inTime®

SCHEDULERS'

User Guide

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INTRODUCTION TO INTIME SCHEDULING

InTime Scheduling is used to manage and maintain daily **Work Schedules** for public safety personnel, private security firms, corporate protection teams, and service technical crews operating in complex 24-hour shift rotations. As a Scheduler, you will use InTime to:

- View and update employee schedules
- Assign shifts and activities
- Process personal scheduling requests including overtime, leave, and shift trade requests
- Process time cards
- Monitor staffing levels and coverage

1. Purpose of This Scheduler Guide

This guide provides Schedulers with the knowledge and procedures required to effectively use InTime for workforce scheduling. It combines conceptual information, system guidance, and step-by-step instructions to support accurate schedule creation, maintenance, and the allocation of operational workforce resources.

2. Role of the Scheduler in InTime

Schedulers use InTime to create, maintain, and manage Work Schedules that support the operational needs of the organization. Their role involves balancing staffing requirements, employee availability, organizational policies, and day-to-day operational changes to ensure appropriate coverage is maintained at all times.

Schedulers are responsible for a wide range of scheduling activities, including:

- Creating and updating daily and future Work Schedules
- Assigning employees to shifts, overtime posts, locations, and operational activities
- Reviewing and adjusting staffing levels to maintain operational coverage
- Processing overtime, leave, shift trade requests, and timecards
- Managing open shifts, overtime postings, and assignment changes
- Monitoring scheduling conflicts, fatigue alerts, and rule violations

- Responding to operational changes by adjusting schedules as needed
- Reviewing schedule history, reports, and staffing information
- Approving timecards, timesheets, and activity requests
- Communicating schedule changes to affected personnel when required

Throughout these processes, schedulers rely on information stored within InTime such as:

- Employee availability
- Qualifications and training levels
- Work groups and assignments
- Fatigue thresholds and scheduling rules
- Operational demand and staffing requirements
- Time-off requests evaluated against available leave balances

By maintaining accurate schedules and responding to changing operational needs, schedulers help ensure the organization maintains proper staffing, operational readiness, and compliance with internal policies and scheduling requirements.

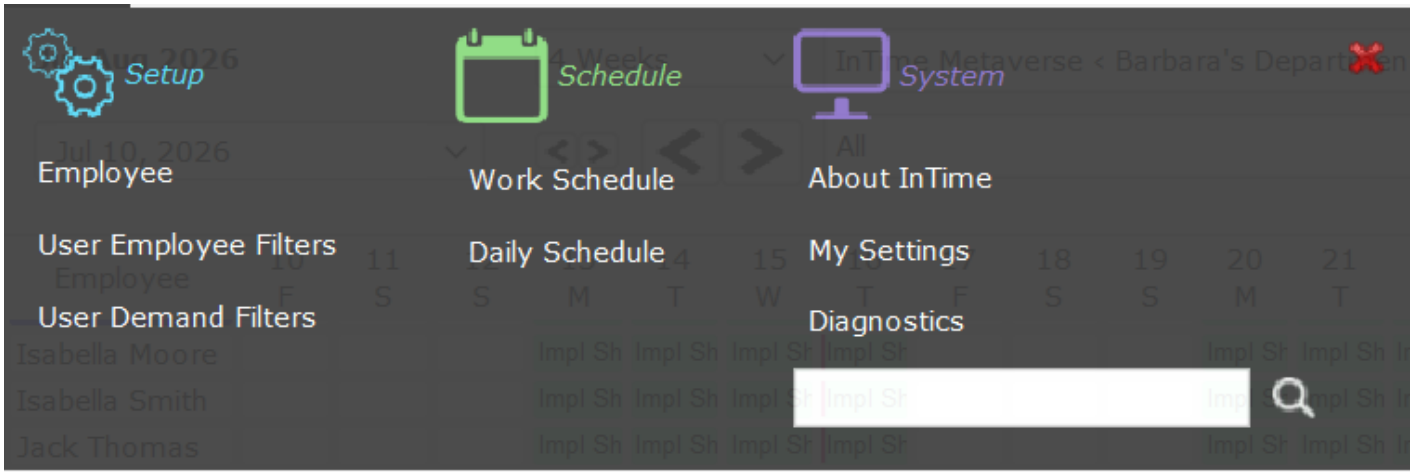
INTIME SCHEDULING CONCEPTS

This section introduces the core screen elements referenced throughout the rest of this guide: the Navigation Bar, the Work Schedule Views, the Command Toolbar, and the Details Panel. Understanding these elements first will make the step-by-step procedures in the sections that follow easier to use.

1. Main Modules (Off the Main Menu)

InTime is organized into core modules that group related functionality. Understanding these modules helps schedulers quickly locate the tools they need for day-to-day scheduling activities.

While schedulers regularly work within a specific set of scheduling and operational modules, some modules contain administrative, payroll, configuration, or system-management functions that may be restricted based on permissions. Understanding the purpose of each module helps schedulers navigate the system more efficiently and identify when assistance from an InTime Administrator may be required.



Setup

The Setup module contains the core configuration data that supports scheduling in InTime. This includes employees, units, locations, activities, demand structures, and other system settings used throughout the scheduling process.

Most Setup functions are managed by InTime Administrators and access is typically restricted based on permissions. While schedulers do not usually make changes within Setup, the information configured here directly affects scheduling activities and system behavior.

Depending on permissions, schedulers may have access to the following Setup functions:

1. **Employee Profile** – Provides access to employee profile information. Scheduler access is typically limited to viewing employee information relevant to scheduling.
2. **User Employee Filters** – Allows schedulers to configure and manage their personal employee filter settings.
3. **User Demand Filters** – Allows schedulers to configure and manage their personal demand filter settings.

💡 If scheduling information appears incorrect or a required scheduling element is missing, contact an InTime Administrator, as the issue may originate from Setup configuration.

Schedule

The Schedule module is the primary workspace for schedulers. It provides access to both the Work Schedule and Daily Schedule views, where schedulers build, review, and manage employee

schedules, assign shifts, monitor staffing levels, and make real-time scheduling adjustments.

Depending on permissions, the Schedule module may also include additional tools used to create and maintain schedule templates, patterns, and other scheduling structures. While these functions are typically managed by administrators or advanced schedulers, they support the scheduling processes used throughout InTime.

System

The System module provides access to user settings, diagnostics, and administrative tools. This includes options such as user setup, permissions, and system-level configurations. Access is typically restricted based on user role.

Find/Search

Figure 1: Main Menu Search

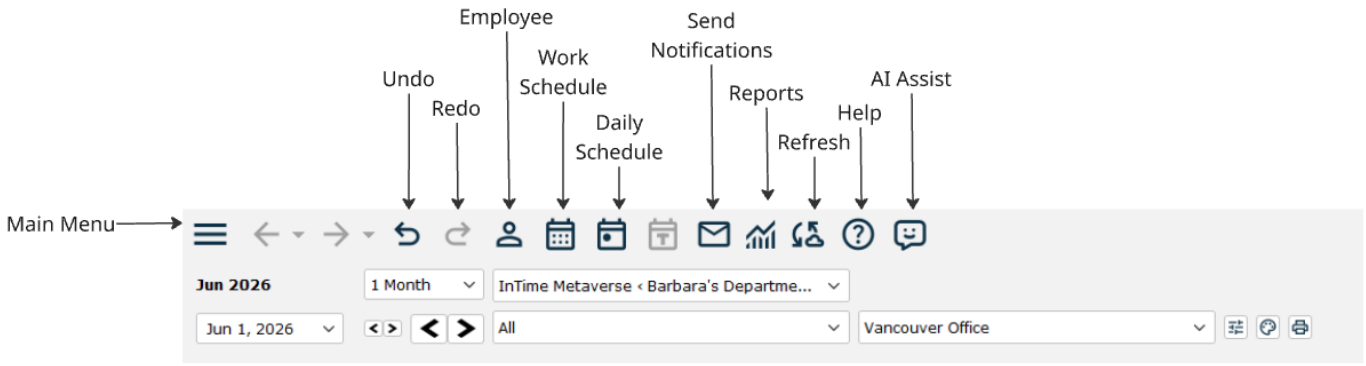


The Find / Search (Magnifying Glass) searches for items within the user's menu. I does not search application data, records, schedule or other system content.

2. Navigation Bar

The toolbar provides quick access to commonly used scheduling functions and navigation tools. It allows Schedulers to perform common actions—such as navigating dates, refreshing the schedule, and accessing key features—without leaving the current view. Understanding how to use the toolbar improves efficiency when building, reviewing, and adjusting schedules.

Figure 2: InTime Navigational bar

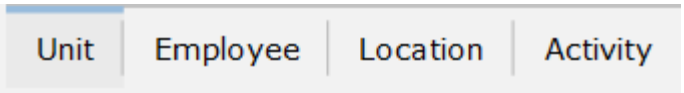


Key Navigation bar elements include:

- **Main Menu (☰):** Expands the main menu, providing role-based access to all InTime modules and features.
- **Forward and Backward Arrows:** Move backward or forward through previously viewed screens within the InTime Desktop Application.
- **Redo:** Reapplies the most recently undone action.
- **Undo:** Reverses the most recent action performed (e.g., undoing a schedule change) as long as it the Refresh icon has not been pushed; or the information has not yet been sent to the server by way of a background process.
- **Employee:** Opens the Employee Profile window for viewing and managing employee information.
- **Work Schedule:** Opens the Work Schedule in multi-day views, including weekly and monthly options.
- **Daily Schedule:** Opens the Daily Schedule view.
- **Templates** (InTime Administrator's Only)**:** Displayed for reference only. Creating and loading schedule templates is typically managed by an agency InTime Administrator or Master Scheduler, so this icon is not available for direct use by Schedulers.
- **Send Notification:** Opens the notification window to send employee messages via email, and, if enabled, SMS from one place.

- **Reports:** Opens the Reports window to access and run available reports.
- **Refresh:** Updates the screen to display the most current scheduling data and system information and permanently saves your changes to the cloud.
- **Help:** Opens InTime help and support resources, including guides, videos, and documentation.
- **AI Assist:** On-demand AI guide for every question about setting up and using InTime."

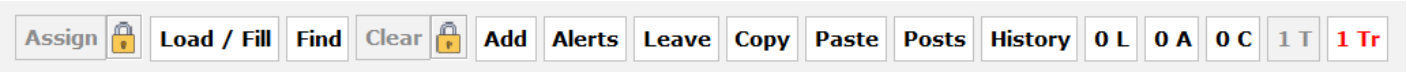
3. Work Schedule Views



Schedulers use different schedule views to analyze assignments from multiple perspectives. Switching between views allows Schedulers to evaluate employee schedules, review location coverage, and identify gaps or conflicts more effectively.

- **Unit View:** Reviews assignments grouped by organizational unit. Use Unit View to review staffing within specific organizational groups and to compare staffing across units and locations.
- **Employee View:** Reviews assignments by employee, displaying the schedule from the perspective of a single employee. Use Employee View when assigning or adjusting an individual employee's schedule, or when reviewing a schedule for patterns related to overtime, wellness, and leave.
- **Location View:** Reviews coverage by location or post. Use Location View when verifying coverage and identifying gaps.
- **Activity View:** Sorts all activities and shifts

4. Command Toolbar



The Command Toolbar is the bar of quick-access buttons that runs along the bottom of the Work Schedule screen. It gives Schedulers one-click access to the same actions available from the right-

click menu on a selected activity block — things like assigning, filling, posting, or viewing history — without needing to right-click each time. It also displays live request queue counts (e.g., when an employee submits a request) and supports locking a function so it stays active across multiple cells in a row.

💡 Daily Schedulers will have limited access to the **Command** toolbar depending on their role-based permissions set up by the System Administrator. The list below flags items that are typically InTime Administrator only. However, some Daily Schedulers may be tasked with some administrative functions depending on their agency.

- **Assign** — Applies the most recently used shift and activity details to the selected cell to create a new assignment. (InTime Administrator)
- **Load/Fill** — Loads or unloads schedule patterns (template schedules) onto the Work Schedule for selected cells. Load applies the employee's default template pattern; Unload removes it. Range Load/Unload extend this to a date range, though existing manually entered schedules must be cleared first, and Range Unload only removes template-loaded patterns not manual entries (Daily Scheduler & InTime Administrator).
- **Find** — Evaluates available employees who have signed up for a posted shift, using configured criteria such as qualifications, availability, and ranking rules; may use Find Lists or other selection tools (Daily Scheduler & InTime Administrator).
- **Clear**— Removes an assignment from a selected cell (or a range of cells/employees over a date range via Clear Range). Does not remove leave, which must be cleared separately in the Leave window (InTime Administrator).
- **Add/Prefill (Prefill)** — Creates an unassigned shift in the schedule based on the assignment details currently loaded in the Details Panel, so it can be posted, assigned, or filled later. Unlike Fill, it creates the shift first without assigning anyone to it (Daily Scheduler & InTime Administrator).
- **Alerts** — Notifications of potential scheduling issues, conflicts, or rule violations (e.g., overlapping assignments, missing qualifications, fatigue thresholds exceeded). Depending on configuration, a conflict can be set to Ignore, Warn (visible warning, or Prevent (Daily Scheduler & InTime Administrator) .

- **Leave** — One of the most common assignment exceptions. Applying leave removes the employee from their scheduled work and may create a vacancy that requires reassignment, filling, or posting (Daily Scheduler & InTime Administrator).
- **Copy** — Duplicates a shift assignment from one cell to another without manually re-entering the details. Copy captures the shift details (including any subblock assignments) from a selected cell; Paste applies those details to an empty cell. Useful for quickly repeating the same assignment across multiple employees or dates (Daily Scheduler & InTime Administrator).
- **Paste** — Inserts a previously copied shift assignment into a selected empty cell. Once a shift has been copied, clicking Paste (or right-click → Paste) applies its details to the new cell, allowing quick duplication across employees or dates without re-entering the shift information (Daily Scheduler & InTime Administrator).
- **Posts/Manage Post/Add Post** — Creates and publishes a posting for an open assignment, making it visible for employees to view and respond to (Daily Scheduler & InTime Administrator).
- **History** — A record InTime maintains for each activity assignment, showing changes made over time — who made a change, when it was made, and the sequence of adjustments. Functions as an audit trail supporting accuracy, accountability, and troubleshooting (Daily Scheduler & InTime Administrator).
- **Request & Submission Queues** — Queues that display employee-submitted requests needing Scheduler review/approval. The guide identifies four types:
    - *Leave Requests* — Requests for time off, such as vacation or sick leave (Daily Scheduler & InTime Administrator).
    - *Activity Requests* — Requests to work or modify specific assignments or activities (Daily Scheduler & InTime Administrator).
    - Court Requests— Requests to manage court-related matters, such as subpoenas, including their review, approval, rejection, or rescheduling (Daily Scheduler & InTime Administrator – NOTE: must have Court Module Installed).
    - *Timesheet Requests* – Requests to record and report worked hours, leave, overtime,

and other pay-related activities for a pay period, submitted by employees and subject to supervisor approval or rejection (InTime Administrator).

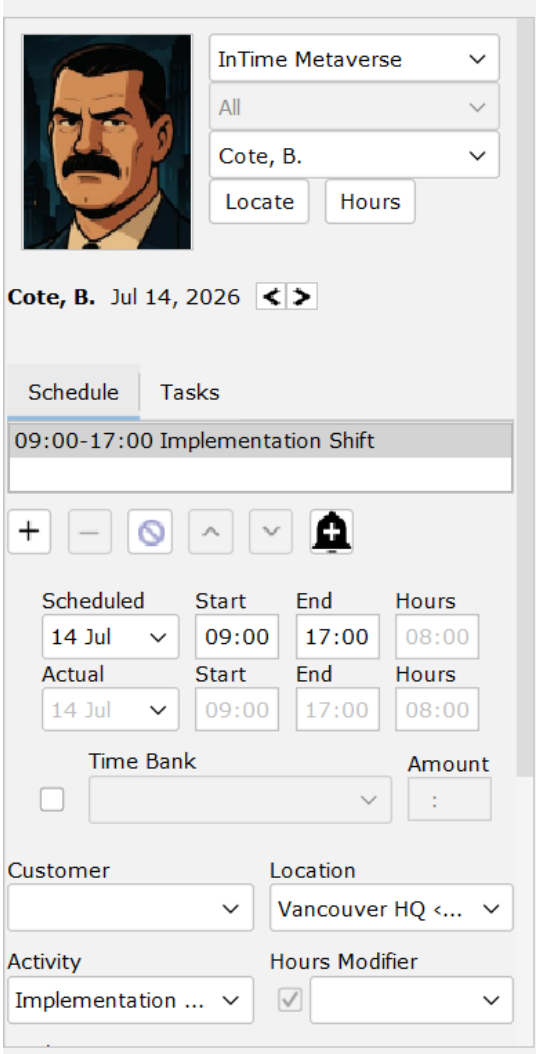
- *Shift Trade Requests* — Requests to swap assignments with another employee (Daily Scheduler & InTime Administrator).

💡 The Timekeeping Module is required to access the Timesheet Requests functionality listed above.

5. Details Panel

The **Details Panel** is where Schedulers view and update the information behind a selected assignment. When you click an assignment on the Work Schedule, the panel refreshes to show its details — and any changes you make there apply only to that selected assignment. It's the primary tool for making quick, targeted edits without altering the rest of the schedule.

In InTime, every scheduled assignment is made up of several core components that define **who is working, what they are doing, where they are assigned, and when the work takes place**.



- **Branch** — Dropdown used to select and view information for a specific Branch (similar to a department or agency, e.g. "Vancouver Police Department"). Displays only the Branches you have permission to access, and filters the panel to show data, employees, or units for the selected Branch. If you have access to multiple Branches, this is how you switch between them.
- **Employee** — Field/dropdown at the top of the panel used to select which employee's assignment you're viewing or editing.
- **Locate button** — Highlights the selected employee's row in the Work Schedule grid so you can find them quickly.
- **Hours button** — Opens the Hours Summary window, showing the employee's scheduled and worked time — used to check workload distribution, overtime exposure, and availability without leaving the schedule.
- **Schedule tab** — Shows the current activity/subblock segments that make up the selected assignment, and is where those segments are added, edited, or removed.
    - **Schedule pane with assigned activities listed** — The list within the Schedule tab displaying each activity segment (subblock) belonging to the assignment.
    - **Add/subtract buttons "+" / "-"** — "+" adds a new subblock (assignment segment); "-" removes the selected subblock. Removing a subblock only removes that segment, not the employee's main shift.
    - **Cancel button** — Cancels the selected assignment; requires choosing a Cancel Reason from a list.
    - **Up/down arrows to reorder blocks and subblocks** — Move selected blocks or subblocks up or down in the list.
    - **Reminder button** — Allows Daily Scheduler to set a reminder for an employee's

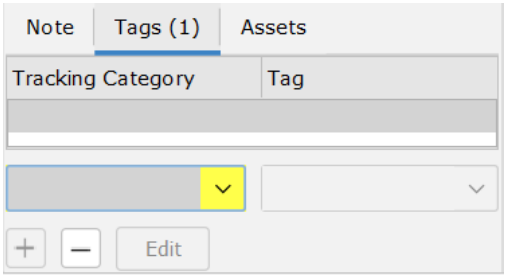
scheduled task.

- **Scheduled hours field** — Total Hours, calculated automatically from the Scheduled Start and End times.
- **Start and End fields** — Scheduled Start and End times — the planned work period for the assignment.
- **Hours field** — System populated. Tells the Daily Scheduler how many hours the activity block or subblock is.
- **Actual hours field** — System populated. Tells the Daily Scheduler the actual hours worked.
- **Actual start and end fields** — Actual Start and End times, used for tracking worked time (as distinct from scheduled time).
- **Time Bank checkbox and field** — Lets a Scheduler apply hours (e.g., overtime) to an employee's Time Bank instead of a payout; select the Time Bank from a dropdown and specify hours.

💡 Timebanks must be enabled by your InTime Administrator.

- **Amount** — Amount of hours" to be attributed to Time Bank.
- **Customer field** — Used for tracking and billing, if your configuration uses Customer tracking.
- **Location field** — Defines where the assignment takes place (site, facility, or operational area).
- **Activity field** — Defines what work the employee is doing during the assigned time (e.g., patrol, training, administrative duties).
- **Hours Modifier checkbox and field** — Classifies how scheduled time should be treated (e.g., premium time, callback, relief coverage) — distinct from Activity, which defines what work is being done.
- **Rank** — Order of importance or title of the employee.
- **Unit** — Lets you assign the shift to a different Unit than the employee's usual one (used for reporting to another Unit temporarily).

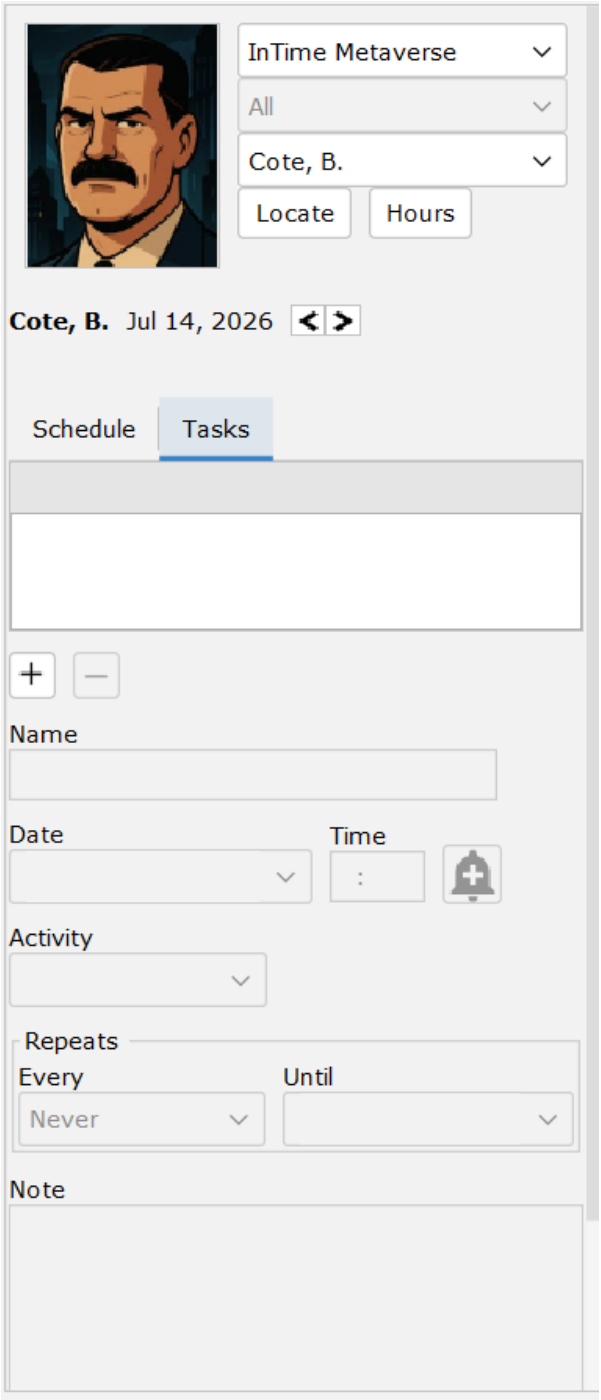
- **Note tab** — Used to add explanatory text (e.g., reason for a change or extension).
- **Tags tab** —Assigns tracking categories and tags to an employee's shift, for tracking special assignments, events, or other agency-specific categorizations. Select a Tracking Category from the dropdown, then choose a specific Tag (e.g., "Supercross") within that category. Once assigned, the tracking category and tag are visible on the shift



  - **Tracking Category and Tag pane** — Grid/menu opened via "Tags" in the Details Panel for classifying the assignment.
  - **Tracking Category dropdown** — Select the category the assignment should be classified under (e.g., overtime, case number, project code).
  - **Tags dropdown** — Select or enter the specific tag value within the chosen Tracking Category. Tags can be Managed (predefined/standardized) or Unmanaged (entered ad hoc).
  - **Add/subtract buttons "+" / "-"** — "+" opens the Tracking Category field to begin adding a new category/tag pairing.

- **Tasks tab** — Lets Schedulers attach reminders, notes, or action items to an assignment; tasks don't create staffing requirements, just supplemental info.

- **Tasks list pane** — Displays the tasks attached to the selected assignment.
- **Add/subtract buttons "+" / "-"** — Adds or removes a task.



- **Name field** — The task's name.
- **Date field** — Automatically pre-fills with the date of the selected shift when assigning a task, so the task defaults to the correct day without manual entry.
- **Time field** — Sets the time associated with the task.
- **Notify button** — Sets a notification/reminder for the task, with options for acknowledgement-required and escalation if not acknowledged.
- **Activity field** — Associates the task with a specific activity or shift.
- **Repeats section** — Lets you program a task to recur on a set pattern (e.g., every Friday at a specific time until a certain date), automating regular tasks or meetings so they don't need to be manually re-entered each time.
- **Every field (dropdown)** — Sets how often the task repeats (labeled "Repeats" dropdown in source).
- **Until** — Sets the end date after which the recurring task stops.
- **Note** — Free-text field to explain what the task is or why it was added.

6. InTime Web Interface Overview

The InTime interface provides access to the core scheduling tools and operational functions used by schedulers to manage workforce activities and schedules. Depending on permissions, schedulers will see the following core areas:

- **View Schedules**: Access personal schedules and, where permitted, view schedules for all employees within the assigned branch in both desktop and web.
- **Team Schedule**: Displays a consolidated team view in both Desktop and Web to support workforce planning and coverage decisions.
- **Requests**: Submit leave, activity, timesheet, and shift trade requests by way of the Web interface. Manage
- **Overtime Sign-Up**: View and sign up for available overtime opportunities by way of the Web interface. Manage leave, activity, timesheet, and shift trade requests by way of the Desktop application.
- **Reports**: Run standard reports to monitor schedules, staffing levels, activities, and more.
- **Notifications**: Send communications to employees via email or SMS directly from the Desktop application.
- **Account Settings**: Manage personal preferences including theme, date formatting, password updates, and team notifications from the Web or Desktop application.

7. Assignment Structure

In InTime, every scheduled assignment is made up of several core components that define **who is working, what they are doing, where they are assigned, and when the work takes place**.

Understanding this structure is essential for Schedulers, as it allows them to read schedules accurately, identify gaps or conflicts, and make precise adjustments when needed.

Each assignment is built from the following elements:

- Employee
- Date & Time

- Location
- Activity

These components work together to form a complete and meaningful assignment within the schedule.



a. Employee

The Employee component identifies **who is assigned to the shift or activity**.

Employees appear in the schedule based on their configured profiles, including display name, rank, and unit. When creating or modifying assignments, Schedulers select employees and ensure that the correct individual is assigned to the appropriate work. When configured, the system also confirms the employee's qualifications and availability before the assignment is made.

As shown in Error! Reference source not found. the assigned employee is displayed within the **Details Panel** and is directly tied to the selected assignment.

From a scheduling perspective, the employee component is critical because it connects the assignment to:

- Qualifications and eligibility
- Availability and time-off requests
- Work rules and constraints

💡 Accurately assigning the right employee helps ensure compliance with organizational policies and operational requirements.

b. Time

As show in Error! Reference source not found. the Time component defines **when an assignment occurs**, including the scheduled start and end times, and is fundamental to all scheduling activities in InTime.

Each assignment includes a defined time range that determines:

- When the employee is expected to work
- The duration of the assignment
- How the assignment appears within the schedule

Within the **Details panel**, Schedulers can view and modify:

- **Scheduled Start and End times** (planned work period)
- **Total Hours** (calculated based on the scheduled time)
- **Actual Start and End times** (used for tracking worked time, if applicable)

From a scheduling perspective, Time is critical because it:

- Ensures proper shift coverage across the schedule
- Helps prevent overlaps, gaps, or conflicts in staffing
- Aligns assignments with operational requirements and work rules
- Impacts payroll, reporting, and compliance with labor policies

Schedulers adjust assignment times directly within the schedule or in the details panel to reflect operational needs. Accurate time entry is essential for maintaining a reliable and effective schedule.

c. Location

The Location component defines **where an assignment takes place** and is a key element in organizing and managing schedules within InTime.

Locations typically represent physical sites, facilities, or operational areas (e.g., buildings, campuses, regions). They are structured hierarchically, allowing Schedulers to view and manage work at different levels of the organization.

From a scheduling perspective, Location is important because it:

- Determines where employees are assigned to work
- Helps organize schedules by site or operational area
- Impacts which employees are eligible or appropriate for an assignment
- Supports reporting and operational visibility across different locations

Schedulers select a location when creating or modifying an assignment to ensure that work is assigned to the correct place. In many cases, locations are also tied to specific activities, units, or staffing requirements.

💡 Using the correct location ensures that schedules accurately reflect operational needs and that employees are assigned to the appropriate work environment.

d. Activity

The Activity component defines **what the employee is doing during the assigned time period**.

Activities represent the specific type of work being performed, such as patrol, dispatch, training, court time, administrative duties, or other operational assignments. They provide critical context to the schedule by distinguishing between different types of work, even when time and location may be similar. That said, the majority of activities are Shifts set up in Groups.

From a scheduling perspective, activities are essential because they:

- Define the purpose of the assignment

- Differentiate between operational and non-operational time
- Support reporting, tracking, and analysis of work performed
- May impact pay rules, overtime eligibility, or premium calculations depending on system configuration

💡 Schedulers rely on activities to ensure that the right work is being assigned at the right time and that staffing aligns with operational needs. Incorrect or missing activity assignments can lead to reporting inaccuracies and confusion in daily operations.

8. Hours Modifiers

While Activities define the type of work, Hours modifiers define how time is treated for payroll, reporting, and operational purposes.

For Schedulers, these elements are important because they impact not only how assignments appear on the schedule, but also how scheduled time is understood and processed across the organization. Selecting the correct combination helps ensure clarity, consistency, and accurate downstream handling of scheduled hours.

e. Hours Modifiers

Hours modifiers provide an additional layer of classification that defines **how scheduled time should be treated**, rather than what type of work is being performed.

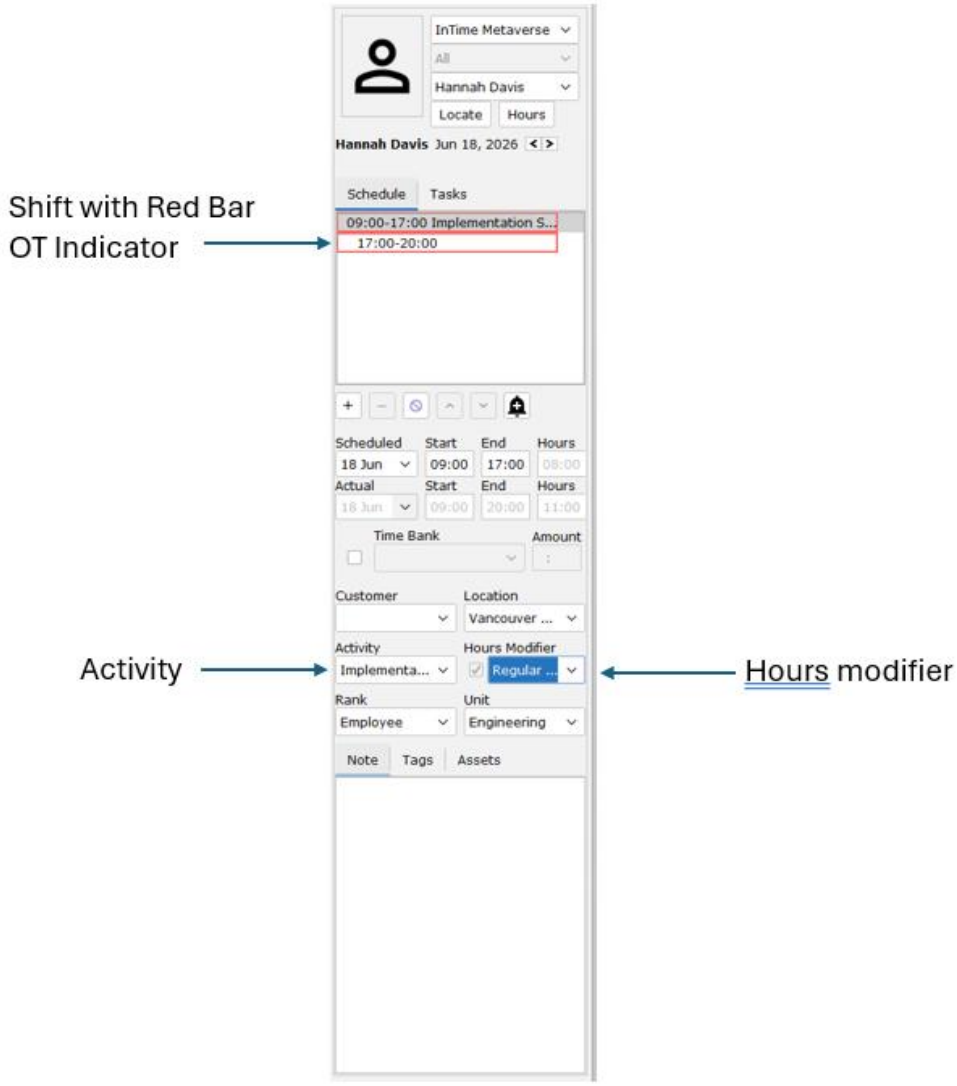
While the activity identifies the assignment itself, the hours modifier adjusts how those hours are interpreted within the system. Depending on organizational configuration, modifiers may indicate conditions such as premium time, callback, relief coverage, special assignments, or other non-standard working conditions.

From a scheduling perspective, hours modifiers are important because they:

- Influence how scheduled hours are processed for payroll or export
- Distinguish standard hours from special or exception-based time
- Support more detailed reporting and tracking
- Ensure that unique scheduling situations are properly identified

Not all assignments require a modifier, but when one is needed, Schedulers must apply the correct option to ensure the time is handled appropriately. The **Activity** and **Hours Modifier** fields are accessible within the **Details Panel**, as shown below.

Figure 3: Details Showing Activity and Hours Modifier Fields



f. Hours Modifiers Matter to Schedulers

Activities and hours modifiers work together to ensure that scheduled time is both **accurately represented and correctly interpreted** across the system.

For Schedulers, their importance goes beyond simple labeling. They directly impact how schedules

are understood and used by other stakeholders.

Specifically, they:

- Distinguish different types of work and assignments
- Improve schedule clarity for supervisors and operations
- Ensure that hours are interpreted correctly by payroll, exports, and downstream systems
- Support accurate reporting and workforce analysis
- Help identify special assignments or exceptions within the schedule

💡 When reviewing or adjusting assignments, Schedulers should always confirm that both the activity and any required hours modifier correctly reflect the real-world scenario being scheduled.

9. Find List Usage Calculators in Scheduling

Find List Usage Calculators are system tools used to help rank and sort employees when Schedulers are filling open assignments, overtime opportunities, or other extra shifts. These calculators support fair and consistent employee selection by organizing find list results according to predefined usage rules.

Schedulers do not configure or maintain these calculators. Their setup is handled by the agency InTime administrators, who determine how employees are ranked, which assignments or hours modifiers are included, and how the calculation resets or recurs over time.

From the Scheduler's perspective, it is important to understand that the prioritized sort lists shown in find list results are driven by these calculator rules. This helps explain why one employee appears higher or lower than another when the system generates a list of potential candidates.

Common calculator methods include:

- **Count Based** – sorts employees based on total number of times an employee has worked a particular assignment or opportunity within a given time period. This period resets automatically based on its chosen recurrence pattern.
- **Hours Based** – counts the number of hours worked at a given assignment and sorts employees based on the total number of hours they have worked. The employee with the

most hours worked will be at the bottom of the list and the employee with the least hours worked will be at the top of the list.

- **Turn Based** – sorts employees based on the date when they were last assigned to work overtime with the most recent assignments at the bottom of the list, often supporting rotational fairness for overtime or extra shifts.

These calculators help standardize assignment decisions and reduce inconsistency when selecting employees for available work. For Schedulers, understanding how calculator results are derived makes it easier to interpret find lists, explain assignment order, and make informed staffing decisions.

💡 Although schedulers do not control calculator settings, they should be familiar with how calculator-based rankings affect find list results during day-to-day scheduling.

EMPLOYEE INFORMATION FOR SCHEDULING

The Employee Information section explains how employee data is organized within InTime and how it supports scheduling activities.

While employee profiles are configured and maintained by InTime Administrators, Schedulers rely on this information to understand employee availability, qualifications, work group assignments, and scheduling constraints. Employee data directly determines how employees appear in schedules, what assignments they are eligible for, and how workforce rules are applied.

This section focuses on how schedulers interpret and use employee information when building and managing schedules.

10. Understanding Employee Profiles and Scheduling Elements

Each employee in InTime is defined by a profile that includes specific scheduling elements. These elements can determine how employees are grouped, what assignments they are eligible for, and when they are available to work.

For schedulers, employee profiles are not something to configure, but something to understand. **The information contained in these profiles directly drives scheduling behavior and decisions.**

This section explains the key components of an employee profile and how they impact scheduling.

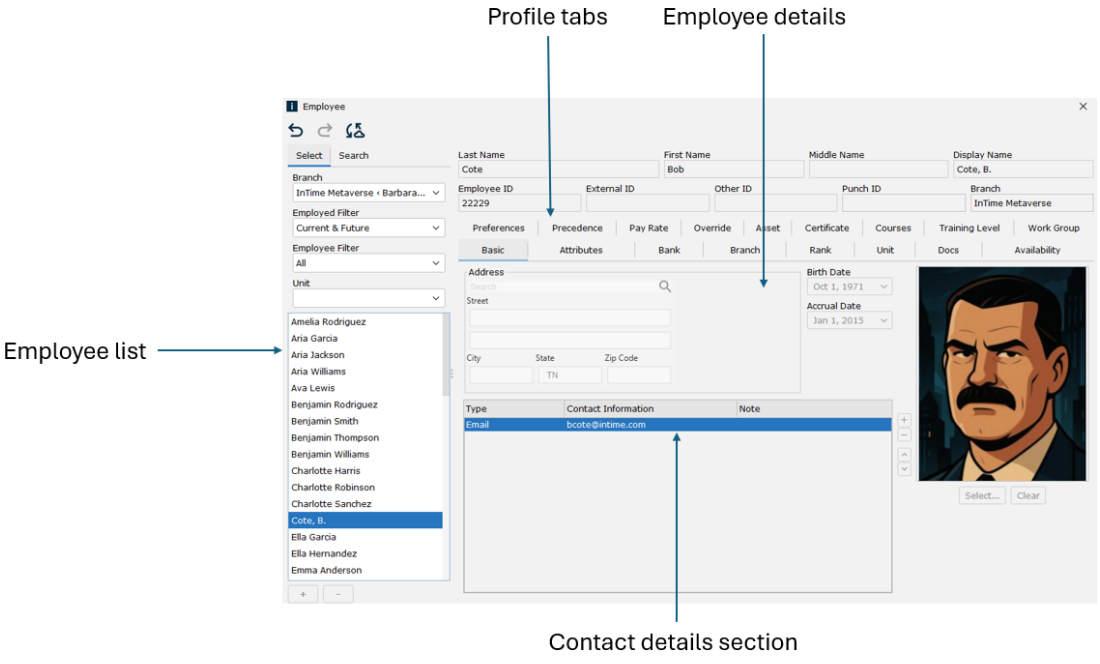
a. Employee Profiles

Employee profiles in InTime serve as the central location for all employee-related information used in scheduling and workforce management. Each profile contains both general employee details and scheduling-specific attributes that can determine how an employee is assigned and managed within the system.

Information within the profile is organized into multiple tabs, allowing Schedulers to view key elements such as availability, work groups, units, ranks, and attributes. These elements work together to define where, when, and how an employee can be scheduled.

Employee profile information may also affect whether an employee appears in scheduling lists, qualifies for specific assignments, or generates scheduling warnings or restrictions. Changes to employee status, qualifications, work groups, or availability may directly impact scheduling eligibility throughout InTime.

> 💡 Schedulers do not maintain employee profiles, nor should they use them to look up live data such as availability to make decisions. The profile is simply the backend data source that powers the work schedule. Schedulers rely on the work schedule to automatically reflect this information when resolving conflicts and making assignments.



b. Employee Profile Tabs and Fields Important to Schedulers

Employee profile information in InTime is organized into multiple tabs, each containing specific fields used to support scheduling and workforce management. While Schedulers do not configure most of these fields, understanding what information is available—and how it impacts scheduling—is important. Both tab views and tab editing have role-based permissions, so you may not see or be able to edit all of the tabs shown here.

Basic

Includes general employee information such as address, birthdate, identification numbers, contact details, identification numbers, and an optional photo.

This information is primarily used for reference. While it may occasionally support communication or identification, it does not directly influence scheduling logic.

Attributes

Defines characteristics associated with an employee, such as collateral assignments, skills, abilities, licenses, certifications, or languages.

These attributes are primarily used to identify qualified employees, support assignment decisions, and ensure scheduling requirements are met. Additionally, they can be used to generate specific filters for collateral assignments or workforce allocation, allowing the work schedule to automatically display the right personnel without manual searching.

Time Banks – View Only

Stores the setup and configuration rules for an employee's individual leave accounts. Including vacation, sick leave, or other accrued time. Time banks are set up by the organization's InTime administrator.

Schedulers do not manage time bank directly within this tab. However, this information may be referenced when reviewing availability, understanding absences, or resolving scheduling discrepancies within the Work Schedule view.

Units – View Only

Units define the specific team, squad, or assignment group an employee belongs to within their broader department or division. Schedulers often view and manage the work schedule by Unit, and employee visibility in the Unit view within the schedule is typically tied to Unit assignment.

Rank – View Only

Rank defines an employee's role or level, such as Officer or Supervisor.

Rank can influence assignment eligibility, display order, and may be used to ensure that the appropriate roles are filled within the schedule.

c. Work Groups in Scheduling

Work Groups establish the system rules for payroll periods, timecard policies, and shift differentials when an organization utilizes timekeeping functionality. While schedulers do not typically assign or modify Work Groups, this tab provides schedulers with view-only access to verifying that an employee's account is active for timekeeping purposes.

d. Employee Availability

Availability defines when an employee **is or is not available to be scheduled for work**. It gives Schedulers a clear picture of an employee's open working hours before an assignment is made.

Schedulers can set specific dates and times marking an employee as **Available** or **Unavailable**. When an employee is marked Available, corresponding dates and times must be entered — leaving these blank flags the fields and blocks navigation away from the profile, preventing an employee from unintentionally being left with no availability on record.

From a scheduling perspective, Availability is important because it:

- Determines whether an employee can be assigned to a given shift
- Helps prevent scheduling employees outside their available hours
- Surfaces conflicts immediately, rather than after an assignment has been made

💡 If an assignment is attempted outside an employee's set availability, the system displays a pop-up alert (**Warn** or **Prevent**, depending on configuration) directing the Scheduler to the Availability tab.

💡 If **Available Only** is checked with no time restrictions entered, the employee is treated as never available. If the employee has no restrictions at all, **Unavailable Only** should be checked instead.

e. Employee Status and Scheduling Eligibility

Employee status and scheduling eligibility determine whether an employee can appear in scheduling lists, receive assignments, or participate in operational scheduling activities within InTime. List organizers (scheduling lists) are used to search for and find available employees.

Depending on organizational configuration, employee status may affect:

- Schedule visibility
- Assignment eligibility
- Overtime selection
- Posting eligibility

Schedulers may encounter situations where employees:

- No longer appear in scheduling lists (List Organizers)
- Cannot be assigned to specific activities
- Generate warnings or restriction alerts
- Become unavailable due to status changes or expired qualifications

Common causes may include:

- Inactive or expired employee status – Employment tab
- Unit transfers – Unit tab
- Missing qualifications or certifications – Attributes tab

- Expired training or asset eligibility – Training tab
- Scheduling restrictions configured by organizational rules

Schedulers do not typically manage employee status directly but understanding how employee status affects scheduling helps explain why employees may appear differently within the Work Schedule or assignment selection windows.

💡 Employee status changes may affect assignment visibility, eligibility, and scheduling behavior throughout InTime.

💡 Depending on permissions and organizational configuration, some employee status changes may only be managed by administrators or supervisors.

f. Employee Attributes (Skills & Qualifications)

Employee attributes define the skills, qualifications, certifications, and characteristics associated with an employee. These attributes are used to determine which assignments an employee is eligible to perform and to apply scheduling filters during the assignment and scheduling process.

Attributes may include items such as certifications, licenses, language skills, or other job-related qualifications. In some configurations, attributes can also represent organizational requirements such as security clearance levels or specialized training.

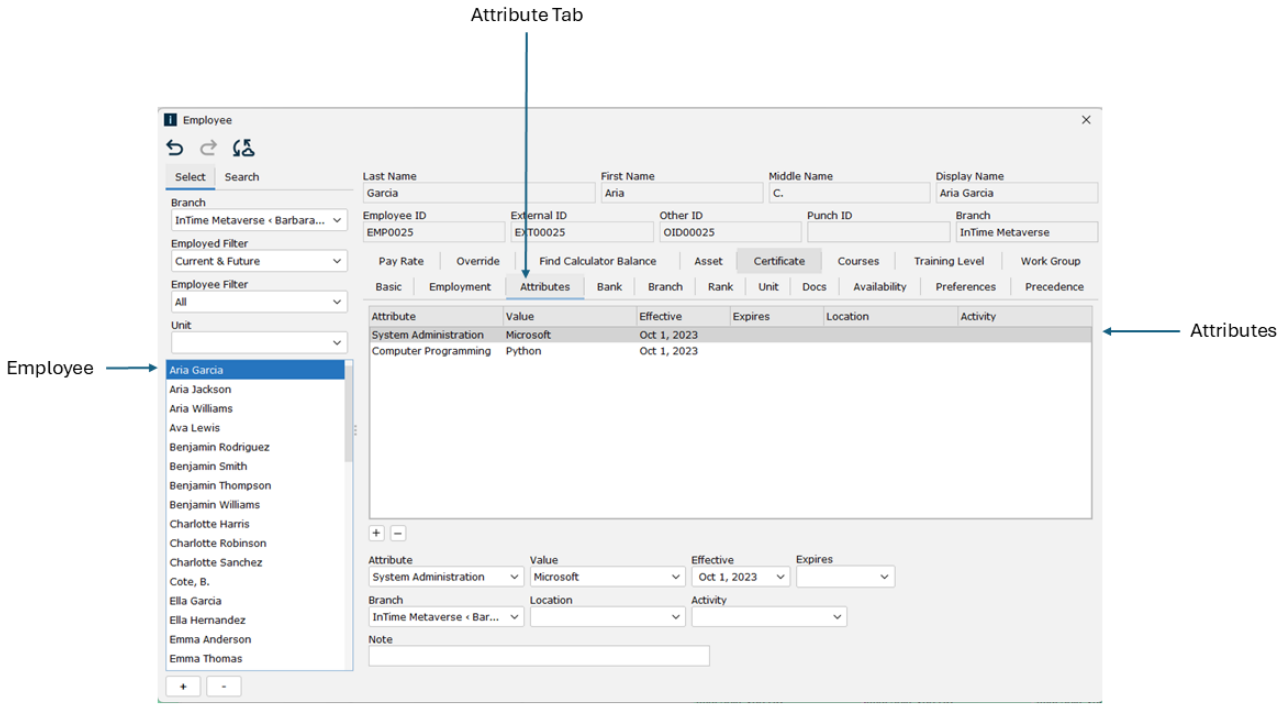
From a scheduling perspective, attributes play a critical role in ensuring that:

- Only qualified employees are assigned to specific activities or positions
- Organizational and regulatory requirements are met
- Scheduling errors and compliance risks are reduced

Schedulers may not directly manage or configure employee attributes. However, they rely on attributes when assigning employees to shifts. The system may use attributes to filter eligible employees, restrict assignments, or generate warnings when an unqualified employee is selected.

Understanding that attributes drive assignment eligibility helps Schedulers make informed decisions and trust system-generated constraints during the scheduling process.

Figure 4: Employee Profile → Attributes section/tab



END-TO-END SCHEDULER WORKFLOW

Scheduling in InTime is not a single action, but a series of connected steps that build and maintain an accurate and complete Work Schedule. While individual tasks such as assigning shifts or adjusting demand can be performed independently, they are most effective when approached as part of a structured process.

This section provides an overview of the end-to-end scheduling workflow used by Schedulers to create, refine, and maintain schedules. It outlines how key activities—such as building base schedules, managing demand, assigning work, and handling open shifts—fit together within the overall scheduling process.

Understanding this workflow helps Schedulers:

- Approach scheduling tasks in a consistent and logical order
- Identify where they are in the scheduling process
- Make informed decisions when adjusting or maintaining schedules

The following subsections describe each part of the workflow and how it contributes to maintaining an effective schedule.

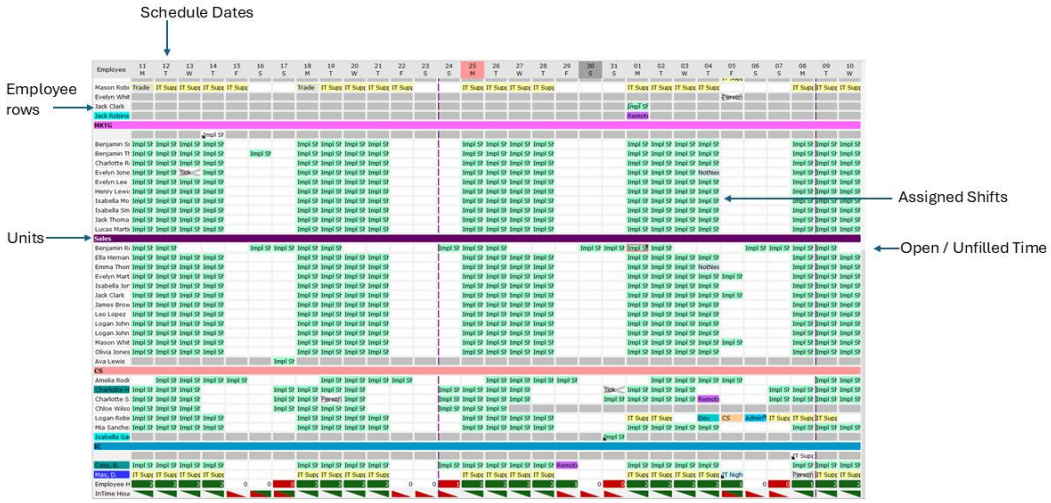
11. Overview of the Scheduling Process

Scheduling in InTime follows a structured process that ensures work is assigned efficiently, coverage requirements are met, and operational needs are supported. While individual tasks may vary based on the situation, Schedulers generally follow a consistent sequence of steps when building and maintaining schedules.

At a high level, the scheduling process includes:

- Filling demand to reflect staffing requirements
- Filling assignments and addressing coverage gaps
- Fill open shifts through postings and selection tools such as Find List Organizers
- Review and validate the schedule for accuracy and completeness
- Maintain the schedule as changes occur

Understanding this workflow helps Schedulers approach scheduling tasks in a logical and consistent way, rather than treating each action as an isolated step.



a. Filling and Assigning Work

Schedulers fill assignments and address any coverage gaps.

This may involve:

- Assigning employees to open shifts
- Making manual adjustments to ensure coverage and compliance

At this stage, the schedule begins to reflect actual staffing rather than just planned structure.

b. Managing Open Shifts (Post-Find-Fill)

When shifts cannot be filled directly, Schedulers use postings to allow employees to participate in voluntary overtime sign-ups.

This process typically includes:

- Posting open assignments
- Allowing employees to sign up
- Reviewing eligible candidates
- Filling the assignment using system tools or manual selection

This step supports fairness, transparency, and efficient staffing, particularly for overtime or extra shifts.

12. Live Schedule Maintenance and Review

Scheduling is an ongoing process. Because the schedule is a live, dynamic tool rather than a static document, schedulers continuously maintain and update it in real time as conditions change.

To endure the live schedule remains accurate, complete and optimized, schedulers actively monitor and review the system to:

- Proactively resolve conflicts or overlapping assignments

- Verify that all operational demand is consistently met
- Confirm that active assignments align with up-to-date employee availability and qualifications
- Ensure appropriate hours modifiers, activities, and locations are correctly applied

🚨 This step is critical to avoid operational issues, payroll discrepancies, or compliance concerns.

a. Daily Schedule Real-Time Management

To support this living ecosystem, daily management routinely includes:

- Filling last-minute vacancies as they arise.
- Adjusting assignments fluidly due to unplanned absences, special operations, or operational shifts.
- Managing new postings and employee sign-ups for open shifts.
- Updating assignments continuously to reflect real-time needs.

Managing the schedule ensures that it remains accurate and aligned with operational requirements.

13. Conflict Alerts

Conflict alerts notify Schedulers of potential scheduling issues, conflicts, or rule violations within the Work Schedule. These alerts help prevent scheduling errors, double-booking, compliance issues, and assignment conflicts before schedules are finalized.

Conflict alerts may appear when:

- Assignments overlap existing schedules
- Employees are already assigned elsewhere
- Scheduling actions violate organizational rules
- Employees lack required qualifications or certifications
- Fatigue thresholds are exceeded

- Assignments overlap leave, training, or court events

Depending on organizational configuration, conflict rules may be configured as:

- **Ignore** — no alert appears
- **Warn** — a visible warning appears, but the Scheduler may continue
- **Prevent** — the scheduling action is blocked until the conflict is resolved

Conflict alerts help Schedulers identify issues that may not be immediately visible while building or modifying schedules.

> 💡 Conflict alerts may appear directly within the Work Schedule, **Details Panel**, or related scheduling windows depending on organizational configuration.

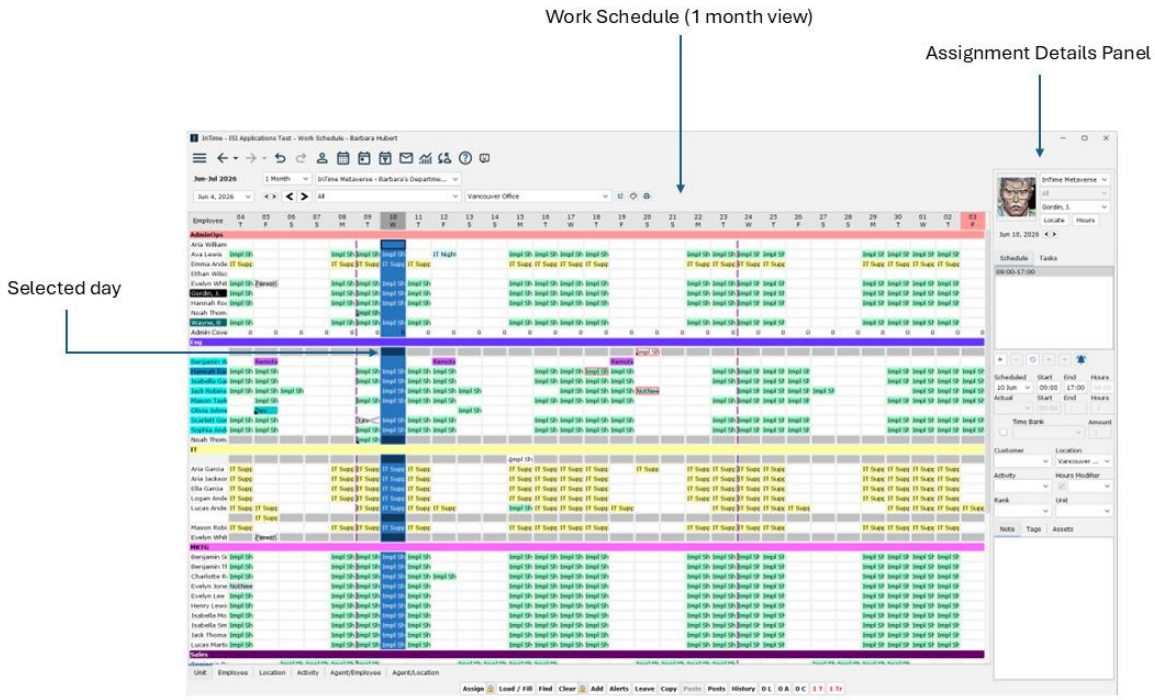
DAY-TO-DAY SCHEDULING

14. Work Schedule vs Daily Schedule

InTime provides different schedule views to support both long-term schedule management and day-to-day operational oversight.

a. Work Schedule

The Work Schedule is the primary scheduling workspace used to create, build, and maintain employee schedules.



The Work Schedule provides a multi-day or multi-week view that allows Schedulers to:

- Load and assign templates
- Assign employees to shifts and activities
- Create and adjust demand
- Manage leave and availability
- Review staffing levels across future dates
- Identify coverage gaps and scheduling conflicts

Because the Work Schedule displays a broader time horizon, it is typically used for Schedule planning and ongoing schedule maintenance.

b. Daily Schedule

The Daily Schedule provides a detailed view of assignments, activities, locations, and staffing information for a single day. If offers a quick snapshot of the entire 24-hour period and can be viewed in three different formats, which are described below.

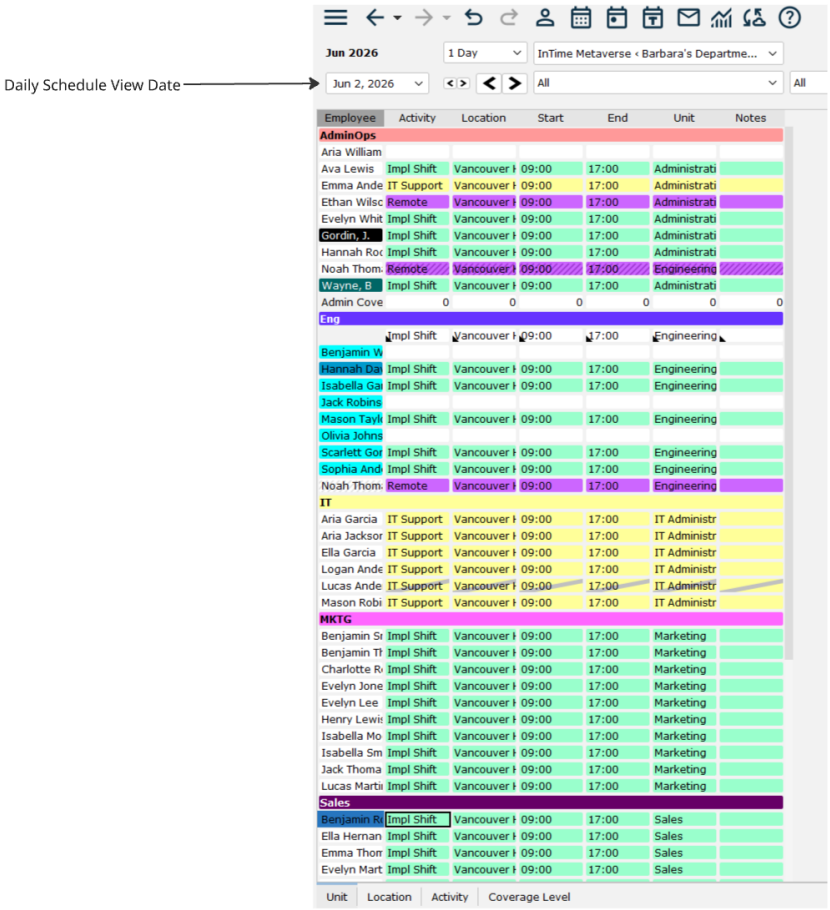
Schedulers and supervisors commonly use the Daily Schedule to:

- Review who is working today
- Verify assignments and coverage
- View employee activities and locations
- Review assignment notes
- Monitor day-of operations
- Quickly answer operational staffing questions

The Daily Schedule can be used to make scheduling changes when necessary; however, it is primarily intended as an operational review tool rather than a schedule-building tool. Most schedule creation and maintenance activities are performed within the Work Schedule.

Understanding when to use each view helps Schedulers work more efficiently and access the information most relevant to the task they are performing.

💡 While assignments can be modified from the **Daily Schedule**, it is generally not the preferred view for building or maintaining schedules. Most scheduling activities are performed within the **Work Schedule**, which provides greater visibility into staffing patterns, future assignments, and coverage requirements.



Because all scheduled activity for the selected date is presented in a consolidated view, Schedulers and supervisors can quickly determine:

- Who is working
- Where employees are assigned
- What activities are being performed
- Which locations are staffed
- Whether operational coverage requirements are being met
- Unscheduled and on-leave employees

The Daily Schedule is particularly useful when reviewing current staffing levels, answering operational questions, or monitoring activity throughout the day.

c. Common Uses of the Daily Schedule

Schedulers and supervisors commonly use the Daily Schedule to:

- Review staffing for the current day
- Verify employee assignments and locations
- View assignment notes and operational comments
- Review activity distribution
- Confirm staffing coverage
- Quickly determine who is working without reviewing the full Work Schedule

💡 While assignments can be modified from the Daily Schedule, most schedule-building and maintenance activities should be performed within the Work Schedule.

Daily Schedule Viewing Options

The Daily Schedule can present information in four different ways depending on the operational information being reviewed. Common viewing options include:

Unit View

Displays employees within their working unit and their assignments for the selected date. This view is commonly used to:

- Determine who is working
- Review employee assignments and/or locations
- Verify schedules
- Locate specific employees
- Show any associated scheduling notes for the employee
- Show associated unit counters if used

Location View

Displays employees within their working location and their assignments for the selected date. This view is commonly used to:

- Determine who is working at which location
- Show configured location demands filled and unfilled

Activity View

Groups assignments by activity. This view is useful when:

- Reviewing operational workload
- Identifying employees assigned to a specific activity
- Verifying activity coverage requirements

Coverage View

Displays staffing levels and coverage information for configured activities and locations. This view may be used to:

- Review coverage requirements
- Identify understaffed areas

🚨 Coverage information is only available when staffing requirements have been configured for the associated activities or locations

ACCESSING INTIME

This section explains how Schedulers log into the **InTime Desktop App where most scheduling activity occurs.**

It will also cover how to navigate the interface, understand menu options based on permissions, and follow password security requirements. These steps ensure secure and efficient access to scheduling tools.

15. Download and Log Into the Desktop App

Before accessing InTime, the desktop application must be installed on your computer. InTime Desktop is only downloadable from the InTime Web App.

💡 An InTime Administrator (or an InTime Implementation Specialist) provides the Scheduler with the InTime Web Application URL, their Organization ID details (Agency, Unit, Department), User ID, and password reset instructions.

💡 If you agency is using single sign-on the InTime Implementation Specialist will provide custom login instructions.

To download the Desktop App:

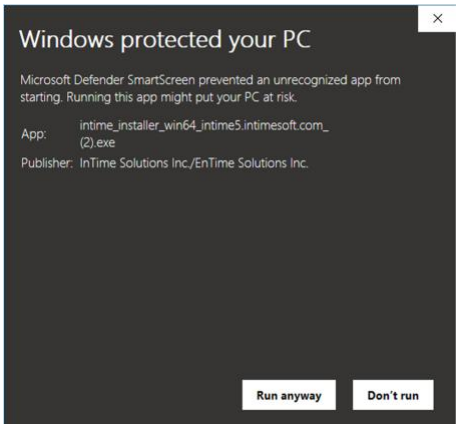
1. Open the **InTime Web Application** and log in (Your InTime Specialist or Project Manager will provide you with the URL).
2. Click **Forgot Password**. The **Set/Reset Password** window will display.
3. On the **Set/Reset Password** window:
    a. Type your **Organization ID** Into the **Organization** field
    b. Type your Username or Email in the **Username** field (This is all of the letters in your work email up to the @ sign.).
    c. Click **Submit**. An email will be sent to your **Inbox**.
4. Click the **Password Reset Link** in your email. The **Reset Password** window will display.
5. In the **Reset Password** window:
    a. Type your new password in the **New Password** field
    b. Re-type your password in the **New Password (again)** field

🚨 By default, passwords require 8 characters and expire every 90 days. Your InTime administrator may change these settings to match your specific organization's password policy. Note that **if you enter incorrect credentials 20 times, your account will be locked for 2 minutes.**

The message "**Your password has been changed. You may now log in**." will display and you can log into the web application.

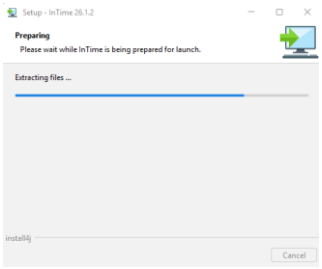
4. From the menu along the top click Download. The **InTime Desktop download** window will display.
5. Click **Download** OR **Instructions**.
6. When **Instructions** is selected, The **Instructions** window will display with instructions described below here.
    a. If a **Window's Security dialog** appears asking you to allow the **Intime Installer** to run, click **More Info**
    b. When the **Windows Protected your PC** window opens, click **Run Anyway**. The Installer will run.

Figure 5: Windows Security Protection During Install



7. When **Download InTime** is selected the **InTime Installer file - intime_installer_win64....intimesoft.com** will be saved to the **Downloads folder** on your desktop.
8. Using **File Explorer**, open your **Downloads** folder and double-click the **Download File**. The **Install Wizard** will run.

Figure 6: InTime Install Wizard



💡 After installing, an InTime shortcut to run InTime is added to the Start Menu on your PC desktop

🚨 **InTime Desktop can only be downloaded from the InTime Web Application and is only available to schedulers and above. Basic users do not have access to the Desktop.**

a. Logging into the InTime Desktop App

💡 An InTime administrator provides the Scheduler with their Organization (Agency, Unit, Department), User ID, and Password reset instructions.

To Log into InTime for the First Time:

1. Open the **InTime Desktop App** on your computer.
2. On the **Login screen**, type:
    a. Your Organization ID Into the **Organization** field
    b. Your Username or Email in the **Username** field
    c. Your Password. In the Password field..

4. Click the **Submit** button. The **InTime Desktop** application will open.

To log into InTime as a Scheduler If you Do Not Have a Password do the Following:

1. Open the **InTime Desktop App** on your computer.
2. On the **Login** screen:
    a. Type your **Organization's ID** Into the **Organization** field

b. Type your **Username** in the **Username** field

c. Type your **Password**

Figure 7: Login Screen



16. Password Security

To protect system access and sensitive employee data, all users must follow established password security practices when using InTime.

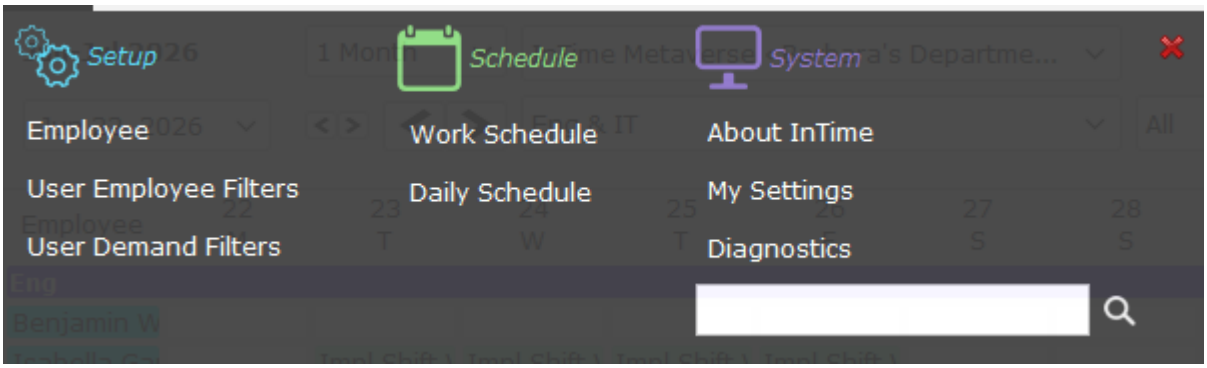
- **Keep your password confidential**: Never share your login credentials with other users. Each user account is tied to individual activity and permissions.
- **Use strong passwords**: Create passwords that meet system requirements, typically including a combination of uppercase and lowercase letters, numbers, and special characters.
- **Avoid easily guessed information**: Do not use names, birthdays, or common words that could be easily identified.
- **Change passwords regularly**: Follow your organization's policy for password updates or change your password immediately if you suspect it has been compromised.
- **Do not reuse passwords**: Avoid using the same password across multiple systems.
- **Log out when not in use**: Always log out of InTime when leaving your workstation to prevent unauthorized access.
- **Use secure devices and networks**: Access the system only from trusted devices and secure networks whenever possible.

Maintaining password security is a shared responsibility. Failure to follow established password security practices may result in system misused, unauthorized access to scheduling data, and breaches of staff personal information.

17. To Access the Scheduler Menus:

1. Click the **(☰)** in the top left corner of the **InTime Desktop Application**. The main menu will appear.

Figure 8: Main Menu



18. To Access the Daily Schedule

1. Click on the **Daily Schedule** **icon** from the navigational bar across the top of the screen. **The Daily Schedule** window will display.
2. Select the date by clicking on the **Date** field above the **Employee** column.
3. Confirm you are in the correct **Branch** from the **Branch** field.
4. Select the correct **Employee** filter from the **Employee filter dropdown** list.
5. Select **All** or the **Specific Unit** you want to display from the **Unit dropdown** list.

NAVIGATING THE WORK SCHEDULE BASICS

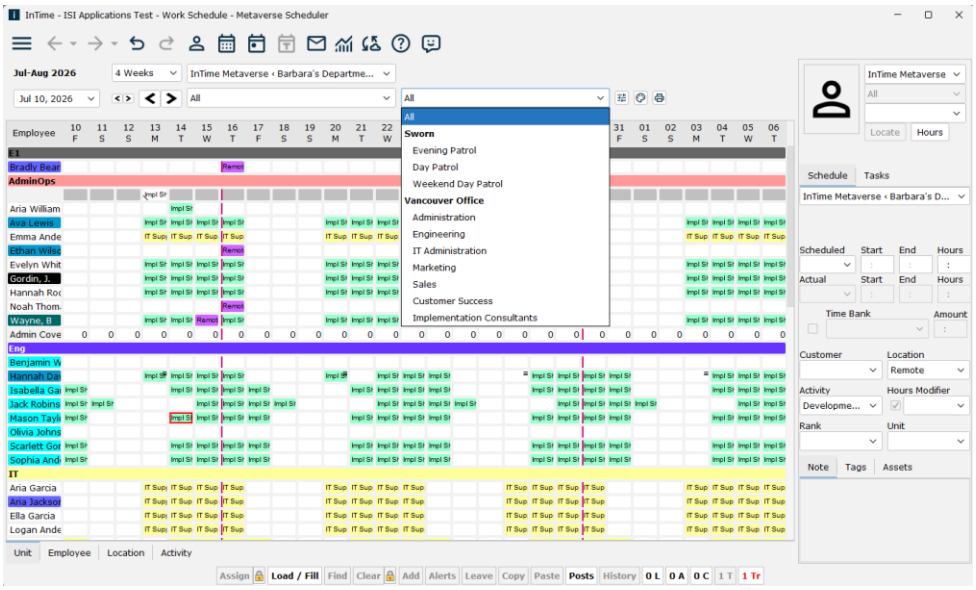
Section 4. Work Schedule Views described the four views available in the Work Schedule – Unit, Employee, Location, Activity, Daily Schedulers typically work from the Unit view, which will be expanded on below.

19. Unit View

Schedulers use the Unit View to review and manage assignments grouped by organizational units. This view provides a structured way to evaluate staffing within specific departments or groups and supports efficient scheduling at the unit level.

To Use the Unit View:

1. Click the **Schedule Icon** to open the **Work Schedule view**.
2. Select **Unit view** from the tabs along the bottom of the schedule grid.
3. The **Unit view** will display.
4. Navigate between units by selecting **Units** from the **Unit** dropdown list along the top of the schedule grid.



5. Review the schedule within the selected unit to:
    - confirm assignments for all employees in the unit

- identify gaps or inconsistencies within the group
- verify that staffing aligns with unit-level requirements

6. Adjust as needed using assignment-level changes or other scheduling tools.

💡 Unit View is the most common view used by schedulers. It organizes the schedule by **organizational structure**, making it useful for reviewing staffing within departments or teams. This view is helpful when working with **unit-specific schedules or responsibilities**. Unit View complements Employee and Location views by providing a **group-level perspective**. Switching to Unit View does not change the schedule — it only changes how the information is displayed.

a. Switching Between Views on the Work Schedule

Schedulers use different schedule views to analyze assignments from multiple perspectives. Switching between views allows Schedulers to evaluate employee schedules, review location coverage, and identify gaps or conflicts more effectively.

To Switch Between Schedule Views in the Work Schedule:

1. Click the **Schedule Icon**  to open the **Work Schedule**.
2. Locate the available **view options** within the schedule interface along the bottom of the schedule grid.
3. Select the desired view based on your task:
    - **Unit View** – to review assignments grouped by organizational unit
    - **Employee View** – to review assignments by employee
    - **Location View** – to review coverage by location or post
    - **Activity View** – sorts all activities and shifts
4. Click the selected view. The schedule will update to display the information in the chosen format.
5. Switch between views as needed to validate and adjust the schedule.

💡 Each view provides a different perspective and should be used based on the task being performed. Use **Unit View** to review staffing within specific organizational groups. Use **Employee View** when assigning or adjusting individual schedules. Use **Location View** when verifying coverage and identifying gaps. Switching views does not change the schedule — it only changes how the information is displayed.

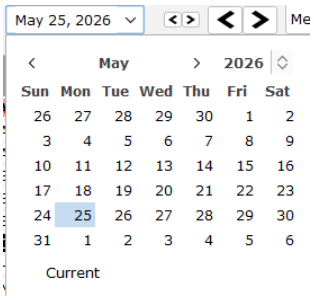
20. Navigating Across Dates

Schedulers use date navigation controls in the **Work Schedule** view to move through the schedule and view assignments across different time periods. This allows for quick review of past, current, and future schedules while adjusting or validating coverage.

To Navigate Across Dates in the Work Schedule

1. Click the **Schedule Icon** to open the **Work Schedule**.
2. Set the date you want the **Work Schedule view** to start from using the **Date** selection tool in the **Navigation bar** immediately above the **Employee column**.

Figure 9: Schedule view date picker



3. Use the Weeks field above and slightly to the right of the **Date Picker** to define how many weeks you want the **Work Schedule view** to display. Schedulers can choose:
    - 1 week
    - 2 weeks
    - 3 weeks
    - 4 weeks
    - 1 months

Figure 10: Schedule Range Picker Example



4. Confirm that the schedule updates to reflect the selected date range.

💡 Navigating across dates allows Schedulers to review schedules beyond the current period and prepare for upcoming changes. Always confirm the active date range before adjusting to avoid modifying the wrong time period. Changes made in one date range do not automatically apply to other periods unless pattern templates are used.

21. Sorting on the Work Schedule

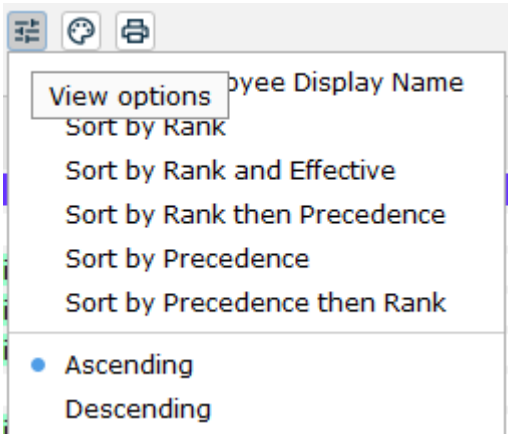
By default, the Work schedule sorts employees by display name in ascending order.

Many agencies change this default so that senior personnel appear at the top of each unit or platoon. To do this, sort by rank effective date in descending order. This pushes the person with the earliest (most senior) rank effective date to the top, followed by the rest of the group in descending seniority order.

To Define How the Work Schedule Sorts Employees

1. Click the **Schedule Icon** to open the **Work Schedule**.
2. Click on the Sort Icon the sorting options will display.

Figure 11: Work Schedule Sorting Options



3. Click on the desired sorting option.

💡 If your agency doesn't use ranks — for example, an agency staffed entirely by one position type — sorting by rank effective date has no visible effect, since everyone shares the same rank. In that case, sorting by display name (the default) or by rank effective

22. Applying Color Schemes

InTime allows schedulers to change the color scheme used to display assignments in the Work Schedule.

Two color schemes are available:

- **Default** – Uses the standard InTime teal-blue color scheme.
- **Custom (Agency)** – Uses colors configured by your organization for Units, Shifts, Activities, and other scheduling elements.

Color schemes affect only how information is displayed on the schedule and do not change any scheduling data or assignments. InTime Administrators will define Rank, Unit, Activity, Location, and Shift colors when they configure InTime.

Schedulers can switch between color schemes at any time to make it easier to identify different assignment types and schedule elements.

To Apply a Theme to the Work Schedule:

1. Click the **Schedule Icon** to open the **Work Schedule view**
2. Click along the top of the **Schedule grid**. The system will **toggle between** the **default** theme and the agency's **custom** colors.

23. Refreshing and Updating the Schedule

Schedulers should refresh the Work Schedule to ensure they are viewing the most current information. This is especially important when multiple users are making changes or when updates have been applied to the schedule.

To Refresh and Update the Schedule

1. Click the **Schedule Icon** to open the **Work Schedule**.
2. Make any adjustments or updates.
3. Click the **Refresh Icon** in the Navigation bar
4. Confirm that the schedule reflects the most recent changes.

In environments with multiple Schedulers, changes may not appear immediately without refreshing. Failing to refresh the schedule may result in working with outdated information.

24. Using the Details Panel

The **Details Panel** is used to view and update assignment information directly from the **Work Schedule**. While the structure of assignment details was introduced earlier, this section focuses on how schedulers use the panel during day-to-day scheduling activities.

To Use the Details Panel:

1. Click the **Schedule Icon** to open the **Work Schedule**.
2. Locate the employee assignment you want to review or modify on the Work Schedule.
3. Click the assignment to select it. The schedule will highlight your selection and automatically

refresh the Details Panel with relevant details.

4. In the **Details Panel**, review the assignment information displayed.
5. Update fields as needed to make changes to the assignment, such as:
    - **Schedule and Actual Start and End time (If different from the current shift or activity time)**
    - **Time Bank (If used)**
    - **Customer (If used for tracking and billing)**
    - **Location**
    - **Activity**
    - **Hours Modifier**
    - **Unit (If reporting to another Unit)**
6. Confirm that the updated assignment reflects correctly in the schedule.

💡 The **Details Panel** is the primary tool for making **quick, targeted changes** to assignments. Changes made in the panel apply only to the selected assignment.

💡 A common oversight during system rollouts is adding a new shift or assignment without checking the location-level configurations. Ensure the new item is explicitly enabled for the location before attempting to assign it on the schedule.

🚨 Always review the assignment after making changes to ensure no conflicts or gaps were introduced.

To View and Employee's Hours Summary:

1. Click the **Schedule Icon**  from the toolbar along the top of the **InTime app**.
2. In the **Details Panel**, select the employee from the **Employee** dropdown list near the top and click **Hours.** The **Hours Summary** window will display.

Figure 12: Hours button on Details panel

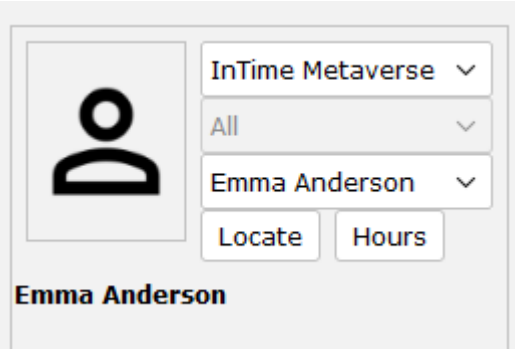
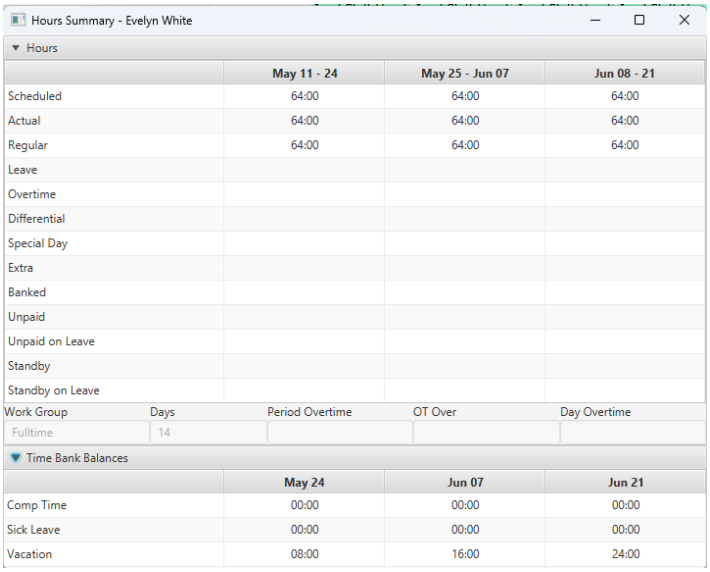


Figure 13: Hours Summary window



3. Review the Employee's hours and close the window.

25. Working with Activity Blocks in the Work Schedule

Activity blocks represent scheduled work within the Work Schedule and are the primary elements Schedulers interact with when reviewing and adjusting assignments. This section focuses on how Schedulers work with activity blocks during day-to-day scheduling tasks.

To Work with Activity Blocks:

1. Click the **Schedule Icon** to open the **Work Schedule**.

2. Locate the activity block within the schedule grid.
3. Click on the activity block to select it.
4. Use the selected activity block to perform actions such as:
    - **reviewing assignment details in the Details Panel**
    - **modifying assignment information**
    - **reassigning or replacing the assignment**
    - **cancelling or removing the assignment (if permitted)**
5. If needed, select multiple activity blocks by:
    - clicking and dragging across the schedule grid
    - using keyboard controls (such as Ctrl + click) to select multiple blocks
6. Apply the desired action and confirm the schedule updates accordingly.

💡 Activity blocks are the primary way schedulers interact with assignments in the schedule. Virtually every action on the live schedule starts by selecting one or more activity blocks. Because changes happen in real time, any updates or modifications you make will impact the selected assignment(s).

🚨 Always verify the impact of changes, especially when working with multiple selected blocks.

b. Locking and Unlocking Command Menu Functions

Locking is commonly used when assigning the same shift to multiple employees or clearing multiple schedule cells quickly. Certain Command menu functions within the Work Schedule may be locked to allow the same action to be repeated across multiple schedule cells without needing to reselect the function each time.

When a Command function is locked:

- The selected action remains active
- Each additional cell clicked will repeat the same action

- The function continues until it is manually unlocked

Commonly locked functions may include:

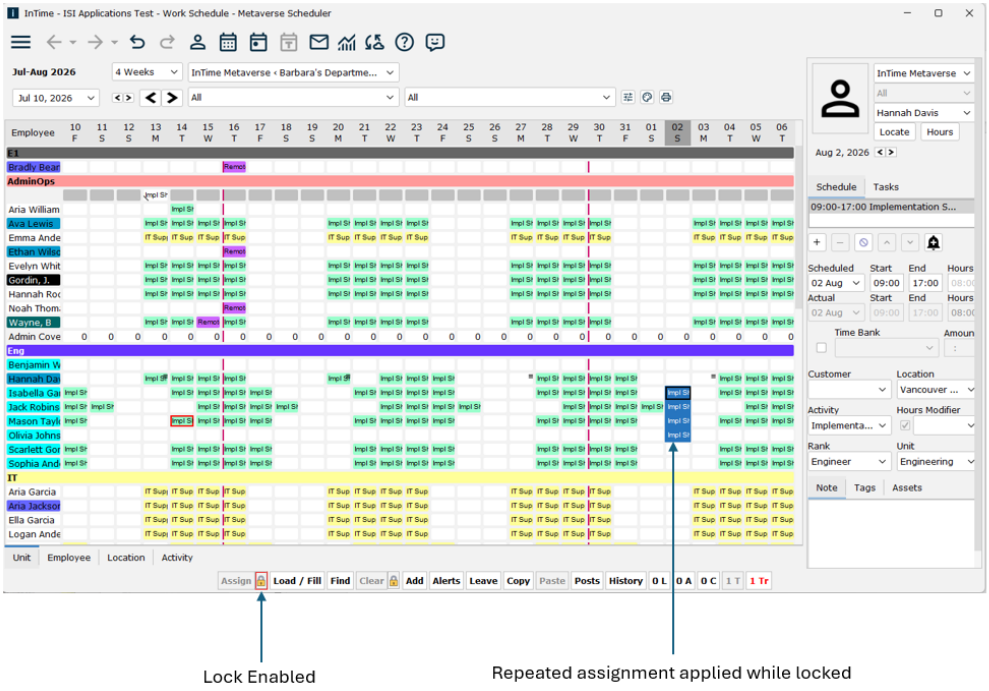
- Assign
- Clear

Locking helps Schedulers:

- Reduce repetitive clicks
- Speed up bulk scheduling tasks
- Apply consistent actions across multiple assignments

To Lock a Command Menu Function:

1. Select the desired command line function, such as **Assign**.
2. Click the **Lock**  **icon** next to the selected function.
3. Click within the schedule cells where the action should be applied.
4. Continue selecting cells as needed while the function remains locked.



To Unlock a Command Line Function:

1. Click the **Lock** **icon** again to deactivate the locked function.
2. Confirm the function returns to normal single-use behavior.

💡 Locking is especially useful when assigning the same shift or clearing multiple schedule cells in succession.

💡 Always verify which command line function is currently locked before clicking additional schedule cells to avoid unintended schedule changes.

🚨 Leaving a function locked unintentionally may result in accidental assignment or clearing actions across multiple schedule cells.

To Check Conflict Alerts:

1. Click the **Schedule Icon** to open the **Schedule view**
2. Review the **Schedule grid** for visual alert indicators, such as:
   - icons or symbols ⚠ Alerts...

- color highlights 
- warning markers within assignment cells 

3. Right-click into an assigned shift and select **Alerts** from the right-click menu, (or click **Alerts** in the **Command** toolbar).
4. Review the **Employee Details** panel for the affected assignments.
5. Identify the cause of the conflict, such as:
   - overlapping assignments
   - availability conflicts
   - qualification or certification issues
   - fatigue rule violations
   - scheduling rule conflicts
6. Adjust as needed to resolve the issue, such as:
   - modifying assignment times
   - reassigning the employee
   - replacing the assignment
   - adjusting schedule coverage
7. Confirm the alert has been resolved or acknowledged as appropriate.

💡 Warning-level alerts allow Schedulers to continue scheduling actions after review, while Prevent-level alerts block the scheduling action until the conflict is resolved.

💡 Not all alerts require schedule changes, but all alerts should be reviewed carefully to ensure compliance with organizational policies and operational requirements.

🚨 **Always review new alerts after making schedule changes to ensure additional conflicts were not introduced**.

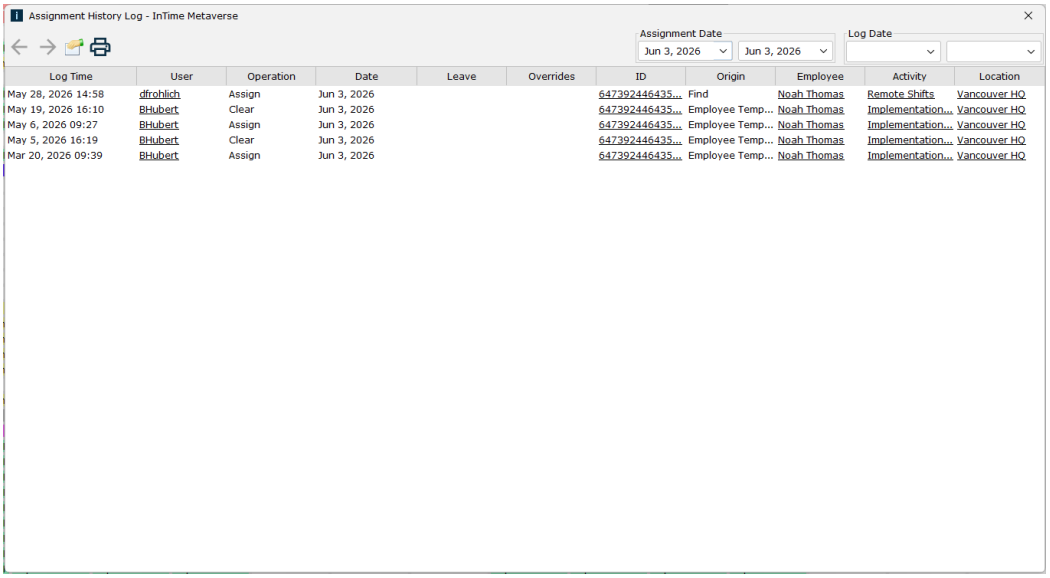
c. Viewing Assignment History

Assignment History allows Schedulers to view changes made to assignments over time. This provides visibility into who made updates, what changes were made, and when they occurred,

supporting accountability and schedule tracking.

To View an Assignment History:

1. Click the **Schedule Icon** from the Icons along the top of the **InTime app**.
2. In the **Schedule grid**, click into the Activity block you want to see the history for.
3. Right-click and select History->History from the right-click menu OR click the History button in the Command tools at the bottom of the screen. The Assignment History Log will display.



4. Review the assignment history and close the window.

💡 Assignment History provides a record of changes and is useful for reviewing updates or resolving discrepancies. This feature helps identify when assignments were modified and by whom. Not all changes may be reversible, but history can be used to guide corrections if needed.

26. Sending Employees Notifications from the Main Toolbar

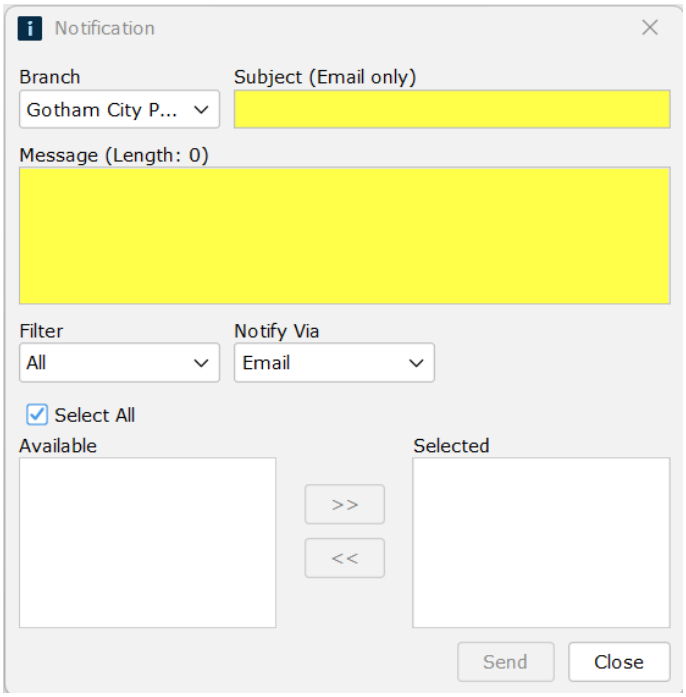
Notifications that are not triggered by a scheduling event in the system, such as a work assignment or leave request approval can be managed via Notifications off of the Main toolbar.

To Send General Notifications from the Main Toolbar

1. Log into InTime and select the **Notifications** icon from the **Main** toolbar. The

Notification window will display with the **Subject (email only)** field and **Message** field highlighted.

Figure 14: Notification window



2. Type your email subject into the **Subject** field (if you are sending the Notification via email) and type your message into the message field.
3. Select the **Filter Group**, from the **Filter** dropdown list.
4. Select the **Notify Via** option from the Notify Via dropdown:
   - **Email**
   - **Email** and **SMS** (if SMS is part of your licensing)
   - **SMS** (if SMS is part of your licensing)
5. Leave the **Select All** checkbox checked, if you would like to send the **Notification** to all employees in the **Filter**. Otherwise uncheck the **Select All** checkbox and:
   a. Click on the employees you want to send the Notification to from the **Available** list (hold Ctrl to select multiple recipients at once).
   b. Click the **››** button to move Notification recipients to the **Selected** list.
   c. Click **Send.**

MANAGING ASSIGNMENTS

Assignment Management focuses on creating and managing assignments within the Work Schedule. While earlier sections covered modifying existing assignments, this section introduces actions that involve creating new assignments, filling open shifts, and managing assignment-related workflows.

These actions are used when building schedules beyond templates, responding to staffing needs, and maintaining accurate and complete assignments throughout the schedule lifecycle.

This section outlines the key actions Schedulers use to create, assign, and manage work within the schedule. These actions support the ongoing maintenance of assignments, including filling open shifts, posting work for employee selection, and responding to changes in staffing needs.

a. Creating Assignments

Schedulers create assignments when new work needs to be added to the schedule that is not already defined by templates, demand, or existing assignments.

To Create a New Assignment:

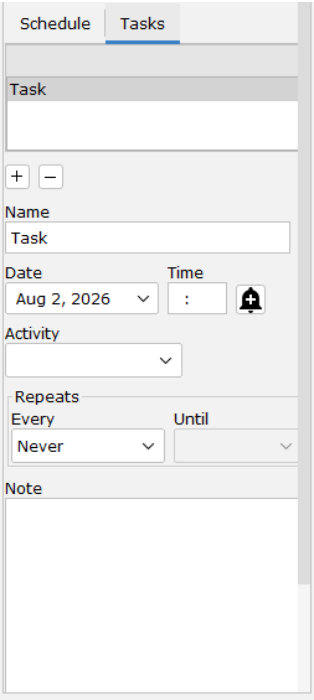
1. Click the **Schedule Icon**  to open the **Work Schedule**.
2. In the **Details** panel, select the employee that you want to assign a shift to from the **Employee** dropdown list and click **Locate**. The employee will become highlighted.
3. Navigate to the appropriate date in the schedule grid and click into the white cell (blank activity block).
4. Right-click and select **Assign,** (or click Assign from the **Command** toolbar along the bottom of the screen).
5. In the **Details** panel, enter (or confirm) the required information:
    - **Scheduled Start and End Times**
    - **Actual Start Time and End Times**
    - **Time Bank and Amount**

- **Customer** (if required)
- **Location**
- **Activity**
- **Hours Modifier** (if applicable)
- **Rank**
- **Unit** (if required)
- **Notes, Tags, Assets**

💡 New assignments should only be created in **empty time periods**. If an assignment already exists, it should be **modified.**

To Add a Task to an Assignment:

1. Click the **Schedule Icon**  to open the **Work Schedule**.
2. In the **Details** panel, select the employee that you want to assign a task to from the **Employee** dropdown list and click **Locate**. The employee will become highlighted.
3. Navigate to the appropriate date in the schedule grid and click into the employee's **activity block** to select the assignment.
4. In the **Details Panel**, click **Task**.



5. Click **"+"** to add a new task. The task fields will become available.
6. Type a task name in the **Name** field.
7. Set the task time in the **Time** field if required.
8. Click the **Reminder** icon to set a reminder option, if required.
9. Select an activity from the **Activity** dropdown list if required.
10. Add a task note about what the task is and/or why it was added to the **Note** field.
11. Review the assignment to confirm the task indicator appears on the schedule.

💡 You must be clicked into an activity block before adding a task.

b. Filling Open Shifts

Filling open shifts involves assigning employees to existing unfilled assignments within the schedule. These assignments may originate from demand, templates, or previously unassigned work.

This process ensures that all required coverage is met by selecting employees based on availability, qualifications, and operational needs.

To fill an Open Shift on the Work Schedule:

1. Click  to open the **Work Schedule.**
2. From the **Employee** column on the left locate the appropriate **Unit** and click on it to select.
3. In the **Work Schedule**, locate the row area where open shift is displayed (typically beneath or associated with the selected Unit).
4. Locate the open shift that needs to be filled and click the open assignment or unfilled shift to select it.
5. Right-click the selected open shift and select **Find,** (or click the **Find** button in the **Command** toolbar along the bottom of the screen). The **Find** window will display.
6. From the **Filter** dropdown list, select the appropriate employee filter.
7. From the **List Organizer** dropdown list, select the appropriate **Organizer**.
8. Review the list of available employees.

💡 Employees who are inactive, unavailable, missing required qualifications, or restricted by organizational scheduling rules may not appear in the available employee list.

9. Select the employee you want to assign to the open shift.
10. Click **Fill** then click **Close**.
11. Confirm that the employee is assigned to the shift in the schedule.
12. Review the assignment to ensure:
    - the employee is available
    - the employee is qualified
    - no conflicts or overlaps were created

💡 Use **Find** to help identify eligible employees based on the selected filters and list organizer. Filling an open shift assigns an employee to existing work; it does not create a new assignment. Always review the filled shift after assignment to confirm it meets coverage and scheduling requirements.

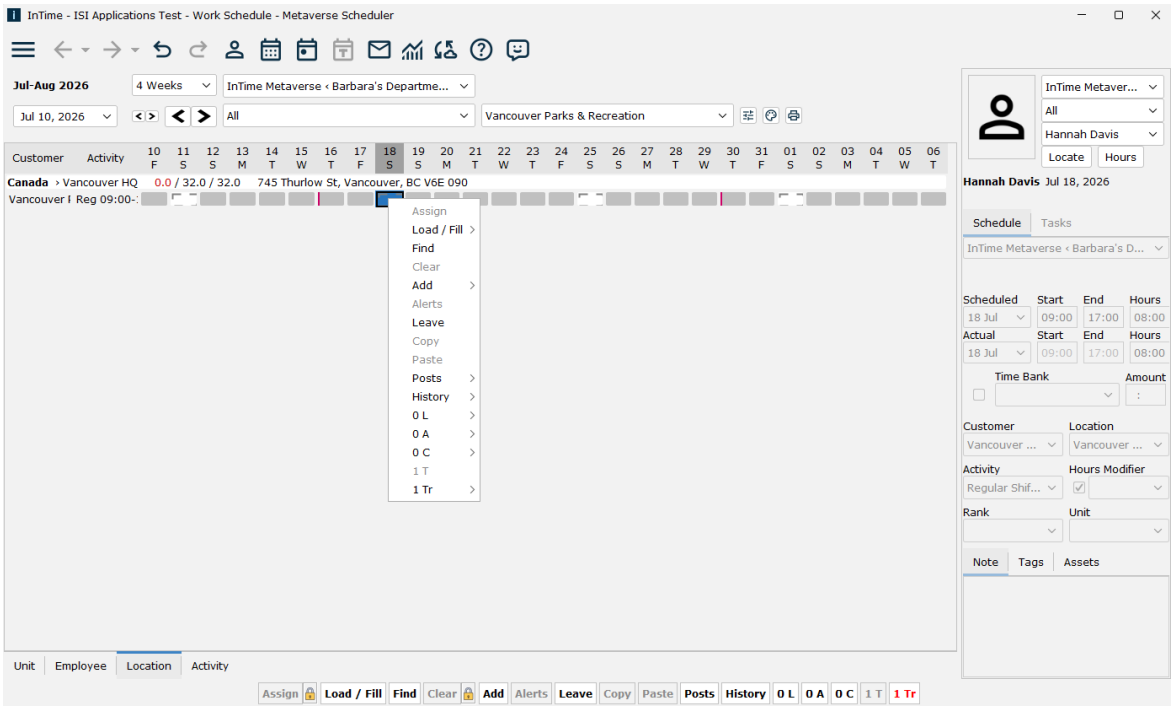
c. Posting Open Shifts (Demand-Based Assignments)

Posting open shifts allows Schedulers to make unfilled assignments available for employees to view, request, or bid on, depending on system configuration. These shifts typically originate from unfulfilled demand or open assignments within the schedule.

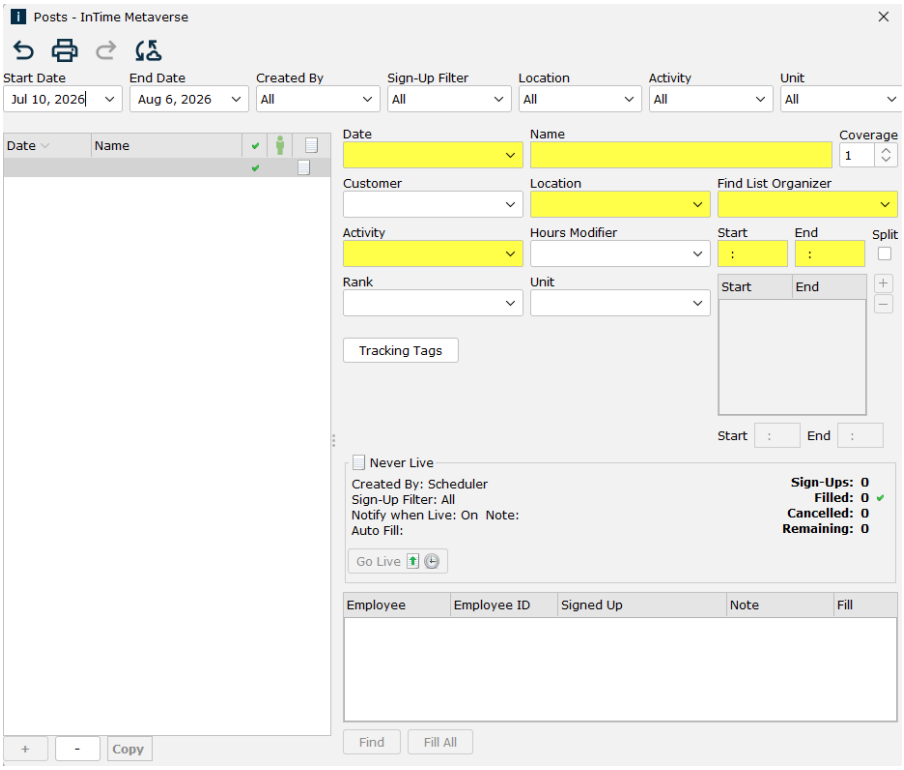
This process is used when Schedulers want employees to participate in filling shifts rather than assigning them directly, supporting fair and transparent distribution of work such as overtime or extra assignments.

To Post a Demand Shift (Unfulfilled shift):

1. Click the **Schedule Icon**  to open the **Work Schedule.**
2. Click **Locations** at the bottom of the **Schedule grid**
3. From the **Location** dropdown list select the **Location** where the unfulfilled demand exists.
4. Locate the unfilled Demand cell (The white boxes represent the **Demand**.) and click in the **white cell** of the **Demand** you want to **Post**.
5. **Right-click** and the **Command** menu will display.



6. Select **Posts** -› **Add Post**. The **Posts** window will display.



1. Review the posting details and update any required fields.
2. Confirm the posting dates, times, activity, location, and number of positions.
3. Apply any required sign-up filters or notification settings, if applicable.
4. Click **Go Live** to make the posting available.
5. Confirm that the posting has been created and appears as expected.

d. Swapping Assignments (Shift Trades)

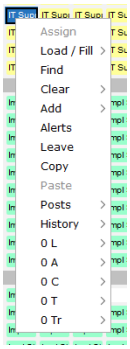
Schedulers can manually swap assignments between employees to adjust schedules while maintaining coverage. This process, commonly referred to as a shift trade, is used to exchange assignments between employees without creating or removing work from the schedule.

To Manually Complete a Shift Trade:

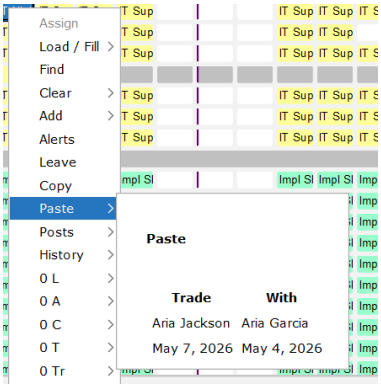
1. Click  to open the **Work Schedule.**
2. Click **Unit** at the bottom of the **Schedule grid** and locate the employees whose shift you

want to trade.

3. Click into the activity block for the shift to be traded and right-click and select **Copy**, (or click the **Copy** button from the **Command** toolbar along the bottom of the screen).



4. Click into the other trading officers activity block that you want to trade.
5. Right-click and select **Paste** from the **Command** menu. The **Trade** window will appear.



6. Select **Trade With** and the trade will be completed

💡 Manual swaps are performed directly in the schedule and take effect immediately. Swapping assignments does not change overall coverage but redistributes work between employees. Shift trades may also be submitted and approved through the employee request process. See **Managing Employee Requests and Approvals** for more information.

🚨 Always verify that both employees are qualified for the assignment and available for the new time or location. Swapping assignments may introduce conflicts or overlaps if not reviewed carefully.

e. Duplicate Existing Assignment

Duplicating an existing assignment allows Schedulers to quickly create a posting based on a similar or identical shift. This is commonly used when multiple employees are needed for the same role or when repeating an assignment with minimal changes.

To Duplicate an Existing Assignment for Posting:

1. Click the **Schedule Icon**  to open the **Work Schedule**.
2. Locate the assignment you want to duplicate from within the **Work Schedule** grid and click on it to select.
3. Right-click and choose **Copy** from the right-click menu, (or click the **Copy** button in the **Command** toolbar).
4. Locate the activity block where you want to place the duplicated assignment the **Work Schedule** and click to select.
5. Right-click and select **Paste**, (or click the **Paste** button in the **Command** toolbar at the bottom of the screen). The copied assignment will be pasted into the **Activity** block.
6. Confirm that the assignment details are correct in the **Assignment Deta**ils panel.

💡 Duplicating assignments helps reduce manual data entry and improves efficiency. This method is especially useful when multiple employees are needed for the same shift or when similar assignments occur frequently.

🚨 **Always review duplicated details to ensure they are still accurate and applicable. Avoid duplicating outdated or incorrect assignments.**

f. Understanding and Working with Subblocks

Subblocks allow schedulers to divide a scheduled shift into smaller time-based segments. Each subblock can be assigned its own location, position, activity, or assignment details while remaining part of the employee's overall scheduled shift.

Schedulers use subblocks to track work that occurs during only part of a shift, such as:

- Temporary post assignments
- Court appearances
- Training sessions
- Overtime extensions
- Special assignments
- Movement between locations during the workday

💡 Multiple subblocks can be added to a single shift, allowing schedulers to accurately reflect how an employee's time is spent throughout the day. See Error! Reference source not found. **on Page** Error! Bookmark not defined. for more details.

💡 Subblocks do not create a new shift. They create additional assignment details within an existing shift.

💡 Employees remain assigned to their primary shift while subblocks provide visibility into specific assignments, locations, or activities that occur during portions of that shift.

To Add a Subblock to a Scheduled Assignment

1. Click the **Schedule Icon**  to open the **Work Schedule**.
2. In the **Assignment Details** panel, select the employee whose assignment you want to add a subblock to from the **Employee** dropdown list and click **Locate**. The employee will become highlighted.
3. Click into the employee's existing activity block to select the assignment.
4. In the **Details Panel**, click the Schedule tab, the current activities will display in the Schedule details list.
5. Click **"+"** to add a new subblock or assignment segment.
6. Enter the subblock details, including:
    - **Start Time**

- **End Time**
- **Location**
- **Activity**
- **Unit,** if applicable
- **Position** or **Rank**, if applicable
- **Customer**, if applicable

7. Confirm the subblock time falls within the employee's scheduled shift, unless the subblock is being used to extend the shift for overtime.
8. Review the **Work Schedule** to confirm the subblock appears correctly for the employee.
9. Check for alerts or conflicts.

To Edit an Existing Subblock:

1. Click the **Schedule Icon**  to open the **Work Schedule**.
2. In the **Details** panel, select the employee whose assignment subblock you want to edit from the **Employee** dropdown list and click **Locate**. The employee will become highlighted.
3. Click into the employee's existing activity block to select the assignment.
4. In the **Details Panel**, click the **Schedule** tab, the current activities will display in the **Schedule** details list.
5. Click on the subblock you want to edit to select it.
6. Update the required subblock details, such as:
    - **Start Time**
    - **End Time**
    - **Location**
    - **Activity**
    - **Unit**
    - **Rank**, if applicable

- **Customer**, if applicable
- **Notes**, if applicable

7. Review the **Work Schedule** to confirm the subblock appears correctly for the employee.
8. Check for alerts or conflicts.

To Remove a Subblock

1. Click the **Schedule Icon**  to open the **Work Schedule**.
2. In the **Details** panel, select the employee whose assignment subblock you want to remove from the **Employee** dropdown list and click **Locate**. The employee will become highlighted.
3. Click into the employee's existing activity block to select the assignment.
4. In the **Details Panel**, click the **Schedule** tab, the current activities will display in the **Schedule** details list.
5. Click on the subblock you want to remove to select it.
6. Click **"-"** to remove the subblock.
7. Review the **Work Schedule** to confirm the subblock no longer appears.

🚨 **Removing a subblock only removes that segment of the assignment. It does not remove the employee's main scheduled shift**.

Using Subblocks to Extend a Shift

Subblocks can be used to extend an employee's scheduled shift when additional coverage is required beyond the employee's original assignment. This is commonly used for overtime, special events, emergency coverage, court appearances, training, or other operational requirements that occur before or after a regularly scheduled shift.

Rather than creating a separate assignment, schedulers can add a subblock to extend the employee's workday while maintaining a clear record of when and where the additional work occurs.

💡 Subblocks used for shift extensions are often assigned different activities, locations, or hours modifiers than the employee's regular shift, allowing the additional time to be tracked separately for scheduling and reporting purposes.

To Extend a Shift Using Subblocks:

1. Click the **Schedule Icon**  to open the **Work Schedule**.
2. In the **Assignment Details** panel, select the employee whose assignment you want to extend from the **Employee** dropdown list and click **Locate**. The employee will become highlighted.
3. Click into the employee's existing activity block to select the assignment.
4. In the **Details Panel**, click the **Schedule** tab, the current activities will display in the **Schedule** details list.
5. Click **"+"** to add a new subblock.
6. Enter the extension details, including:
    - **Start Time**
    - **End Time**
    - **Activity**
    - **Location**
    - **Unit**, if applicable
    - **Hours Modifier**, if applicable
    - **Time Bank details**, if applicable
    - **Customer**, if applicable
7. Confirm that the extension begins before or after the employee's regular shift, as intended.
8. If the extension represents overtime, select the appropriate **Hours Modifier** or overtime-related option required by your agency.
9. Add a note, if needed, explaining the reason for the shift extension.
10. Review the **Work Schedule** to confirm the subblock appears correctly for the employee.

g. Creating and Working with Recurring Tasks

Recurring tasks are commonly used for regularly scheduled reminders that occur on a predictable basis, such a training sessions, administrative duties, meetings, court appearances, inspections, or other recurring i9tems schedulers want flagged. Once configured, the system creates the task according to the defined recurrence set in the Details panel, reducing the need to manually create the same reminder repeatedly. An activity can optionally be attached to an task for additional context, but an activity is not required.

Recurring tasks allow schedulers to create a series of scheduled activity reminders that repeat according to a defined pattern. Unlike an assignment – which blocks and employee's schedule and can create a scheduling conflict – a recurring task functions like a note or reminder, similar to a post it note, rather than a definitive work assignment. Placing a task on the schedule does not create a conflict or a shortage, even if an actual assignment is later made for that same date and time.

Demand, which identifies staffing requirements, recurring tasks create actual schedule assignments that are automatically generated on specified dates and times.

Recurring tasks should be used when the same reminder needs to appear on multiple dates following a consistent schedule. Because tasks to not block the scheduler, schedulers must still create the actual assignment separately whenever staffing is required according to the defined recurrence set in the Details panel, reducing the need to manually recreate the same assignment task repeatedly.

Recurring tasks should be used when the same activity needs to occur on multiple dates following a consistent schedule. Schedulers should review recurring tasks periodically to ensure they remain accurate and continue to reflect operational requirements.

> 💡 Recurring tasks create reminders only. They do not create assignments, demand rows, or staffing requirements, and they will not generate scheduling conflicts.

To Create a Recurring Task:

1. Click the **Schedule Icon**  to open the **Work Schedule**.
2. In the **Assignment Details** panel, select the employee that you want to assign a recuring

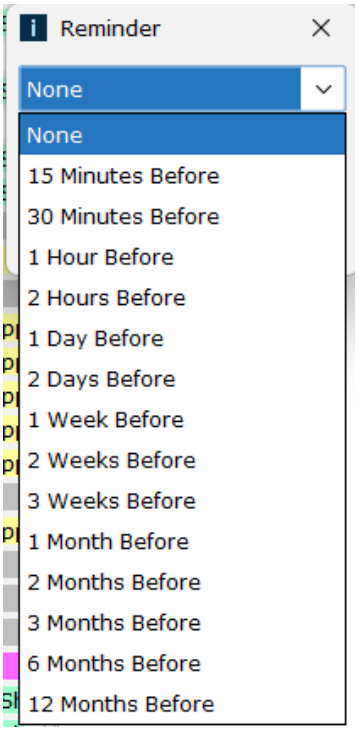
task/activity to from the **Employee** dropdown list and click **Locate**. The employee will become highlighted.

3. Click into the employee's **Activity** block for the first date the recurring task should occur.

> You must click into the Activity block before adding the recurring task or assignment. The selected Activity block becomes the first instance of the recurrence.

4. In the **Details** panel click **Task**.
5. Click **"+"** to add a new Task/Assignment.
6. Type a **Task Name** into the **Name** field.
7. Set the **assignment start time** in the **Time** field.
8. Click on the **Notification** button  to set a notification for the Task/Assignment if desired and a notification option from the **Reminder** dropdown list.
9. If the employee is required to acknowledge that they have received the notification, click the **Acknowledgement Required** checkbox.
10. If a supervisor must be notified when an acknowledgement has NOT BEEN RECEIVED select who will receive the escalation from the **Escalation** dropdown list.

Figure 15: Reminder Dropdown List Example



11. Select an **Activity** or **Shift** assignment from the **Activity** dropdown list.
12. In the **Repeats** section:
    a) Select when the **Task** should repeat from the **Repeats** dropdown list.
    b) If the recurring task will expire, select an end date for the recurring task from the **Until** field.
13. Validate the recurring task has been added to the **Work Schedule** for the employee.

To Edit a Recurring Task

1. Click the **Schedule Icon** to open the **Work Schedule**.
2. In the **Assignment Details** panel, select the employee whose recurring task/assignment you want to edit from the **Employee** dropdown list and click **Locate**. The employee will become highlighted.
3. Click the **Activity** block that contains the recurring assignment or task indicator that you want to edit.

4. In the **Assignment Details** panel, click **Task**.
5. Select the recurring task or assignment that you want to edit from the **Task** list.
6. Make the changes required such as:
    - **Task name**
    - **Time**
    - **Reminder notification settings**
    - **Escalation** or **acknowledgement** settings
    - **Associated activity**
    - **Recurrence pattern**
    - **End date**
    - **Notes**
7. When prompted, select how the change should be applied:
    - **This task only** – updates only the selected task
    - **All future tasks**—updates the selected occurrence and future occurrences in the recurrence series

To Cancel or Remove a Recurring Task

1. Click the **Schedule Icon**  to open the **Work Schedule**.
2. In the **Assignment Details** panel, select the employee whose recurring task/assignment you want to Cancel/Remove from the **Employee** dropdown list and click **Locate**. The employee will become highlighted.
3. Click the **Activity** block that contains the recurring assignment or task indicator that you want to **Cancel/Remove**.
4. In the **Details** panel click **Task**.

5. Select the recurring task/assignment you want to remove.
6. Click **"-"** to remove the selected recurring task/assignment.
7. When prompted, select how the removal should apply.
    - **This task only** – removes only the selected occurrence
    - **All future tasks** – removes the selected occurrence and future occurrences in the recurrence series
8. Review the Work Schedule to confirm the recurring task was removed correctly

To View Recurring Tasks on the Schedule

1. Click the **Schedule Icon**  to open the **Work Schedule**.
2. In the **Details** panel, select the employee whose recurring task/assignment you want to view from the **Employee** dropdown list and click **Locate**. The employee will become highlighted.
3. Review the employee's row within the schedule to locate the date range you want to view.
4. Locate the recurring task indicator within the employee's schedule.
5. Click the assignment cell that contains the recurring assignment.
6. In the **Details Panel**, click **Task** to display the recurring assignment details.
7. Review the assignment information, including:
    - **Task name**
    - **Scheduled time**
    - **Recurrence pattern**
    - **Reminder settings**
    - **Notes**
8. If multiple recurring assignments exist for the employee, select each assignment from the **Task** list to review its details.

💡 Recurring assignments are typically displayed as task indicators associated with the employee's scheduled activity rather than as separate activity blocks.

💡 Reviewing recurring assignments regularly helps ensure scheduled tasks remain current and continue to reflect operational requirements.

h. Prefill Assignments

A Prefill is an Assignment cell that you add to the Work Schedule before assigning an employee to work that Assignment. All the Assignment Details are already present in the cell, and it's visually indicated by a white triangle in the bottom left corner. You can edit the Assignment in the right activity panel just like any other Assignment.

Schedulers may use Prefill when they need to create an additional open shift, duplicate a similar assignment, or prepare work that still needs to be staffed.

Prefill behaves differently depending on where it is used:

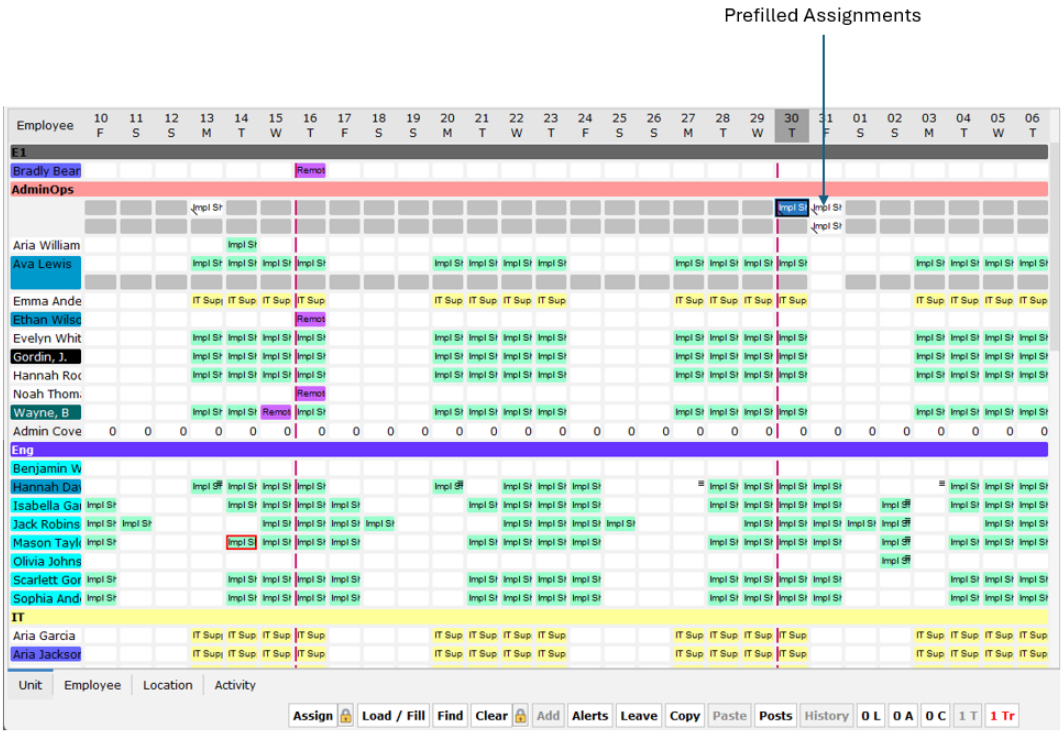
- If Prefill is applied from an employee's filled activity block, InTime adds a new row and creates an unassigned shift above or below the selected assignment.
- If Prefill is applied from an empty white cell, InTime creates an unassigned shift directly in that cell.
- The prefilled shift uses the most recent assignment details displayed in the Details Panel, such as activity, location, start time, end time, unit, and other configured parameters.

💡 Always review the Details Panel before using Prefill. The system uses the currently loaded assignment details, which may not be the shift you intend to create.

To Prefill Assignments:

1. Click the **Schedule Icon**  to open the **Work Schedule**.
2. Click into an **Assignment** that has the shift details you want to use as a prefill.
3. Right-click and select **Add-› Prefill,** (or select Prefill from the **Command** toolbar along the

bottom of the screen). The assignment will be loaded into the cell(s) but will not be assigned. The Prefilled Assignments will be added to the Work Schedule.



i. Adding Additional Assignment Activity Blocks

Schedulers may need to add additional assignment cells when an employee requires more than one assignment within the same time period or day. This allows multiple assignments to be scheduled without replacing or modifying existing ones.

To Add an Additional Assignment Activity Block:

1. Click the **Schedule Icon** to open the **World Schedule**.
2. In the **Customer Details** panel, select the employee that you want to assign a shift to from the **Employee** dropdown list and click **Locate**. The employee will become highlighted.
3. Locate the employee's existing assignment cell date.
4. Right-click within the employee's row and select **Add->Add**, **(**or **Add** from the **Command** toolbar along the bottom of the screen. A new assignment cell row appear below the employee's current row).

5. Click on the new cell.
6. Add the assignment details using the **Employee Details** panel, including:
    - **Activity**
    - **Location**
    - **Start and End Time**
    - **Unit**
    - **Rank**
    - **Customer**
7. Confirm that both assignments appear correctly for the employee. **Check for Alerts**.

💡 Additional assignment cells allow multiple assignments to exist **without overwriting existing work**. This is commonly used when an employee performs **more than one role or assignment in the same day or shift**. Always verify that assignments do not unintentionally overlap unless overlapping work is intended and permitted. The availability of additional cells may depend on system configuration.

MANAGING POSTINGS – SHIFT, OVERTIME, AND SPECIAL DUTIES

Managing shift postings involves creating, publishing, and filling open assignments through a structured workflow that allows employees to participate in shift selection. This process supports efficient staffing by combining scheduler actions with employee sign-ups and system-driven selection tools.

Unlike direct assignment methods, posting enables a more controlled and transparent approach to filling open work, particularly for overtime, backfill, and other variable staffing needs.

27. Understanding the Posting Process

The assignment posting process provides a structured approach to making open shifts available and filling them efficiently. It connects the steps of creating a posting, allowing employee sign-ups, and ultimately assigning employees to open work.

Understanding how these steps work together helps Schedulers manage postings effectively, ensure fair distribution of assignments, and maintain proper coverage throughout the schedule.

a. Overview of the Posting Process

The posting process follows a defined sequence that allows Schedulers to make open assignments available, collect employee interest, and assign shifts in a controlled and consistent manner. Each step in the process builds on the previous one to ensure that shifts are filled efficiently and in accordance with organizational practices.

The Posting Workflow

The posting process generally follows these steps:

1. **Create a Posting**
   An open assignment is selected and prepared to be posted.
2. **Publish the Posting**
   The posting is made available for employees to view and respond to.
3. **Employee Sign-Ups**
   Employees review available postings and submit their interest or request to work the shift.
4. **Review Sign-Ups**
   The Scheduler reviews employees who have signed up for the posting.
5. **Fill the Assignment**
   The Scheduler selects and assigns the most appropriate employee to the shift.

💡 The process may vary slightly based on system settings, but the overall workflow remains consistent. Posting supports fair and transparent assignment of work, especially for overtime or extra shifts. Schedulers are responsible for reviewing and finalizing all assignments, even when employees participate in the process.

b. The Post-Find-Fill Workflow

The Post–Find–Fill workflow is the core process used to assign employees to posted shifts. It combines employee participation with system-driven selection tools to ensure that assignments are filled efficiently and in accordance with organizational rules.

Understanding the Post–Find–Fill Process

The workflow consists of three connected steps:

Post

The Scheduler creates and publishes a posting for an open assignment, making it available for employees to view and respond.

Find

The system evaluates available employees who have signed up using configured criteria such as qualifications, availability, and ranking rules. This may include the use of **Find Lists** or other selection tools.

Fill

The Scheduler selects an employee from the available candidates or uses system tools to assign the shift.

Together, these steps ensure that shifts are filled in a structured, consistent, and fair manner.

> 💡 The **Find** step may occur automatically or be initiated by the Scheduler, depending on system configuration. Unlike Posts not all workflows require employee sign-ups; some assignments may be filled directly using Find tools. Schedulers should always review system-generated recommendations before filling assignments. This workflow supports fairness, transparency, and compliance with scheduling rules.

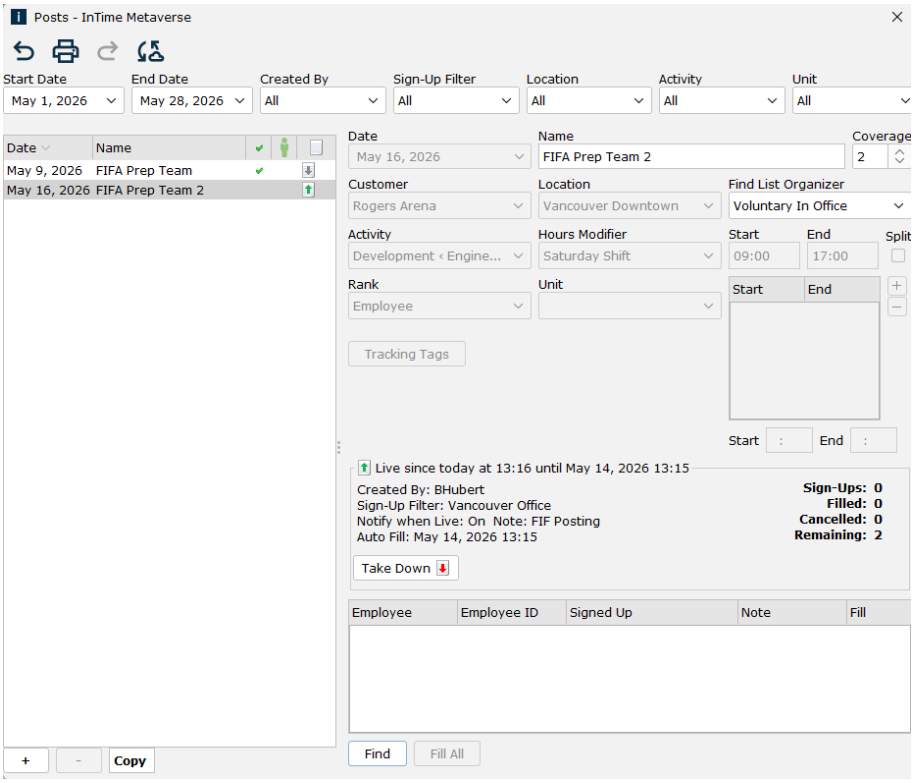
c. Manage Posts Window

The Manage Posts window is used to view, track, and manage all active and completed postings within the Schedule. It provides a centralized location for Schedulers to monitor posting status,

review sign-ups, and act on open assignments.

To Access the Manage Posts Window:

1. Click the **Schedule Icon** to open the **Work Schedule**.
2. Click **Posts** in the **Command** menu along the bottom of the Schedule Grid. The **Manage Posts** window will display.



Using the Manage Posts Window

Within the Manage Posts window, Schedulers can:

- View a list of active and past postings
- Review posting details such as:
    - Location
    - Activity
    - Date and time

    - Number of positions
- Check the status of each posting (open, filled, cancelled, etc.)
- Access employee sign-ups for each posting
- Act on postings, including:
    - Filling assignments
    - Modifying posting details
    - Cancelling postings

💡 The **Manage Posts window** serves as the primary tool for tracking and managing posted assignments. Posting status should be monitored regularly to ensure shifts are filled in a timely manner. Available actions and display options may vary based on system configuration.

🚨 **Schedulers should review sign-ups and act before posting deadlines when applicable**.

d. Posting Assignments Details

Posting assignment details define the structure and requirements of a posted shift. These details determine how the posting appears to employees, who is eligible to sign up, and how the assignment will be filled.

Key Posting Details to Review

When creating or managing a posting, Schedulers should review the following fields:

- **Activity**
  Defines the type of work to be performed.
- **Location**
  Specifies where the assignment will take place.
- **Date and Time**
  Indicates when the assignment occurs.
- **Number of Positions**

Determines how many employees are needed for the posting.

- **Unit or Organizational Group** (if applicable)
  Identifies the unit associated with the assignment.
- **Hours Modifier** (if applicable)
  Indicates whether the assignment qualifies for overtime or special pay.

💡 Some fields may be required or restricted based on system configuration.

🚨 Incorrect posting details can lead to unqualified employees signing up, shifts not being filled, or reporting or payroll discrepancies. Always verify assignment details before publishing a posting. Changes made after publishing may affect employee sign-ups and posting visibility.

e. Publishing a Posting

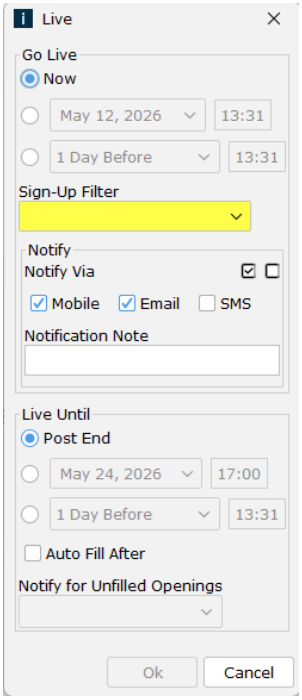
Publishing a posting makes an open assignment visible to employees and allows them to sign up for available shifts. Once published, the posting becomes active and follows the defined posting workflow.

To Publish a Posting for Sign Up:

1. Click the **Schedule Icon**  to open the **Work Schedule**.
2. In the **Work Schedule**, locate the assignment or demand shift to be posted and click to select.
3. Right-click and select **Posts -› Add Post** from the **Right-click** menu, (or click the **Posts** button in the **Command** toolbar along the bottom of the screen). The **Posting Details** window will display.
4. Review and confirm all posting details, including:
   - Activity
   - Location

- Date and time
- Customer
- Number of positions
- Any required modifiers or settings

5. Click **Go-Live**. The **Live** window will display.



6. From the **Sign-Up Filter** dropdown list, select the **Sign Up filter** you want to target for sign ups.

7. From the **Notify group**, select how you want to communicate to you employees about the posting. The options are:

   - **Mobile**
   - **Email**
   - **SMS** (if available)

8. Add a **Notification Note** in the **Note** field, and select one of the following options:

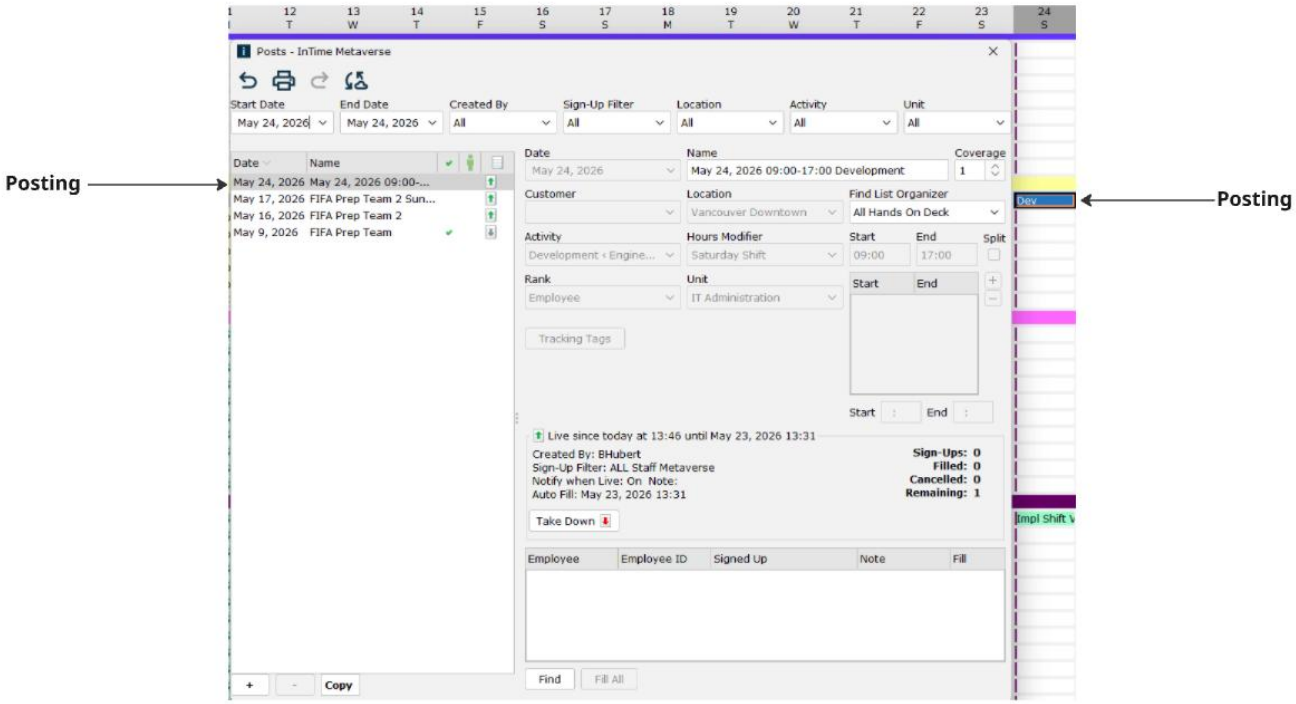
   - **Post End** - the posting will remain live until you manually take it down. If you do not check

this, you can set a specific date and time for the post to come down automatically. This controls how long the posting is available for sign-ups.

- **Date closed field** - the posting will automatically be taken down on this date at the time specified.
- **Day closed for applications field** - the posting will automatically be closed for applications by this time (from 1 day to 6 months prior to the posting's close date)
- **Auto Fill** - once the deadline is reached defined above has passed and the posting is no longer live; the system will automatically fill any outstanding vacancies using the Find List Organizer associated with this posting. Employees at the top of the list will be assigned to the open spots, and they will be notified of their assignment.
- **Notify of Unfilled Openings** - notifies a selected filter group that there are shifts not signed up for and that have been auto-filled. This sends a notification to the specified group about the auto-filled assignments.

9. Click **OK**.

   The posting will display in the **Manage Posts** window and in the Schedule.



💡 Publishing a posting makes the shift available for employee sign-up. Once published, employees may immediately begin submitting requests or interest. Always verify posting details before publishing to avoid incorrect sign-ups.

🚨 **Changes made after publishing may impact employees who have already signed up. Some postings may include deadlines or rules that affect how and when employees can respond.**

f. Sign-Up Filters and Notifications

Sign-up filters and notifications control which employees can view and respond to postings and how they are informed about available shifts. These settings help ensure that postings reach the appropriate employees and support efficient and targeted staffing.

Configuring Sign-Up Filters and Notifications

When creating or editing a posting, Schedulers can configure:

Sign-Up Filters

These determine which employees are eligible to view and sign up for the posting. Common filters may include:

- **Unit or Work Group**
- **Qualifications or Attributes**
- **Availability or scheduling criteria**
- **Employee groups or lists**

Applying filters ensures that only qualified and appropriate employees are able to respond to the posting

Notifications

Notifications inform employees that a posting is available. Depending on system configuration, notifications may include:

- System alerts or messages
- Email notifications
- Mobile or application notifications

These help increase visibility and improve response time for open shifts.

Using Filters and Notifications Effectively

Schedulers should:

- Apply filters to target the most appropriate employees
- Avoid overly restrictive filters that may limit sign-ups
- Use notifications to increase awareness of urgent or critical postings
- Review and adjust settings based on response patterns

💡 Filters directly impact who can see and respond to a posting. Filter and notification options may vary based on system configuration.

🚨 **Incorrect filter settings may result in no employee sign-ups or unqualified employees responding. Notifications do not guarantee responses but improve visibility.**

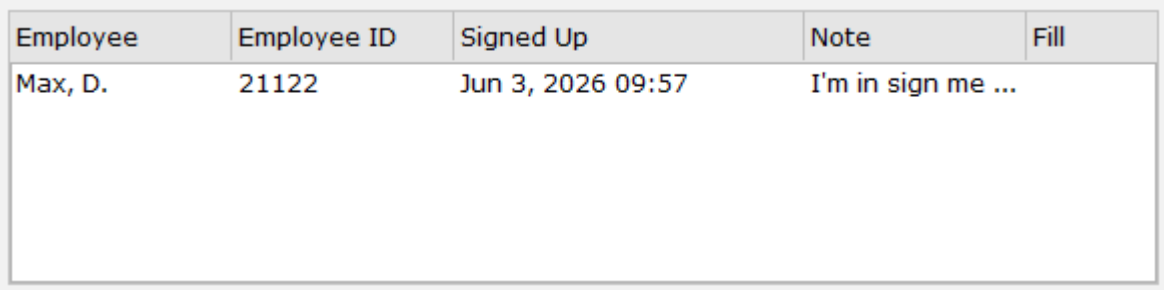
g. Employee Sign-Ups

Employee sign-ups occur when employees respond to posted assignments by indicating their interest in working a shift. This step connects the posting process to the final assignment, allowing Schedulers to select from available candidates.

To Review Employee Sign-Ups:

1. Click the **Schedule Icon** to open the **Work Schedule**.
2. Click **Posts** in the **Command** toolbar. The **Posts** window will display.
3. From the postings list on the left side of the window, click on the posting you want to review. The Posting's Details window will display.
4. From the **Sign-Ups** section in the bottom right of the window, review the list of employees who have signed up for the posting.

Figure 16: Posting Sign-Up List



Employee	Employee ID	Signed Up	Note	Fill
Max, D.	21122	Jun 3, 2026 09:57	I'm in sign me ...	

💡 The employees are sorted in the order that they signed up, not in the order that they will/should be filled. How employees are assigned will depend on the agency's policies.

5. Evaluate each employee based on:
    - Qualifications
    - Availability
    - Ranking or selection criteria
6. Click **Fill All**. The posting will be filled with the first person in the list.

💡 Employee sign-ups represent interest, not confirmed assignments. Schedulers are responsible

for reviewing and selecting the appropriate employee. Sign-ups may be ranked or filtered based on system configuration (such as Find Lists or rules).

🚨 **Lack of sign-ups may require alternative actions, such as reposting or direct assignment. High sign-up volume may require additional evaluation to ensure fair and appropriate selection.**

28. Managing Posted Assignments

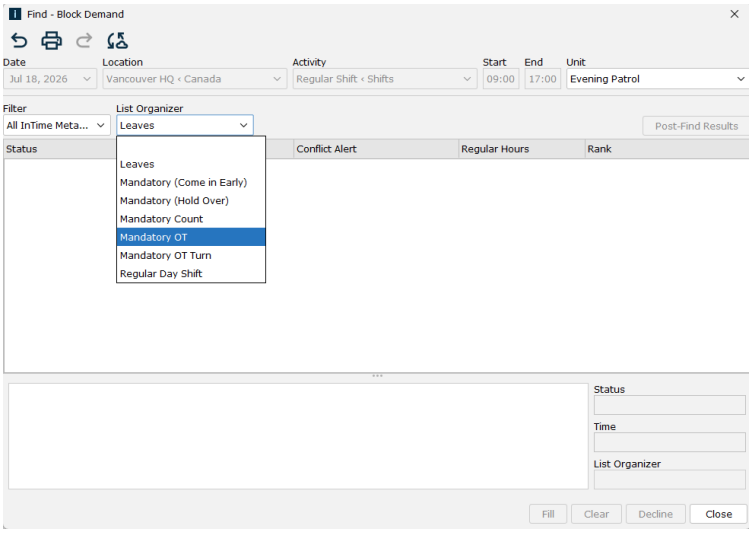
Managing posted assignments involves reviewing employee sign-ups and completing the process of assigning employees to posted shifts. This step ensures that open work is filled appropriately based on qualifications, availability, and organizational rules.

a. Using Find Lists

Find Lists are used to organize and rank employees based on predefined criteria, helping Schedulers select the most appropriate candidate for a posted assignment.

To Use Find Lists When Filling a Posted Assignment:

1. Click the **Schedule Icon** to open the **Work Schedule**.
2. Locate the posting or open assignment you want to fill. (White activity cell blocks.)
3. Click on the assignment to select it. Right-click and select **Find** from the **Right-click** menu, (or click **Find** in the **Command** toolbar at the bottom of the screen). The **Find** window will display.



4. In the **Find** window, select the appropriate **Filter** from the **Filter** dropdown list. The list of available employees will display in the **Employee list** with the most suitable employee listed at the top.
5. Review the ranked list of employees and click on an employee to select.
6. Click **Fill**.
7. Click **Close**.
8. Confirm that the assignment has been filled correctly in the Work Schedule.

💡 Find Lists support the **"Find" step** in the Post–Find–Fill workflow. Find Lists help ensure **fair and consistent selection** of employees. Ranking criteria may include hours worked, previous assignments, rotation rules.

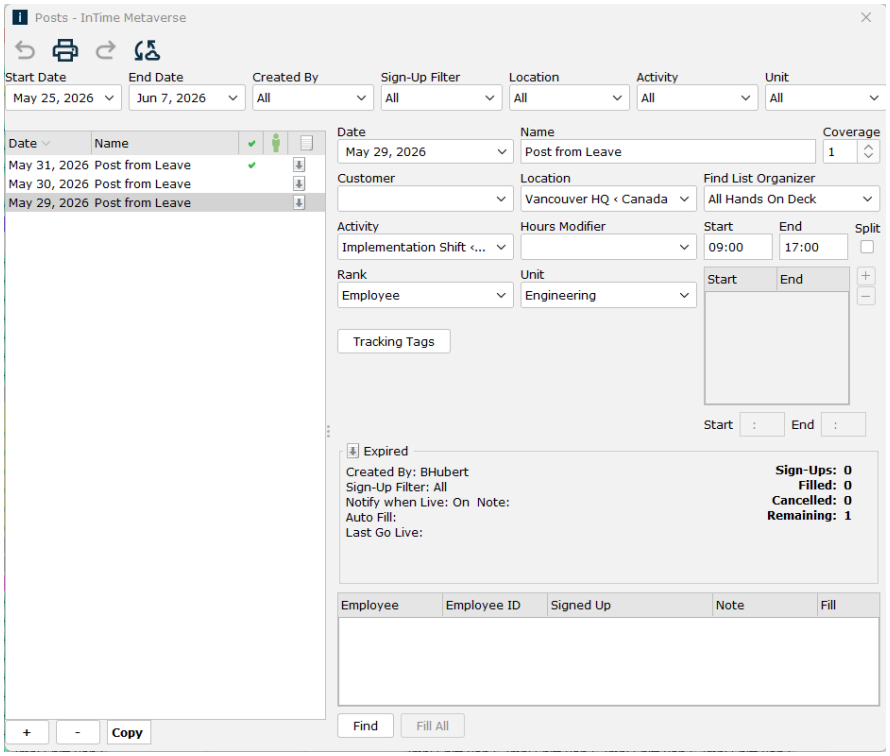
🚨 **Always review the list before selecting an employee**.

b. Auto Fill

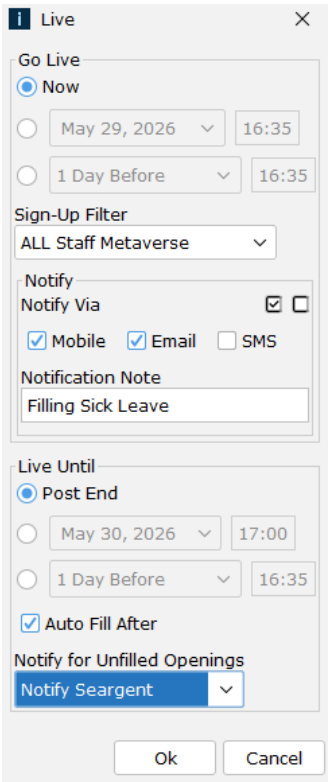
Auto Fill allows the system to automatically assign employees to posted assignments based on configured rules and selection criteria. Unlike Prefills, where the Scheduler selects the employee directly, Auto Fill uses system-defined ranking and assignment logic to fill open shifts automatically.

To Use Auto Fill:

1. Click the **Schedule Icon**  to open the **Work Schedule**.
2. Click the **Activity block** for the shift you want to post to select it.
3. Right-click and select **Posts->Add Posts,** (or click the **Posts button** in the **Command Toolbar** along the bottom of the screen). The **Find** window **will** display.



4. Click the **Go Live** button. The **Live** window will display with the **Sign-Up Filter** field highlighted.



5. Select the appropriate **Sign-Up Filter** from the **Sign-up Filter** dropdown list.

6. Type a note in the **Notification Note** field (optional).
7. Set how the Posting will be sent to employees by clicking the appropriate checkboxes: **Mobile**, **Email**, or **SMS**.

💡 Some organizations limit the number of posting notifications to avoid posting overload.

8. Accept the current **Live Until dates,** (or check the **Post end** radio buttons).

💡 When a Post Ends it is no longer available for signup. Posts can be taken down manually or automatically when the assignment date and time have been reached.

9. Click **Autofill After** and select the appropriate **Auto Fill group** to **Notify** when unfilled.
10. Click **OK** and close the **Live** window
11. Close the **Posts** window.

💡 Auto Fill speeds up the assignment process but should always be reviewed. The system uses configured rules to determine employee selection. Results may vary based on available employees, filter settings, ranking logic.

🚨 **Schedulers remain responsible for final validation**.

c. Cancelling (Unpublish) Postings

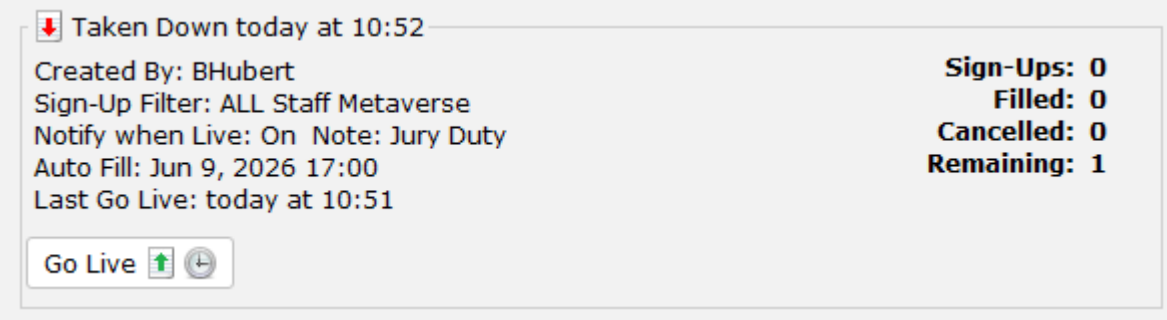
Cancelling a posting removes it from availability and prevents further employee sign-ups. This action is used when a posting is no longer needed or must be corrected.

To Cancel (Unpublish) a Posting:

1. Click the **Schedule Icon**  to open the **Work Schedule**
2. Click the **Posts** button in the **Command** toolbar along the bottom of the screen. The **Posts** window will display.
3. Click on the posting to be cancelled within the **Postings** list.
4. Click **Take Down** . A **Take Down** message will be displayed, and the posting will not

longer be active.

Figure 17: Posting Take Down Example



💡 Use this action when the shift is no longer needed, the posting was created incorrectly.

🚨 **Cancelling a posting does not automatically remove assignments that have already been filled. Always review whether coverage still needs to be addressed after cancelling. Posting status should be monitored to avoid leaving unused or outdated postings active.**

29. Common Posting Scenarios

Common posting scenarios represent typical situations Schedulers encounter when managing open assignments. Understanding how to handle these scenarios helps ensure postings are used effectively and that shifts are filled in a timely and accurate manner.

a. Backfill for Leave

Backfilling for leave involves creating a posting to cover an assignment when an employee is unavailable due to approved time off.

To Backfill an Assignment for Leave:

When leave creates an open assignment, Schedulers can post the resulting vacancy directly from the Leave workflow.

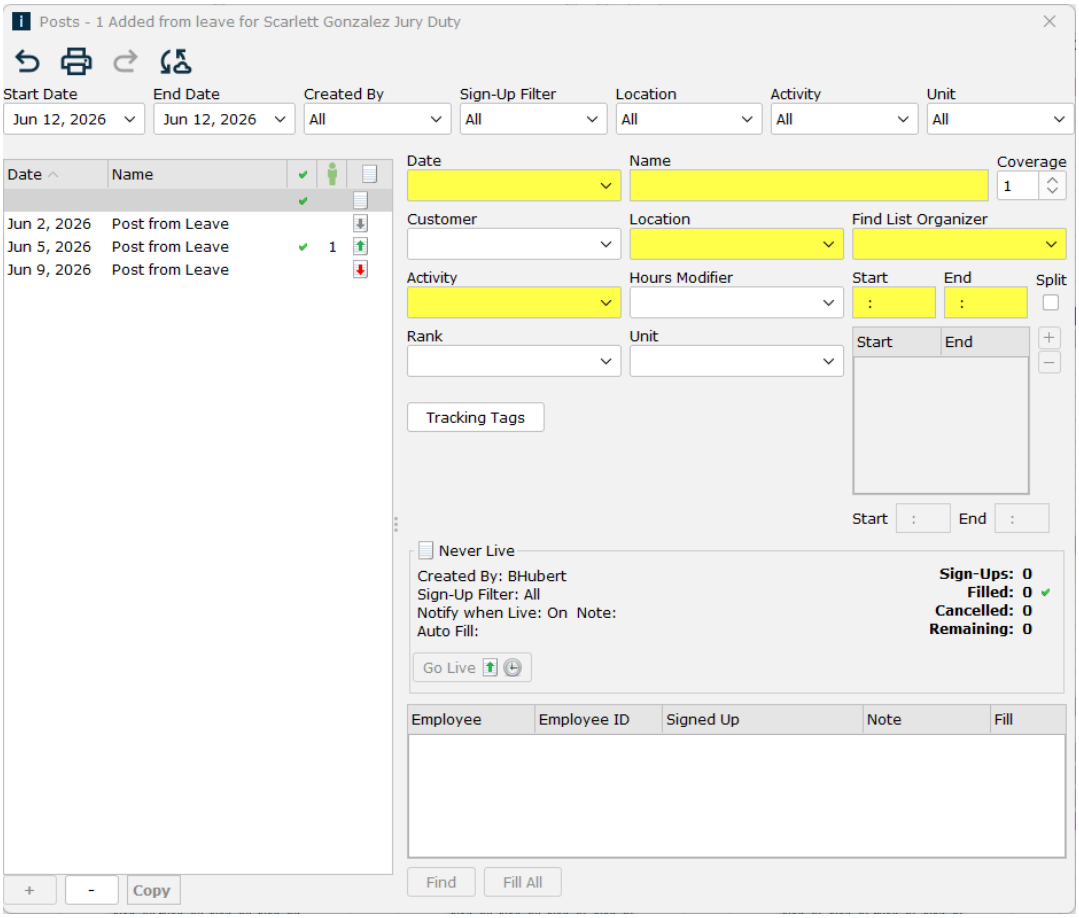
Leave is one of the most common assignment exceptions managed by Schedulers. Applying leave removes the employee from their scheduled work and may create a vacancy that requires reassignment, filling, or posting.

b. Create New Posting

Creating a new posting involves defining a shift that does not already exist in the schedule and making it available for employee sign-up. This is used when new work must be scheduled or when coverage is needed for assignments not currently represented in the schedule.

To Create a New Posting:

1. Click the **Schedule Icon**  to open the **Work Schedule**.
2. Hover over the **Posts** button in the **Command** toolbar along the bottom of the screen and select **Add Post**. The **Posts** window will display.
3. Click **"+"** along the bottom of the **Posting** list.
4. In the **Posting Details** section, enter the following required information as shown in Error! Reference source not found. below:
    a. **Date** - mandatory
    b. Name - mandatory
    c. Activity - mandatory
    d. **Location** - mandatory
    e. Find List Organizer - mandatory
    f. Start time - mandatory
    g. **End Time** - mandatory
    h. **Coverage -** optional
    i. **Customer -** optional
    j. **Hours modifier -** optional
    k. **Rank -** optional
    l. **Unit -** optional
    m. **Tracking tags -** optional



5. Click **Go Live** Go Live. The **Live** window will display.
6. From the **Go Live** section choose one of the following:
    a. **Now** - Posting is published when **OK** is clicked
    b. **Date** - Posting is published on a specific date
    c. **Before**-Posting is published between 1 day and 6 months before the shift.
7. From the **Sign-Up Filter** dropdown list, select the appropriate sign up filter.
8. From the **Notify** section select one or more of the following notification options:
    a. Mobile
    b. Email
    c. SMS
9. Type a note into the **Notification Note** field that will be sent with the posting to the employees.

10. From the **Live Until** section, select one of the following:
    a. **Post End** - posting stays live until it is filled or expires
    b. **Post End Date** - posting ends on the defined date
    c. **Post End After** - posting ends x number of days before the posting is due
11. Click **Auto Fill Aft**er if you want the posting to be **Auto Filled** after the time specified on the **Posting End Date** or When the **Post Ends After time** has elapsed.
12. Select a list of who should be notified of unfilled postings from the **Notify for Unfilled Postings** dropdown list.
13. Click **OK.**
14. Confirm that the posting appears in the **Posting List** within the **Posting** window.
15. **Close** the **Posts** window.

💡 Use this method when no existing assignment is available to duplicate or modify. Ensure all posting details are accurate before publishing. New postings should align with operational needs and staffing requirements.

🚨 If the posting represents recurring or ongoing work, consider whether a template or recurring setup is more appropriate.

c. No One Signs Up – Mandatory Postings

In some cases, a posting may not receive any employee sign-ups. When this occurs, the Scheduler must take additional steps to ensure the assignment is filled and coverage is maintained.

To Address a Posting with No Sign-Ups:

1. Click the **Schedule Icon** 📅 to open the **Work Schedule**.
2. Hover over the **Posts** button in the **Command** toolbar along the bottom of the screen and select **Manage Posts**. The **Posts** window will display.
3. Locate the posting with no sign-ups in the **Postings** list and click to select.

4. Review **sign-up filters and notifications** to ensure the posting was visible to the appropriate employees.
5. Click **Find**. The **Find - Post** window will display.
6. Click on the **Convert to Schedule Fill** checkbox and select the appropriate **List Organizer** from the **Schedule List Organizer** dropdown list.
7. Click on the employee that you want to fill the shift and click **Fill**.

🚨 If **Enable List Order Bypass** is selected in the **Find List Organizer** set up Schedulers can bypass anyone on the list and schedule whomever they choose.

If you must bypass employees on the returned list: Click on the first employee in the list and Select the **Post Fill Override Reason** from the **Post Fill Override Reason** dropdown list. Click **OK**. Repeat this until you reach the employee that you want to fill the shift. Click **Fill**.

8. Confirm that the assignment is filled in the **Work Schedule** and coverage is restored.
9. Click **Close.**

💡 Depending on you InTime configuration **you may be forced to accept the first person in the list** Or **click on the employee to select then click Decline and select a Decline reason** from the Decline Reason dropdown list. This process would need to be repeated until you reach the employee you want to assign.

🚨 **In urgent situations, direct assignment may be required to ensure coverage. Reposting without changes may not resolve the issue — adjustments are often necessary.**

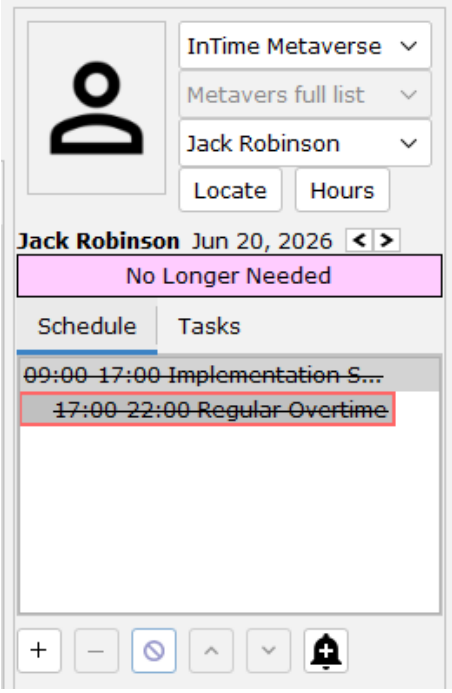
d. Cancel a Filled Assignment

Cancelling a filled assignment may be necessary when a previously assigned shift is no longer required or must be reassigned. This action removes the employee from the assignment and may require additional steps to restore coverage.

To Cancel a Filled Assignment:

1. Click the **Schedule Icon** to open the **Work Schedule**.
2. Locate the filled assignment and click on it to select.
3. In the **Assignment Details** panel, hover over the **Cancel Icon** and select **No Longer Needed**. The **Assigned shift details** will be struck through, and the "***No Longer Needed***" message will display.

   Figure 18: Example of a Canceled Shift



4. Confirm that the **Activity block** shows the **Cancellation** .

💡 This action is different from cancelling a posting — it applies to the **assignment itself**, not the posting. Consider whether the assignment should be reposted or reassigned directly. Ensure that any impacted employees are notified according to organizational procedures.

🚨 **Cancelling a filled assignment removes the employee but does not automatically restore coverage. This action may create a new gap that must be addressed.**

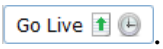
e. Posting Multiple Assignments

Posting multiple assignments allows Schedulers to create and manage several similar shifts at the same time. This is commonly used when multiple employees are needed for the same role, location, or time period.

To Post Multiple Assignments:

1. Click the **Schedule Icon**  to open the **Work Schedule**.
2. Hover over the **Posts** button in the **Command** toolbar along the bottom of the screen and select **Add Post**. The **Posts** window will display.
3. For each **Posting** do the following:
    a. Click **"+"** along the bottom of the **Posting List**.
    b. In the **Posting Details** section, enter the following required information as shown in Error! Reference source not found. below:
        - **Date** - mandatory
        - **Name** - mandatory
        - **Activity** - mandatory
        - **Location** - mandatory
        - **Find List Organizer** - mandatory
        - **Start time** - mandatory
        - **End Time** - mandatory
        - **Coverage -** optional
        - **Customer -** optional
        - **Hours modifier -** optional
        - **Rank -** optional

- **Unit -** optional
- **Tracking tags -** optional

4. Once the postings are created select them by holding down the **CTRL** key and clicking on each posting you want to publish. Click **Go Live** 

. The **Live** window will display.
5. From the **Go Live section** choose one of the following:
    a. **Now** - Posting is published when OK is clicked
    b. **Date** - Posting is published on a specific date
    c. **Before**-Posting is published between 1 day and 6 months before the shift.
6. From the **Sign-Up Filter** dropdown list, select the appropriate sign up filter.
7, From the **Notify Section** select one or more of the following notification options:
    a. **Mobile**
    b. **Email**
    c. **SMS**
8. Type a note into the **Notification Note** field that will be sent with the postings to the employees.
9. From the **Live Until** section, select one of the following:
    a. **Post End** - postings stay live until they are filled or expire
    b. **Post End Date** - postings end on the defined date
    c. **Post End After** - postings end x number of days before the posting is due

2. Click **Auto Fill After** if you want the postings to be **Auto Filled** after the time specified on the **Posting End Date** or When the **Post Ends After time** has elapsed.
3. Select a list of who should be notified of unfilled postings from the **Notify for Unfilled Postings** dropdown list.
4. Click **OK.**

5. Confirm that the postings appear in the **Posting** list within the **Posting** window.
6. **Close** the **Posts** window.

💡 This method uses a single Filter Group and is more efficient than creating and posting each assignment individually. This approach is commonly used for high-demand shifts, group assignments, events or large staffing needs. After filling, verify that assignments are distributed correctly across employees.

🚨 Setting the correct number of positions is critical when posting multiple assignments. Monitor sign-ups to ensure that all positions are filled appropriately.

MANAGING REQUESTS AND APPROVALS

Managing requests and approvals involves reviewing, approving, or rejecting requests submitted by employees through InTime or other system interfaces. These requests directly impact scheduling, availability, and assignment coverage, and must be evaluated carefully to ensure they align with operational needs and organizational policies.

Schedulers are responsible for ensuring that all requests are handled consistently, that coverage is maintained, and that any approved changes are accurately reflected in the schedule.

30. Understanding Employee Requests and Approvals

Employee requests represent actions initiated by employees that require Scheduler review and decision-making. These requests often result in changes to the schedule and must be evaluated in the context of staffing needs, employee eligibility, and organizational rules.

Understanding how requests affect the schedule helps ensure that decisions are made consistently and that unintended gaps or conflicts are avoided.

a. Request Types

Schedulers may encounter several types of employee requests, including:

- **Timesheet Requests -** 
  Requests related to time reporting, adjustments, or corrections (NOTE these are covered in the Timesheet section of this guide).

- **Leave Requests -** 
  Requests for time off, such as vacation or sick leave.

- **Timesheet Requests -** 
  Requests related to time reporting, adjustments, or corrections (NOTE these are covered in the Timesheet section of this guide).

- **Shift Trade Requests -** 
  Requests to swap assignments with another employee.

💡 Employees can submit shift trade requests through the InTime mobile or web apps. These requests are routed to the Trade queue, located in the command line area of the schedule interface.

b. Reviewing and Processing Requests

Schedulers are responsible for reviewing each request and determining whether it can be approved without negatively impacting coverage or operational requirements.

To Access Employee Requests:

1. Click the **Schedule Icon**  to open the **Work Schedule.**
2. When an employee makes any of the available request, the queue in the **Command** toolbar at the bottom of the screen will display red with the number of requests in that queue that need to be approved.

💡 The request queues will be organized based on the filters that have been setup for the request type.

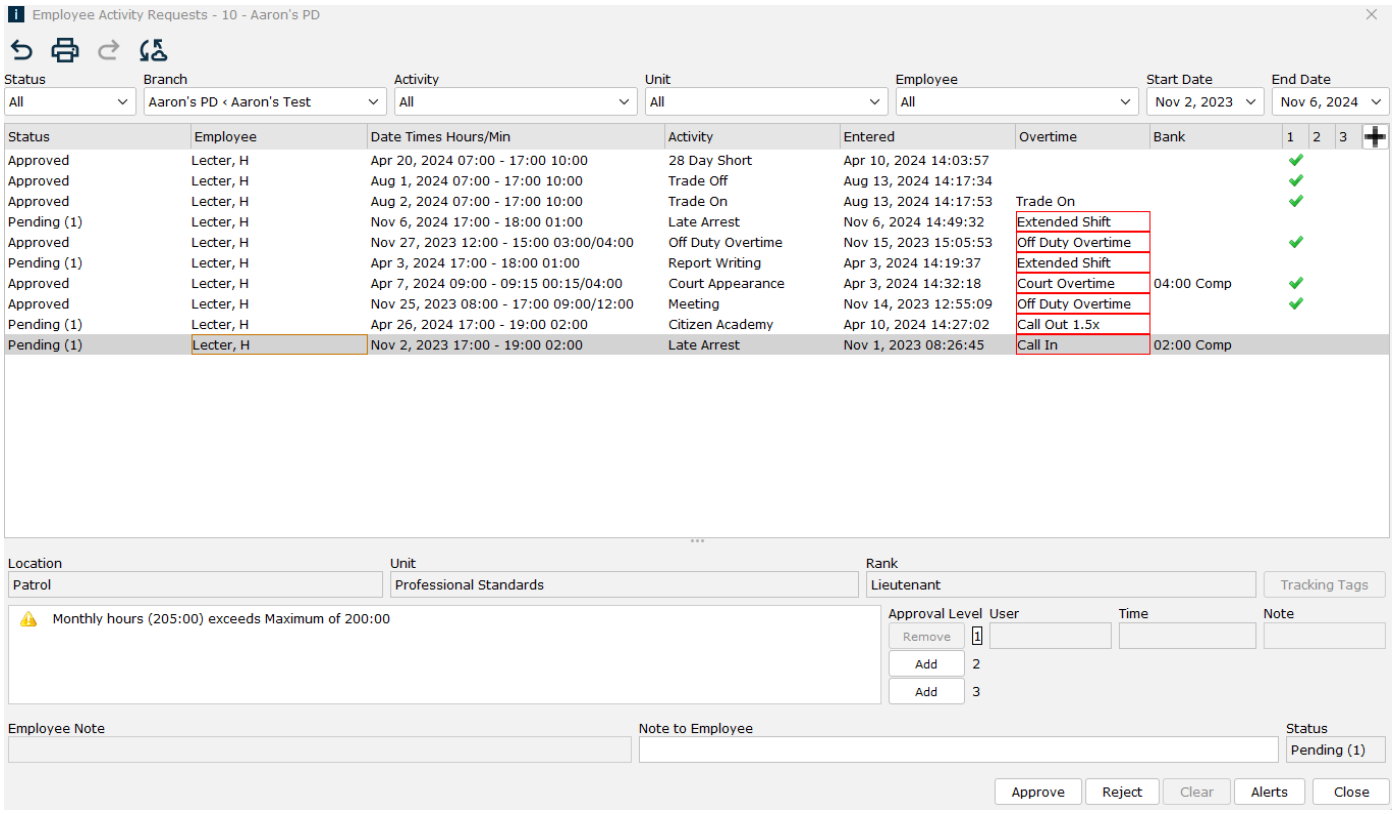
Figure 19: Request Queues in the Command toolbar



3. Click on the **Request Queue** you would like to access. The associated **Requests Queue** will display.

To Review and Process Employee Activity Requests:

1. Click the **Schedule Icon** to open the **Work Schedule.**
2. Click on the **Activity Queue** 1 A button in the **Command** toolbar along the bottom of the screen to open the **Activity Requests** queue. The **Employee Activity Requests** window will display.



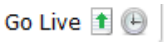
3. Click on the **Activity Request** you want to review and approve. The details will populate the lower portion of the **Activity Requests** window. Review the details.
4. **Approve** or **Reject** the **Activity Request** as follows:

a. To **Approve** the **Activity Request**, click **Approve**

b. To **Reject** the **Activity Request** click **Reject**.

5. Click **Close** to close the **Employee Activity Requests** window and return to the Main Schedule.

To Review and Process Employee Leave Requests:

1. Click the **Schedule** Icon  to open the **Work Schedule.**
2. Click on the **Leave Queue**  button in the **Command** toolbar along the bottom of the screen to open the **Leave Requests queue**. The **Leave Requests** window will display.
3. Click on the **Leave request** that you want to review and approve.
4. Click **Approve** or hover over the **Decline button** and select a **Leave Decline reason** to reject the **Leave Request**.
5. For **Approved Leave Requests** click **Post**. The **Posts** window will display.
6. Select a **Find List Organizer** from the **Find List Organizer dropdown list**.
7. Click **Go Live** 
8. From the **Go Live section** choose one of the following:

   d. **Now** - Posting is published when **OK** is clicked

   e. **Date** - Posting is published on a specific date

   f. **Before**-Posting is published between 1 day and 6 months before the shift.

9. From the **Sign-Up Filter dropdown list**, select the appropriate sign up filter.
10. From the **Notify Section** select one or more of the following notification options:

    d. **Mobile**

    e. **Email**

    f. **SMS**

11. Type a note into the **Notification Note field** that will be sent with the postings to the employees.

12. From the **Live Until section**, select one of the following:
    a. **Post End** - postings stay live until they are filled or expire
    b. **Post End Date** - postings end on the defined date
    c. **Post End After** - postings end x number of days before the posting is due
13. Click **Auto Fill Aft**er if you want the postings to be **Auto Filled** after the time specified on the **Posting End Date** or When the **Post Ends After time** has elapsed.
14. Select a list of who should be notified of unfilled postings from the **Notify for Unfilled Postings dropdown list**.
15. Click **OK.**
16. Confirm that the posting appears in the **Posting List** with a .

💡 If time banks are setup, InTime will display that the time exceeds what is in the bank in the lower left white box if. If the time banks are set to PREVENT overdrawn hours, the APPROVE button will be greyed out and the supervisor/scheduler will not be able to approve the requested leave.

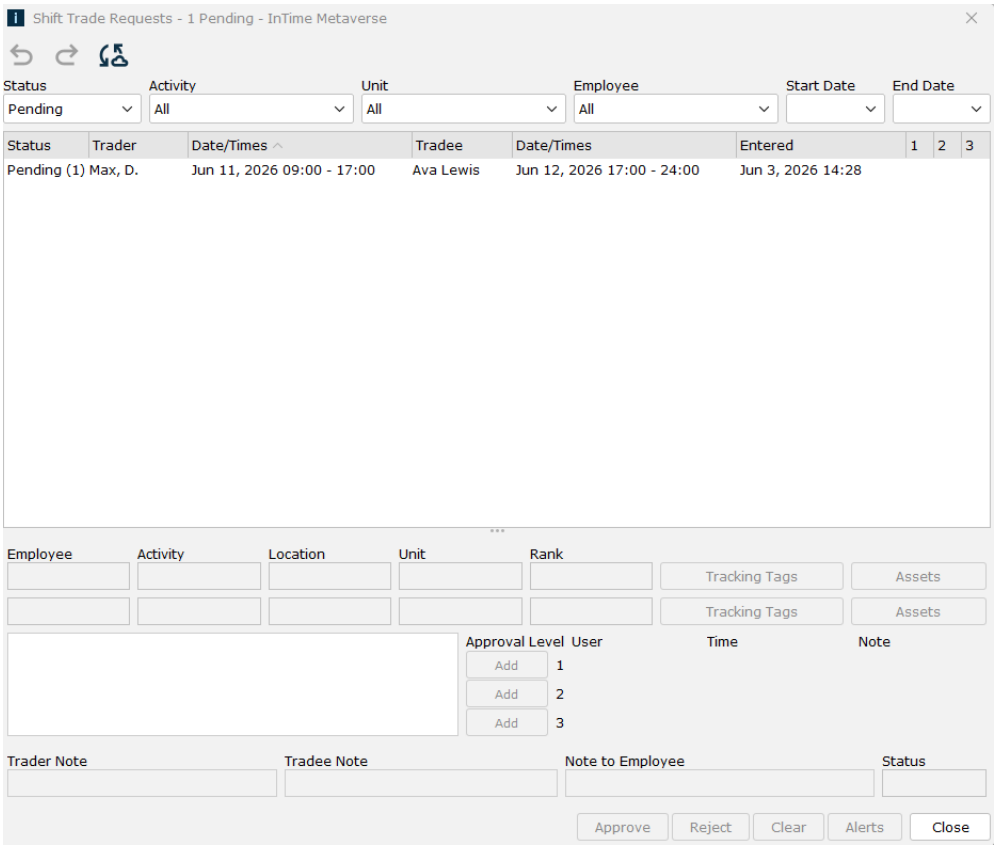
🚨 **Approved requests may automatically update the schedule depending on the request type. Always review the schedule after approval to ensure coverage is still met.**

To Review and Approve Time Sheet Requests:

See MANAGING LEAVE REQUESTS on page 108.

To Review and Approve Shift Trade Requests

1. Click the **Schedule Icon**  to open the **Schedule view.**
2. Click on the **Trade Queue**  **button** in the **Command toolbar** along the bottom of the screen to open the **Trade Requests queue**. The **Shift Trade Requests** window will display.



3. Click on the **Shift Trade request** that you want to review and approve.
4. Click the **Approve** or **Decline** button.
5. Click **Close** to return to the **Work Schedule**.

💡 Using the system's "Decline" button protects supervisors and the organization by creating a record of any denied time-off requests. This digital paper trail mitigates legal risk and union grievances by providing timestamped, business-related evidence—such as minimum staffing thresholds—to justify the decision.

c. Notifications to Employees

When a request is approved or rejected, the system typically notifies the employee automatically.

Schedulers do not manually send notifications, but their actions directly trigger these updates.

Depending on how the agency has set up their notifications employees may be notified when a

request is:

- Approved
- Rejected
- Modified

Notifications may be delivered through:

- SMS
- Email
- Mobile app notifications

💡 Because notifications are triggered by Scheduler actions, it is important to ensure that all approvals and rejections are accurate before confirming. Employees rely on these updates to understand their schedule and next steps.

MANAGING LEAVE REQUESTS

Managing leave involves more than simply approving employee requests. Schedulers are responsible for ensuring leave is applied correctly, staffing levels are maintained, and operational coverage requirements are met. Depending on organizational workflows, Schedulers may review leave requests submitted by employees, manually apply leave directly to the schedule, create postings to fill uncovered assignments, and monitor employee leave balances.

Effective leave management helps maintain schedule accuracy, reduce staffing shortages, and ensure employees are assigned and compensated correctly.

💡 Before creating a posting, Schedulers should determine whether operational coverage is required for the vacated assignment.

31. Understanding Leave Management

Leave management allows Schedulers to review, apply, and track employee leave directly within the Work Schedule whether processing employee-submitted requests or manually applying operational adjustments.

InTime allows Schedulers to create postings in two ways: directly from the Leave window while applying the leave, or after the leave has been created by selecting the vacated assignment and creating a posting from the schedule. Both methods generate a posting that can be published for eligible employees to view and respond to.

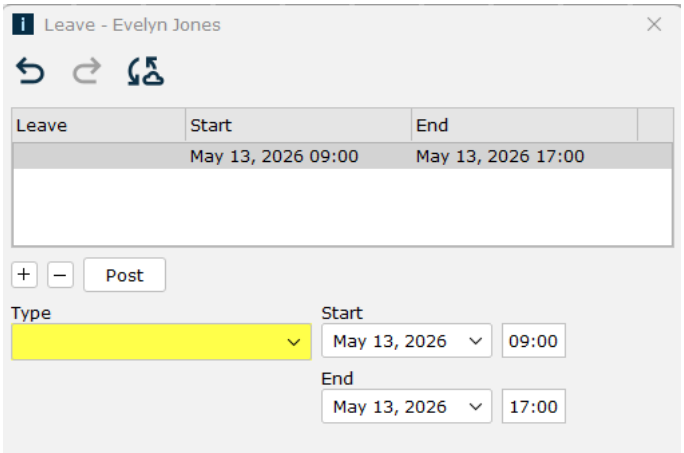
a. Applying Leave Manually

Schedulers can manually apply leave directly to the Work Schedule when leave was not submitted through a request or when operational schedule adjustments are required.

To Apply a Leave Manually and Create Posting from Leave:

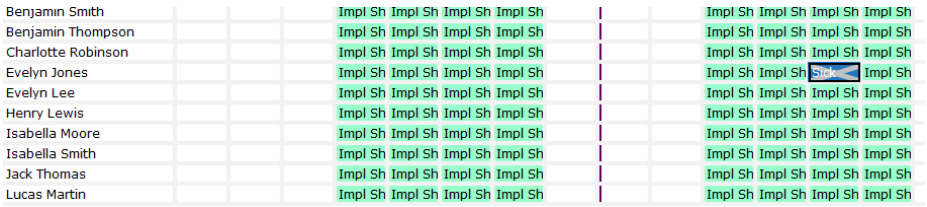
1. Click the **Schedule Icon**  to open the **Schedule view**
2. In the **Details Panel**, select the employee that you want to apply a leave to from the **Employee** dropdown list and click **Locate**. The employee will become highlighted.
3. On the **Work Schedule**, click into the **Activity** block cell for the employee on the date you want to assign leave.
4. Right-click and select **Leave** from the **Right-click** menu, (or click **Leave** in the **Command** toolbar along the bottom of the screen). The **Leave** window will display.

Figure 20: Leave window with Leave Type dropdown list highlighted.



5. Click the **"+"** and the **Type** field will highlight and the **Leave Start** and **End date** will populate the **Leave grid**.
6. Select the **Leave Type** from the **Type** dropdown list.
7. Adjust the **Start** and **End date** and **Time** fields as needed. The Schedule will be updated.

Figure 21: Example of How Leave Displays on Work Schedule



8. Click **Post**, to create a posting to backfill the **Leave** entry. The **Posts** window will display with the new posting selected.

💡 Creating a Posting directly from a Leave Request is considered a shortcut It is not our preferred method of posting since it populates the Post From Leave statement in the Posting window and not what the assignment is.

9. Select an appropriate **List Organizer** from the **Find List Organizer** dropdown list.
10. Click **Go Live** Go Live . The **Live** window will display.
6. From the **Go Live section** choose one of the following:

   a. **Now** - Posting is published when OK is clicked

b. **Date** - Posting is published on a specific date

c. **Before**-Posting is published between 1 day and 6 months before the shift.

9. From the **Sign-Up Filter dropdown list**, select the appropriate sign up filter.
10. From the **Notify Section** select one or more of the following notification options:
    a. **Mobile**
    b. **Email**
    c. **SMS**
11. Type a note into the **Notification Note field** that will be sent with the posting to the employees.
12. From the **Live Until section**, select one of the following:
    d. **Post End** - posting stays live until it is filled or expires
    e. **Post End Date** - posting ends on the defined date
    f. **Post End After** - posting ends after x number of days before the posting is due
13. Click **Auto Fill Aft**er if you want the posting to be **Auto Filled** after the time specified on the **Posting End Date** or When the **Post Ends After time** has elapsed.
14. Select a list of who should be notified of unfilled postings from the **Notify for Unfilled Postings dropdown list**.
15. Click **OK.**
16. Confirm that the posting appears in the **Posting List** with a  and close the window.

💡 Approved leave may reduce available employee leave balances depending on the selected leave type and organizational policies.

b. Posting Vacated Assignments

After a Leave has been approved or manually applied, there is an unfilled assignment in the

schedule. Schedulers may need to create a posting to maintain staffing coverage.

> 💡 Before creating a posting, Schedulers should determine whether operational coverage is required for the vacated assignment.

c. Leave Management Best Practices

Schedulers should:

- Review staffing levels before creating leave postings
- Assess minimum staffing requirements before approving leave
- Consider overtime impacts and staffing costs
- Avoid unnecessary postings when coverage is not operationally required
- Process leave requests promptly to reduce scheduling conflicts
- Monitor upcoming leave to identify future staffing shortages

> 💡 Reviewing leave requests and coverage requirements in advance can help reduce last-minute staffing shortages and overtime usage.

WORKING WITH TIME BANKS

Time Banks are used to track employee leave balances, compensation time, overtime banking, and other accumulated time categories within InTime. Schedulers typically have view-only access to Time Bank information and do not directly modify employee balances, accruals, carryovers, or Time Bank configuration.

Time Bank balances are typically maintained through payroll, finance, or administrative processes. Schedulers generally interact with Time Banks by viewing balances and assigning eligible overtime hours to approved Time Banks during scheduling workflows.

32. Understanding Time Banks

Time Banks store accumulated employee time balances such as vacation, sick leave, compensation time, or other organizational leave categories. These balances help Schedulers determine whether employees have sufficient available time when reviewing leave requests or processing overtime banking.

When approved leave is applied to an employee schedule, the associated Time Bank balance is typically updated automatically based on organizational configuration and leave rules. Schedulers are responsible for ensuring the correct leave type is applied but are not normally responsible for manually adjusting Time Bank balances.

Schedulers commonly use Time Banks to:

- Review available leave balances
- Validate leave requests
- Assign overtime hours to compensation banks
- Review accumulated compensation time
- Support staffing and scheduling decisions

💡 Time Bank balances, accrual rules, and payout configurations are typically managed by InTime Administrators, finance, or payroll staff and may vary depending on organizational policies.

a. Viewing Time Bank Balances

Schedulers can review employee Time Bank balances directly from the Work Schedule to help determine whether employees have sufficient available leave or compensation time. Time Bank balances may include vacation, sick leave, compensation time, overtime banks, or other organizational leave categories.

To View Employee Time Bank Balances in the Work Schedule:

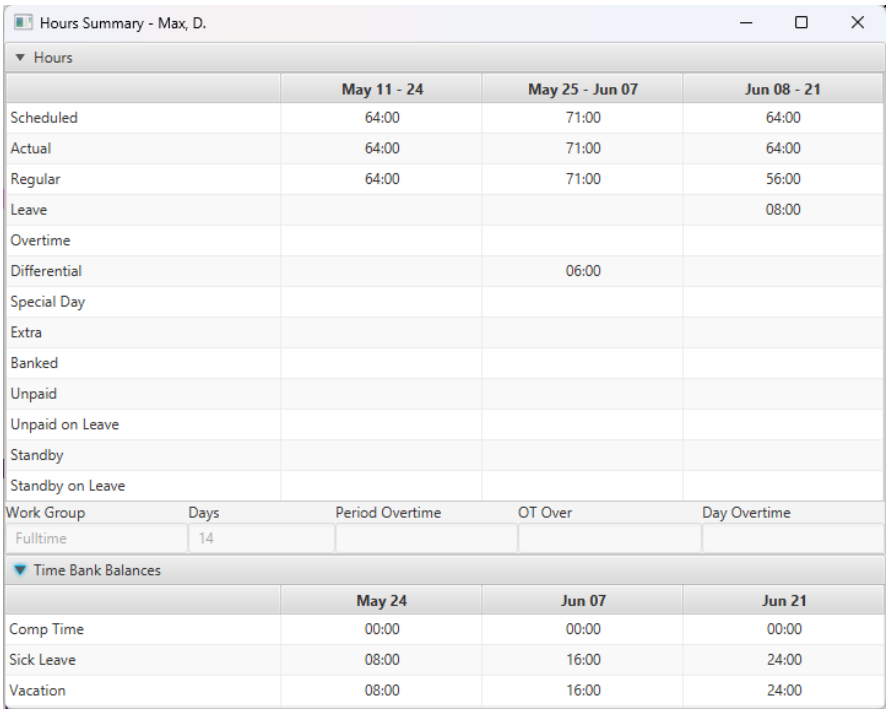
1. Click the **Schedule** Icon  to open the **Work Schedule.**
2. In the **Assignment Details** panel, select the employee that you want to apply a leave to from

the **Employee** dropdown list and click **Locate**. The employee will become highlighted.

3. Click **Hours**. **The Hours Summary** window will display.

4. In the lower half of the window click the **Expand/Collapse Arrow** to display **Time Bank Balances** as shown below.

Figure 22: Employee Hours with Time Bank Balances Displayed



5. Review the employee hours summary information. Close the window.

💡 The Hours view is the primary method Schedulers use to review employee Time Bank balances. While some organizations may allow Time Bank information to be viewed elsewhere in InTime, Schedulers generally do not need to access employee Time Banks directly from the Employee Profile.

💡 Depending on organizational configuration and permissions, some Time Banks may display projected future accruals or estimated future balances.

💡 Time Bank visibility and available balance information may vary depending on organizational policies, employee agreements, and system permissions.

b. Banking Overtime Hours

When employees request compensation time instead of a payout, Schedulers can bank eligible overtime hours into compensation or leave banks. Overtime banking is handled directly during the overtime assignment process. Schedulers select an eligible Time Bank and specify the hours to bank.

To Bank Overtime Hours:

Overtime banking is handed directly during the overtime assignment process. Schedule select an eligible Time Bank and specify the hours to bank.

For the steps to assign overtime hours to a time bank see Error! Reference source not found. on **page** Error! Bookmark not defined. or Error! Reference source not found. on **page** Error! Bookmark not defined..

💡 Employees may request that overtime hours be banked instead of paid out, but overtime banking is controlled by organizational policies, employee agreements, and Scheduler or supervisor approval.

💡 Available Time Banks and overtime banking options may vary depending on employee eligibility, organizational configuration, and system permissions.

c. Time Bank Visibility and Permissions

While Schedulers can **view** balances to support daily scheduling decisions, they typically do not have permissions to modify them. Balance discrepancies, accruals questions, carryover issues, or manual adjustments must be processed by an InTime Administrator or payroll representative. These restrictions help maintain payroll accuracy and protect sensitive employee information.

💡 Depending on permissions and organizational configuration, Schedulers may only be able to view Time Bank balances from within the Schedule Hours panel or other limited system views.

💡 Time Bank balances and accrual information may not update immediately if external payroll or finance systems are integrated with InTime.

d. Key Time Bank Scheduling Considerations

When managing leave and overtime, keep the following in mind:

- **Insufficiency & Accruals:** Verify the employee has enough hours. Remember that projected future accruals can change if additional leave is used before the requested date.
- **Policy Limits:** Some banks have maximum balance limits or strict payout restrictions based on collective bargaining agreements.
- **Automation & Syncing:** Balances usually update automatically when leave is applied, but external payroll system integrations can cause minor display delays.
- **Operational Impact:** Always weigh leave approvals against minimum staffing levels and operational demand.

💡 Employees who exceed available leave balances may require unpaid leave, alternative leave types, or additional approval workflows depending on organizational policy.

💡 Time Bank rules, accruals, payout options, and overtime banking policies may vary significantly between organizations and employee groups.

Using Filters

Filters help Schedulers narrow the schedule view to focus on specific employees, units, locations, assignments, or other scheduling criteria. The primary scheduling filters are setup by an administrator for everyone to see and use.

Using filters allows Schedulers to work more efficiently by reducing visual clutter and isolating the information relevant to the current scheduling task.

Schedulers commonly use filters when:

- Reviewing staffing coverage
- Locating employees or assignments
- Managing large schedules

- Identifying conflicts or coverage gaps
- Focusing on specific operational areas or units

a. User Filters

Daily Schedulers can create their own unique User Employee Filters. The scheduler/supervisor may want one view that shows just their people wherever they might be. User Employee filters are useful when a supervisor is responsible for employees that may work across multiple units for collateral assignments. Another use case for User Employee filters would be for special projects.

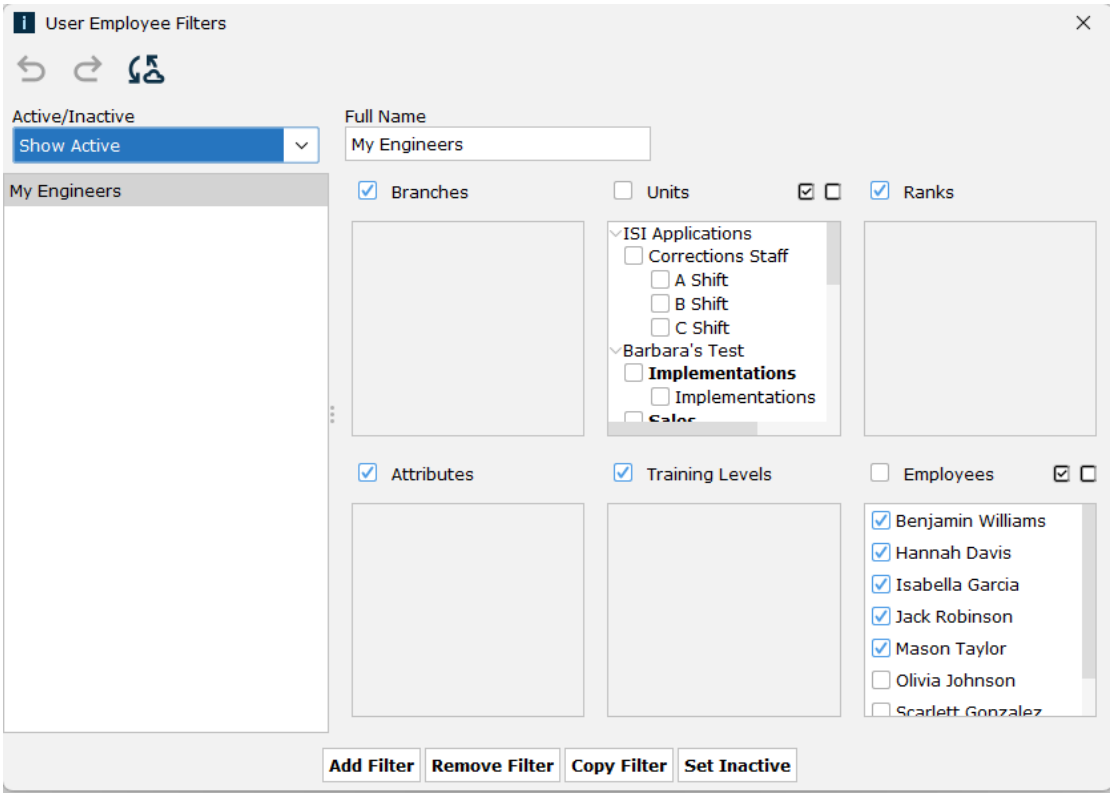
> 🚨 User filters are only visible to the user/scheduler who creates them. They cannot be shared or used with Find List Organizers or for Posting Notifications, etc.

To Access User Employee Filters

1. Click the **Main Menu** (☰) and select **User Employee Filter** under the **Setup heading**. The **User Employee Filter** window will display.
2. From the **Branch** dropdown list, confirm you are in the correct branch.
3. From the **Type** dropdown list, select the type of employee you wish to locate a filter for.
4. From the **Active/Inactive** dropdown list select **Show Active**. All active filters will be displayed.

To Create a New User Employee Filter

1. Click the **Main Menu** (☰) and select **User Employee Filter** under the **Setup heading**. The **User Employee Filters Setup** window will display.



2. From the **Branch** field, confirm you are in the correct branch.
3. Click the **Add Filter** button at the bottom of the screen. The **Name** field will become highlighted. Type a name for your filter.
4. Set the properties for you filter:
    a. **Branches** - unselect Branches if you want to specify a branch otherwise will default to your current branch.
    b. **Unit** - unselect if you want to specify the units and select the units you want to include in the filter results.
    c. **Rank** - unselect if you want to specify the ranks that will be included in the filter results.
    d. **Attributes** - unselect if you only want specific attributes to be included in the filter results.
    e. **Employee** - unselect if you **only want specific employees to be included** in the filter results. T

💡 Leaving the filter attribute select will result in all of the attributes being included in the filter result. For example, leaving Ranks selected will include all ranks or leaving the Employees check box checked (recommended) will include all employees.

To Copy a Filter:

1. Click the **Main Menu** (☰) and select **User Employee Filter** under the **Setup heading**. The **User Employee Filter** window will display.
2. From the **Branch** field, confirm you are in the correct branch.
3. Select the **Show Active** from the **Active/Inactive** dropdown list and select the filter you want to copy from the list of filters below.
4. Click the **Copy Filter** button at the bottom of the window.
5. Give the copied filter a new name in the **Full Name** field.
6. Customize your filter properties.

To Set a User Filter as Inactive:

1. Click the **Main Menu** (☰) and select **User Employee Filter** under the **Setup heading**. The **User Employee Filter** window will display.
2. From the **Branch** field, confirm you are in the correct branch.
3. Select the **Active** from the **Active/Inactive** dropdown list and select the filter you want to set as inactive from the list of filters below.
4. Click the **Set Inactive** button at the bottom of the window.
5. Click the **Refresh icon** to save your changes.
6. Select the **Inactive** from the **Active/Inactive** dropdown list and confirm the filter is in the inactive list.

How to Remove a User Filter

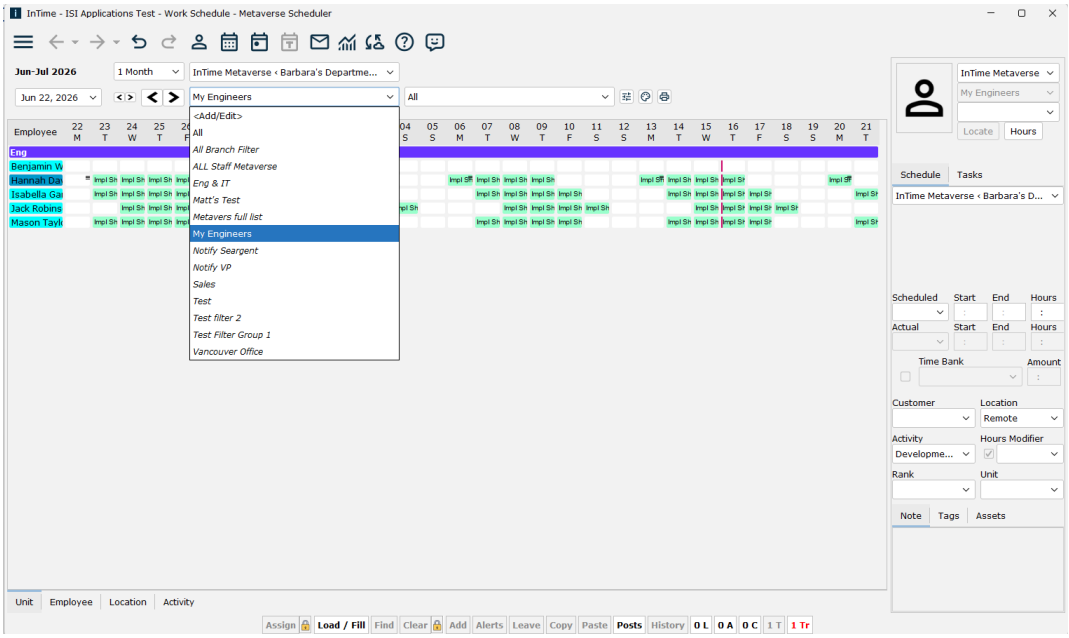
1. Click the **Main Menu** (☰) and select **User Employee Filter** under the **Setup heading**. The **User Employee Filter** window will display.

2. From the **Branch** field, confirm you are in the correct branch.
3. Select the **Show All** from the **Active/Inactive** dropdown list and select the filter you want to remove from the list of filters below.
4. Click the **Remove Filter** button at the bottom of the window.
5. Click the **Refresh icon** to save your changes.
6. Select the **Show All** from the **Active/Inactive** dropdown list and confirm the filter is no longer in the list.

b. Using Filters Created by Administrators

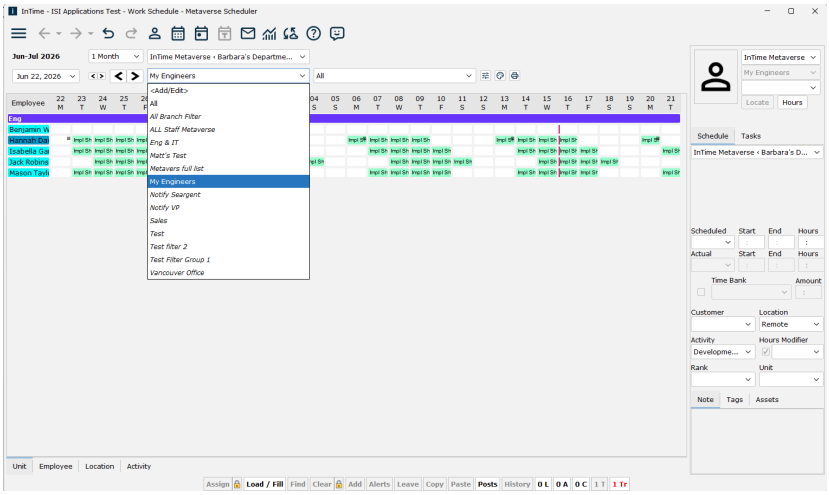
In addition to the filters you build for your own use, an administrator can create filters that are globally available to you or to other schedulers. These are sometimes called custom filters or global filters, and they're different from the branch/unit selector, which is a system-level filter tied to your organization's structure.

Administrator-created filters are typically set up around a specific scheduling responsibility. For example, an administrator might configure a filter for the personnel you're specifically in charge of, even when those employees are scattered across multiple units, platoons, or shifts on the main schedule.



To Access an Administrator-Created Filter

1. Click the **Schedule Icon** to open the **Work Schedule**.
2. Click on the Filter dropdown list and select the filter your administrator has set up.



Common Ways Schedulers Use Administrator-Created Filters

- Viewing a group of personnel who share an attribute or secondary assignment but aren't part of the same unit — for example, a filter built for all SWAT-team members regardless of which unit they're primarily assigned to.
- Viewing a sub-group within a larger unit — for example, a squad within a platoon — so you can see only the people you're responsible for, even though the standard platoon view would show everyone.
- Combining two or more units into a single view when you oversee more than one area (e.g., IT and Engineering).
- Separating full-time and part-time employees when you only need to schedule one group.

💡 If you create a posting while an administrator filter is applied, double-check that the filter matches who should actually be eligible for that assignment. Because the view only shows the filtered subset of employees, posting from a narrow filter can unintentionally limit who sees or can claim it.

TRACKING CATEGORIES AND TAGS

Tracking Categories and Tags are used to classify and organize Work Schedule assignments for operational tracking, reporting, accounting, and compliance purposes. They help Schedulers identify and report on specific types of work such as overtime, special duty assignments, projects, case tracking, or other operational activities without affecting core scheduling behavior.

33. Understanding Tracking Categories and Tags

Tracking Categories and Tags provide additional detail and context for assignments in the Work Schedule without altering the core scheduling behavior. Schedulers use them to improve reporting accuracy, track assignments, and streamline accounting.

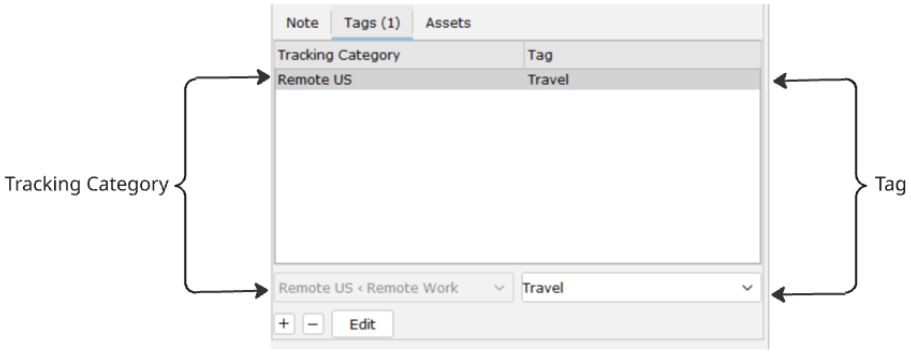
> 💡 Depending on permissions and organizational configuration, Tracking Categories and Tags may be managed centrally by InTime Administrators or added directly by Schedulers within the Work Schedule.

34. Common Uses for Tracking Categories

Schedulers use Tracking Categories and Tags to organize and analyze assignments

for:

- **Specific Work Types:** Overtime, special duty/events, court assignments, report writing, administrative tasks, travel, or training.
- **Financial & Operational Tracking:** Billing, accounting references, or specific project tracking.
- **Reference Identifiers:** Associating assignments directly with case numbers, project codes, event IDs, or operational tracking references.



💡 Tracking Categories provide additional reporting detail without affecting assignment eligibility, staffing rules, or scheduling logic.

a. Managed vs Unmanaged Tags

Tags provide additional detail and classification for assignments within a Tracking Category. Depending on how they are configured, Tags may be either Managed or Unmanaged.

Managed Tags

Managed Tags are predefined and controlled within the system to ensure consistency across schedules, reports, and operational tracking.

Managed Tags are typically:

- Standardized across the organization
- Used for consistent reporting and analysis
- Maintained by InTime Administrators or authorized Schedulers
- Selected from predefined lists

Managed Tags are commonly used for:

- Project codes
- Operational classifications

- Overtime tracking categories

Unmanaged Tags

Unmanaged Tags are created as needed by users during scheduling and operational workflows. They provide flexibility for temporary, situational, or ad hoc tracking requirements.

Unmanaged Tags are commonly used for:

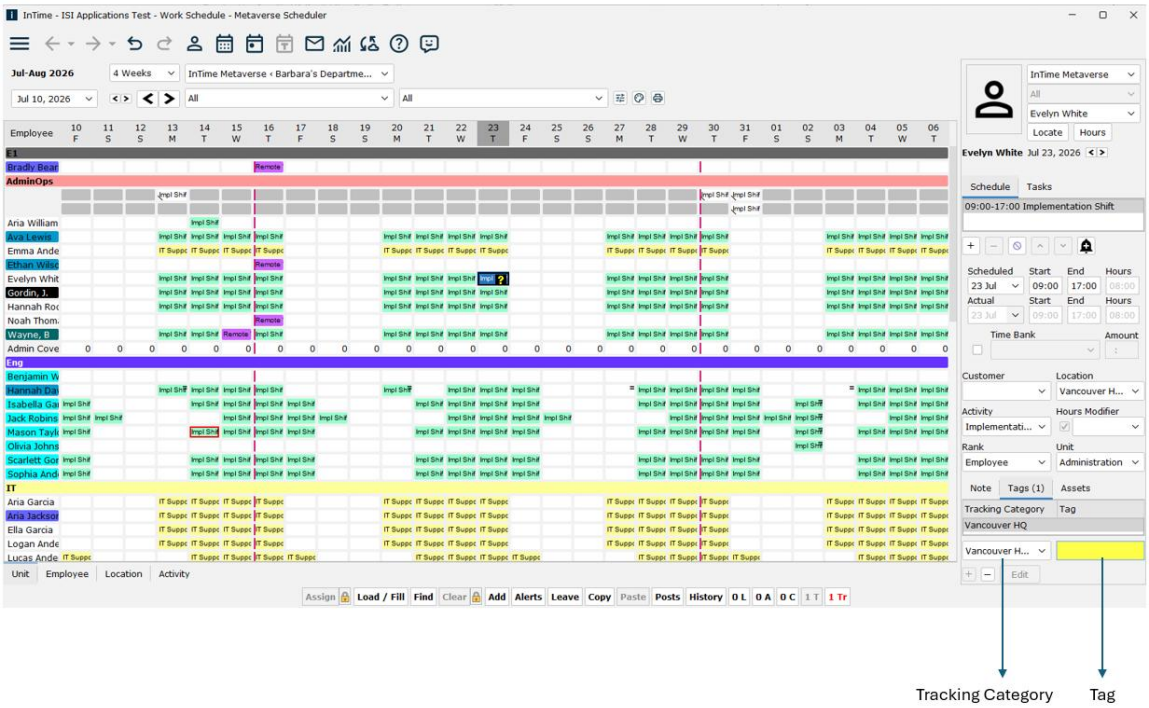
- Temporary operational references
- Special events
- Short-term tracking needs
- Situational assignment labeling
- Case numbers

💡 Managed Tags help ensure reporting consistency and standardized tracking across the organization. Unmanaged Tags provide flexibility but should be used carefully to avoid duplicate, inconsistent, or unclear reporting data.

b. Applying Tracking Categories and Tags to Assignments

To Apply a Tracking Category or Tag to an Assignment:

1. Click the **Schedule Icon**  to open the **Work Schedule**.
2. Within the Work Schedule, locate and select the assignment you want to apply a tracking category to.



3. Near the bottom of the **Assignment Details** panel click **Tags** to open the **Tracking Category** and **Tags** grid and menu options.
4. Click **"+"** and the **Tracking Category** field will become highlighted.
5. Select the appropriate **Tracking Category** from the dropdown list. The **Tags** field will become highlighted.
6. Select or enter the appropriate Tag value as required.
7. Review the **Assignment Details** panel to ensure the selected **Tracking Category** and **Tag** match the purpose of the assignment.
8. Review the **Work Schedule** or **Assignment Details** panel to confirm the **Tracking Category** and **Tag** were applied correctly.

💡 Available Tracking Categories and Tags may vary depending on the selected Activity, organizational configuration, and user permissions.

💡 Tracking Categories and Tags should be applied consistently to support accurate reporting and operational tracking.

c. Tracking Categories and Activities

Tracking Categories and Tags may be associated with specific Activities within the Work Schedule depending on organizational configuration and operational requirements.

Certain Activities may:

- Require specific Tracking Categories
- Limit which Tags are available
- Support reporting or billing requirements
- Be used for operational or compliance tracking

Schedulers commonly encounter Tracking Categories when working with:

- Overtime assignments
- Court assignments
- Training activities
- Special events
- Project-based work
- Administrative or report-writing assignments

Depending on system configuration:

- Some Tags may only be available for certain Activities
- Reports may group assignments using both Activity and Tracking Category information

Tracking Categories help organizations:

- Improve reporting accuracy
- Organize operational work
- Track special assignments or projects

- Support payroll, billing, or compliance requirements

💡 Tracking Categories and Tags do not typically affect employee eligibility, staffing rules, or assignment availability unless specifically configured by the organization.

💡 Available Tracking Categories and Tags may vary depending on Activity type, organizational setup, and user permissions.

d. Managed vs Unmanaged Tags

Tags may be configured as either Managed or Unmanaged depending on organizational setup.

- Managed Tags are predefined and selected from standardized lists.
- Unmanaged Tags may be entered manually by users during scheduling workflows.

Managed Tags help maintain:

- Consistent reporting
- Standardized operational tracking
- Uniform assignment labeling

Unmanaged Tags provide additional flexibility for:

- Temporary operational needs
- Special events
- Situational assignment tracking

💡 Available Tags and Tag behavior may vary depending on organizational configuration and user permissions.

💡 Schedulers should apply Tags consistently to support accurate reporting and operational visibility.

e. Tracking Categories Best Practices

When working with Tracking Categories and Tags:

- Apply categories consistently across similar assignments
- Verify the selected Tracking Category matches the purpose of the assignment
- Use standardized Tags whenever possible
- Avoid creating unnecessary or duplicate unmanaged Tags
- Review assignment details carefully before saving changes
- Use Tags to improve operational visibility and reporting clarity
- Follow organizational naming standards and reporting requirements
- Verify Tracking Categories on overtime, special events, or project-based assignments when required

Schedulers should also:

- Confirm required Tracking Categories are applied before finalizing assignments
- Review reports periodically to ensure consistent category usage
- Communicate unclear or missing Tracking Category requirements to supervisors or administrators as needed

💡 Consistent use of Tracking Categories and Tags improves reporting accuracy, operational tracking, and organizational visibility across schedules and reports.

🚨 Inconsistent or incorrect Tracking Category usage may reduce reporting accuracy and create confusion in operational or payroll reporting.

TIMESHEETS

Timesheets are the records in InTime that track the hours an employee has worked during a specific pay period. In InTime, Timesheets are used to summarize scheduled and worked hours for employees.

> 💡 Not all organizations or departments require Timesheets. This is defined in the employees' work groups and are defined by an InTime Administrator.

35. Understanding Timesheets

Timesheets are directly connected to the employee's Work Schedule providing the official record of hours worked, leave, and banked time use for payroll and reporting. Because they are connected, any changes made to schedule assignments, overtime, or leave entries will automatically update the timesheet and require review or reapproval.

Timesheets are used to:

- Summarize scheduled and worked hours
- Track overtime, banked time, and leave
- Provide a breakdown of hours by category (such as Straight Hours, SD, OT, Banked, and Leave)
- Support payroll processing and reporting
- Allow employees to review and submit their hours for approval

a. Timesheet Approval Workflow

Employees submit Timesheets through their mobile app or web portal. Once submitted, the Timesheet is routed to the Scheduler /Supervisor for review and approval. Supervisors are also able to submit timesheets on behalf of employees that are unable to or are unavailable to submit their own.

As a Timesheet moves through the review and approval process, its status is automatically updated. Employees may receive notifications when a Timesheet is:

- Submitted
- Approved
- Rejected or returned for correction

b. Submitting Timesheets

Employees submit Timesheets through their mobile app or web portal. Once submitted, the Timesheet is sent to the Scheduler for review and approval.

c. Reviewing Timesheets

Supervisors and Schedulers review timesheets to ensure that all recorded work hours, assignments, leave, and overtime are accurate before the timesheet is approved and sent to payroll. Reviewing helps to:

- Catch and correct errors such as missing assignments, incorrect hours, wrong locations, or incorrect pay modifiers.
- Confirm that all scheduled and worked hours are properly reflected.
- Ensure compliance with organizational policies and pay rules.
- Prevent payroll discrepancies and disputes by verifying the accuracy of the data before approval.

If any discrepancies are found during the review, the timesheet can be rejected so corrections can be made in the work schedule before resubmission.

Schedulers should review submitted Timesheets carefully to ensure:

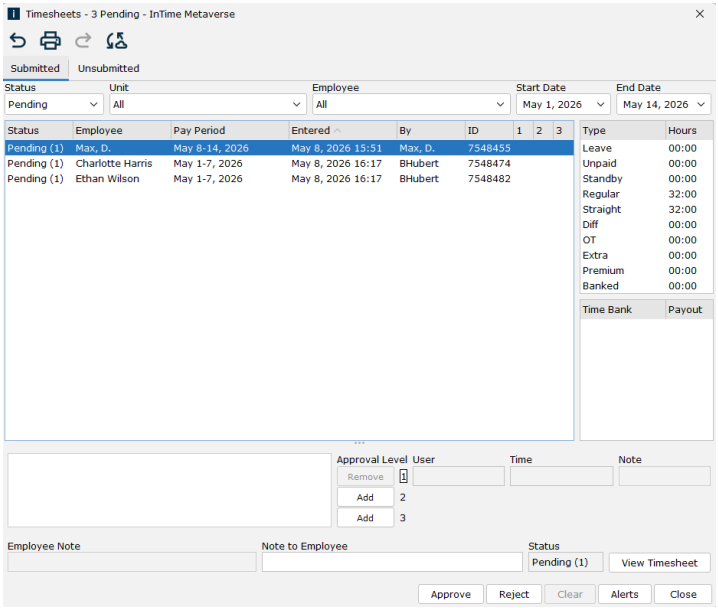
- Worked hours are accurate
- Leave and overtime are correct
- Schedule changes are reflected properly

If issues are identified, the Timesheet can be rejected and the employee must resubmit the Timesheet.

💡 Common Timesheet issues include missing overtime assignments, unapproved leave entries, incorrect hours modifiers, assignments that were changed after the Timesheet was submitted, Schedulers should verify that all schedule changes and approvals are reflected correctly before approving the Timesheet. . If the employee's schedule needs to be modified, it must be done by a scheduler before the timesheet is resubmitted by the employee They may have to resubmit an activity or a leave to be approved prior to the timesheet submission. If their schedule needs to be modified, it must be done by a scheduler and after the timesheet resubmitted by the employee

To Review a Timesheet:

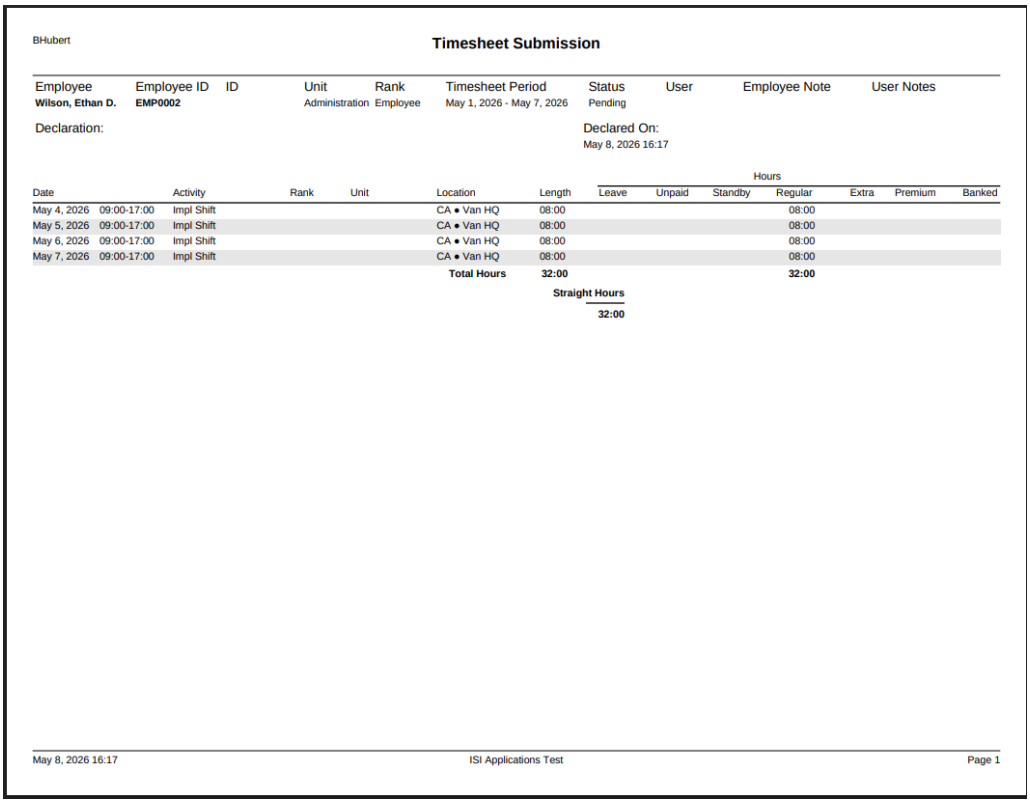
1. Click the **Schedule** icon  to open the **Work Schedule.**
2. Click the **Timesheet Queue** button  in the **Command** menu at the bottom of the screen. **The Timesheet** window will display.



3. Select the **Timesheet status** from the **Status** dropdown list.
4. Select the **Unit** where the employee whose Timesheet you want to review resides (Optional).
5. Select a **Start Date** and **End Date** if applicable.
6. Either select the employee whose Timesheet you want to review from the **Employee** dropdown list; or click onto the **Timesheet** you want to review to select it. A summary of the

timesheet will be displayed in the **Assignment Details** panel.

7. Click the **View Timesheet** button. The employee's **Timesheet** will display.



BHubert

Timesheet Submission

Employee	Employee ID	ID	Unit	Rank	Timesheet Period	Status	User	Employee Note	User Notes
Wilson, Ethan D.	**EMP0002**		Administration	Employee	May 1, 2026 - May 7, 2026	Pending			

Declaration:

Declared On:
May 8, 2026 16:17

Date		Activity	Rank	Unit	Location	Length	Hours: Leave	Unpaid	Standby	Regular	Extra	Premium	Banked
May 4, 2026	09:00-17:00	Impl Shift			CA • Van HQ	08:00				08:00			
May 5, 2026	09:00-17:00	Impl Shift			CA • Van HQ	08:00				08:00			
May 6, 2026	09:00-17:00	Impl Shift			CA • Van HQ	08:00				08:00			
May 7, 2026	09:00-17:00	Impl Shift			CA • Van HQ	08:00				08:00			
					Total Hours	**32:00**				**32:00**			

Straight Hours
32:00

May 8, 2026 16:17 ISI Applications Test Page 1

d. Approving or Rejecting Timesheets

Once submitted, a timesheet's status will show as Pending until it is approved. Approved timesheets are used for payroll and reporting purposes.

To Approve or Reject a Timesheet:

1. Click the **Schedule** icon  to open the **Work Schedule.**
2. Click the **Timesheet Queue button**  in the **Command Line** at the bottom of the screen. **The Timesheet** window will display.
3. From the **Status** dropdown list along the top of the menu select **Pending**.
4. Click on the **Timesheet** you want to approve.
5. Click the **Approve** button to approve. A green check mark will appear to the right of the employee's **Timesheet** row.

OR

Click the **Reject** button to reject the Timesheet. A red **X** appears on the right side of the employee's **Timesheet** row.

💡 Timesheets are rejected if an employee submits them before their leave or activity requests have been officially approved, or if they forgot to include them entirely.

e. Timesheet Notifications

InTime can notify employees when their Timesheet has been:

- Approved
- Rejected

Notification behavior may vary depending on organizational configuration and employee notification settings.

f. When Timesheets have Multiple Approvers

When your agency requires more than one approval level, the timesheet will move through various levels of pending status. For example, it may show as "awaiting 1st level approval," "2nd level approval," "3rd level approval," and so on. Each required approver must approve the Timesheet before it reaches a fully approved status. The timesheet remains in a pending status until all required approval levels have completed their review.

💡 Depending on organizational workflows, some approvers may perform a detailed review while others provide final authorization approval.

How Multiple Timesheet Approvals Work:

1. The employee submits their timesheet for the pay period.
2. The timesheet appears in the **Submitted** Tab of the **Timesheet** window for review.
3. The first-level approver reviews the timesheet:

- If correct, they approve it, and the timesheet moves to the next approval level.
- If not correct, they reject it, and the required corrections must be completed before the Timesheet can be resubmitted and approved.

4. The process repeats for each subsequent approval level (e.g., 2nd level, 3rd level), with the timesheet status updating to indicate which level is pending.
5. Once all required approvers have approved the timesheet, its status changes to **Approved**.
6. If at any stage a timesheet is rejected, corrections must be made before resubmission and the approval process restarts.

g. Bulk Approving Timesheets

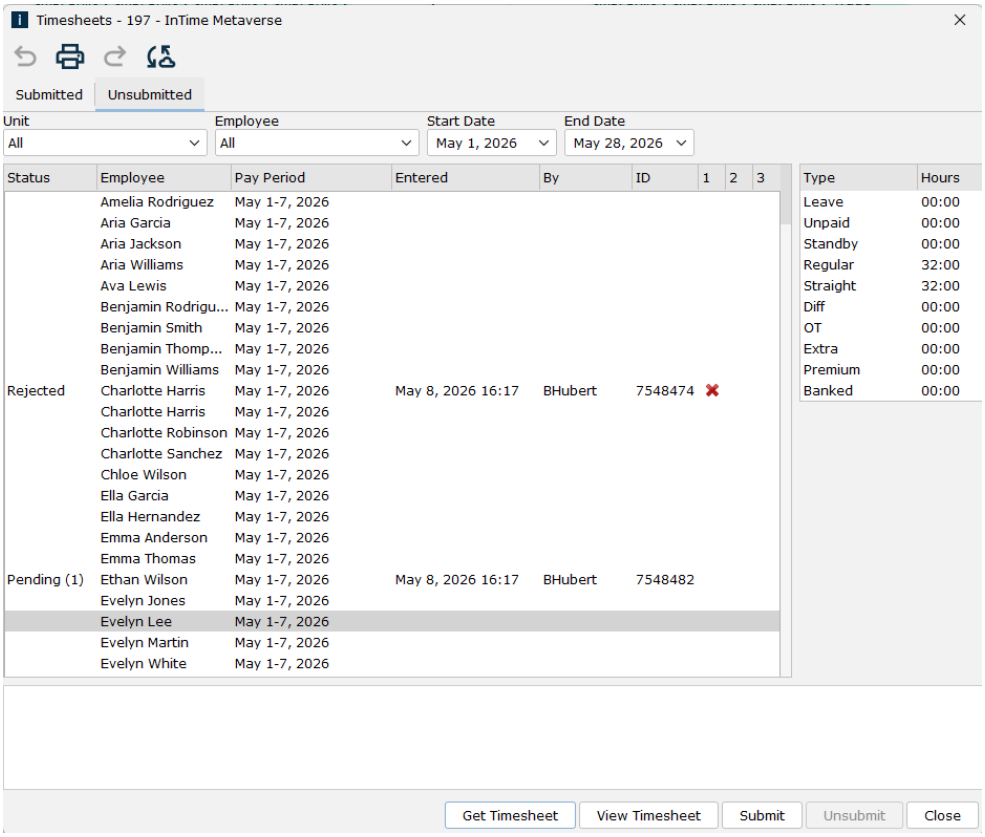
Schedulers can bulk approve Timesheets by holding down the Shift key or the Ctrl key and selecting multiple time sheet rows at once.

h. When Employees Forget to Submit Their Timesheets

If an employee forgets to submit their timesheet, a Scheduler (such as a supervisor or payroll administrator) can submit the timesheet on the employee's behalf.

To Submit a Timesheet on Behalf of an Employee:

1. Click the **Schedule** icon  to open the **Work Schedule.**
2. Click the **Timesheet Queue** button  in the **Command** toolbar at the bottom of the screen. **The Timesheet** window will display.
3. Click on the **Unsubmitted** tab. The **Unsubmitted Timesheets** tab will display.



4. Click on the **Timesheet** you want to submit and click the **Get Timesheet** button. This loads the employee's timesheet.
5. Click **View Timesheet** to review. If everything is correct. **Click Submit**. The **Timesheet** will not display in the **Submit** window and is ready for approval or rejection.

💡 Organizations may handle unsubmitted Timesheets differently based on policy. Some agencies require employees to submit their own Timesheets, while others allow Schedulers or payroll staff to submit them on the employee's behalf.

APPENDIX A — BEST PRACTICES FOR SCHEDULERS

The following best practices are based on operational scheduling experience and are intended to help Schedulers maintain accurate schedules, reduce last-minute staffing issues, and improve overall scheduling efficiency.

Best Practice Area	Recommendation	Why it Matters
Managing Schedules by Exception	Review alerts, shortages, overages, and scheduling conflicts daily instead of waiting until schedules are finalized.	Helps prevent last-minute staffing issues and keeps schedules balanced and accurate.
Planning	Review schedules two to three weeks in advance for training, court, leave, or special assignments entered by other supervisors.	Early identification of conflicts reduces scheduling scrambles and overtime pressure
Monitoring Unit Counters and Alerts	Understand how unit counters and alerts function instead of ignoring warning indicators.	Helps proactively manage staffing shortages, overages, and fatigue risks.
Managing Shift Trades	Encourage employees to use the Shift Trade feature in the mobile app or web portal instead of manually editing trades in the schedule.	Improves tracking, audit history, and approval visibility as well as schedule conflict / fatigue warnings.
Managing Leave and Overtime Requests	Review leave requests and overtime activity requests daily.	Prevents approval backlogs and reduces delays in schedule updates.

Supporting Accurate Employee Submissions	When rejecting incorrect leave or overtime requests, use rejection notes to explain the issue.	Encourages employee accountability and reduces repeat submission errors.
Timesheet Management	Remind employees to submit Timesheets before vacations or at the end of their final shift in the pay period.	Helps ensure Timesheets are approved on time and reduces payroll processing delays.
Tracking Schedule Changes	Use system workflows and approval features whenever possible instead of making undocumented manual schedule changes.	Improves audit tracking and reporting accuracy.
Maintaining Accurate Employee Data	Regularly verify employee qualifications, ranks, units, and availability information.	Reduces assignment conflicts and scheduling errors.
Communication with Employees	Notify employees of significant schedule changes as early as possible and encourage timely responses to requests and postings.	Improves operational coordination and reduces missed assignments.

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