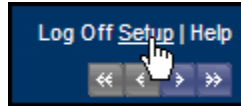


Group Schedules

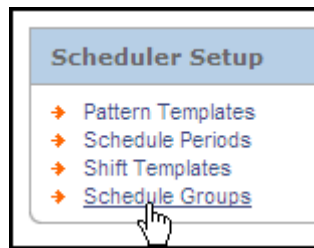
The group schedule is used when a set of employees all work the same shift. If you do not already have a group you will first need to create the group name.

A. Create Group Name

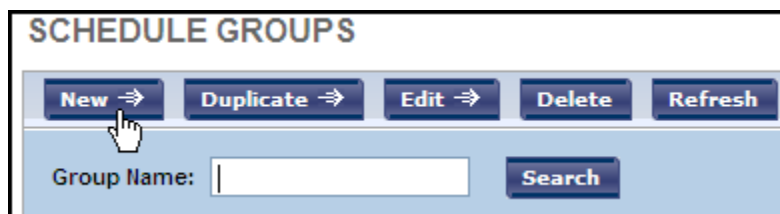
- On the right corner of the screen click **Setup**.



- Within **Scheduler Setup** select **Schedule Groups**.



- Select **New**.

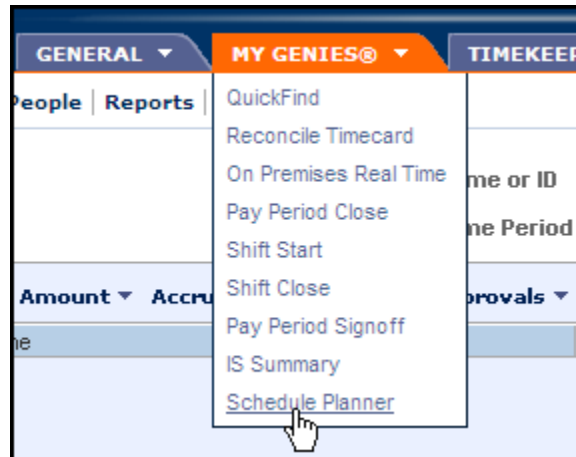


- Enter your desired **Group Name**.
 - It is helpful to include the shift within the Group Name.
- Check the **Allow Schedule Inheritance** box.
- When finished select **Save & Return**.



B. Add Employees to Group

- Click **My Genies** → **Schedule Planner**.



- Schedule Planner lists all your employees.
- Click the **By Group** tab.



- All **Ungrouped Employees** will appear at the top and those within a group at the bottom.
- Using the aide of shift and control functions select each of the Ungrouped Employees you wish to add into a group.
- Click **Group** → **Add to Group**.

BY EMPLOYEE		BY GROUP	
Save		Actions ▾ Shift ▾ Pay Code ▾ Accrual Amount ▾ Group ▾ View ▾	
Name	Sch Hrs.	Sun 8/1	
Ungrouped Employees		0.00	
Nussdorf, Daniel	0.00		
Palmer, Robert	0.00		
Schedules Training 8a-430p	0.00		830a - 5p

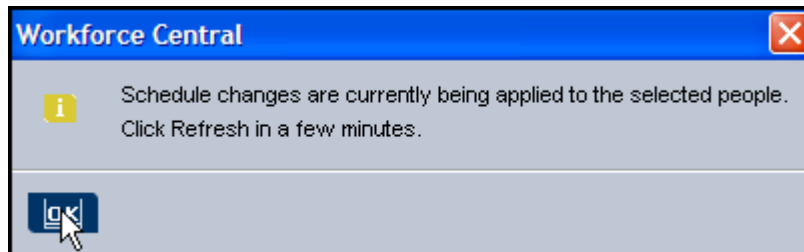
Add to Group →
 Remove from Group →
 Load Group →

- This opens the **Add to Group** box.

- **Schedule Group:** Use the drop-down menu to locate your group.
- **Start Date:** Set the start date to be the first Sunday of the Current Pay Period.
- **End Date:** Leave as forever unless you want the schedule to end at a particular date.
- **Leave the “Remove employees from other schedule inheritance groups for selected date range” checked.**
- **OK:** When finished select OK.
- Select **Save**.

BY EMPLOYEE		BY GROUP	
Save		Actions ▾ Shift ▾ Pay Code ▾ Accrual Amount ▾ Group ▾ View ▾	
Name	Sch Hrs.	Sun 8/17	Mon 8/18
Financial Systems 830a - 5p			
Nussdorf, Daniel	0.00		
Palmer, Robert	0.00		

- Whenever changes are made and Saved in Schedule Planner, the following message appears. Click OK on the message.



- Wait a few seconds and click Refresh.

Show	1- Financial Systems Group	Edit
Time Period	Current Schedule Period	Refresh

- Group names will appear in **Bold**.
- On the By Group tab in Schedule Planner, Group names will be listed below individual names.
- You can create as many Groups as necessary.
- Follow same instructions to create multiple groups with different schedules.

BY EMPLOYEE	BY GROUP
Save	Actions ▾ Shift ▾ Pay Code ▾
Name	
Financial Systems 830a - 5p	
Nussdorf, Daniel	
Palmer, Robert	
Schedules Training 8a-430p	
Brooks, Lonnell	
Eckert, Louis	
Fiore, Kurt	

C. Remove an Employee from an Existing Group

- Highlight the employee(s) to be removed from group.
- Click **Group** → **Remove from Group**.

BY EMPLOYEE	BY GROUP		
Save	Actions ▾ Shift ▾ Pay Code ▾	Accrual Amount ▾	Group View ▾
Name	Sch Hrs.	Sun	
Financial Systems 830a - 5p	0.00		
Nussdorf, Daniel	0.00		
Palmer, Robert	0.00		

Group View ▾

- Add to Group →
- Remove from Group →**
- Load Group →

- The Remove from Group box appears

- **Schedule Group:** Use the drop-down menu to match the **Schedule Group** with the **Group Name**.
- **Start Date:** Insert the date you wish the employee to be removed from the group, best practice is to use the first Sunday of the Pay Period.
- **End Date:** Select forever.
- **OK:** When finished select OK.
- Select **Save**.

- Employee(s) removed from the Group will be listed above the Group name and will have no pattern applied.

BY EMPLOYEE	BY GROUP
Save	Actions Shift Pay
Name	
Ungrouped Employees	
Palmer, Robert	
Financial Systems 830a - 5p	
Nussdorf, Daniel	
Schedules Training 8a-430p	
Brooks, Lonnell	
Eckert, Louis	
Fiore, Kurt	

D. Add an employee to an existing Group

- Highlight the employee(s) to be removed from group.
- Click **Group** → **Add to Group**.

BY EMPLOYEE		BY GROUP	
Save		Actions	Shift
Name	Sch Hrs.	Pay Code	Accrual Amount
Ungrouped Employees			
Palmer, Robert	0.00		
Financial Systems 830a - 5p			
Nussdorf, Daniel	0.00		
Schedules Training 8a-430p			830a - 5p

Group View

- Add to Group →
- Remove from Group →
- Load Group →

- The Add to Group box appears

Add to Group

Schedule Group: Financial Systems 830a...

***Start Date:** 8/17/2008

***End Date:** Forever

Remove employees from other schedule inheritance groups for selected date range.

OK Cancel Help

- **Schedule Group:** Use the drop-down menu to match the **Schedule Group** with the **Group Name**.
- **Start Date:** Insert the date you wish the employee to be added to the group, best practice is to use the first Sunday of the Current Pay Period.
- **End Date:** Select forever.
- **Leave the “Remove employees from other schedule inheritance groups for selected date range” checked.**
- **OK:** When finished select OK.
- Select **Save**.



- Employee(s) added to the Group will be listed under the Group name and will have their pattern applied.

BY EMPLOYEE	BY GROUP
Save	Actions ▾ Shift ▾ Pat
Name	
Financial Systems 830a - 5p	
Nussdorf, Daniel	
Palmer, Robert	
Schedules Training 8a-430p	
Brooks, Lonnell	
Eckert, Louis	
Fiore, Kurt	