



## Transfer a Shift by Editing the Shift

You can transfer a specific shift or shift segment worked by a specific employee to a different business structure (location and job), a different work rule, a different cost center (pay source), or a different labor category.

### Examples of transfers:

- **Business Structure transfer** — A manufacturing manager needs to transfer an employee from a Line 1 assembly job to work on a Line 2 adjustment job for the next few days because the Line 2 adjuster is off work.
- **Work Rule transfer** — An employee is called in to work a regular shift at the last minute. The Manager transfers the shift from a regular shift work rule to an overtime shift work rule because of the short notice.
- **Payer Cost Center transfer** — For a training session, an employee must be transferred to Cost Center 32145 from 3:00 pm until the end of their shift.

**Labor Category transfer** — An employee scheduled to work a shift on one project must be transferred to another project for a complete shift.

### To transfer a shift:

1. Right-click a shift and select **Edit**. The **Edit Shift** panel appears.
2. For the segment or segments to transfer, select **Transfer Employee** to display the transfer menu. If the transfer you need does not appear on the menu, select **More** to define the transfer. The **Transfer** panel appears.
3. Select the new transfers or transfers you need (business structure, work rule, payer cost center, or labor category) from one or more of the menus under these four headings.
  - If the required menu item is missing for **Business structure**, select **None** to specify the required business structure, then select the location, and then a job.
  - For a **Work Rule** transfer, select the new work rule. If the required work rule does not appear, start typing the name of the work rule in the Search field. When the desired work

1/



- If the required menu is missing for **Payer Cost Center**, select **None** to specify the required cost center. Select Cost Center, then either select a cost center from the menu or search for an unlisted cost center by typing in the first few letters of its name.
  - If the required menu is missing for the Labor Category, select None to specify the required labor category. Select Labor Category, then either select the labor category from the menu, or search for an unlisted labor category by typing in the first few letters of its name.
4. Select **Apply** to return to the Transfer panel.
  5. Repeat for all segments you want to transfer. There is no need to transfer breaks.
  6. Select **Apply** to make the change.
  7. Save your changes.