

## Setting Up Schedules.

Let's take a few minutes to talk about the different things that can be done with regards to schedules. There are several ways that you can set up a person's schedule in the system.

Now at this point, it might be best to go into the "System Space" to get the schedules configured the way that you want. If you want your schedules broken up by department, project, or location the "System Space" is where you would go to do this. Then, you can set schedules according to this information.

As you can see from the attached Screenshot, there are fields for Locations, Projects, and Types of Work. These can be used to help you better track, and schedule your employees. To add an item, Type in the Name, description, and any code you want to associate with that item (if any) then click the Add Location, Add Project, etc button.

The screenshot displays the 'System Space' configuration page in QuickBase Workplace. The page includes a navigation bar with 'Start Place', 'Documents', 'People Place', 'Schedule Place', and 'System Space'. The main content area is divided into three sections: 'All Locations', 'All Projects', and 'All Types of Work'. Each section contains a table with columns for 'code', 'name', and 'desc', and a form with 'Code', 'Name', and 'Desc' input fields and 'Clear' and 'Add' buttons. The 'All Locations' section shows a table with one entry: L1, Location 1, Default Location. The 'All Projects' section shows a table with one entry: P1, Project 1, Default Project. The 'All Types of Work' section shows a table with one entry: TW1, Type of Work 1, Default Type of Work. The page also includes a footer with 'intuit.' and 'Internet | Protected Mode: On'.

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More information: coming soon

**All Locations**

code	name	desc
L1	Location 1	Default Location

Code:  Name:   
Desc:

**All Projects**

code	name	desc
P1	Project 1	Default Project

Code:  Name:   
Desc:

**All Types of Work**

code	name	desc
TW1	Type of Work 1	Default Type of Work

Code:  Name:

intuit.

## Setting Up Employees Schedules (Not Rule Based):

Navigate to the Schedule Editor by clicking on “Schedule Place,” then “Schedule Editor”

Now you will see a layout similar to the one below. This will show you each of your employee’s names, and their schedule for that current week. To change, or set Schedules. Click in the “Change” Button in the Upper left hand corner of the Screen, and choose the correct dates you want in the drop down menu Under “Show Items that Start on or After” Then Check the boxes for the employees which you want to display. Then Select the “Show” Button.

The screenshot displays the QuickBase Workplace interface for the Schedule Editor. The browser address bar shows the URL: <https://workplace.intuit.com/db/bdq3tunjsgl/bin-release/hermes.html>. The page title is "QuickBase Workplace". The navigation menu includes "Start Place", "Documents", "People Place", "Schedule Place", and "System Space". The "Schedule Place" sub-menu is active, showing "Schedule Editor", "Defined Schedules", "Rules Engine", and "Schedule Generator".

The main content area shows a calendar for the week of August 14-20, 2008. A "Change" dialog box is open, with the following options:

- Change: 14-Aug-2008
- Show items that start on or after: 08/14/2008
- and end before: 08/21/2008
- Buttons: Cancel, Show
- Employee selection:
  - Geovany Soto
  - Robb Bromley
  - Leo Jerman

The calendar grid shows a 9:00 AM Default schedule for the dates 15-Aug-2008, 18-Aug-2008, 19-Aug-2008, and 20-Aug-2008. The Intuit logo is visible in the bottom right corner.

You will then see the Items you have selected in a Grid-Like Format with Employees names Listed on the left, and the dates, going across. In order to make an entry on an employee on a certain day, click your mouse under the corresponding day for that person. You will see a window like the one below pop up for that day. It gives you all the options you could want. Status (some examples include Scheduled, Vacation, PTO, etc) from here you can define what you would want this persons schedule to be for this day. You can select the dates to set the schedule to start and end, as well as things like location, project, type of work, and status (for example scheduled, or PTO) Once you are done making changes for this day, click "Save"

The image shows a dialog box titled "New schedule item for Leo Jerman". It contains the following fields and controls:

- Start: 08/21/2008, 12:00 AM
- End: 08/21/2008, 12:00 AM
- Status: Scheduled
- Location: Location 1
- Project: Project 1
- Type of Work: Type of Work 1

At the bottom of the dialog are three buttons: Delete, Cancel, and Save.

The application will now go back to the Schedule editor, and you should see your manual entry. This is identified in [Blue Text](#).

You can repeat this same process for any day that you want to manually enter, or edit a schedule for a person.