

Add or Remove an Employee from a Scheduling Group

Schedule groups organize employees who share characteristics into groups that make their schedules easier to manage or view.

Employees can be in more than one group, but you can only add employees to one group at a time.

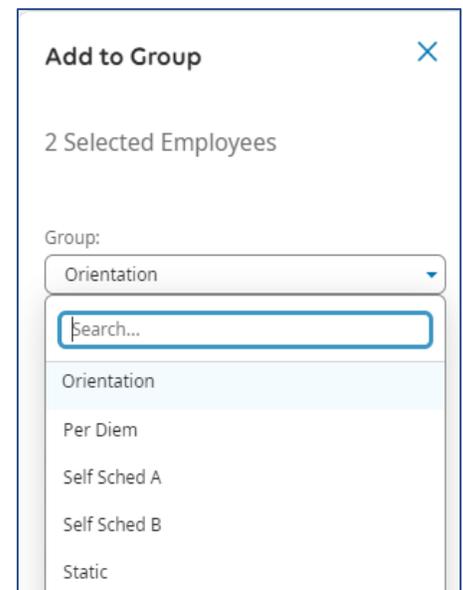
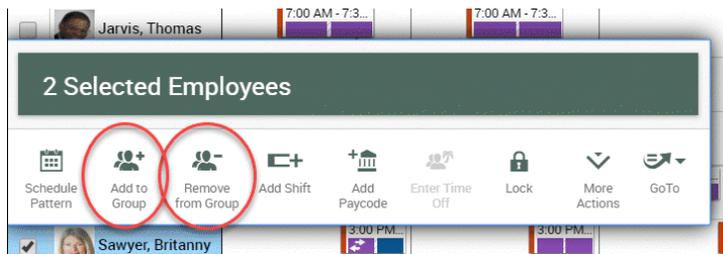
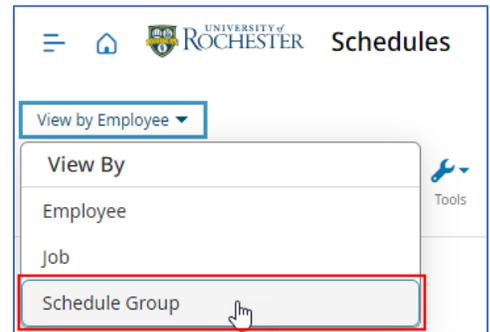
Follow the practice of modifying **both** the group you are ending/modifying for the period and the new one you are adding. See page 2 for specific examples and additional details.

Important! Set your date range at the top of the screen to start the Sunday prior to the day you want the change to be effective.

To add employees to a schedule group:

In the schedule, click **View by > Schedule Group**. The available groups are listed in the first column as well as the ungrouped employees.

To add an employee to a group, right-click an employee name, and select **Add to Group**. **Note:** To add multiple employees, click the check box next to each name you want to add, then right-click one of them. You can also control-click or shift-click the employees, then right-click one of the employees.



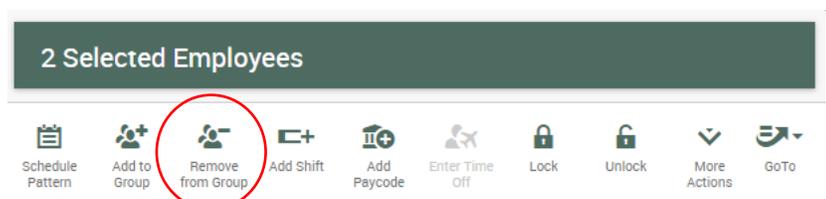
In the **Add to Group** panel, do the following:

- Select a group from the **Group** drop-down box.
- Specify a **Start Date** and an **End Date**.

Note: The option to check the box to **Remove employees from other schedule inheritance groups for selected date range** is not currently functional. You have to complete this step separately to remove employees from a group (see below)

- Click **Apply**.

To **remove** someone from a group, follow the same steps as above, but click **Remove from Group** instead of Add to Group:



In the **Remove from Group** panel, do the following:

- Select a group from the **Group** drop-down box.
- Specify a **Start Date** and an **End Date**.
- Click **Apply**.

In these examples, you want to move someone from Group A to the Static Group.

Example 1: Collaborative scheduling period is March 2-March 21 and you want to move someone from Group A to the Static Group **permanently**:

	Start Date	End Date
Group A (Rotating Group)	1/31/24	2/28/24 (Person will be removed from the rotating group on this date.)
Static Group	2/28/24 (Date the person will be added to the Static Group; be sure it is before the collaborative scheduling period begins.)	Forever (Person will remain in the Static group.)

Example 2: Collaborative scheduling period is March 2-March 21 and you want to move someone from Group A to the Static Group **only for the upcoming period**:

	Start Date	End Date
Group A (Rotating Group)	3/21/24	Forever (Permanent group – person will return to this group once they leave the Static group – 3/21.)
Static Group	2/28/24	3/21/24 (Person will be removed from the Static group on 3/21 and go back to Group A.)