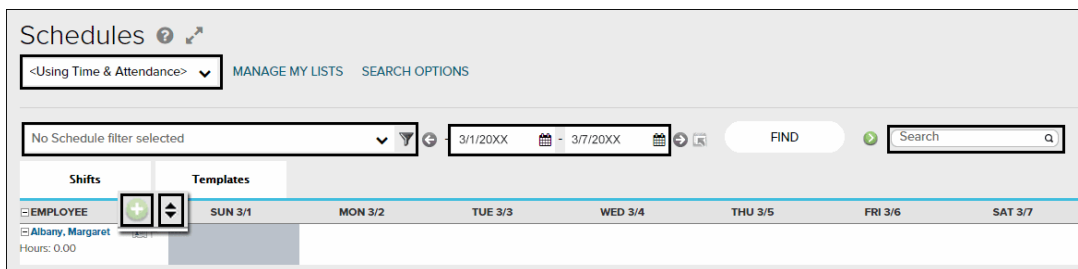
Essential Time & Attendance Supervisor Scheduling Basics for ADP Workforce Now

Filtering and Sorting Schedules

Overview

You can filter employees on a schedule to reduce the number of employee records that are displayed. You can sort the employee records to help streamline your scheduling tasks.

Explore: Filtering and Sorting Features



Elements and Descriptions

Element	Description
Employee list field	Use to select a predefined filter, such as Using Time & Attendance. You can also create your own employee list.
Schedule filter field	Use to filter employees against schedule elements such as start or end times, worked or nonworked hours, and so on.
Date range fields	Use to filter employee schedules by date range. The default view is the current week. Click the Previous or Next button to view the previous or next date range. Click (calendar) to select a range of dates.
Search field	Use to enter the first few letters of the employee's first or last name to quickly select the employee from the results that are displayed as you type.
(add)	Use to add employees to the scheduling grid who otherwise did not meet your list or to filter criteria.
(sort)	Click to display a menu of options to sort employees in the grid.






■ Creating a Schedule Filter Job Aid

■ Overview

You can limit the amount of records that will be displayed in the scheduling grid by creating a schedule filter, based on elements of the schedule, such as start and end times, lunch plans, pay codes, and so on.

■ Instructions

Starting Point: My Team > Time & Attendance > Schedules

Step	Action
1	Click  (filter). Result: The Manage My Lists window opens.
2	Click  (add).
3	Enter a filter name.
4	Click Create Criteria Set , click  (options), and select Create Schedule Criteria . Result: Additional fields are displayed.
5	In the Field Name field, select the field on which you want to filter.
6	In the Comparison field, select a comparison value.
7	In the Field field, select or enter a value. Example: Scheduled start time is greater than or equal to 8am.
8	Click Add Criteria to the Set , if applicable.
9	Select Done .
10	Click Return . Result: The schedule filter is available for use.