

Shifts and schedules

Another Check-In · A02

Before the demonstration

Berland Hope

- Your assigned responsibility
- The correct training record
- Evidence of the result

Today's outcome

Schedule and override can be traced to dates, staff and reason.

Shift definitions

Bertrand Hope

- Open Locations > Shifts
- inspect definition times, timezone, overnight flag and grace values
- create/edit only with the corresponding grant

In this step

Read the timezone, times, overnight setting and grace values together. A definition describes the schedule rule. Creating or changing that rule requires different authority from assigning an existing rule to an employee.

Effective assignment

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- Assign an approved shift to staff with effective start/end, location and priority

In this step

Check the employee, location and effective dates. Priority matters when assignments compete. A correct shift definition can still produce the wrong expectation if you assign it to the wrong period or person.

The weekly calendar

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- Review the Calendar for the chosen week and staff

In this step

Inspect the intended week after the assignment. The calendar lets you check which schedule applies on each date. Use the employee's expected work pattern to catch a date-range mistake before it affects report interpretation.

Temporary overrides

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- Create a reasoned temporary override, or preview bulk assignments and apply only ready rows on approved training data

In this step

Use a reasoned override for an approved temporary exception. Bulk preview deserves the same identity and date checks as an individual assignment. Apply ready rows only after reviewing the proposed results.

History and authority

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- Inspect History and relevant attendance report
- deactivate definitions only with shifts.delete

In this step

Check history and the affected attendance report after a change. Deactivating a definition has its own permission. Supervisors can have assignment authority without definition authoring, and managers can lack deactivation authority.

Common problems

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- Mixing local times with custom UTC override fields
- wrong effective dates
- assuming scheduling is enabled
- applying all CSV rows without reading validation

A useful support report

The task and record

The expected result

The actual message

The authorized next step

Guided practice

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- Assign an existing shift for one fictional employee, add a one-day override and verify the week calendar/history
- Definition authors additionally create a training shift

Evidence to show

The correct training case

The result or permitted decision

Your explanation of the next step

Practice debrief

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- Correct context and permitted action
- A result you can trace
- A clear next step if blocked

Expected result

Schedule and override can be traced to dates, staff and reason.