

## FLOATING EMPLOYEE(S) TO ANOTHER TEAM USING MASS EDIT

Mass edit can be used to float one employee or multiple employees to one location.

Log into the Schedule Admin and load the \*team’s schedule for the employee or employees to be floated from, for the dates to be floated.

\*Instead of loading the team’s schedule you can also find and locate the employees to be floated using the lookup in the Employee field, select the dates and then load schedule

### Steps for floating an employee(s) using mass edit:

1. Select the wand icon from the function tools and select Mass edit, the pencil icon will be added to the front of the function tools
2. Select the shifts that will be floated to a select team – they will be shaded green—(these shifts can be scheduled to one employee or multiple employees)
3. Select the pencil icon from the function tools, and then select Float and the Float Wizard displays
4. Select the team that employees will be floated to – in the Floated to Unit field
5. Select or type the employee’s shift for each floated shift listed, and then select Next
6. Select Floats for the Float Code, and then select Next
7. Verify all floats are correct, and then select Finish

A message displays stating “Shift successfully floated” select OK to acknowledge

Shifts display shaded blue with the name of the team where the employee will be working.

The screenshot illustrates the three steps of the mass edit process in the WFM software:

- Step 1:** The user selects the 'Mass Edit' option from a dropdown menu in the function tools.
- Step 2:** The user selects specific shifts in the schedule grid, which are highlighted in green. The grid shows shifts for units like D12 0645 and N12 1845.
- Step 3:** The user clicks the pencil icon in the function tools, opening a context menu where the 'Float' option is selected.

Float Wizard

Float To Unit  **4**

Ztrain169749, Josiah T

Work Date	Unit	Position	Detail Day	Start Time	End Time	Shift	Activity
Float From	06/10/2024	VUH 9S	CP	06:45	19:15	D12 0645	WRK
Float To	<input type="text" value="06/10/2024"/>	<input type="text" value="VUH 7T3 ORT..."/>	<input type="text" value="CP"/>	<input type="text" value="06:45"/>	<input type="text" value="19:15"/>		

Create New Shift

Ztrain169749, Josiah T

Work Date	Unit	Position	Detail Day	Start Time	End Time	Shift	Activity
Float From	06/11/2024	VUH 9S	CP	18:45	07:15	N12 1845	WRK
Float To	<input type="text" value="06/11/2024"/>	<input type="text" value="VUH 7T3 ORT..."/>	<input type="text" value="CP"/>	<input type="text" value="18:45"/>	<input type="text" value="07:15"/>		

Create New Shift

Ztrain176607, Carina B

Work Date	Unit	Position	Detail Day	Start Time	End Time	Shift	Activity
Float From	06/09/2024	VUH 9S	CP	06:45	19:15	D12 0645	WRK
Float To	<input type="text" value="06/09/2024"/>	<input type="text" value="VUH 7T3 ORT..."/>	<input type="text" value="CP"/>	<input type="text" value="06:45"/>	<input type="text" value="19:15"/>		

Create New Shift

Ztrain176607, Carina B

Work Date	Unit	Position	Detail Day	Start Time	End Time	Shift	Activity
Float From	06/12/2024	VUH 9S	CP	06:45	19:15	D12 0645	WRK
Float To	<input type="text" value="06/12/2024"/>	<input type="text" value="VUH 7T3 ORT..."/>	<input type="text" value="CP"/>	<input type="text" value="06:45"/>	<input type="text" value="19:15"/>		

Create New Shift

Floating Shift Confirmation

Float Code

Create Relief for

Activity Name

Employee	Activity Name
	ADJ
	CALL OUT WORK SHIFT
Ztrain169749, Jo...	<b>FLQAT</b>
Ztrain169749, Jo...	SB
Ztrain169749, Jo...	SWAP

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Float Code  **6**

Create Relief for floated part of Original Shift

Employee	Status	Work Date
	RNN	
Ztrain169749, Jo...	RNN	06/10/2024
Ztrain169749, Jo...	RNN	06/11/2024
Ztrain169751, La...	RNN	06/11/2024
Ztrain170181, Ka...	RNN	06/09/2024
Ztrain176607, Ca...	RNN	06/09/2024
Ztrain176607, Ca...	RNN	06/12/2024

Floating Shift Confirmation

Employee	Status	Work Date	Unit	Shift	Position	Activity	Detail Day	Start Time	End Time
Ztrain169749, Jo...	Float From	06/11/2024	VUH 9S	D12 0645	CP	WRK		06:45	19:15
	RNN	06/11/2024	VUH 9S	D12 0645	CP	WRK		06:45	19:15
Ztrain169749, Jo...	Float To	06/11/2024	VUH 7T3 ORT...	D12 0645	CP	WRK		06:45	19:15
Ztrain169751, La...	Float From	06/11/2024	VUH 9S	N12 1845	CP	WRK		18:45	07:15
	RNN	06/11/2024	VUH 9S	N12 1845	CP	WRK		18:45	07:15

Schedule Compliance Violation(s)

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