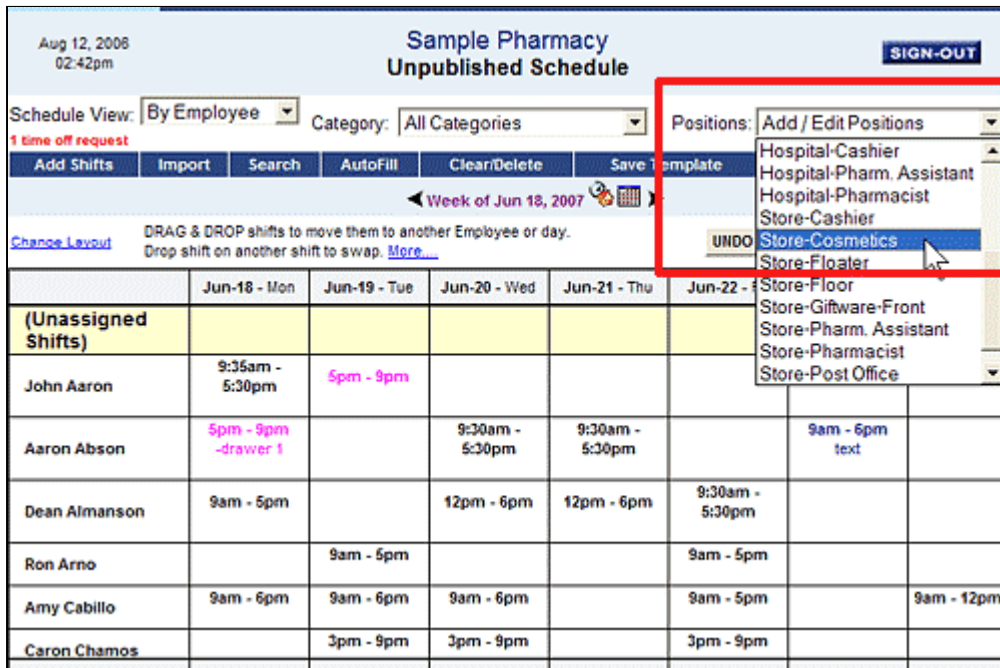


Positions - Jobs -----

What is a Position?

A Position is a particular type of job. For example if you have 12 people who work as cashiers you would have one position called Cashier. If you have certain cashier shifts that are special and need to be worked by only some of the cashiers you could create another Position - for example "Cashier-Trainee." Each schedule view can be set to show or not show the Position Names for each shift.



A Position can be a particular job at a particular location.

Downtown - Cashier

Uptown - Cashier

Add your Positions (Jobs)

Once your Positions have been created you need to [set which Positions each employee can work](#).

Related Topics:

- Multiple locations or departments?
- Add your Positions (Jobs)
- Location Specific Positions
- Update/Add Your Employees
- [Setting What Positions Employees Can Work](#)
- Deleting Positions
- How Position Groups can be Used
- [Creating & Editing "Position Groups"](#)
- [Filtering the Schedule View/Printout](#)
- [Rating Employees for Positions/Locations](#)

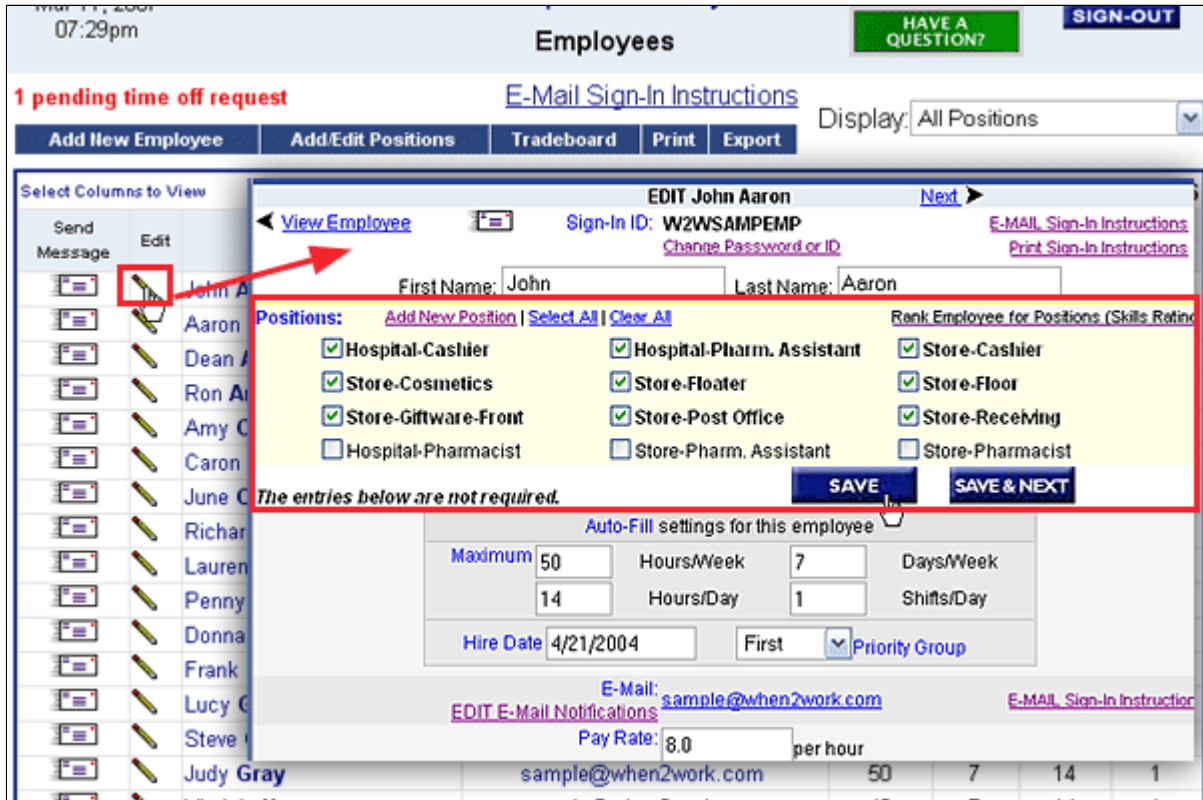
Set Each Employee's Positions

Each employee has be set as to what Positions they can work. Optional - you also can set which Positions you prefer to have each employee to work.

To Edit an Employee and set what Positions they can work:

From any page:

- In the Top Menu choose **EMPLOYEES** to go to the Employee List page



- Click the **Pencil Icon** next to any employee name to open the Edit Employee window
- Check the boxes next to the Positions that this employee can work
- Click **Save** (or **Save & Next** to edit the next employee)

OR you can access the Edit Employee window from anywhere in the system:

- Click the Employee name to bring up their Employee Details window
- Click the **Edit this Employee** link in the upper right of the window

07:33pm **Unpublished Schedule** [HAVE A QUESTION?](#) [SIGN-OUT](#)

Schedule View: **By Employee** Category: **All Categories** Positions: **All Positions**

[Add Shifts](#) **John Aaron** [Next](#)

[Change Layer](#) [E-MAIL Sign-In Instructions](#)

(Unassigned Shifts)

John Aaron

Information **Schedules - Preferences** **Time Off**

Name: John Aaron [EDIT This Employee](#)

Phone: 555-2239

E-Mail: sample@when2work.com [Edit E-Mail Notifications](#)

Positions: Hospital-Cashier Hospital-Pharm. Assistant Store-Cashier
 Store-Cosmetics Store-Floater Store-Floor
 Store-Giftware-Front Store-Post Office Store-Receiving

Hire Date: 4/21/2004

EDIT John Aaron [Next](#)

[View Employee](#) Sign-In ID: **W2WSAMPMP** [E-MAIL Sign-In Instructions](#)
[Change Password or ID](#) [Print Sign-In Instructions](#)

First Name: Last Name:

Positions: [Add New Position](#) [Select All](#) [Clear All](#) Rank Employee for Positions (Skills Rating)

<input checked="" type="checkbox"/> Hospital-Cashier	<input checked="" type="checkbox"/> Hospital-Pharm. Assistant	<input checked="" type="checkbox"/> Store-Cashier
<input checked="" type="checkbox"/> Store-Cosmetics	<input checked="" type="checkbox"/> Store-Floater	<input checked="" type="checkbox"/> Store-Floor
<input checked="" type="checkbox"/> Store-Giftware-Front	<input checked="" type="checkbox"/> Store-Post Office	<input checked="" type="checkbox"/> Store-Receiving
<input type="checkbox"/> Hospital-Pharmacist	<input type="checkbox"/> Store-Pharm. Assistant	<input type="checkbox"/> Store-Pharmacist

The entries below are not required. [SAVE](#) [SAVE & NEXT](#)

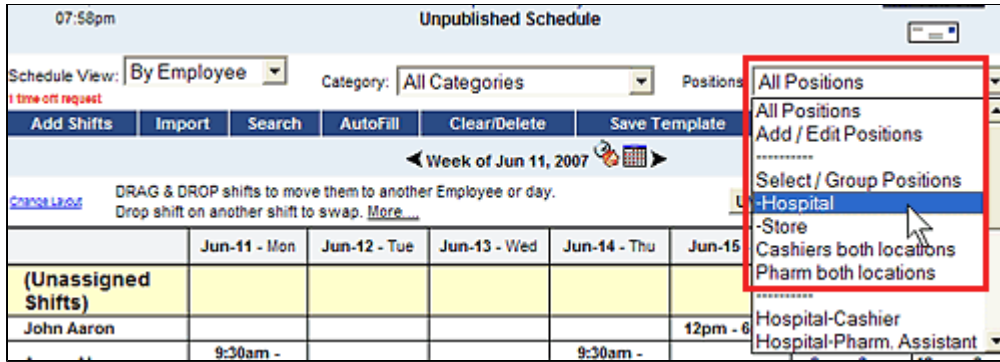
[Auto-Fill settings for this employee](#)

Related Topics:

- [What is a position?](#)
- [Rating Employees for Positions/Locations](#)

Create & Edit "Position Groups"

Position Groups make it easy to view groups of shifts in any manner you like. Position Groups are shortcuts to view certain groups of Positions. You can group any number of positions and name the group for quick access later. Filtering your view to show a Position Group not only limits the view/printout to show only those shifts but also allows you to affect only those shifts when you [Import](#), [Clear/Delete shifts](#) or [Save Template](#). When you are done you can choose All Positions to go back to viewing the complete schedule.



Once you have created and named a Position Group it will appear in the Positions dropdown before your regular list of Positions.

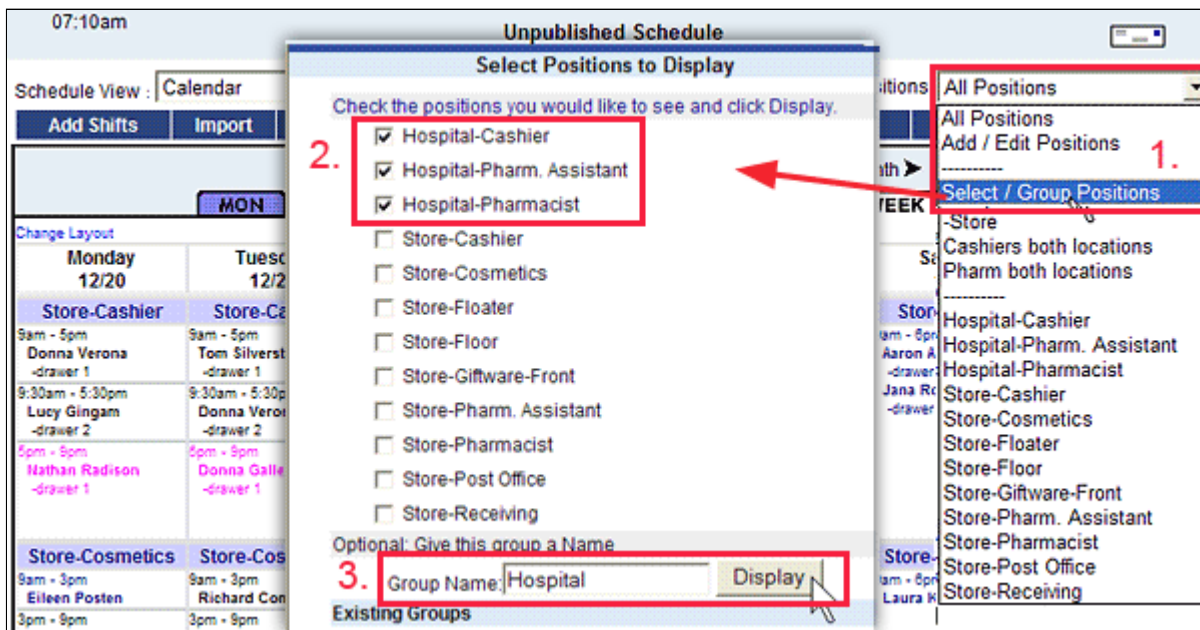
Ex. if you create a number of positions that are for trainees: Cashier - Trainee, Cosmetics - Trainee, etc., you can create a group that includes all of the Trainee positions for a quick view of all Trainees that are working today.

Ex. if you create location-specific positions you can group those positions so that you can view one location at a time and perhaps also create a view that includes one position across all locations. The possibilities are endless.

How to create a Position Group

From any Schedule Page

- In the Positions dropdown choose **Select/Group Positions** to open the Select/Group Positions window (1.)

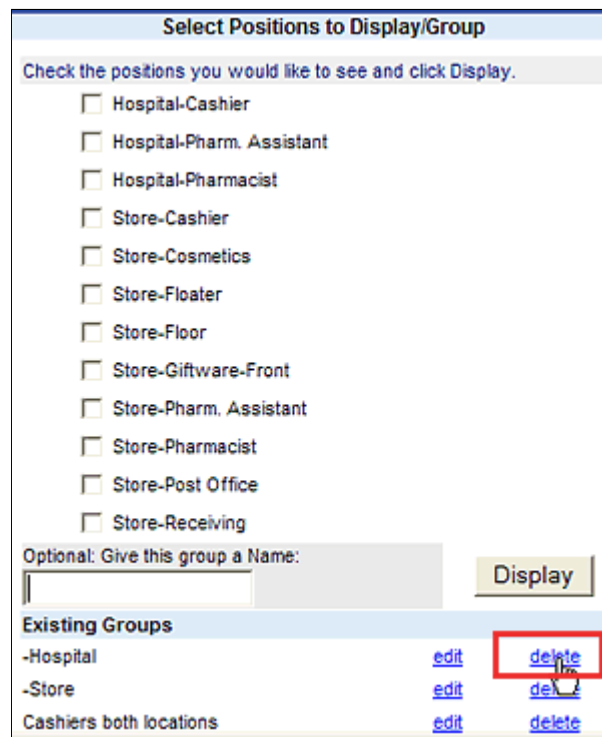
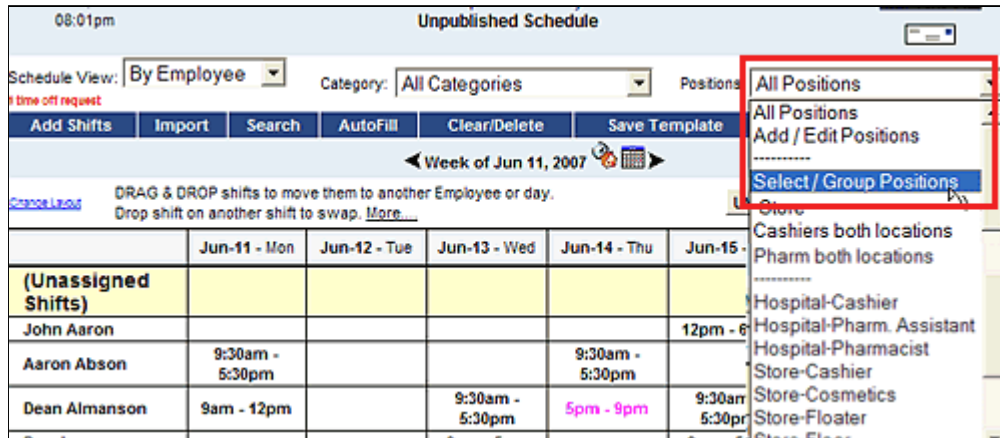


- Put a check next to the Positions that you want to be included in this group **(2.)**
- Type a name for the group for quick access to the group later and Click **Display (3.)**
- The window will close and your Positions dropdown will now list the named group before the regular Positions

Deleting Position Groups

From any Schedule Page

- In the Positions dropdown choose **Select/Group Positions** to open the Select/Group Positions window.



- In the Select Positions window scroll down to the bottom Existing Groups section
- Click the **Delete** link next to the Position Group
- the window will close and the group will no longer appear in the Positions dropdown

Editing Position Groups

From any Schedule Page

- In the Positions dropdown choose **Select/Group Positions** to open the Select/Group Positions window
- In the Select Positions window scroll down to the bottom Existing Groups section
- Click the **Edit** link next to the Position Group
- The section above will immediately display the settings & group name
- Make any changes to the group

- Click **Display**

Related Topics:

- [Multiple locations or departments?](#)
- [AutoFilling Certain Positions Separately](#)
- [How Position Groups can be Used](#)
- [Filtering the Schedule View/Printout](#)
- [Location Specific Positions](#)
- [Rating Employees for Positions/Locations](#)

Delete Positions

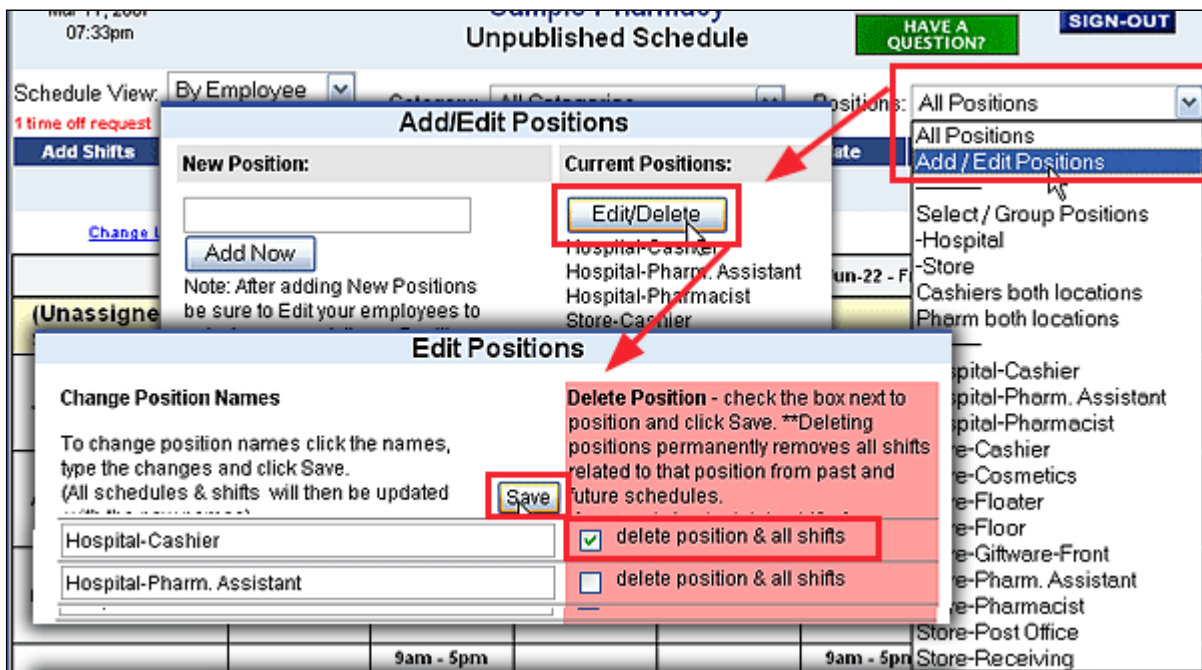
Deleting Positions is NOT normally recommended once you have started scheduling. When you delete a position it removes the position name and all shifts for that Position that you ever created. Normally Positions would only be deleted when you are in the process of setting up your account and you have not set up any schedules.

If you simply want to delete all the shifts on a week for a one position you can filter your Schedule View to only include that position and then click **Clear/Delete**. This will allow you to delete the shifts for just that one position for that one week.

If you want to remove a Position name and all shifts related to it from all schedules (past and future):

From any Schedule View

- In the Positions dropdown choose **Add / Edit Positions** to open the Add/Edit Positions window
- Click the Edit/Delete Button to open the Edit Positions window



- Put a checkmark next the Position and shifts you want to delete
- Click **Save**

Related Topics:

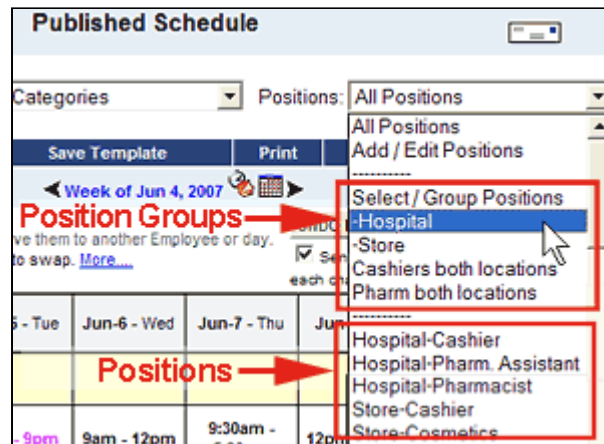
- [Deleting Multiple Shifts](#)
- [Clearing Work Assignments - Deleting Shifts](#)
- [Saving / Naming Schedules & Shifts](#)
- [Deleting Saved Schedules](#)

How "Position Groups" can be Used

Position Groups can be created so that, for example, a particular group of positions for a location or department can be viewed on the screen, printed or dealt with separately. You also can then use Import, Clear/Delete and Save Template with a group separately. A Position Group is simply a way to create a shortcut for viewing certain shifts.

Any group of positions can be created (and if named will be saved for later use).

Ex. If location-specific Position names have been used you can create Position Groups that include only the Positions for one location. These groups can be created as a one time view or if you give the selected Positions a name you can quickly use that group again. Named Position Groups appear in the Position dropdown above the list of Position Names.



Related Topics:

- [Location Specific Positions](#)
- [Rating Employees for Positions/Locations](#)

Location-Specific Positions

Locations or departments can be added to an account by making "location-specific Position names" and then creating a "position group" that includes those positions. Then the location is quickly viewable by choosing that group in the Positions dropdown menu. (See [Multiple locations or departments?](#) to determine if you should use separate WhenToWork accounts for your multiple locations or use the Contact link at the bottom of your account pages if you need help.)

Ex. Create Position names like: Cashier - Dept 1, Cashier - Dept 2 , Sales - Dept 1, Sales - Dept 2 (you can use any names you like and each location can have different positions)

You then have the flexibility of viewing any combination of these Positions (One location, all Cashiers across all locations etc.) Each employee's "Position Preferences" can also be set, by you or the employee (if you allow them), to indicate what Locations they prefer to work.

To create Location-Specific Positions in one Account:

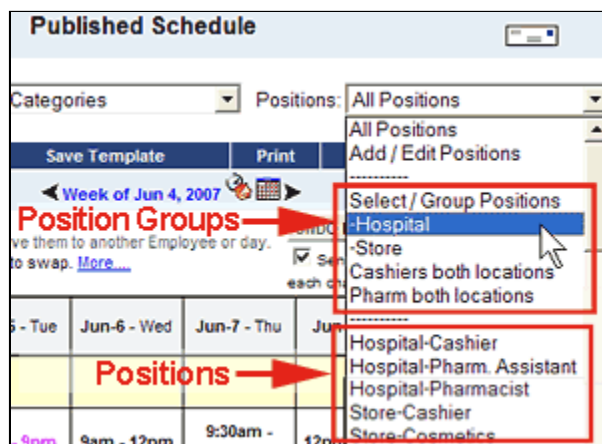
From any Schedule View

- In the Positions dropdown choose **Add Positions** to open the Add Positions window
- Enter the Position name followed by the Location abbreviation or department Ex. Store 1 - Cashier or or Cashier - Store 1 (it is helpful to keep in mind that some schedule views allow you to sort a list of shifts by position name so whether you choose to put the location name or abbreviation before or after the position name just depends on how you want your position names to look on the schedules and whether you will be sorting positions on the schedule views). Position names can always be changed later.
- Click **Add Now**
- The window will close and the new position will be added
- To add another location-specific Position - repeat process

To create a Position Group to filter views to show only one location

From any Schedule View

- In the Positions dropdown choose **Select/Group Positions** to open the Select/Group Positions window
- Put a check next to the Positions that you want to be included in this group (Ex. all Dept 1 Positions)
- Type the location name (Ex: Dept 1) for the group
- Click **Display**
- The window will close and the schedule will only show the shifts in the Position Group
- The Positions dropdown will now also list your location position group above the regular Positions



Related Topics:

- [Creating & Editing "Position Groups"](#)
- [Multiple locations or departments?](#)
- [Rating Employees for Positions/Locations](#)

Rate Employees for Positions/Locations - Position Preferences

Each employee can be set for "Position Preferences" (similar to skills). This tells AutoFill which positions (locations) you prefer to have each employee work. It can be helpful, for example, to indicate that an employee can work a difficult position but you prefer to have them work other positions. It can also be useful in setting which locations the employee prefers to work (Ex. for an employee you can set all Location 1 positions to "prefer" and other location positions to "dislike.") Managers (with permission to edit employees) can set these preferences - but you can also allow your employees to rate their own positions on the [SETTINGS>Employee Permissions](#) page.

To set Position Preferences for an employee:

From any page

- On the top menu choose **EMPLOYEES** to go to the Employee List page

The screenshot shows the 'WhenToWork.com' interface. At the top, the 'EMPLOYEES' menu item is highlighted. Below it, the 'EDIT John Aaron' window is open, showing the 'Position Preferences for John Aaron' section. This section includes a list of positions with checkboxes to set preferences. The 'Store-Floater' position is highlighted in red, indicating a 'dislike' preference. The 'Save Changes' button is highlighted in red. A table on the right side of the window shows 'Days/Week' and 'Shifts/Day' for various employees.

Employee	Days/Week	Shifts/Day
20	7	14
10	7	14
30	7	14
40	7	14

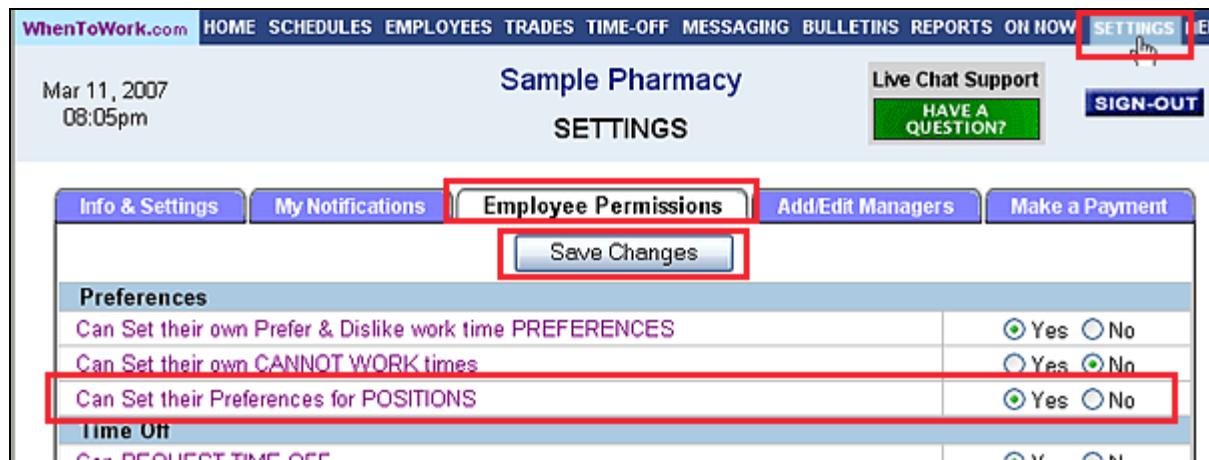
- Click the **pencil icon** next to the employee name to open the Edit Employee window
- Click the **Rank Employee for Positions (Skills Ratings)** link found on the right
- Click any Position name once to change to Prefer (green) again to change to Dislike (red) and again to change back to no preference
- Click the **Save Changes** button

Employees do not see position preferences unless you have set "Employees Can Set Their Preferences for Positions" to Yes on your [SETTINGS>Employee Permissions](#) page. By choosing "Yes" you allow employees to see and set their own preferences for locations or position preferences when they sign in.

To allow employees to set their own Position Preferences

From any page

- On the top menu click **SETTINGS** to go to the Settings page
- Click the **Employee Permissions** tab
- For **Employees Can set Preferences for Positions** Click **Yes**
- Click **Save Changes**



When employees sign in and look at their Preferences page they will now see a list of their positions and will be able to set each position to like, dislike or no preference.

Related Topics:

- [Editing Employee Details](#)
- [How Employee Work Time Preferences are Used](#)