

Auto-Schedule Employees

Quick Start Guide

Document Details

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Overview

This document outlines how to use Auto-Schedule in Teamworx to automatically create and assign shifts based on specified priorities for positions and employees.



Download the latest version of this document here:

<https://links.crunchtime.com/TWQS-AutoScheduleEmployees>

... or scan the QR code to the left.

Related User Group Permissions

Screen Name	Control Name	Description
Labor Schedule	Access Teamworx Auto-Scheduler	Allows Net-Chef users to use the Auto-Schedule function in the Teamworx Labor Schedule screen.

Auto-Schedule Employees

Before Getting Started...

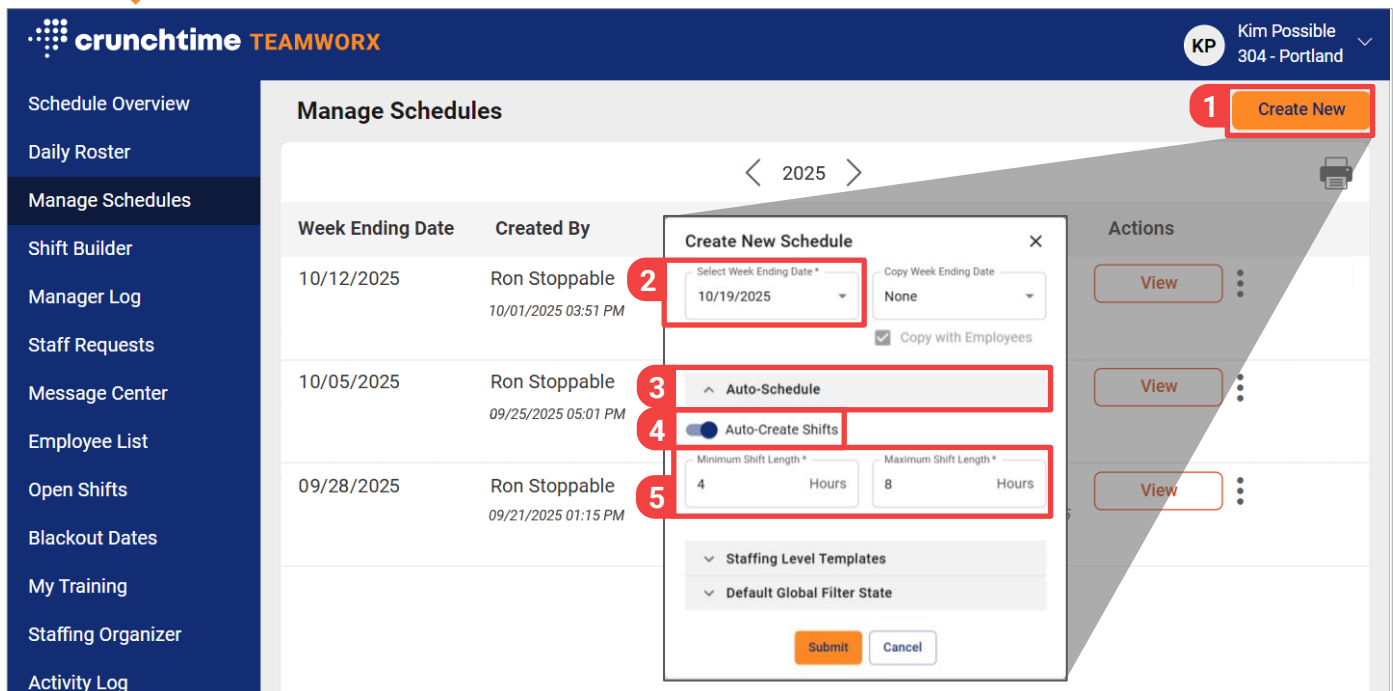
Auto-Scheduler is available for users when one of two settings is enabled in Enterprise Manager:

- Teamworx managers will have access when the Teamworx Corporate Control to Access *Teamworx Auto-Scheduler* is enabled.
- Net-Chef users will have access when the User Group permission for *Labor Schedule > Access Teamworx Auto-Scheduler* is enabled for their corresponding user group.

Auto-Create Shifts

This process will auto-create new shifts with available employees for a period with no current schedule.

 Teamworx > Manager Console > Manage Schedules



The screenshot shows the 'Manage Schedules' page in the Teamworx interface. A 'Create New' button is highlighted with a red box and the number 1. A modal window titled 'Create New Schedule' is open, showing a table of existing schedules and a form to create a new one. The form includes a 'Select Week Ending Date' dropdown (highlighted with a red box and number 2), a 'Copy Week Ending Date' dropdown (highlighted with a red box and number 3), a 'Copy with Employees' checkbox, an 'Auto-Schedule' section (highlighted with a red box and number 4), and 'Auto-Create Shifts' toggle (highlighted with a red box and number 5). The 'Auto-Create Shifts' section also includes 'Minimum Shift Length' and 'Maximum Shift Length' fields (highlighted with a red box and number 5). The modal also shows 'Staffing Level Templates' and 'Default Global Filter State' sections, and 'Submit' and 'Cancel' buttons.

- 1 From the Manage Schedules screen, select *Create New*.
- 2 Select *Week Ending Date* to choose the desired period.
- 3 Expand the *Auto-Schedule* section.
- 4 Toggle *Auto-Create Shifts* to the "On" position.
- 5 If necessary, edit one or both of the following values:
 - *Minimum Shift Length* – If not user-defined, this value defaults to '5'.
 - *Maximum Shift Length* – If not user-defined, this value defaults to '12'.
 If these values are updated, they become the new default for this user at this location.



Note: Corporate may set limits on the Minimum & Maximum Shift Length.

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Auto-Schedule Employees

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Auto-Create Shifts (Continued)

Teamworx > Manager Console > Manage Schedules

crunchtime TEAMWORX KP Kim Possible 304 - Portland

Schedule Overview
Daily Roster
Manage Schedules
Shift Builder
Manager Log
Staff Requests
Message Center
Employee List
Open Shifts
Blackout Dates
My Training
Staffing Organizer
Activity Log

Manage Schedules Create New

< 2025 >

Week Ending Date	Created By	Actions
10/12/2025	Ron Stoppable 10/01/2025 03:51 PM	View
10/05/2025	Ron Stoppable 09/25/2025 05:01 PM	View
09/28/2025	Ron Stoppable 09/21/2025 01:15 PM	View

Create New Schedule

AUTO-Create Shifts

Minimum Shift Length * 4 Hours Maximum Shift Length * 8 Hours

6 Staffing Level Templates

7 Check All

Forecasted Demand - Sales
Demand (Sales, 60-Minute Intervals)

PRE-SHIFT TASKS
Task (Sales)

SUMMER WEEKEND TASK
Task (Sales)

8 Submit Cancel

- 6 Expand the *Staffing Level Templates* section.
- 7 We recommend selecting at least one *Demand* and one *Task* template. For the best results, select the demand template that covers your forecasted demand.
- 8 Select *Submit* to auto-create shifts with available employees, based on the selected templates.



Tip: If you can't select a Staffing Level Template, this means that corporate has selected a default template to be used!

Auto-Schedule Employees

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Auto-Create Shifts (Continued)

 Teamworr > Manager Console > Manage Schedules > Edit

Publish
Save Draft
Close

KP
Kim Possible
304 - Portland

Labor Schedule

Week View
Day View

Oct 13 - Oct 19, 2025

Availability Options

Position

P&L Sub

Employee

Search by Name		MON 13	TUE 14 ↑	WED 15	THU 16	FRI 17	SAT 18	SUN 19
^ CASHIER +		Sched./Ideal Hrs. 116.25/70.25	Sched./Ideal Hrs. 88.75/57.75	Sched./Ideal Hrs. 89.25/57.75	Sched./Ideal Hrs. 88.75/57.75	Sched./Ideal Hrs. 89.25/57.75	Sched./Ideal Hrs. 88.75/57.75	Sched./Ideal Hrs. 82.75/50.75
1	Courtney Tyler Weekly Hours: 24 1	07:00 AM - 12:00 PM	06:30 PM - 11:30 PM	A	06:30 PM - 11:30 PM	10:00 AM - 05:00 PM	12:00 AM - 06:00 AM	+
2	Chris Stabler Weekly Hours: 26.5 2	10:00 AM - 04:00 PM	06:00 AM - 12:00 PM	06:00 AM - 12:00 PM	12:00 AM - 06:00 AM	+	+	+
3	Lisa Wang Weekly Hours: 28 3	Unavailable 04:00 AM - ... 06:30 PM - 11:30 PM	07:00 AM - 12:00 PM	Unavailable All Day	Preferred All Day 07:00 AM - 12:00 PM	07:00 AM - 12:00 PM	11:00 AM - 05:00 PM	07:00 AM - 12:00 PM

A In the 'Week' view, the *shift* field is highlighted for all Auto-Scheduled shifts.

 TeamworrX > Manager Console > Manage Schedules > Edit

[illegible]

B In the 'Day' view, the *Employee* field is highlighted for all Auto-Scheduled shifts.

Auto-Schedule Employees

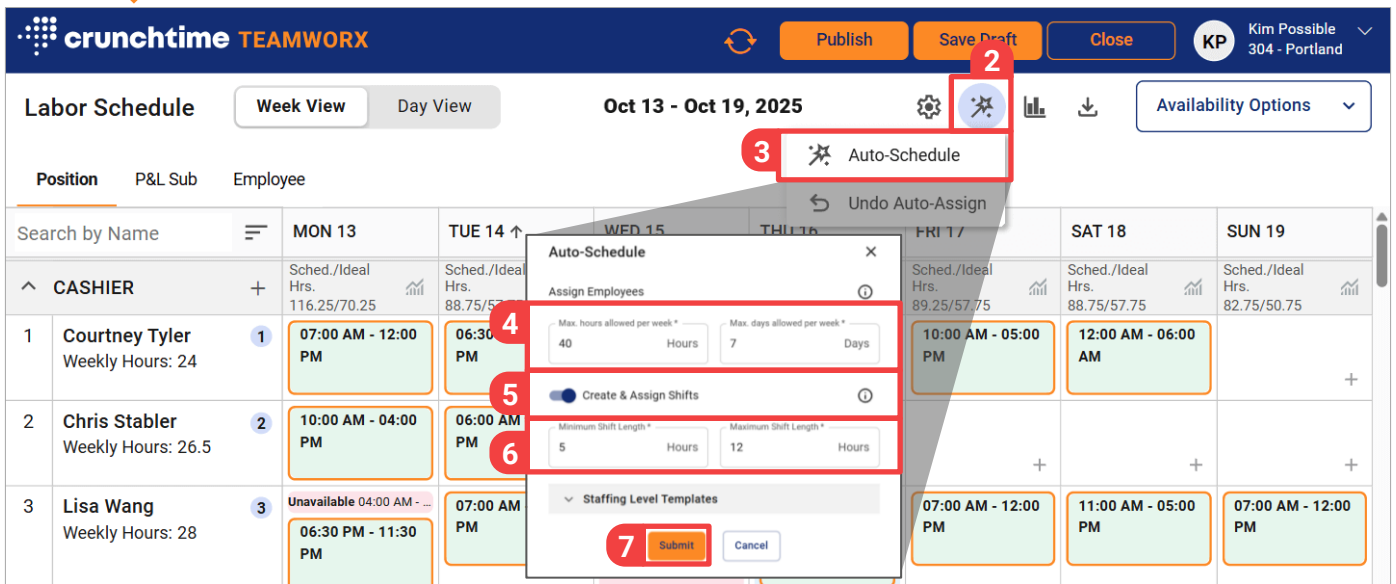
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Create & Assign Shifts

This process will auto-create new shifts with available employees for a period with an existing schedule. You might need to do this when the schedule was previously created and now it needs to be updated. For example, your forecasts changed, resulting in new shifts being needed for the schedule.

This process will only add shifts to your schedule; it won't remove anything.

 Teamworx > Manager Console > Manage Schedules



1. From the Manage Schedules screen, select *Edit* for an existing Labor Schedule.

2. Click or tap the *Magic Wand* icon.

3. Select *Auto-Schedule*.

4. If necessary, edit one or both of the following values:

- *Maximum hours allowed per week* – Initially, this defaults to the lowest “Weekly Hours” overtime threshold defined by the location’s State/Province labor rules in Enterprise Manager. If none are defined, this value defaults to ‘40’.
- *Maximum days allowed per week* – Initially, this defaults to the lowest “Days Worked” overtime threshold defined by the location’s State/Province labor rules in Enterprise Manager. If none are defined, this value defaults to ‘5’.

If these values are updated, they become the new default for this particular user at this location.



Tip: You can enter parameters for Max Hours/Max Days that are **lower** than actual overtime thresholds, to add some padding before people even start getting *close* to overtime!

5. Toggle *Create & Assign Shifts* to the “On” position.

6. Edit the *Minimum Shift Length* and/or *Maximum Shift Length* fields if needed.

7. Select *Submit* to create and assign the shifts with available employees.

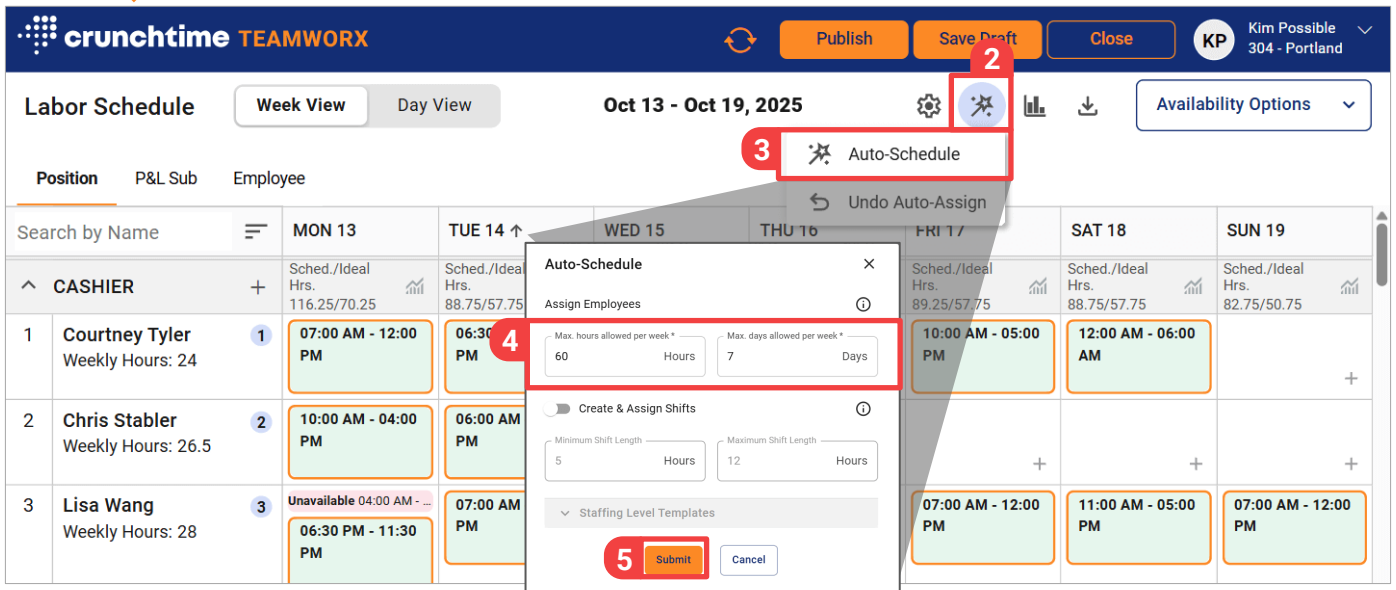
Auto-Schedule Employees

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Auto-Assign Employees

This process will auto-assign available employees to 'Unassigned' shifts in an existing schedule.

Teamworx > Manager Console > Manage Schedules



1. From the Manage Schedules screen, select *Edit* for an existing Labor Schedule.

2 Click or tap the *Magic Wand* icon.

3 Select *Auto-Schedule*.

4 If necessary, edit one or both of the following values:

- *Maximum hours allowed per week* – Initially, this defaults to the lowest “Weekly Hours” overtime threshold defined by the location’s State/Province labor rules in Enterprise Manager. If none are defined, this value defaults to ‘40’.
- *Maximum days allowed per week* – Initially, this defaults to the lowest “Days Worked” overtime threshold defined by the location’s State/Province labor rules in Enterprise Manager. If none are defined, this value defaults to ‘5’.

If these values are updated, they become the new default for this particular user at this location.



Tip: You can enter parameters for Max Hours/Max Days that are **lower** than actual overtime thresholds, to add some padding before people even start getting close to overtime!

5 Select *Submit* to update Unassigned shifts with available employees.

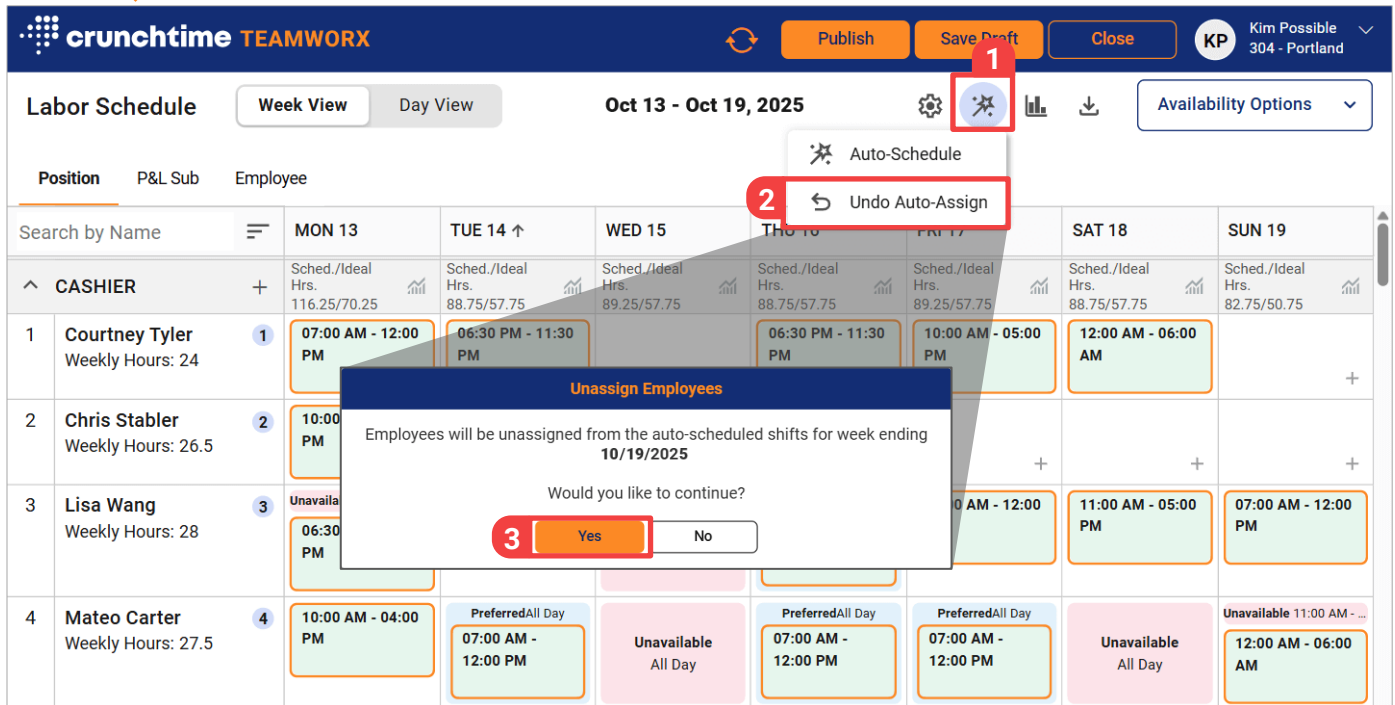
Auto-Schedule Employees

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Undo Auto-Assign

This process will undo all automatically scheduled shifts for the selected period.

Teamworx > Manager Console > Manage Schedules



The screenshot shows the Teamworx Labor Schedule interface for the week of October 13 to October 19, 2025. The interface includes a top navigation bar with 'Publish', 'Save Draft', and 'Close' buttons. A user profile 'Kim Possible 304 - Portland' is visible. The main area shows a grid of shifts for four employees: Courtney Tyler, Chris Stabler, Lisa Wang, and Mateo Carter. A pop-up dialog titled 'Unassign Employees' is displayed, asking 'Would you like to continue?' with 'Yes' and 'No' buttons. The 'Yes' button is highlighted with a red box labeled '3'.

To undo Auto-Assign:

- 1 Select the *Magic Wand* icon.
- 2 Choose *Undo Auto-Assign*.
- 3 Select Yes from the pop-up message to unassign all auto-assigned shifts.



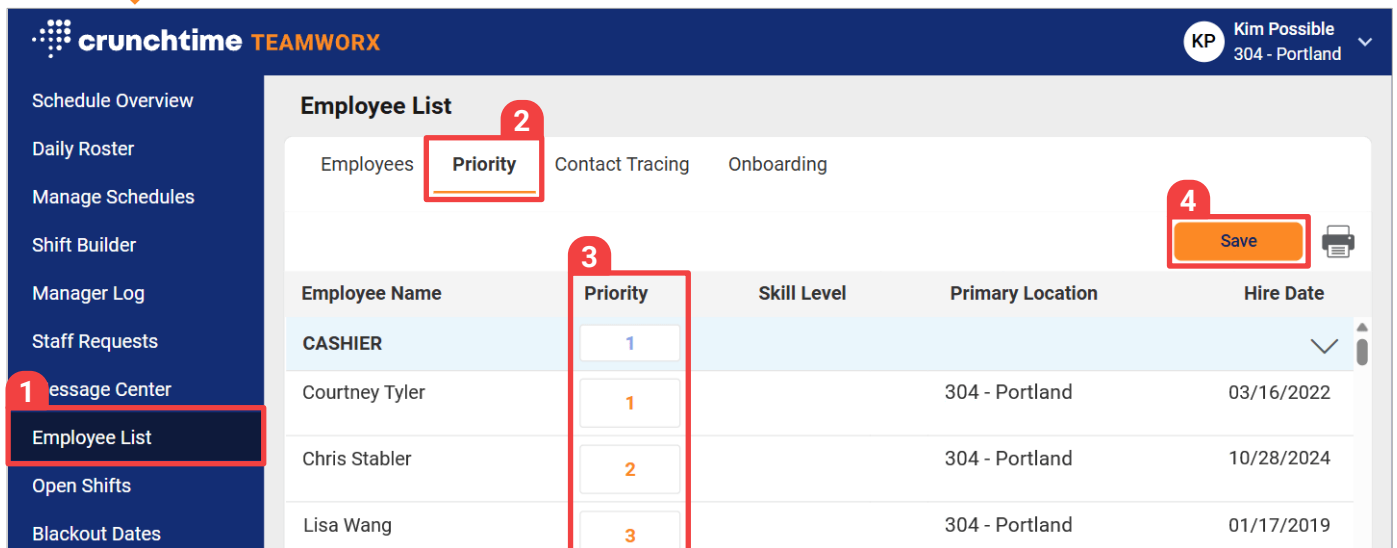
Note: *Undo Auto-Assign* will not remove employees that were added to the schedule manually.

Auto-Schedule Employees

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Assign Priority

Teamworx > Manager Console > Employee List



Employee Name	Priority	Skill Level	Primary Location	Hire Date
CASHIER	1			
Courtney Tyler	1		304 - Portland	03/16/2022
Chris Stabler	2		304 - Portland	10/28/2024
Lisa Wang	3		304 - Portland	01/17/2019

- 1 From the Manager Console, select *Employee List*.
- 2 Choose the *Priority* tab.
- 3 The Priority column is used to indicate the preference given to each Position and/or Employee. The lowest number indicates the highest priority (1 = highest priority, 2 = second priority, etc.)
 - Assign a Priority to each position as desired.
 - Assign a Priority to each employee within that position as desired.
- 4 When you're finished, select Save.



Tip: Decimal values can be entered for resequencing Priority. The Employees/Positions will be sequenced when changes are saved. These values are displayed in the Labor Schedule 'Week' view.



Note: Only Net-Chef users will have the ability to set Employee and Position Priority. Teamworx managers will not see the Priority tab when viewing the Employee List screen.

Auto-Schedule Employees (Continued)

System Logic

The Auto-Schedule feature will auto-create shift records based on the Staffing Level Templates and Forecasted Sales (or Guests, Checks) associated with the selected weekly period.

It will then populate editable, auto-created shifts on working days (i.e. the shift date is $\geq$ the current date) using the following logic:

1. Teamworx will only consider eligible employees for auto-created shifts. This will consist of:
 - Employees who are *not* terminated or on leave.
 - Employees who are linked to the same Position as the auto-created shifts.
 - Employees who are linked to the current Location in Net-Chef.
 - Employees who are not scheduled somewhere else (on this schedule or at another Location).
 - Employees who are “available” for the entirety of the shift as defined by their Availability.
 - Employees who will not exceed the Maximum Weekly Hours/Days as defined by the user.
2. If Position Priority is populated, Teamworx will try to schedule all shifts for the highest priority position before scheduling the second highest priority position or shifts with unprioritized positions (e.g. if the Position ‘Bartender’ is given first priority, Teamworx will try to fill all Bartender shifts first before moving on to other shifts).
3. If there are multiple unassigned shifts, Teamworx will select which shift to assign next based on historical sales. The shift with the highest historical sales volume will be assigned first.
4. Among eligible employees, Teamworx will select those most suited to take the shift. For example:
 - If you have assigned priorities to employees for each position, Teamworx will assign your “best” employees to the highest priority shifts, respecting the employee eligibility described above.
 - If you have NOT assigned employee priorities and there are 2 or more eligible employees, the one with the fewest scheduled shifts that day and the lowest scheduled weekly hours will be assigned.
 - If there are multiple employees that all have an equal chance, Teamworx will randomly select one to assign, to allow for some rotation.
5. The steps above will be repeated to evaluate each shift and the available employees until all unassigned shifts that can be scheduled are filled.

Notes:



- Teamworx only auto-assigns employees to shifts you can currently edit. If you are viewing the schedule by Staffing Structure, then those are the only shifts that will be auto-filled.
- If you use the ‘Day’ view, shifts will be auto-scheduled for that day; if you use the “Week” view, shifts will be auto-scheduled for the whole week (most effective use).
- In the ‘Day’ view, if there are multiple shifts defined for a single Station/Position row, Teamworx will assign all of the shifts for that row to the same employee.



Warning: Auto-Schedule does NOT reference Labor Rules. When reviewing the schedule prior to publishing, managers must still check for shifts that might incur penalties and adjust as appropriate.