

## Add or Remove an Employee from a Scheduling Group

Schedule groups organize employees who share characteristics such as schedules into groups that make their schedules easier to manage or view. When you assign a schedule group, you may be assigning schedules to all members of the group

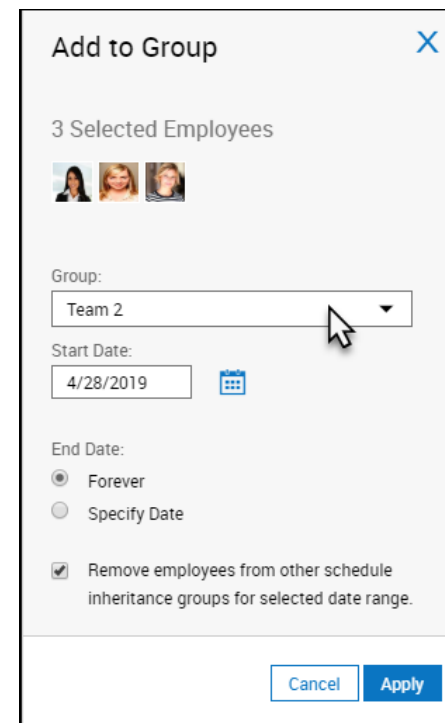
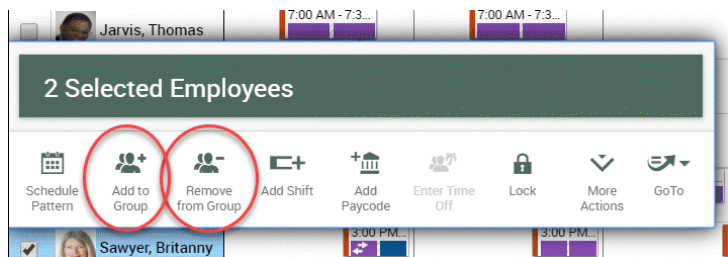
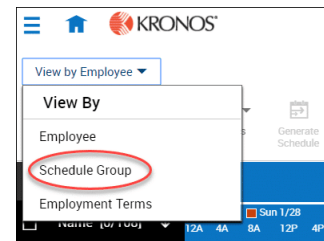
Follow the practice of modifying **both** the group you are ending/modifying for the period and the new one you are adding. See page 2 for specific examples and additional details.

**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.**

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



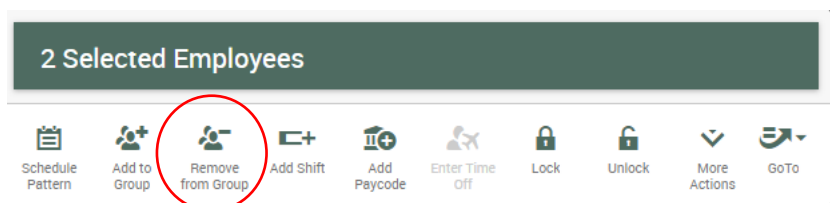
In the **Add to Group** panel, do the following:

- 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)	<b>1/31/21</b>	<b>2/28/21</b> (Person will be removed from the rotating group on this date.)
Static Group	<b>2/28/21</b> (Date the person will be added to the Static Group; be sure it is <b>before</b> the collaborative scheduling period begins.)	<b>Forever</b> (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)	<b>3/21/21</b>	<b>Forever</b> (Permanent group – person will return to this group once they leave the Static group – 3/21.)
Static Group	<b>2/28/21</b>	<b>3/21/21</b> (Person will be removed from the Static group on 3/21 and go back to Group A.)

