

# Schedule Planner Legend




	Open shifts (shifts that are not assigned to an employee) appear at the top row of the schedule on the date when they occur.
	The locked icon on a shift indicates the shift is locked and cannot be modified or removed without unlocking it. Locked cells are gray.
	The comment icon indicates the shift or paycode has a comment attached. Hold the cursor over the shift to see the details, including the comment.
	The transfer icon indicates that the shift (or a segment of the shift as shown here) is not the primary job, primary labor category, or primary work rule of the employee assigned.
	The signed off icon (enlarged here for clarity) indicates that the day is locked by the payroll department and impossible for the scheduling manager to change. No schedule item can be added, deleted, or modified on this day.
	Holidays are indicated by a red flag icon (enlarged here for clarity) in the date header.
	Segment tags appear as an icon on a shift or shift segment. They identify additional custom characteristics of that shift or segment. Hold the cursor over the tag icon to see more details for the tag.
	The people icon flags the shifts of employees who are no longer part of the schedule group. For example, if there is a change to the group (or the employees were removed from a group) on a day in the loaded period.
	The swap shift icon displays on shifts to indicate where shift swaps were made by an employee's approved swap request.
	Shifts with bold text indicate that the shift is either a result of an open shift request or a self-schedule request.
	A blue border highlighted around a shift indicates the initial shift you selected to perform a quick action (Swap, Copy/Paste, or Assign).
	A shift that temporarily displays as grayed out indicates that the system is processing an action (Swap, Copy/Paste, or Assign) on that shift.
	Shifts with a black border and a red dot displayed in the right corner have been modified but not yet saved in the Schedule Planner. When you save the black border and red dot no longer display on the shift.
	A vertical red bar indicates a shift or paycode that is not inherited from a group.

## Daily Coverage

	Overcoverage Color
	Undercoverage Color
	Perfect Coverage Color

## Rule violation indicators

The following icons display in the Severity column of the Rule Violation add-on to indicate the highest rule violation affecting an employee. A dot beside the icon means that there are more than one rule violation affecting the employee's schedule.

-  Informational – A rule has been broken, but at the lowest level of severity. You can save the schedule and continue without responding to the violation.
-  Warning – You can save the schedule and continue without responding to the violation.
-  No Save – The schedule cannot be saved with this severity of rule violation.

## View Schedule Planner by

View by employees	By default, the employee rows are sorted by employee Name, in alphabetical order. You can also sort the employee rows according to the contents of any of the columns currently displayed.
View by schedule group	Schedule groups allow you to create, view, and modify employee schedules in unison. An employee may belong to one group, to multiple groups, or to no group.
View by job	Viewing the schedule by job enables you to see a comprehensive view of open and filled employee shifts by specific job in each location. With this view, you can better identify gaps in the schedule and assess coverage issues by job.

## Quick Action Tool Bar

													
Assign	Unassign	Insert Shift Transfer	Insert Shift Template	Comment	Paycode	Copy / Paste	Delete	Lock / Unlock	Swap	Approve	Refuse	Cancel	Quick Actions

Quick Actions — Opens and closes the Quick Action menu	Assign — Assigns open shifts to employees	Unassign — Unassigns shifts or paycodes from employees
Insert Shift Transfer — Changes the job for a shift.	Insert Shift Template — Creates and assigns shifts from a shift template to an employee	Comment — Indicates or adds Comments to a shift or paycode
Paycode — Replaces an assigned shift with a paycode	Copy / Paste — Copies and pastes a shift	Delete — Deletes a shift, paycode, or accrual
Lock /Unlock — Locks or unlocks a shift. (You cannot lock or unlock days with this button.)	Swap — Swap shifts, paycodes, or days with no shifts	Approve — If a time-off request requires approval by multiple managers, and you approve the request, the system notifies the other approvers.
Refuse — If a time-off request requires approval by multiple managers, and is refused by any one of them, the request is refused.	Cancel — Cancel requests. Available only if cancellation is configured.	