Scheduler Basics



1 Navigate to https://connect.threadhcm.com/default.aspx Client: CYN22 - CynTech Legal: Cynkar Technologies Status: Active Q Client Search Scheduler History Search the menu Scheduler History

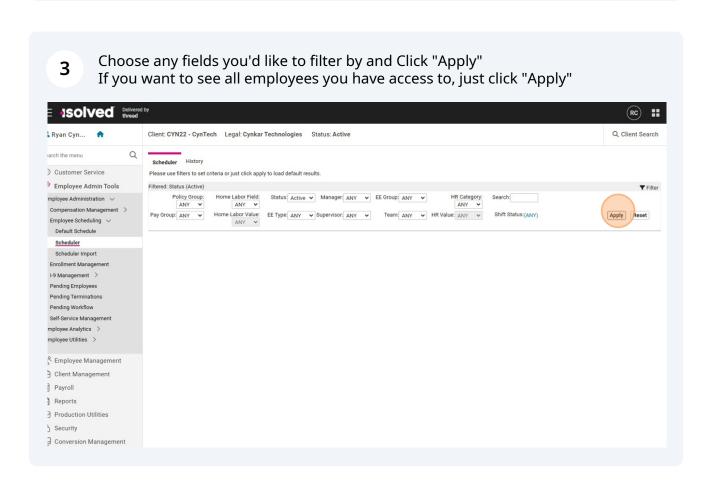
Customer Service

Please use filters to set criteria or just click apply to load default results.

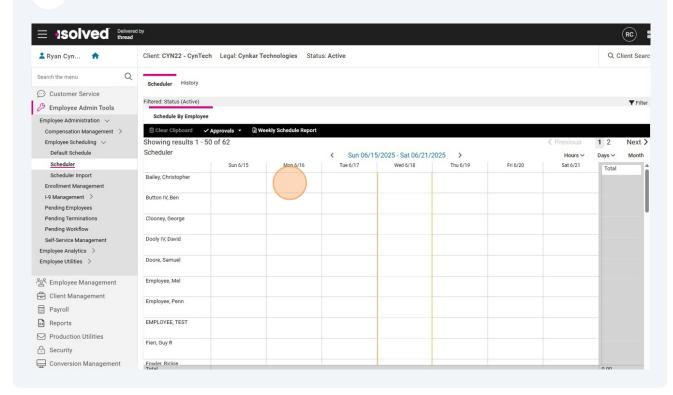
Filtered: Status (Active)

Policy Group: Home Labor Field: | ANY | EE Group: ANY | HR Category: | ANY | EE Type: | ANY | Team: | ANY | HR Value: | ANY | Shift Status: (ANY) Apply Reset Scheduler Scheduler Import Enrollment Management I-9 Management > Pending Employees Pending Terminations Pending Workflow Employee Analytics > Employee Utilities > Employee Management Client Management Payroll Production Utilities → Security Conversion Management System Management 0 --------

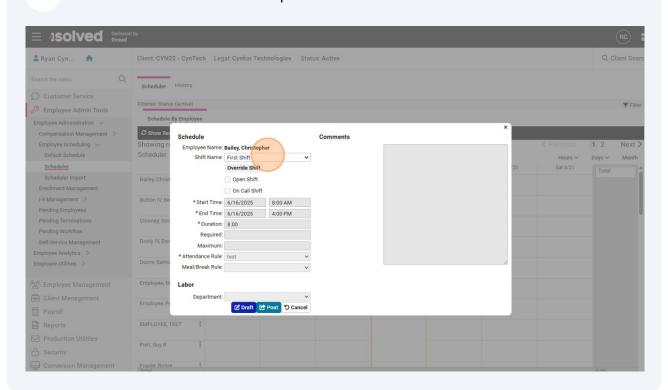
2 Click "Scheduler" ≡ •Isolved Delivered by thread (RC) Ryan Cyn... Client: CYN22 - CynTech Legal: Cynkar Technologies Status: Active Q Client Searc Scheduler History Customer Service Please use filters to set criteria or just click apply to load default results. Employee Admin Tools Filtered: Status (Active) ▼ Filte Policy Group: Home Labor Field: Status Active V Manager ANY V EE Group ANY V HR Category: Search: Employee Administration V Compensation Management > Pay Group ANY Home Labor Value: EE Type: ANY Supervisor: ANY Team ANY HR Value: ANY Shift Status: (ANY) Apply Reset Employee Scheduling V Default Schedule Scheduler Scheduler Import Enrollment Management Pending Employees Pending Terminations Pending Workflow Self-Service Management Employee Analytics > Employee Utilities > മ്മ Employee Management Client Management Payroll Reports Production Utilities Conversion Management



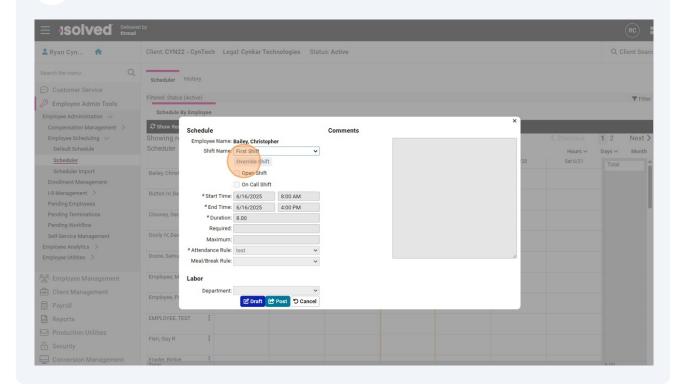
4 Click on the time card where you are looking to add a shift.



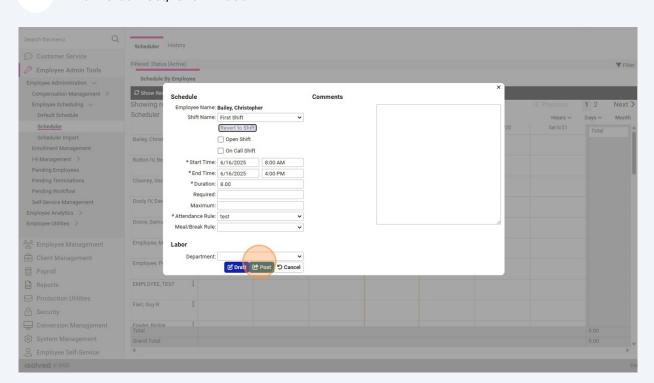
Choose the shift from the dropdown



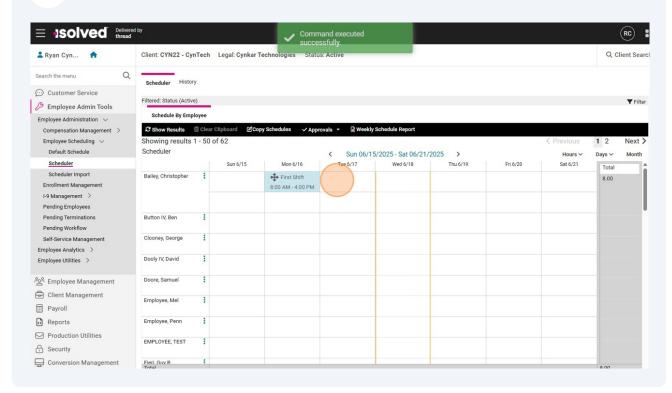
6 Click "Override Shift" if you need to change any details for the existing shift.



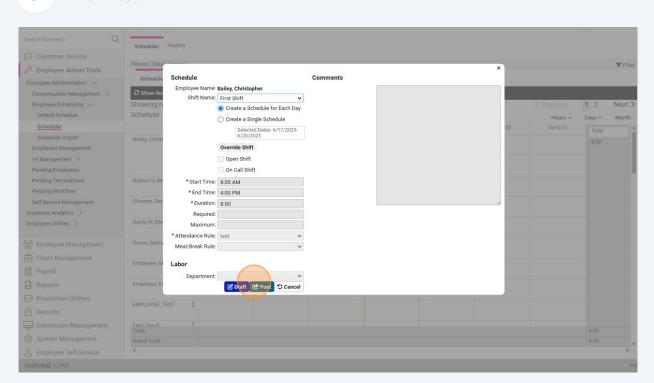
7 If all is correct, Click "Post"



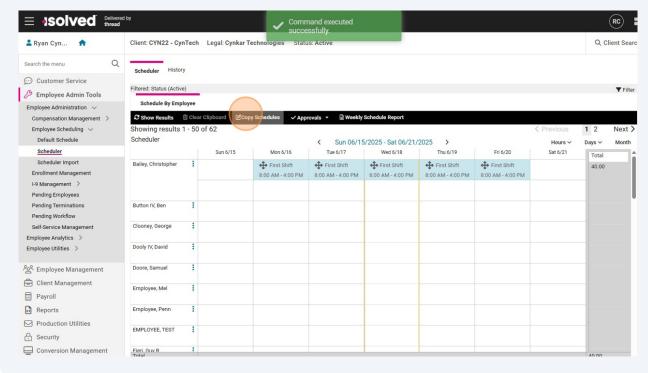
If you click and drag on the time card, you can add multiple days of shifts.



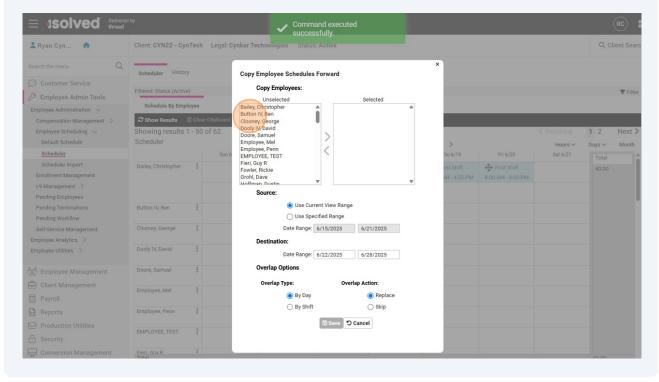
Then Post.



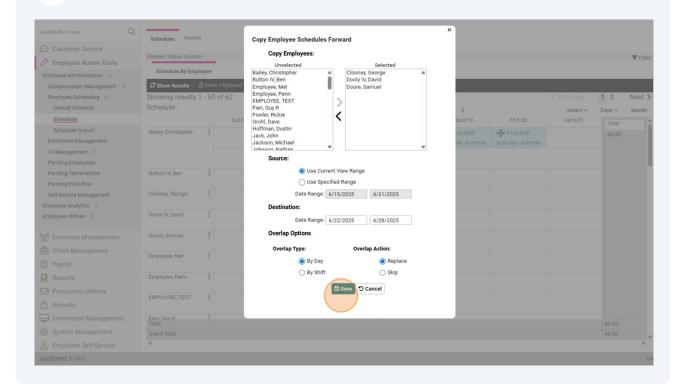
10 If you need to copy schedules to future weeks, Click "Copy Schedules"



You can choose the employees you want to copy, and the date range you'd like to copy to and from.

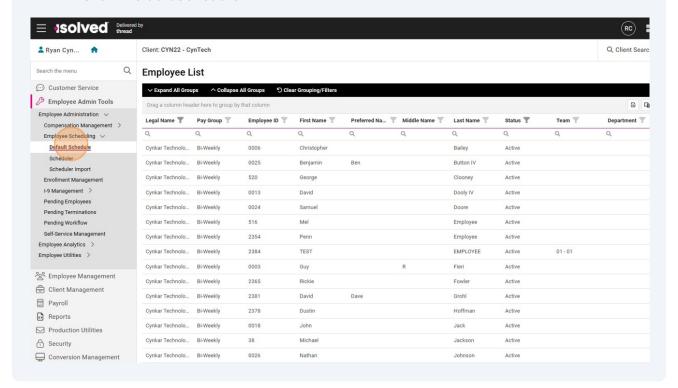


12 Then click "Save"

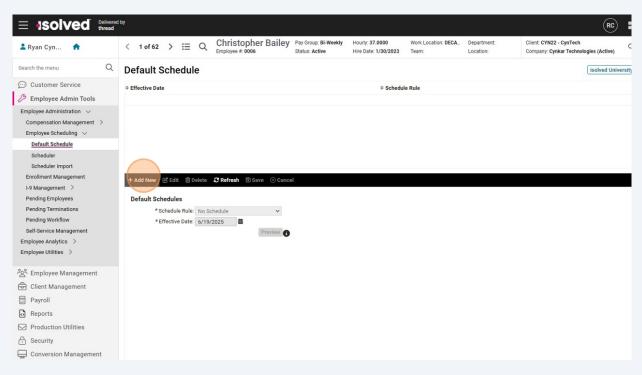


There is also the option of Default Scheduler. If you create Schedule Rules, you can then apply those schedules to employees using Default Schedules and these can be set up indefinitely into the future so you don't have to manually assign shifts.

Click "Default Scheduler"

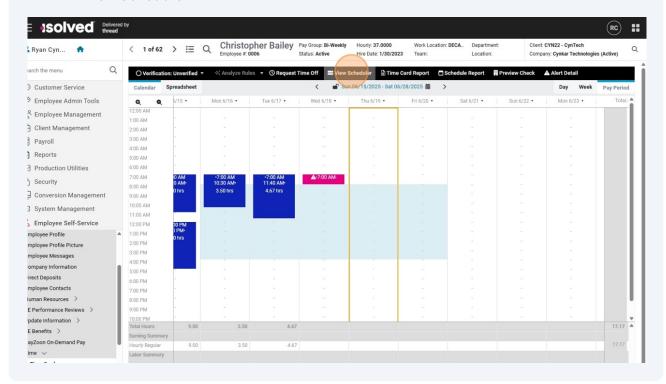


Click "Add New" and add your Schedule Rule. (Schedule Rules do need to be created first)



If you navigate back to the time card, you will see blocks of time on each day that has a schedule. This will be in the background of any worked blocks of time.

If you want to edit the schedule for that specific employee quickly, you can click "View Scheduler"



If you do want a full schedule for the week, you can navigate back to the Scheduler and Click "Weekly Schedule Report"

