EDITING A SHIFT OR SHIFTS IN THE ADVANCED SCHEDULE VIEW (ASV)

EDIT A SINGLE SHIFT USING THE DETAILS EDIT PANEL –

1. Select a shift that you want to edit, and the details edit panel displays
2. Select from the functions available (see screenshot below, with functions circled in green)
3. Make changes needed, then save the changes

Edit functions may differ depending on the type of shift selected, however the most common functions are listed in the screenshot below. All scheduled shifts will display the employee's name and other related employee information to the left of the edit functions and display Save & Cancel buttons at the bottom. If a shift is >6-hours there will be a meal break listed in the details section of the shift information.

EDIT FUNCTIONS: There are "how to" documents for each function on the WFM Help site, the following can be found by going to the Schedule Admin Toolbox and then to Advanced Schedule View (ASV)

- **Copy**: Name of documents - Adding Shifts in the ASV, & Adding Shift to Be Booked Off to Holiday PTO or In-Service
- **Mark for Swap**: Name of document – Swap Shift -How to use Mark for Swap in the ASV
- **Float**: Name of documents – Float an Employee to Work on Another Team, & Floating Employee(s) to Work Another Team Using Mass Edit
- **Book-Off**: Name of documents - Booking Off an Employee-How to Steps, & Booking Off Several Shifts in the ASV
- **Split Shift:** Name of Document - Split Shift Functionality–Four Scenarios with How to Steps
- **Shift Comments**: Name of document – Shift Comments-How to Add

Editing a shift without using edit functions to modify: Select the shift to be changed

1. Change the time - edit start and or end times, and save
2. Change the Position (job) – change to a selected job and save
3. Change the activity – change to WRK, ORI or Approved On and save (cannot change an activity to a book-off code)
4. Delete a shift – It is suggested that you do not delete self-scheduled shift unless the employee is scheduled above FTE. Use the delete function to delete shift added in error.
5. Unassign a shift – will remove the shift from the employee's schedule and created an unassigned shift for the time and job selected
6. Add Shift – Used to add Late Stay to a scheduled shift – select shift, select Add Shift, select Late Stay and job, then select Add Shift
7. Shift History is used to view the transaction history of a shift

Editing Booked-Off Shift

- The details edit section displays a different set of edit functions (see screenshot below)
- You cannot make changes and select Save – an error message displays; the last sentence states, "Please cancel the book-off and reapply with the desired changes."
- You must use the book-off function to modify the shift by first cancelling the book-off
- Then you can book-off again, editing the book-off times, or book-off code

EDITING SHIFTS USING THE MASS EDIT MODE

The system defaults to the Details Edit mode. There is another option, called the Mass Edit mode, which allows you to edit multiple shifts at a time. To change to Mass Edit mode, go to the function tools in the top-right corner of the page. Select the wand icon, then select Mass Edit.

A new function icon, a pencil, has been added to the beginning of the lists of function tools. Click the pencil icon to see the various functions available for editing shifts:

- Lengthen - You want to extend the length of a shift or selected shifts.
- Shorten - You want to shorten a shift or a set of shifts.
- End Shifts – Modify the end time of a shift of set of shifts.
- Unassign - Your employee resigned after scheduling, so you need to send all or most of her shifts to the billboard or want to add them to the unassigned shifts.
- Delete – Delete shifts, remember only use delete if you these shifts are not going to be needed for assigning.
- Book Off - To book-off several shifts for one person or multiple employees.
- Float - You are floating several employees or several shifts for an employee to a specific team.
- Change Position (Job) - You are assigning several shifts to a different job, i.e., SL, MR, CP.
- Edit Shifts - You have an employee that you have scheduled to work, but now you decide they need more time in orientation, or you copied a schedule to an orient and forgot to change the WRK activity to ORI.
- Send to Billboard – You have unassigned shifts that need to be offered to staff for scheduling.

From the Schedule Admin Toolbox>Advanced Schedule View (ASV) - see the document, Mass Edit – How to Use Mass Edit to Edit Multiple Shifts or Floating Employee(s) to Work Another Team Using Mass Edit