



# Create a Schedule

## Quick Start Guide

### Document Details

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### Overview

This guide will show you how to create a new labor schedule in TeamworX.

### System Requirements

- CES Version 07.40.00 or higher



Be sure to grab the latest version of this document here:

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

OR by scanning the QR code to the left.



Watch the tutorials on MainCourse:

<https://links.crunchtime.com/TWX102vtba>



# Create a New Schedule

## Getting Started

The screenshot shows the Teamworx Manage Schedules interface. The left sidebar contains a menu with options: Schedule Overview, Daily Roster, Manage Schedules (highlighted with a green box and callout 1), Shift Builder, Manager Log, Staff Requests, Message Center, and Employee List. The main content area is titled 'Manage Schedules' and shows a table with columns 'Week Ending Date' and 'Created By'. A 'Create New' button is in the top right corner (callout 2). A modal window titled 'Create New Schedule' is open, showing a 'Select Week Ending Date' dropdown (callout 3) with '09/25/2022' selected, a 'Copy Existing Week Ending Date: (optional)' dropdown set to 'None', a checked checkbox for 'Copy with employees', and a 'Submit' button (callout 4) and a 'Cancel' button.

- 1 From the Manager Console, select *Manage Schedules*.
- 2 Choose *Create New*.
- 3 Pick the week you want to schedule from the *Select Week Ending Date* dropdown.
- 4 Select *Submit*.

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# Create a New Schedule

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## Schedule Shifts (Day View)

- 5 Select the *date* you would like to schedule.
- 6 Click or tap the *Add (+)* icon next to the position you want to schedule. This will add a new row under the position.
- 7 Select the *Station* dropdown to specify a station (optional).
- 8 Select a team member from the *Employee* dropdown menu.



**Note:** Employees will appear on the drop-down menu if they are linked to the selected position and are not already scheduled for a shift during this time at this location, or any alternate locations.

**Still not seeing an employee?** Check to see if you have any filters enabled on this page that might prevent you from seeing a particular person.

- 9 If not already selected, choose *Work* from the shift selector menu.
- 10 With your cursor or finger, *drag to paint* the length of the shift onto the grid.



**Tip:** Need to quickly undo a change? Try selecting the same cell again. The scheduling “smart” grid will automatically reverse your change!

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# Create a New Schedule

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## Schedule Shifts (Week View)

**Teamworx > Manage Schedules: Create New**

**Labor Schedule** Publish Save Draft Cancel KP Kim Possible 304 - Portland

**Day View** Oct 17 - 23, 2022 Week View Hourly Forecast Back of House Payroll

MON 17 TUE 18 WED 19 THU 20 FRI 21 SAT 22 SUN 23 Paid Unpaid Work Non-Work Override Availability

Station Employee ↑ Filter Dly Hrs Wkly Hrs Shift Hrs Shifts 6AM 7AM 8AM 9AM 10AM 11AM 12PM 1PM 2PM 3PM 4PM 5PM 6PM 7PM 8PM 9PM 10PM 11PM

- 1 Select *Week View*.

**Labor Schedule** ☆ Publish Save Draft Cancel KP Kim Possible 304 - Portland

**Week View** Oct 17 - 23, 2022 Day View Hourly Forecast Back of House Payroll

Position P&L Sub Employee Override Availability

Employee ↑ Rank Wkly Hrs Monday Oct 17, 2022 Tuesday Oct 18, 2022 Wednesday Oct 19, 2022 Thursday Oct 20, 2022 Friday Oct 21, 2022 Saturday Oct 22, 2022 Sunday Oct 23, 2022

Cashier + Sched. Hrs. - 12.5 Sched. Hrs. - 8 Sched. Hrs. - 6 Sched. Hrs. - 0 Sched. Hrs. - 0 Sched. Hrs. - 0

1 Chris Stabler 8.00 2:00 PM-10:30 PM Drive Thru 1:30 PM-8:00 PM Register 1 1:30 PM-8:00 PM No Station

2 Courtney Tyler 13.00 1:30 PM-8:00 PM Register 1 1:30 PM-8:00 PM No Station

01:30 PM - 08:00 PM Submit Cancel

- 2 Click or tap the *Add (+)* icon next to the position you want to schedule. You will be prompted to select an employee.
- 3 Select the *Employee* row you would like to edit to bring it into focus.
- 4 Select *Add Shift* on the weekday that you'd like schedule this employee.
- 5 Enter the *Start* and *End Time* for the shift. Select *Submit* to save your change.



**Tip:** You can quickly move a shift from one employee to another (on the same day). Just click/tap and hold the *Three Bar* (≡) icon and drag the shift to the right employee.





# Break Violations

## Overview

Teamworx monitors shifts for potential break and overtime violations. In some cases, you may be prompted to correct these violations before publishing a schedule.



**Setup:** Depending on the Labor Rules established in Enterprise Manager, Paid or Unpaid Breaks may be required for certain shifts, or may not be allowed for scheduling at all.

## Identify Break Violations

**Teamworx > Manage Schedules: Create New**

**Labor Schedule** **Publish** **Save Draft** **Cancel** **KP** Kim Possible 304 - Portland

**Day View** Sep 19 - 25, 2022 **Week View**

**MON 19** **TUE 20** **WED 21** **THU 22** **FRI 23** **SAT 24** **SUN 25** ☐ Paid ☐ Unpaid ☒ Work ☐ Non-Work **Override Availability**

**Station** **Employee** **Filter** **Dly Hrs** **Wkly Hrs** **Shift Hrs** **Shifts**

**Hourly Forecast**

**Back of House Payroll**

**Cleaning Crew** +

**Cook, Line** +

**Cook, Prep** +

**1** **9.00** 9.00 9.50

**1** **9.00** 9.00 9.50

- 1** Click or tap on the highlighted *Daily/Weekly Hours* field. A pop-up window will open describing the corrections needed for the shift.

### Labor Rule Violations

#### Paid Breaks

This shift requires (1) 30 minute paid breaks.

#### Unpaid Breaks

This shift requires (1) 30 minute unpaid breaks.

**OK**

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**Teamworx > Manage Schedules: Create New**

## Labor Schedule

CRUNCH TIME! TEAMWORX

Publish Save Draft Cancel

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304 - Portland

### Day View

Sep 19 - 25, 2022

Week View

1 Paid Unpaid Work Non-Work Override Availability

| MON 19   | TUE 20  | WED 21   | THU 22    | FRI 23 | SAT 24 | SUN 25 |     |      |      |      |     |     |     |     |     |     |     |     |     |      |      |
|----------|---------|----------|-----------|--------|--------|--------|-----|------|------|------|-----|-----|-----|-----|-----|-----|-----|-----|-----|------|------|
| Station  |         |          |           |        |        |        |     |      |      |      |     |     |     |     |     |     |     |     |     |      |      |
| Employee |         |          |           |        |        |        |     |      |      |      |     |     |     |     |     |     |     |     |     |      |      |
| Filter   | Dly Hrs | Wkly Hrs | Shift Hrs | Shifts |        |        |     |      |      |      |     |     |     |     |     |     |     |     |     |      |      |
|          |         |          |           | 6AM    | 7AM    | 8AM    | 9AM | 10AM | 11AM | 12PM | 1PM | 2PM | 3PM | 4PM | 5PM | 6PM | 7PM | 8PM | 9PM | 10PM | 11PM |

- > Hourly Forecast
- ✓ Back of House Payroll

Cleaning Crew +

Cook, Line +

1 × Grill Sara Krishna

Cook, Prep +

9:00 9:00 9:00

A B

- 1 Using the *shift selectors*, apply the necessary changes to the *schedule grid*.
  - A In this example, a 30-minute Paid break and a 30-minute Unpaid break are added to Sara's shift.
  - B Once all labor violations are resolved the Daily Hours field will no longer be highlighted red.

If Meal Period (Unpaid) or Paid Breaks are required, the Daily Hours column will be highlighted in red.

If Daily or Weekly Hours Overtime are eclipsed, the Daily or Weekly Hours columns will be highlighted in red.



