

## WhenToWork.com Employee Scheduling Help

### **Before you begin Scheduling - - - - -** **3 Step Overview of Setting up Automatic Scheduling**

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#### **STEP 1 - Review your Positions (Jobs) and Employees**

Verify that you have added the **Position** (Job) names that you want to use. From any Schedule View in the upper right of the screen click the Positions dropdown menu choose **Add-Edit Positions**. [More >](#)

Verify that you have added your **Employees** and that each employee is set as to which Positions they can work. From any page click **EMPLOYEES** in the top menu. [More >](#)

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#### **STEP 2 - Your First Schedule**

You are now ready to create your initial schedule. The easiest way to put in your first schedule is to enter one of your already prepared schedules. Once the first schedule is entered you can copy it into future weeks by using **Import** (clearing the work assignments) and then **AutoFill** to get the best assignments for the new week. [More about entering your first Schedule >](#)

After entering your first schedule your work is done...all that is left to do is [Publish](#) so that your employees can view it online.

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#### **STEP 3 - Future Weeks - Automatic Scheduling**

**In future weeks use Import** to bring in the previous week's schedule, (clearing the work assignments) and make any [necessary changes to the shifts](#). Use AutoFill to automatically assign the shifts to the best workers for that particular week. AutoFill will use granted time off and any employee work-time preferences along with each employee's maximum hours/shift per day/week to create the best schedule possible. [More about AutoFill >](#)

Publish the schedule to make it viewable by employees when they sign in. When you Publish - Employees also receive their schedules if their e-mail is entered. [More >](#)

Quickly send sign-in instructions to all employees who have not yet signed in from the EMPLOYEES page. [More >](#)

#### **Related Topics:**

- [Multiple locations or departments?](#)
- [Add your Positions \(Jobs\)](#)
- [Update/Add Your Employees](#)

## Special Scheduling Situations - - - - -

### Multiple Locations or Departments?

- **IF ANY EMPLOYEE WORKS AT MORE THAN ONE LOCATION OR DEPARTMENT** your locations should all be included in one WhenToWork account. This way employees will never be double-booked across locations.

Locations or departments are added to an account by making [location-specific Position names](#) and then you can [Group the Positions](#) for quick viewing of each location.

Ex. Create Position names like: Cashier - Dept 1, Cashier - Dept 2, or Dept 1 Sales, Dept 2 Sales

You then have the flexibility of [viewing any combination of these Positions](#) (all workers at one store or all Cashiers across all locations etc.) Optional - You also can set each employee's [Position Preferences](#) to indicate what Locations they prefer to work or [allow employees to choose their preferred positions](#).

**Note: When locations are included in one account they must be Published at the same time.** Publishing affects all positions and locations. To Publish locations separately use separate WhenToWork accounts (see below). Also if you put all locations in one account we currently do not have a way to restrict managers to only edit or view their own positions or location.

We do not normally recommend having more that 200 employees in one account as it may make some of the displays hard to read. Please contact us for more information if you plan to have more than 200 employees in one account.

- **IF NO EMPLOYEE WORKS AT MORE THAN ONE LOCATION OR DEPARTMENT and the department/locations are handled separately** you can create different WhenToWork accounts (linked only for billing purposes so you only pay for your combined total of employees across accounts). This allows you to create and publish totally separate schedules at different times.

[Click here for instructions on how to link accounts.](#)

You also may request an "Administrative Account" so that you can view and run reports across multiple accounts. There is no extra charge for this added service.

#### Related Topics:

- [Linking Accounts for Billing](#)
- [Total Number of Employees](#)
- [Finding your Account Number](#)
- [Location Specific Positions](#)
- [Creating & Editing "Position Groups"](#)
- [How Position Groups can be Used](#)
- [Filtering the Schedule View/Printout](#)
- [Rating Employees for Positions/Locations](#)

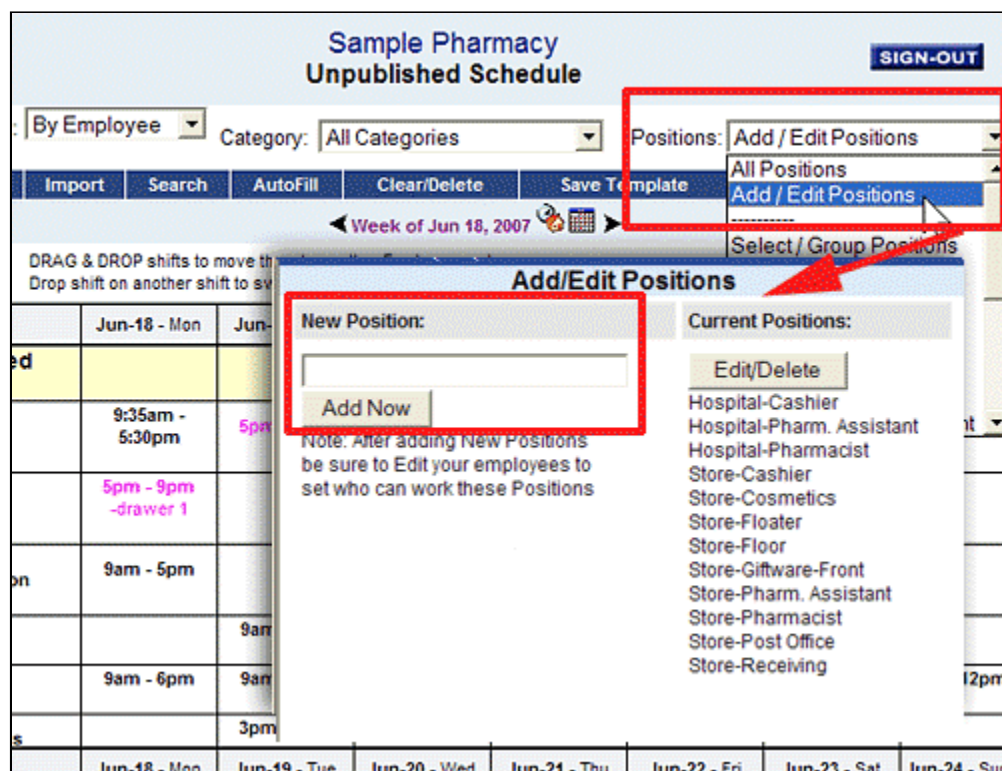
## Add your Positions (Jobs)

When setting up your account initially you entered some Position names and set some employees to be able to work them. You can always enter new Positions and edit any Position names you have already added. Once new Positions are entered you need to [set each Employee as to which Positions they can work](#).

### To Add a New Position

From any Schedule View:

- In the **Positions** dropdown menu choose **Add / Edit Positions** to open the Add/Edit Positions window
- Type a new Position name and click **Add Now** (the new name will appear in list on the right)
- Continue adding position names until you are done - then close window



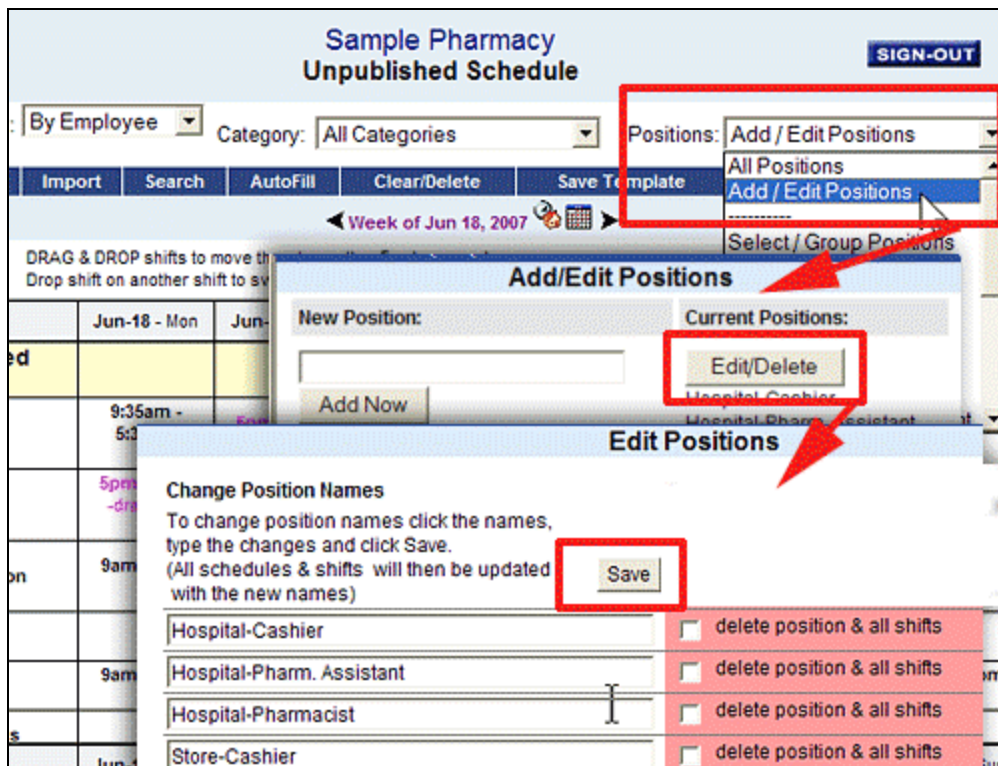
The screenshot shows the 'Sample Pharmacy Unpublished Schedule' interface. At the top, there is a 'SIGN-OUT' button and a 'Positions' dropdown menu. The 'Positions' dropdown menu is open, showing options: 'Add / Edit Positions', 'All Positions', 'Add / Edit Positions', and 'Select / Group Positions'. The 'Add / Edit Positions' option is highlighted. Below the dropdown menu, there is a table with columns for days of the week (Jun-18 - Mon, Jun-19 - Tue, Jun-20 - Wed, Jun-21 - Thu, Jun-22 - Fri, Jun-23 - Sat, Jun-24 - Sun) and rows for different shifts (9:35am - 5:30pm, 5pm - 9pm - drawer 1, 9am - 5pm, 9am - 6pm, 3pm). The 'Add/Edit Positions' window is open, showing a 'New Position' input field with an 'Add Now' button. Below the input field, there is a note: 'Note: After adding New Positions be sure to Edit your employees to set who can work these Positions'. To the right of the 'New Position' input field, there is a list of 'Current Positions' including Hospital-Cashier, Hospital-Pharm. Assistant, Hospital-Pharmacist, Store-Cashier, Store-Cosmetics, Store-Floater, Store-Floor, Store-Giftware-Front, Store-Pharm. Assistant, Store-Pharmacist, Store-Post Office, and Store-Receiving. There is an 'Edit/Delete' button above the list.

NOTE: Be sure to [edit your employees](#) and check off these new positions that each employee can work.

### To Edit a Position Name (Job) (to change the way it displays on all schedules)

From any Schedule View:

- In the **Positions** dropdown menu choose **Add / Edit Positions** to open the Add/Edit Positions window
- Click the **Edit/Delete** button on the right to open the Edit Positions window
- Click on the position name and make any changes
- Click the **Save** Button and then okay



- On all schedules that position name will be updated

**To Delete a Position Name** - (not normally recommended as all shifts associated with that position will be removed from past, current and future schedules)

From any Schedule View:

- In the **Positions** dropdown menu choose **Add / Edit Positions** to open the Add/Edit Positions window
- Click the **Edit/Delete** button on the right
- Check off the position(s) you want to completely remove
- Click the **Save** button and when warned click okay

**Related Topics:**

- [What is a position?](#)
- [Setting Each Employee's Positions](#)
- [Deleting Positions](#)
- [Location Specific Positions](#)
- [How Position Groups can be Used](#)
- [Rating Employee Position "Skills" or Location Preferences](#)
- [Creating & Editing "Position Groups"](#)
- [Editing Employee Details](#)

## Update/Add Your Employees

Add your employees and be sure each one is set as to which Positions they can work. (You can add other Employee details now or at any later time.) All that is required to add an employee is a first name and the Positions they can work.

### To ADD Employees

From any page:

- In the top menu click **EMPLOYEES** to go to the Employee List page
- Click **Add New Employee** to open the Add Employee window

- Fill out the Employee's information (The only required information is a name and what Positions that employee can work.) Note: Adding employee E-mail addresses will mean they receive automatic message (and published schedule) forwarding
- Click **Add this Employee**
- The window will remain up for you to enter another new employee
- Click **Close Window** when you are finished adding employees

### To EDIT an Employee's information

From any page:

- In the top menu click **EMPLOYEES** to open the Employee List page
- Click the **pencil icon** next to the employee name to open the Edit Employee window

Dec 19, 2006 06:13pm Sample Pharmacy **SIGN-OUT**

**Employees**

1 pending time off request [E-Mail Sign-In Instructions](#) Display: All Positions

**Add New Employee** **Add/Edit Positions** **Tradeboard** **Print** **Export**

Select Columns to View Total Employees: 35

Send Message	Edit	Name <small>(click to view info)</small>	Phone	E-Mail*	Employee No.	Max Weekly Hours	Max Daily Days	Max Daily Hours	Max Daily Shifts	Pay Rate
		John Aaron	555-2239	sample@when2work.com	12300	50	7	14	1	8.00
		Aaron Abson		sample@when2work.com	12301	30	7	14	1	7.75
		Dean Almanson	555-2875	sample@when2work.com	12302	50	7	14	2	11.00
		Ron Arno	555-2967	sample@when2work.com	12303	40	7	14	1	11.75
		Amy Cabille	555-9284		12304	40	7	14	1	7.75

- Add/Change any details for the Employee
- Click **Save** (or **Save & Next** to go to the next Employee)

If you [allow your employees to sign in](#) they can add/change many of their own details such as:

- Phone Numbers
- E-Mail & Text Message Addresses and Notifications
- Whether other employees can see their email or phone numbers
- Address
- Work Time Preferences (if you allow employees to set them)
- Cannot Work times (if you allow employees to set them)
- Positions Preferences (if you allow employees to set them)

**Related Topics:**

- [Editing Employee Details](#)
- [Should I Let Employees Sign In?](#)
- [Each Employee has a sign-in ID](#)
- [Sending Employees Sign In Instructions](#)
- [Optional Tradeboard](#)
- [Enter E-Mails for Automatic Forwarding](#)
- [Controlling what Employees View/Do](#)