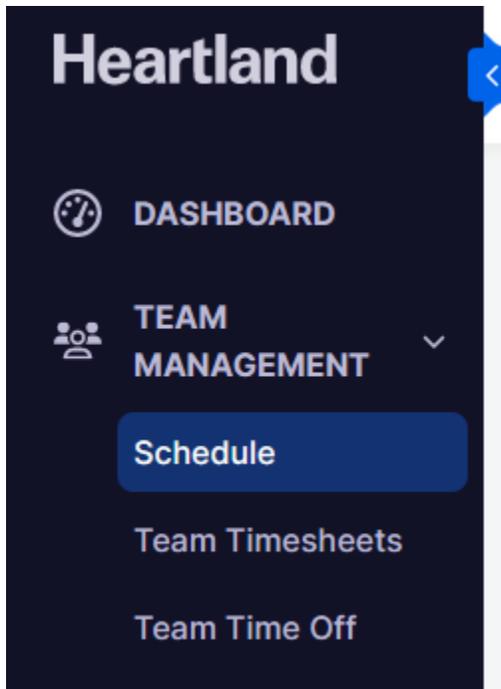


# Schedule Employees for Shifts

Navigate to the **Schedule** page.



There are three ways to view the schedule. These include:

- **Employee View** – This will show you all available employees.
- **Shift View** – This will show you all available shifts.
- **Job View** – This will divide the calendar by Jobs.

We will demonstrate how to assign an individual employee to a shift using the **Employee View**.

Below is a blank schedule.

Feb 11 - Feb 17 | Day Week Month | Employee View | Show Filter | Options | Current

All Open Unpublished | Display scheduled employees only | Show Revenue Data | Total 0h : 00m \$0.00

Search	SUN, FEB 11 0h:00m / \$0.00	MON, FEB 12 0h:00m / \$0.00	TUE, FEB 13 0h:00m / \$0.00	WED, FEB 14 0h:00m / \$0.00	THU, FEB 15 0h:00m / \$0.00	FRI, FEB 16 0h:00m / \$0.00	SAT, FEB 17 0h:00m / \$0.00
OPEN SHIFTS							
AS Andy Smith							
AY Angus Young							
DM Deanna Mann							
JS Joe Smith							

1-4 of 4 employees

**Note**, if you do not see the employee that you wish to assign a shift, you must first designate them as a shift-based employee, by going to **Employees**, select the employee, then select the **Time & Attendance** tab, and choose **Shift Schedules** on the left. You will see an indication whether this person is shift-based.

JS Joe Smith  
Full Time  
Start Date: 08/01/2023

Profile Benefits **Time & Attendance** History

Overview

- Timesheets
- Pay Rules and Rates
- Time Off
- Shift Schedules**

**Shift Schedules**

Schedule Shift Approval Path: Account Owner Approves Shift Requests (effective now)

**This is a Shift Schedule based user:** Yes (effective now)

Employee Can View: Only their own schedule (effective now)  
Employee can only view their schedule. They will not see any other team member's schedule.

On the row for the employee for whom you wish to assign a shift, hover over the date until you see a plus sign.

<input checked="" type="radio"/> All <input type="radio"/> Open <input type="radio"/> Unpublished <input type="checkbox"/> Display scheduled employees only <input type="checkbox"/> Show				
<input type="text" value="Search"/> <input type="button" value="↓"/>	SUN, FEB 11 0h:00m / \$0.00	MON, FEB 12 0h:00m / \$0.00	TUE, FEB 13 0h:00m / \$0.00	V
OPEN SHIFTS				
AS Andy Smith				
AY Angus Young				
DM Deanna Mann				
JS Joe Smith				
				<input type="button" value="+"/>

Select the button that appears, and a modal window will open up. You can either use an existing template, or you can manually construct the shift, and enter the **Start Time, End Time, Time Zone**, enter a **Shift Name**, and select any specific job, choose a **Location**, and then give it a color (this is how it will appear on the schedule).

**Note:** Only **Start Time, End Time, and Color** are necessary to create a schedule.

## Create Schedule



[Shift](#) [Add Unavailability](#) [Time Off](#)

START DATE(UTC)

02/13/2024

EMPLOYEES

Joe Smith

TEMPLATE

shift test

SHIFT NAME

shift test

START TIME

09:00 AM

JOBS

Please choose a job

END TIME

05:00 PM

LOCATION

Tes Location #2

SHIFT LENGTH

8 Hours

TIME ZONE

(GMT-08:00) Pacific Time - Los Angeles

COLOR



#FF6900

BREAK

START TIME

END TIME

TYPE

Add Break

SHIFT NOTES

Add Shift Note

Repeat

Save as template

Close

Create

You may also choose to repeat this schedule for as many days as you like, by selecting the **Repeat** button, and then entering how often the shift will repeat, what days, and what the end date is.

Repeat

REPEAT EVERY

1

UNIT

Week(s)

REPEAT ON

Sun

Mon

Tue

Wed

Thu

Fri

Sat

Repeat on option is required

ENDS

On

DATE

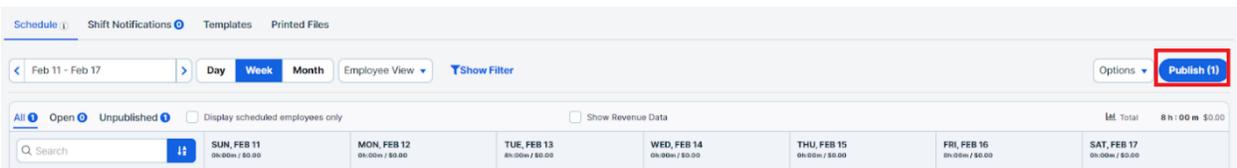
02/14/2024

When you are ready, select **Create**. The shift will now appear on the calendar.

	SUN, FEB 11 0h:00m / \$0.00	MON, FEB 12 0h:00m / \$0.00	TUE, FEB 13 9h:00m / \$0.00	WED, FEB 14 0h:00m / \$0.00	THU, FEB 15 0h:00m / \$0.00	FRI, FEB 16 0h:00m / \$0.00	SAT, FEB 17 0h:00m / \$0.00
OPEN SHIFTS							
AS Andy Smith							
AY Angus Young							
DM Deanna Mann							
JS Joe Smith 8h:00m / \$0.00			9 AM - 5 PM shift test				

Repeat this process for all employees you wish to schedule.

When you are ready, select the **Publish** button on the upper right:



This will bring up a modal, where you can choose how to notify the employees of their shift.

## Publish the schedule ×

**Feb 11, 2024 To Feb 17, 2024**

Total Shifts: 1

Total Hours: 8h:00m

How do you want to send notifications?

Notify all users of new schedule

Notify employees with changes only

Don't send notifications

Close

You may

- Notify all users,
- Notify employees with changes only, or

- Don't send any notifications.

It is recommended that you choose one of the first two options, and an email will be sent to the employee to notify them of their shift, and they will be able to see it when they log into Heartland Time.

Once it has been published, the shift will appear as filled with the color you chose on the schedule.

The image shows a portion of a scheduling grid. On the left, there is a circular profile icon with the initials 'JS' and the name 'Joe Smith' below it, with '8h:00m / \$0.00' underneath. The grid consists of several columns. The third column from the left is filled with an orange color, indicating an assigned shift. In the top right corner of this orange cell, the text '9 AM - 5 PM' is displayed above a small calendar icon and the text 'shift test'.

If you wish to assign many people to shifts at once, you may also [Bulk Assign](#) employees to shifts.