



**PEOPLE PLANNING:  
ADVANCED SCHEDULING  
COURSE**



## Table of Contents

### CONTENTS

<b>PEOPLE PLANNING: ADVANCED SCHEDULING COURSE.....</b>	<b>1</b>
Contents.....	3
<b>MODULE 1: COURSE ESSENTIALS .....</b>	<b>5</b>
About this Course.....	6
Course Modules.....	6
Course Callouts.....	6
<b>MODULE 2: INTRODUCTION TO ADVANCED SCHEDULING .....</b>	<b>7</b>
Scheduling Overview.....	8
The Scheduling Process.....	8
Navigating the Current Schedule widget .....	8
Current Schedule Widget Overview.....	10
Header.....	10
Workspace.....	12
Schedule Tabs.....	13
Adjusting Dates .....	14
Adjusting the Column Selection .....	15
Gantt View and Tabular View.....	15
Saving and Refreshing Data in the Current Schedule widget.....	17
Saving Edits.....	17
Canceling Edits .....	17
Saving a Custom Location .....	17
<b>MODULE 3: WORKING WITH SHIFTS .....</b>	<b>20</b>
Adding Shifts .....	21
Inserting a Shift Template .....	21
Deleting Shifts .....	22
Scheduling a Pay Code Amount .....	23
Transfers Overview .....	25
Scheduling Labor Account Transfers.....	25
Scheduling Work Rule Transfers .....	28
Schedule Pattern Overview.....	29
Assigning a Pattern Template .....	29
Creating a Schedule Pattern without a Template .....	31

Deleting a Pattern from a Schedule .....	34
<b>MODULE 4: REQUESTS AND SELF-SCHEDULING .....</b>	<b>36</b>
Working with Availability .....	37
Viewing Availability .....	37
Working with Schedule Groups.....	43
<b>MODULE 5: WORKLOAD PLANNER.....</b>	<b>46</b>
About the Workload Planner .....	47
Workload Planner Overview .....	48
Header .....	48
Workspace.....	49
Updating a Workload Plan .....	50
<b>MODULE 6: SCHEDULE GENERATION .....</b>	<b>52</b>
Open Shift Overview .....	53
Generating Open Shifts.....	53
<b>MODULE 7: EVALUATING AND BALANCING THE NEXT SCHEDULE .....</b>	<b>56</b>
Evaluating the Next Schedule .....	57
Evaluating Schedule Coverage from the Daily Coverage Tab.....	57
Staffing Assistant.....	58
Reviewing Schedule Rules.....	59
Making Schedule Adjustments.....	61
Creating Open Shifts Manually .....	61
Assigning Remaining Open Shifts.....	63
Use the Staffing assistant Tab to Assign an Open Shift.....	63
Assign an Open Shift Manually .....	65
Deleting a Shift vs. Unassigning a Shift .....	66
Unassigning a Shift .....	67
Attaching Comments and Notes .....	68
<b>MODULE 8: FINALIZING THE NEXT SCHEDULE.....</b>	<b>70</b>
Posting the Next Schedule .....	71
Generating Schedule Reports .....	73
<b>MODULE 9: SMS QUICKFILL .....</b>	<b>76</b>
SMS Quickfill Overview .....	77
Viewing SMS Quickfill Notifications .....	78

# MODULE 1: COURSE ESSENTIALS

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## ***MODULE OBJECTIVES:***

- Describe the content within the instructor-led course.
- Discuss the format of this course.
- Understand the layout of the reference guide.

## ABOUT THIS COURSE

This instructor-led course is delivered in nine modules. As you proceed through the course, the Facilitator explains the concepts of each task and then guides you through hands-on practice exercises. Below is an outline of the instructor-led modules that are covered in this class:

## COURSE MODULES

- Module 1: Course Essentials
- Module 2: Introduction to Advanced Scheduling
- Module 3: Advanced Scheduling and Working with Shifts
- Module 4: Requests and Self-Scheduling
- Module 5: Workload Planner
- Module 6: Schedule Generation
- Module 7: Evaluating and Balancing the Next Schedule
- Module 8: Finalizing the Next Schedule
- Module 9: SMS QuickFill

## COURSE CALLOUTS

Certain elements of the Advanced Scheduling application require special attention. The course identifies those elements by using one of the icons displayed below.

### WARNING

The warning callout identifies potential problems or issues to consider.

### POLICY

The business policy callout outlines specific policies that need to be followed for specific tasks.

### ADDITIONAL INFORMATION

The additional information callout provides helpful hints regarding certain tasks.

# MODULE 2: INTRODUCTION TO ADVANCED SCHEDULING

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## **MODULE OBJECTIVES:**

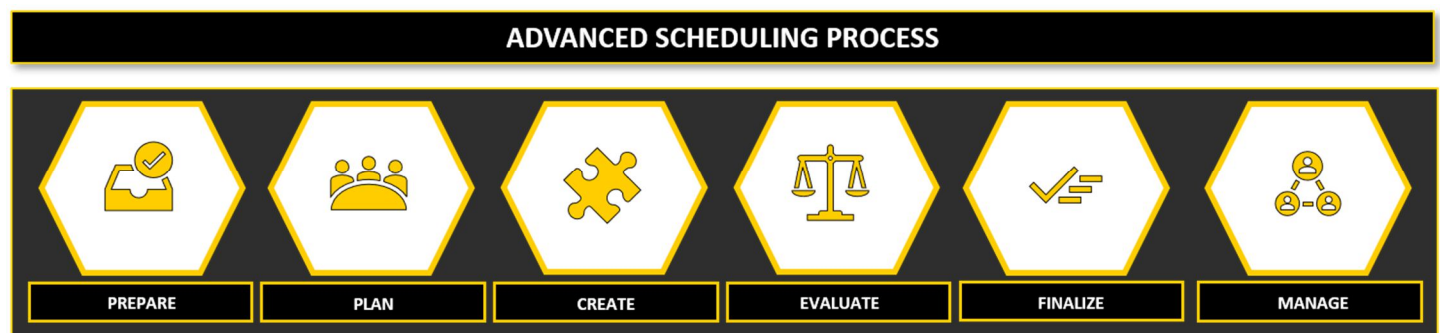
- Overview of scheduling.
- Navigate the Current Schedule widget.
- Create a location query.

## SCHEDULING OVERVIEW

Employee scheduling is an important aspect to the overall workforce management process. Scheduling provides additional functionality within the Advanced Scheduling application including exception tracking and the ability to schedule time off and transfers in advance.

## THE SCHEDULING PROCESS

To develop and deploy an efficient schedule, you need to ensure that you have the right people scheduled in the right jobs at the right time. The scheduling process aligns with and supports the overall labor management process and includes five main phases. While many of the scheduling tasks in Advanced Scheduling are automated or performed infrequently, they must be completed at the appropriate point in the scheduling process.



## NAVIGATING THE CURRENT SCHEDULE WIDGET

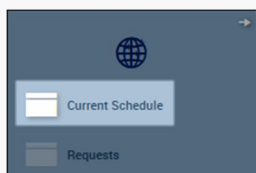
As a planning task, it is important to review the schedule for the next schedule period and identify any employee fixed schedule updates. The majority of scheduling tasks are performed using the Current Schedule widget.

### LEARNING SCENARIO

You want to review the next schedule to determine any employee core schedule updates.

#### ACCESS THE CURRENT SCHEDULE WIDGET

- 1 Click to open the **Current Schedule widget** from the Related Items pane.





## ACCESS THE CURRENT SCHEDULE WIDGET

2 Maximize the **Current Schedule widget** workspace.



3 Click the drop-down arrow in the **Show** field and select which location to view in the workspace.

4 Click the drop-down arrow in the **Time Period** field and select **Next Schedule Period**.

5 Review the **Schedule Grid** for the next period.

By Employee						8/30 - 9/05				9/06 - 9/12				9/13 - 9/19			
On P...	Person Name	Job	week...	Sche...	Skill	S 30	M 31	T 01	W 02	T 03	F 04	S 05	S 06	M 07	T 08	W 09	T 10
Open Shifts																	
	ADDONISIO, El...	RN	0.00	0.0 - ...	CHG												
	Bruning, Lacey	RN	0.00	0.0 - ...													
	Grayson, Wayn...	RN	40.00	57.5 - ...			9:00AM	9:00AM	9:00AM	9:00AM	9:00AM			9:00AM	9:00AM	9:00AM	9:00AM
	Harris, James	RN	0.00	0.0 - ...													
	Kronos	RN	36.00	12.0 - ...	CHG	7:00AM											

6 Minimize the **Current Schedule widget** workspace.



## ADDITIONAL INFORMATION

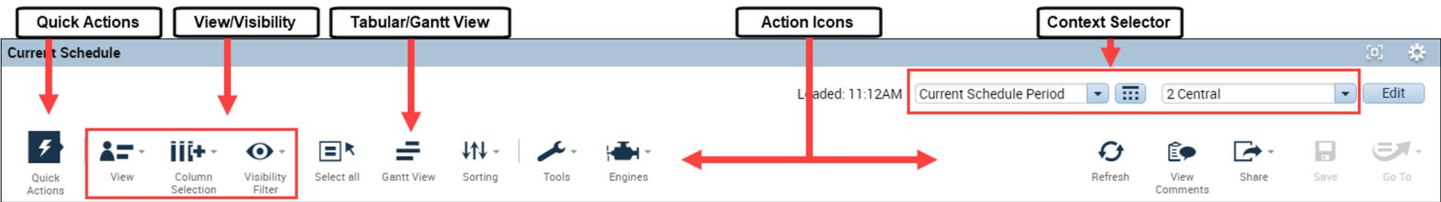
- All Home Locations in the Show field include all employee locations and jobs to which you have access by default.
- Creating a Custom Location is taught later in this guide.

CURRENT SCHEDULE WIDGET OVERVIEW

The Current Schedule widget includes three main areas; Header, Workspace and Schedule Tabs, each area is described below.

HEADER

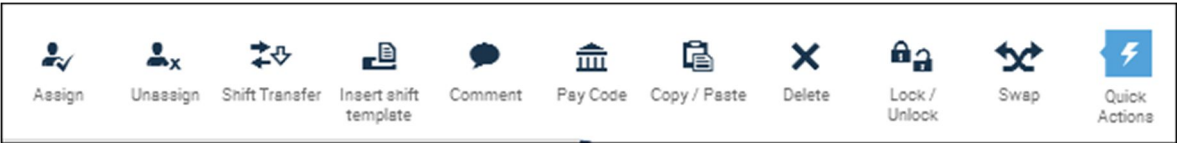
The header of the Current Schedule widget contains the following components:



Element	Description
Quick Actions	Provides icons that allow you to perform the most common scheduling actions quickly and easily.
View / Visibility	Provides options for viewing the schedule. <ul style="list-style-type: none"><li>Use the View icon to select how you want to view the schedule (by employee, schedule group, or job).</li><li>Use the Column Selection and Visibility Filter icons to control which schedule elements you see.</li></ul>
Tabular / Gantt View	Allows you to toggle between Tabular and Gantt views of the schedule.
Action Icons	Performs an action on the displayed schedule data.
Context Selector	Sets the time period and location you want to work with.

QUICK ACTIONS

When you click on Quick Actions, additional icons display. These icons help you to streamline schedule tasks and minimize the number of mouse clicks to perform a task. To stop using a quick action, click the icon again. The following table describes the functions for each icon.



Icon	Description
<b>Assign</b>	Click the Assign icon, click an open shift, and then the date cell of the employee you want to work the shift.
<b>Unassign</b>	Click the Unassign icon and then click the shift of the employee you want to remove from the scheduled shift. Advanced Scheduling creates an open shift for you to fill.
<b>Shift Transfer</b>	Click the Shift Transfer icon to view a list of possible jobs you can reallocate employees to in your view. Select a job from the list, and then click a shift in the schedule to perform the job transfer. Only jobs you are currently viewing are available to select.
<b>Insert shift template</b>	Click the Insert shift template icon to view a list of shift templates you can apply to employees. Select a shift template from the list, and then click a date cell to add that shift to an employee's schedule.
<b>Comment</b>	Click the Comment icon to view a list of comments you can apply to employee schedules. Select a comment from the list, and then click a shift or pay code to add that comment to an employee's schedule.
<b>Pay Code</b>	Click the Pay Code icon to view a list of pay codes you can apply to employees. Select a pay code from the list, and then click a date cell to add that pay code to an employee's schedule.
<b>Copy / Paste</b>	Click the Copy / Paste icon to copy and paste a shift or pay code. The first click copies the item; subsequent clicks paste the item.
<b>Delete</b>	Click the Delete icon, and then click the shifts or pay codes in the schedule to delete them. Advanced Scheduling does <u>not</u> create an open shift for the deleted shift.
<b>Lock / Unlock</b>	Click the Lock / Unlock icon and select the shifts to either lock or unlock.
<b>Swap</b>	Click the Swap icon, click the shift of the first employee whose shift you want to swap, and then click the shift of the second employee for the swap.

## WORKSPACE

The workspace lists employee names and displays schedule information specific to each employee in columns to the right. Employee scheduled shift times or shift labels for the dates selected in the Time Period field display in the schedule grid. Schedule edits are performed in the schedule grid workspace. Located at the bottom of the schedule grid workspace are the total number of hours and employees that are scheduled for each day in the selected location and time period.

Employee Details

Schedule Grid

By Employee						8/02 - 8/08		8/09 - 8/15		8/16 - 8/22		8/23 - 8/29	
On P...	Person Nam	Job	week...	Sche...	Skill	Sun 8/16	Mon 8/17	Tue 8/18	Wed 8/19	Thu 8/20	Fri 8/21	Sat 8/22	
Open Shifts[1]													
... TE IP/2 Ctrl/RN													
ADDONISIO, El...							6:00AM - 6:00PM	6:00AM - 6:00PM	6:00AM - 6:00PM	6:00AM - 6:00PM			
Bruning, Lacey													
Grayson, Wayn...							9:00AM - 9:00PM	9:00AM - 9:00PM	9:00AM - 9:00PM	9:00AM - 9:00PM	9:00AM - 9:00PM		
Harris, James							5:30AM - 5:30PM	5:30AM - 5:30PM	5:30AM - 5:30PM	5:30AM - 5:30PM	5:30AM - 5:30PM		
Indicators													
All Days						Sun 8/16	Mon 8/17	Tue 8/18	Wed 8/19	Thu 8/20	Fri 8/21	Sat 8/22	
Employee Sche...			556.0			24.0	23.0	23.0	23.0	23.0	23.0	0.0	
Employee Count			29.000			2.000	2.000	2.000	2.000	2.000	2.000	0.000	
Indicators													

Element	Description
Employee Details	Lists the employee names from the selected location in the Show field. Additional scheduling information is provided in the columns following the name for reference. Columns can be sorted or expanded to view full details.
Schedule Grid	Displays each employee's scheduled shift times or shift labels for the dates selected in the Time Period field.
Indicators	Displays schedule totals for coverage and metrics.

SCHEDULE GRID WORKSPACE INDICATORS

The schedule grid workspace displays each employee’s scheduled shift times for the dates selected in the Time Period field. Indicators appear in the workspace to call your attention to a specific attribute or change to a scheduled shift. For example, double-arrows indicate a shift transfer. Hold your cursor over a shift cell or an employee name to view more detailed information.

By Employee

On P...	Person Name	Job	week...	Sche...	Skill
Open Shifts[1] ▾					
...	TE IP/2 Ctrl/RN				
	ADDONISIO, El...	RN	0.00	0.0 - ...	CHG
	Bruning, Lacey	RN	0.00	0.0 - ...	
	Grayson, Wayn...	RN	40.00	57.5 - ...	
	Harris, James				

Grayson, Wayne S

On Premises: false  
Person ID: WFI-99999WG  
Job: RN  
Phone Number:  
weekly Hrs: 40.0  
Sched Weekly Hours: 57.5 - 57.5 - 57.5 - 57.5  
FTE:  
Skill:

8/02 - 8/08

8/09 - 8/15

8/16 - 8/22

8/23 - 8/29

Sun 8/16

Mon 8/17

Tue 8/18

Wed 8/19

Thu 8/20

Fri 8/21

Sat 8/22

Grayson, Wayne S

9:00AM - 9:00PM (8/19)

1. 9:00AM [12.0]: Regular  
UMMS/SJMC/SJ HOS/UMSJ Hosp/NURSING IP/ACUTE IP/2 Ctrl/RN

Sun 8/16	Mon 8/17	Tue 8/18	Wed 8/19	Thu 8/20	Fri 8/21	Sat 8/22
24.0	23.0	23.0	23.0	23.0	23.0	0.0
2.000	2.000	2.000	2.000	2.000	2.000	0.000

SCHEDULE TABS

The Current Schedule widget contains supporting tabs located at the bottom of the page to help you evaluate the schedule and determine coverage options for the next schedule period. The use of scheduling tabs is described in more detail later in this course.

Daily Coverage

Staffing Assistant

Rule Violations

Element	Description
Daily Coverage	<div>Contains coverage rows to help you evaluate the schedule and determine coverage options. Different coverage view options are available from the drop-down menus:<ul style="list-style-type: none"><li>Counts – Numerically displays scheduled and planned coverage data.</li><li>Coverage – Graphically displays the scheduled and planned coverage data. The numeric value represents the number of employees scheduled and the bar graph color indicates if you are under, over, or fully staffed. Hold your cursor over the graph bar to locate specific time span gaps.</li></ul></div>

Element	Description
Staffing Assistant	Displays candidates to fill an open shift, sorts according to employees' eligibility to fill an open shift.
Rule Violations	Displays the name of the employee, the date a schedule rule was violated, and the severity and description of the violation. Perform the necessary schedule edits to clear a rule violation.

You have many options to view data in the Current Schedule widget. Different view options are described below.

## ADJUSTING DATES

You may be viewing several weeks' worth of schedules and want to zoom in to view a week or several days. To zoom in on a week, click on the date range. A blue bar appears above the week you are viewing. You can also click and drag across several days to zoom in on those days. To zoom out, click the date range once to return to the week view. Click the date range again to return to a multiple week view.

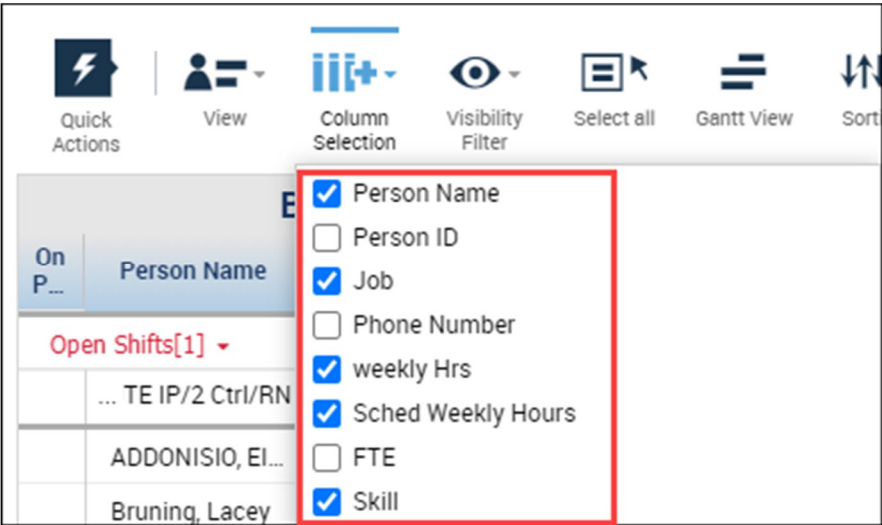
By Employee								8/02 - 8/08	8/09 - 8/15	8/16 - 8/22	8/23 - 8/29
On P...	Person Name	Job	Phon...	weekl...	Sche...	FTE	Skill	Sun 8/23	Mon 8/24	Tue 8/25	Wed
Open Shifts											
	ADDONISIO, El...	RN	1222...	0:00	0:00 -...		CHG				

By Employee								8/02 - 8/08	8/09 - 8/15	8/16 - 8/22	8/23 - 8/29
On P...	Person Name	Job	Phon...	weekl...	Sche...	FTE	Skill	Sun 8/23	Mon 8/24	Tue 8/25	Wed
Open Shifts											
	ADDONISIO, El...	RN	1222...	0:00	0:00 -...		CHG				
	Ekronos	RN	1236...	36:00	36:00...						

ADJUSTING THE COLUMN SELECTION

The Current Schedule widget is designed to include a number of helpful columns. In addition to displaying information, these columns can be used to sort. In some cases, the columns may not be beneficial to your particular Unit. Using the Column Selection icon, you can hide columns from your view.

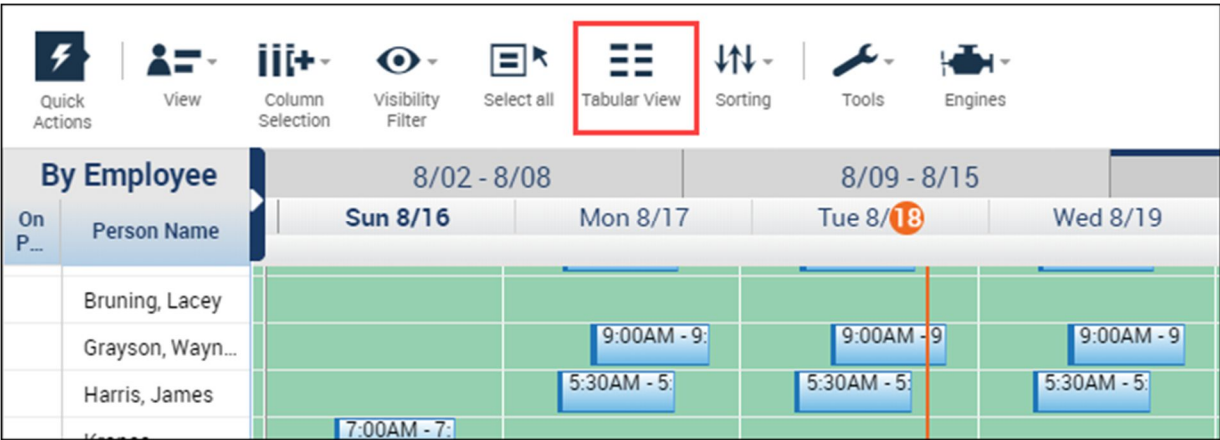


GANTT VIEW AND TABULAR VIEW


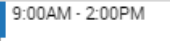
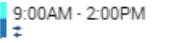
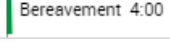
The Current Schedule widget can present schedules in two views, Gantt View and Tabular View. The Gantt View represents shifts and non-worked time using a bar to indicate the length and time of the shift. Different types of shifts, breaks, and non-worked time are represented with different colors. This view shows the coverage during the day. The Tabular View displays the start and end time of the shift. This view allows for more days to display.

Tabular View

To access the Tabular view, click the Tabular View button on the toolbar.





The following table describes the Tabular view indicators and their functions.


Indicator	Description
	An orange highlight displays the current date.
	A blue line within a cell Indicates an assigned shift.
	Two different shades of blue within the cell indicates a shift with a transfer.
	A green line within the cell indicates a scheduled pay code.


Gantt View


To access the Gantt view, click the Gantt View button on the toolbar.


Quick Actions


View


Column Selection


Visibility Filter

Select all

Gantt View

Sorting

Tools

Engines

By Employee

On P...

Person Name

8/02 - 8/08

8/09 - 8/15

Sun 8/16

Mon 8/17

Tue 8/18

Wed 8/19

Bruning, Lacey

Grayson, Wayn...

9:00AM - 9:00PM

9:00AM - 9:00PM

9:00AM - 9:00PM



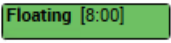
Harris, James

5:30AM - 5:30PM

5:30AM - 5:30PM

5:30AM - 5:30PM

The following table describes the Gantt view indicators and their functions.

Indicator	Description
	Orange highlights and vertical line indicate the current date and time.
	Blue cells indicate a normal shift.
	Green cells indicate a scheduled pay code.



## ADDITIONAL INFORMATION

When entering time into the schedule, use either the 12-hour or 24-hour time format.

## SAVING AND REFRESHING DATA IN THE CURRENT SCHEDULE WIDGET

When you add or modify schedule data, the application displays your edits but does not save them automatically. You must tell the application to save the data. Prior to saving your data, you can cancel your edits if necessary.

### SAVING EDITS

When you edit a schedule in the Current Schedule widget, the Save icon turns orange to let you know that your data is not yet saved.



### CANCELING EDITS

The Current Schedule widget does not save your edits until you tell it to do so. Up until that time, you can remove or cancel your edits using the Refresh button. When you click Refresh, the application re-displays the most recently saved information, overwriting any unsaved edits.



## SAVING A CUSTOM LOCATION

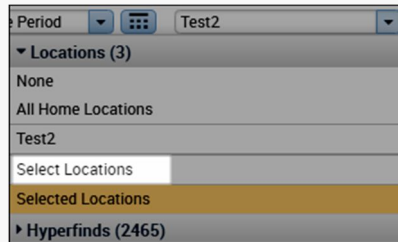
As a Manager, Timekeeper, Scheduler or Charge, you may have access to employees at different locations and jobs in the Current Schedule widget. From the Context Selector you can select one location and job to view at a time. If you notice you are accessing one particular location and job on a frequent basis you can save it to your drop-down list.

## LEARNING SCENARIO

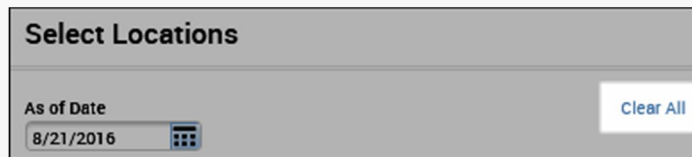
You want to be able to view the schedules of employees in a single unit when creating and viewing schedules. You set up saved locations so that you can display the schedules of your most frequently viewed employees with fewer clicks. Set up a location query for the RNS's in Saint James and call it Train UMSJ Hosp RN's.

### CREATE A LOCATION IN THE SHOW FIELD

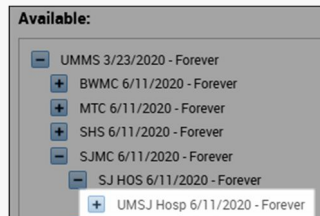
- 1 Click the drop-down arrow in the **Context Selector Show** field and click **Select Locations**.



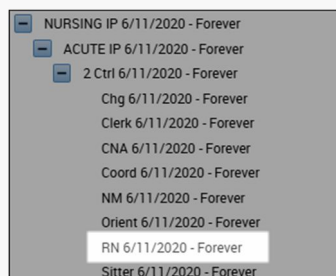
- 2 Click **Clear All** to remove the existing location and job selections.



- 3 Click the **plus [+]** icon to expand the location options.

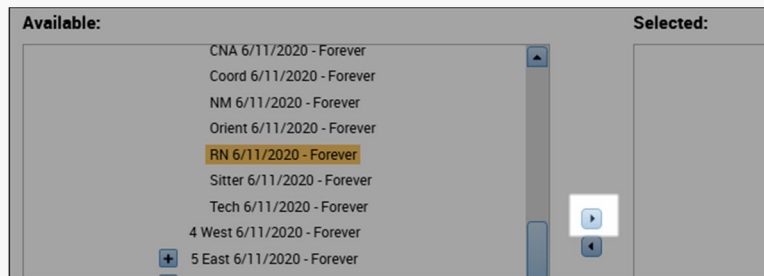


- 4 Continue to expand the **Organizational Map** for each location and department. Select the job you want to include in your schedule view.



## CREATE A LOCATION IN THE SHOW FIELD

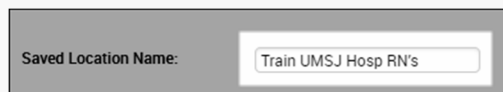
5 Click the right-facing arrow to move your selection to the **Selected** window.



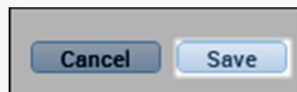
6 Click **Save As**.



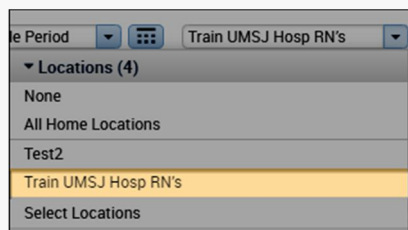
7 Enter a unique **Name** for the location.



8 Click **Save**. The employees with the selected primary location assignment display in the workspace.



9 The saved search displays in the **Show** field drop-down list for future access.



## ADDITIONAL INFORMATION

The saved search displays under your log on and is viewable only to you. You can select it and edit or delete it at any point in time.

# MODULE 3: WORKING WITH SHIFTS

---

## **MODULE OBJECTIVES:**

- Add, edit and delete shifts.
- Schedule a pay code.
- Schedule a job transfer.
- Add employee schedules using templates.
- Update a schedule pattern.

## ADDING SHIFTS

The Current Schedule widget provides different methods for adding shifts into employee schedules depending on the situation. You can add shifts using one of the following methods:

- In-cell entry – used for adding simple shifts that include only a shift start and end time. Shift start and end times are entered directly in the date cell.
- Shift Templates – used when entering a common shift in which a shift template has already been created.
- Shift Editor – used when adding more complex shifts that contain specific shift attributes (i.e. shifts with transfers, etc.).

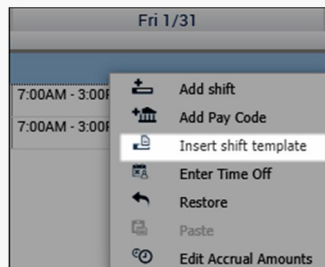
## INSERTING A SHIFT TEMPLATE

### LEARNING SCENARIO

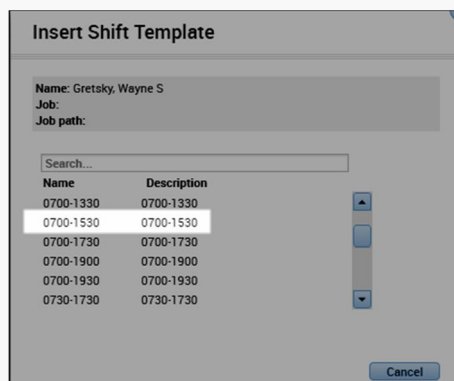
Your employee works a common shift from 7:00 AM to 3:30 PM. Since the shift is used often, there is a shift template already created. Insert the shift template for Friday.

#### INSERT A SHIFT TEMPLATE

- 1 Locate the employee's row and right-click the cell under the date where you want to add a shift. Select **Insert Shift Template**.



- 2 Click the scrollbar in the **Insert Shift Template** field and select a template from the list or optionally use the search feature.



### INSERT A SHIFT TEMPLATE

3 Click **Save**.



### ADDITIONAL INFORMATION

If you determine that an employee's shift needs to be shortened or lengthened, you can edit the shift start or end times accordingly.

### DELETING SHIFTS

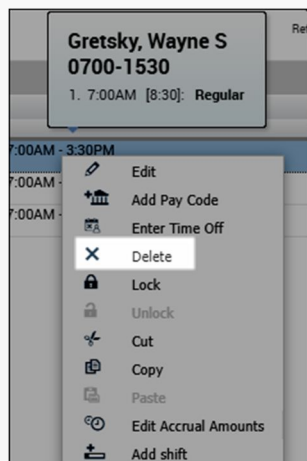
If an employee is no longer working a specific shift, you can delete the shift from the schedule. If the employee's schedule changes, it is important to update the Current Schedules widget accordingly, so the employee does not receive an exception in the timecard.

### LEARNING SCENARIO

Your employee is no longer working the 7:00 AM to 3:30 PM shift on Thursday, so you must delete the shift.

### DELETE A SHIFT

1 Right-click the date cell for the employee whose shift you want to delete. Select **Delete**.



2 Click **Save**.



## SCHEDULING A PAY CODE AMOUNT

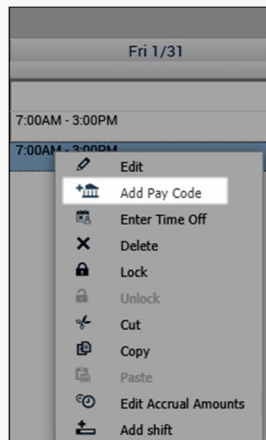
Entering a pay code into an employee's schedule allows you to schedule non-worked time. Non-worked hours include sick time and vacation or paid time off. You should schedule your employees' non-worked time when you know about it in advance. Once the schedule date becomes part of the current pay period, the pay code amount automatically populates the employee's timecard.

### LEARNING SCENARIO

One of your employees is going to be on Jury Duty on Friday. You want to schedule a pay code amount in the employee's schedule as a reminder of the absence, but more importantly to populate the employee's timecard accordingly.

#### SCHEDULE A PAY CODE AMOUNT

- 1 Locate the employee's row and right-click the date to which you want to enter a pay code amount. Select **Add Pay Code**.



- 2 Confirm the date selected in the **Effective Date** field is correct.

A screenshot of the 'Add Pay Code' dialog box. It has a title bar 'Add Pay Code'. Inside, it says 'Assigned to Montana, Joe H'. Below that, there is a label 'Effective Date:' followed by a text input field containing '1/31/2020' and a small calendar icon to its right.

## SCHEDULE A PAY CODE AMOUNT

- 3 From the **Pay Code** drop-down list, select the pay code.

- 4 Enter the number of hours to allocate to the pay code in the **Amount** field or select from the pre-defined list.

- 5 If the pay code amount must replace the employee's existing shift, select the **Override Shift** check box. To override the entire shift, select **Whole Shift**. To override part of the scheduled shift, select **Partial Shift**.

- 6 In the **Start Time** field, enter the effective time for the pay code amount. If the employee already has a schedule, the shift start time is the default time

- 7 In the **Repeat for (D)** field, enter the number of consecutive days for which the pay code amount applies.

- 8 Click **Apply**.

- 9 Click **Save**.



## TRANSFERS OVERVIEW

Throughout a shift, an employee punches for the time they work, and that time is allocated to their default labor account and work rule assignment along with any non-worked hours. Transfers allow you to allocate hours to an alternate labor account and jobs in order to charge the hours where they are worked. This process is useful when employees work in different Accounting Unit or a different Department.

When you schedule a work rule transfer, the Advanced Scheduling applies a different set of rules to the employee's shift when calculating hours. This feature allows certain worked time to calculate differently than other worked time.

If the transfer is known in advance, it is entered into the schedule. When an employee punches in and out, the hours are automatically allocated according to the scheduled job transfer.

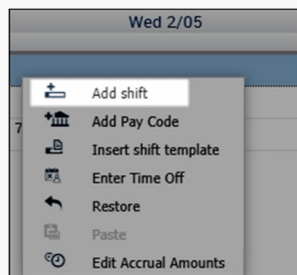
## SCHEDULING JOB TRANSFERS

### LEARNING SCENARIO



One of your employee's is going to work in the Food Services department as a Cashier next Wednesday. In order for labor to be allocated correctly, you need to schedule the employee in the department where the employee is working. Create a shift and include a job transfer.

#### SCHEDULE A JOB TRANSFER



- 1 Locate the employee's row and right-click the date for which you want to enter a shift with a labor transfer. Select **Add Shift**.



- 2 Confirm the date selected in the **Start Date** field is correct.

	Start Date	Type
 	2/05/2020	Regular

- 3 For the hours the employee is scheduled to work before the transfer, complete the **Start Time** and the **End Time** fields accordingly.

	Start Date	Type	Start Time	End Time
 	2/05/2020	Regular	7:00am	12:30pm

## SCHEDULE A JOB TRANSFER

4 Click the **Insert Row** icon.

		Start Date	Type	Start Time	End Time
+	x	2/05/2020	Regular	7:00am	12:30pm

5 On the new row, confirm the time the shift transfer begins displays in the **Start Time** field.

		Start Date	Type	Start Time	End Time
+	x	2/05/2020	Regular	7:00am	12:30pm
+	x	2/05/2020	Regular	12:30pm	1:30pm

6 In the **End Time** field, enter the time the shift transfer ends.

		Start Date	Type	Start Time	End Time
+	x	2/05/2020	Regular	7:00am	12:30pm
+	x	2/05/2020	Regular	12:30pm	3:30pm

7 Click the **Job Transfer** field and select the applicable Department and job from the Organizational Map. If the labor.

Insert Template ▾ Shift Label  Repeat this shift for  days

		Start Date	Type	Start Time	End Time	End Date	Duration	Job Transfer	Labor Level Transfer	Work Rule Transfer
+	x	2/28/2021	Transfer	6:30am	7:00pm	2/28/2021	12:50	UMMS/UMMSC/t		

Comments (0) [Add Comment](#)

Transfer

Name Abrenica, Lans Tristan B  
Job UMMS/BWMC/BWMC/BWMC/NURSING IP/ACUTE IP/2 EAST/RN  
Labor Account  
Work Rule

Job Transfer Labor Account Work Rule

- NURSE ADMIN 6/11/2020 - Forever
- NURSING IP 6/11/2020 - Forever
  - ACUTE IP 6/11/2020 - Forever
    - 2 EAST 6/11/2020 - Forever
      - Chg 6/11/2020 - Forever
      - NM 6/11/2020 - Forever
      - OTA 6/11/2020 - Forever
      - OThrp 6/11/2020 - Forever
      - PCT 6/11/2020 - Forever
      - Pschtr 6/11/2020 - Forever
      - RN 6/11/2020 - Forever**
      - Sec 6/11/2020 - Forever

## SCHEDULE A JOB TRANSFER

- 8 Click **Apply** on the **Transfer** dialog box.



- 9 Click **Apply** again on the **Add Shift** dialog box.



- 10 Click **Save**.



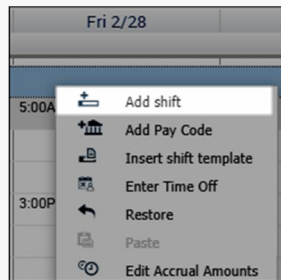
## SCHEDULING WORK RULE TRANSFERS

### LEARNING SCENARIO



An employee is called in on Friday. Since any on call time is calculated differently than regular worked time, a different work rule application is needed. Create a shift and include a work rule transfer.

#### SCHEDULE A WORK RULE TRANSFER



- 1 Locate the employee's row and right-click the date for which you want to enter a shift with a work rule transfer. Select **Add Shift**.



- 2 Confirm the date selected in the **Start Date** field is correct.

	Start Date	Type
 	2/28/2020	Regular

- 3 Click the **Start Time** field and enter the time the shift begins.

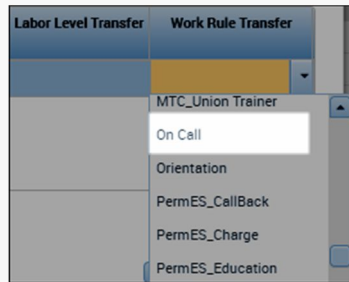
	Start Date	Type	Start Time
 	2/28/2020	Regular	8:00am

- 4 Click the **End Time** field and enter the time the shift ends.

	Start Date	Type	Start Time	End Time
 	2/28/2020	Regular	8:00am	5:30pm

## SCHEDULE A WORK RULE TRANSFER

- 5 Click the drop-down arrow in the **Work Rule Transfer** field and select a work rule from the list.



- 6 Click **Apply**.



- 7 Click **Save**.



## ADDITIONAL INFORMATION

A double arrow icon ( ⇌ ) displays next to the shift indicating a transfer. You can hover your mouse over the shift to display the transfer details.

## SCHEDULE PATTERN OVERVIEW

If employees have a pre-defined, or fixed schedule that they work on a consistent basis, you can assign a pattern template for their schedule assignment. Once a pattern is applied to an employee's schedule, it repeats the predefined shifts and days until an end date is defined or the pattern is deleted or overridden by another pattern.

## ASSIGNING A PATTERN TEMPLATE

### LEARNING SCENARIO

You have an employee who works the same shifts on the same days every week. To make scheduling quicker, insert a predefined pattern template to the employee's schedule. Set the end date to Forever.

## ASSIGN A PATTERN TEMPLATE

- 1 Right-click the employee's name in the **Current Schedules** widget.

By Employee	
Name ^	Sun 2/02
Gretsky, Wayne S	
Krenicky, Mary E	
Montana, Joe H	

- 2 Click the **Schedule Pattern** icon.

By Employee	
Name ^	Sun 2/02
Gretsky, Wayne S	
Krenicky, Mary E	
Montana, Joe H	

- Schedule Pattern
- Add shift
- Add Pay Code
- Enter Time Off
- Lock

- 3 Click the calendar icon in the **Start Date** field and select the effective date on which the employee begins working the pattern.

Start Date: 2/02/2020 End Date: Clear

Forever

- 4 Click the calendar icon in the **End Date** field and select the last effective date of the pattern. To have the pattern in effect with no end date, select **Forever**.

Start Date: 2/02/2020 End Date: Clear

Forever

- 5 Optionally, select **Override Other Patterns** to replace any other assigned pattern.

☐ Override Other Patterns

Items in rotation Find

- 6 Click **Pattern Template** and select a template from the list.

Add Shift | Add Pay Code | Shift Template | Pattern Template

Items in rotation

No.	Sunday	Monday
1		

Search...

Name	Description
3AM-7AM SU...	
5:30AM-5:30PM	
5am-1:30pm ...	
7AM-11AM M...	

## ASSIGN A PATTERN TEMPLATE

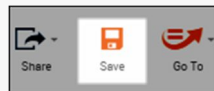
7 Click **Apply**.

Cancel Apply

8 Verify the pattern displays for the correct dates and click **OK**.

Start Date	End Date	Duration	Rotation
2/02/2020	Forever	1 week	1 Week: Sa - 130p(Mon,Tue,Wed,Thu,Fri)

9 Click Save.



## CREATING A SCHEDULE PATTERN WITHOUT A TEMPLATE

If a pattern template is not available in the drop-down list, you can build an ad hoc pattern for an employee. The ad hoc pattern is assigned to the selected employee; it cannot be saved and assigned to employees at a later time.

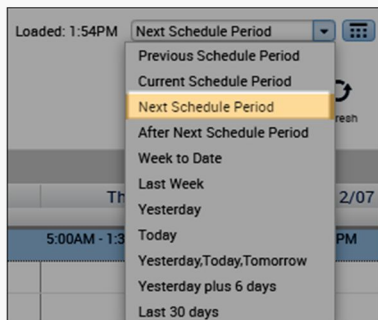
### LEARNING SCENARIO

You have an employee who works the same shifts on the same days every week, but there is not a pattern template for the specific schedule. You create a single-use pattern for an employee. Create a pattern to accommodate the following schedule:

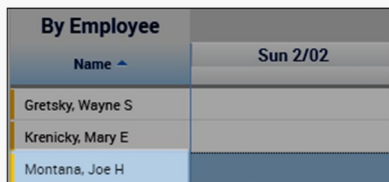
SUN	MON	TUE	WED	THU	FRI	SAT
Off	7a - 330p	7a - 330p	7a - 330p	3p-1130p	3p-1130p	Off

## CREATE AN AD HOC PATTERN

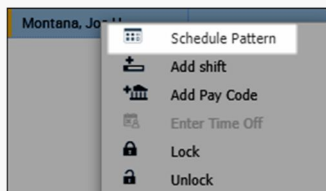
- 1 Click the drop-down arrow in the **Time Period** field and select the timeframe the pattern begins.



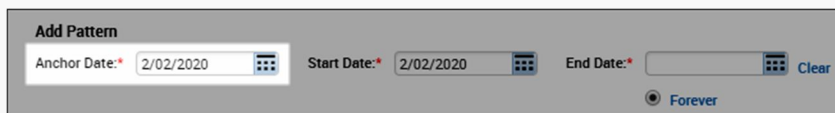
- 2 Right-click the employee's name in the **Current Schedules** widget.



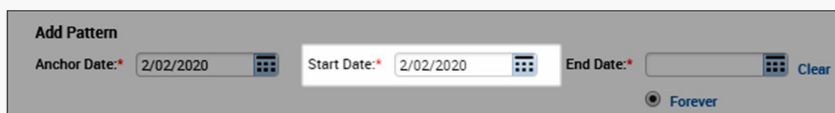
- 3 Click **Schedule Pattern**.



- 4 Click the drop-down arrow in the **Anchor Start Date** (defines the start date of the pattern) field and select the effective date on which the pattern starts.



- 5 Click the drop-down arrow in the **Start Date** field and select the effective date on which the employee begins working the pattern.





## CREATE AN AD HOC PATTERN

- 6 Click the drop-down arrow in the **End Date** field and select the last effective date of the pattern. To have the pattern in effect with no end date, select **Forever**.

- 7 Optionally, select **Override Other Patterns** to replace any other assigned pattern.

- 8 Set the **Define Pattern for** field to either **Days** or **Weeks**, and enter the number of days or weeks the pattern repeats.

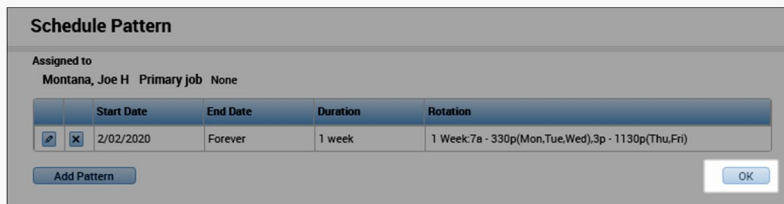
- 9 Click the **Day** cell for the day you want to add a shift. Enter shift start and end times separated by a hyphen (i.e. 7a-330p).

- 10 Continue adding shifts for the remainder of the scheduled days within the pattern. You can also use the insert shift template link to add a shift template to any day.

- 11 Click **Apply**.

## CREATE AN AD HOC PATTERN

**12** Verify the pattern displays for the correct dates and click **OK**.

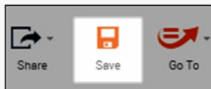


The 'Schedule Pattern' dialog box shows the following details:

- Assigned to:** Montana, Joe H Primary job None
- Start Date:** 2/02/2020
- End Date:** Forever
- Duration:** 1 week
- Rotation:** 1 Week: 7a - 330p (Mon, Tue, Wed), 3p - 1130p (Thu, Fri)

Buttons: Add Pattern, OK

**13** Click Save.



## ADDITIONAL INFORMATION

You can double-click the employee name at any time to make any necessary pattern adjustments.

## DELETING A PATTERN FROM A SCHEDULE

If a pattern no longer fits an employee's schedule, you can delete the pattern assignment.

## LEARNING SCENARIO

The employee for whom you created the single-use pattern, no longer works those shifts and days. Delete the pattern from the employee's schedule.

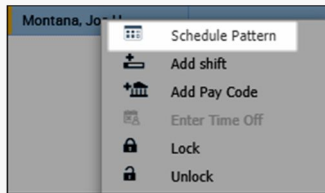
## DELETE A PATTERN FROM A SCHEDULE

**1** Right-click the employee's name in the **Current Schedules** widget.

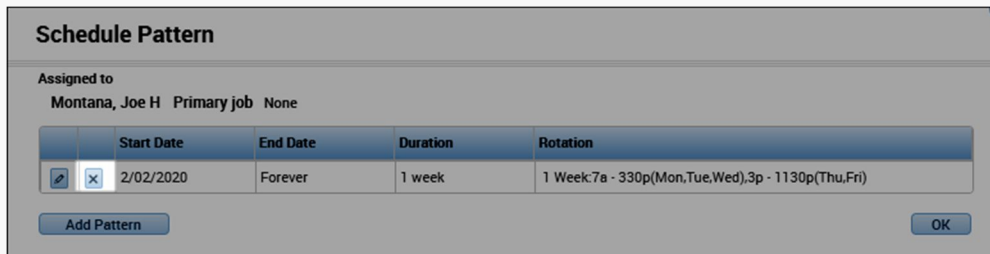
By Employee	
Name	Sun 2/02
Gretsky, Wayne S	
Krenicky, Mary E	
Montana, Joe H	

## DELETE A PATTERN FROM A SCHEDULE

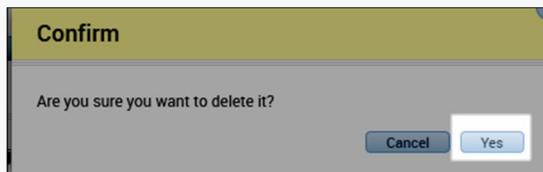
2 Click **Schedule Pattern**.



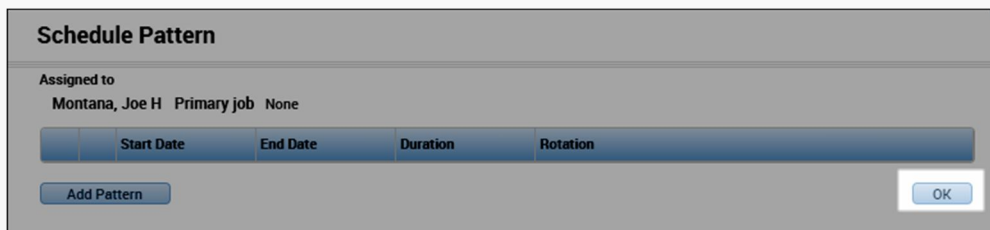
3 Click the **Delete Row** icon.



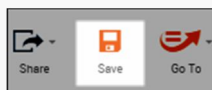
4 Click **Yes** to confirm the deletion of the pattern.



5 Verify the pattern no longer displays and click **OK**.



6 Click **Save**.



# MODULE 4: REQUESTS AND SELF-SCHEDULING

---

## **MODULE OBJECTIVES:**

- Manage availability.
- Manage the self-scheduling process.
- Assign and remove employees from a schedule group.

WORKING WITH AVAILABILITY

Availability indicates specific days and times when an employee can and cannot be scheduled to work. Availability is used by Managers, Timekeeper Schedulers or Charges to assign shifts. Employees can be assigned a repeating pattern of availability. If the employee’s availability changes, you must update the assigned pattern, or apply an availability override.


Additionally, employees can submit their availability using Kronos Employee Self-Service. Advanced Scheduling automatically updates the employee’s availability in the Current Schedule widget by shading unavailability time spans in purple or adding the employee to the call list for any shift openings during their available time frame.


LEARNING SCENARIO


You want to review the availability workspace for the next schedule period. Adjust your Current Schedule widget view to display the availability workspace.


ACCESS EMPLOYEE AVAILABILITY


1 Click the **Gantt View** icon in the Current Schedule widget.


 Quick Actions


 View


 Column Selection


 Visibility Filter

 Select all

 Gantt View

 Sorting

 Tools

 Engines

2 Review the availability workspace.

By Employee		8/02 - 8/08		8/09 - 8/15		8/16 - 8/22		8/23 - 8/29	
On P...	Person Name	Sun 8/16	Mon 8/17	Tue 8/18	Wed 8/19	Thu 8/20	Fri 8/21	Sat 8/22	
	Bruning, Lacey								
	Grayson, Wayn...			9:00AM - 9	9:00AM - 9	9:00AM - 9	9:00AM - 9		
	Harris, James		5:30AM - 5	5:30AM - 5	5:30AM - 5	5:30AM - 5	5:30AM - 5		
	Kronos	7:00AM - 7							
	Kronos, Sched ...								

VIEWING AVAILABILITY

The Current Schedule widget uses colors to identify each employee’s availability so that you can quickly determine when the employee is available or unavailable to work.

employee experience

ONEUMMS

Page 37 of 79

By Employee		8/02 - 8/08		8/09 - 8/15		8/16 - 8/22		8/23 - 8/29	
On P...	Person Name	Sun 8/16	Mon 8/17	Tue 8/18	Wed 8/19	Thu 8/20	Fri 8/21	Sat 8/22	
	Bruning, Lacey								
	Grayson, Wayn...			9:00AM - 9	9:00AM - 9	9:00AM - 9	9:00AM - 9		
	Harris, James		5:30AM - 5	5:30AM - 5	5:30AM - 5	5:30AM - 5	5:30AM - 5		
	Kronos	7:00AM - 7							
	Kronos, Sched ...								
	Smith, Kara	7:00AM - 7							

Availability Indicators	Description
Light Green	Time when an employee is available to work.
Gray	Time when an employee is not available to work.
White	Time when an employee's availability is not known.
Purple	Time when an employee prefers not to be scheduled for work.
Dark Green	Time when an employee prefers to be scheduled for work.

LEARNING SCENARIO

You have a new hire starting and need to assign her to an availability pattern.

ASSIGN AN AVAILABILITY PATTERN TO AN EMPLOYEE

1

Right-click the employee's **Name** in the Current Schedule widget.

By Employee		8/02 - 8/08		8/09 - 8/15		8/16 - 8/22		8/23 - 8/29	
On P...	Person Name	Sun 8/16	Mon 8/17	Tue 8/18	Wed 8/19	Thu 8/20	Fri 8/21	Sat 8/22	
	Bruning, Lacey								
	Grayson, Wayn...			9:00AM - 9	9:00AM - 9	9:00AM - 9	9:00AM - 9		

2

Select **Availability**.

Grayson, Wayn...	
...	
...	
...	
...	
...	
...	
...	
...	
...	

Schedule Pattern

Availability

Add shift

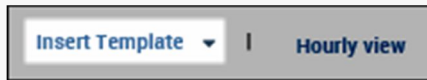
Add Pay Code

Enter Time Off

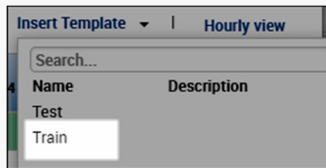
Lock

### ASSIGN AN AVAILABILITY PATTERN TO AN EMPLOYEE

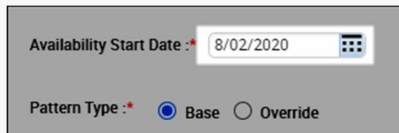
3 Click the **Insert Template** link.



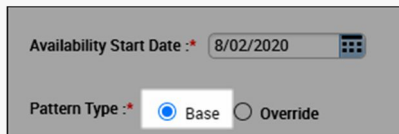
4 Select an **Availability Pattern** from the list.



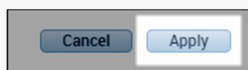
5 Click the **Availability Start Date** calendar icon and select the date the pattern assignment begins.



6 Select **Base** for the Pattern Type.



7 Click **Apply**.



8 Click **OK**.



### ADDITIONAL INFORMATION

Once you add the availability pattern and click OK, it is automatically saved and is viewable in the Gantt View of the Current Schedule widget.

## LEARNING SCENARIO

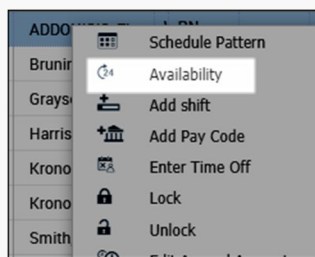
You need to set up base availability without an availability template. Assign the ad hoc availability pattern as the employee's base availability.

### SETUP A BASE AVAILABILITY PATTERN FOR AN EMPLOYEE

- 1 Right-click the employee's **Name** in the Current Schedule widget.

By Employee							8/02 - 8/08						
On P...	Person Name	Job	Phon...	week...	Sche...	FTE	Skill	S 02	M 03	T 04	W 05	T 06	F 07
Open Shifts[1] ▶													
	ADDONISIO, El...	RN		0.00	0.0 - ...		CHG		6.0	6.0	6.0	6.0	

- 2 Select **Availability**.



- 4 Select one or more **Day** cells using the Ctrl key.

Friday					Saturday				
4	8	12	16	20	4	8	12	16	20

- 5 Click **Hourly View**.

Insert Template ▼					Hourly view				
Friday					Saturday				
4	8	12	16	20	4	8	12	16	20



## SETUP A BASE AVAILABILITY PATTERN FOR AN EMPLOYEE

- 6 Click the **Start Time** field and enter the time the availability type begins.

Assigned to  
ADDONISIO, EILEEN Primary job [UMMS/SJMC/SJ HOS/UMSJ Hosp/NU]

Select availability by hour:

☐ Unavailable ☐ Unknown ☒ Available ☐ Preferred

3:00am 6:00am 9:00am

Or enter exact times and select availability type:

Start Time:  End Time:

- 7 Click the **End Time** field and enter the time the availability type ends.

Assigned to  
ADDONISIO, EILEEN Primary job [UMMS/SJMC/SJ HOS/UMSJ Hosp/NURSING IP/

Select availability by hour:

☐ Unavailable ☐ Unknown ☒ Available ☐ Preferred ☐

3:00am 6:00am 9:00am 12:00pm

Or enter exact times and select availability type:

Start Time:  End Time:

- 8 Select an **Availability Type**.

Select availability by hour:

☐ Unavailable ☐ Unknown ☒ Available ☐ Preferred ☐ Preferred Time Off

- 9 Click **Apply**.

- 10 Select one or more **Day** cells using the Ctrl key.

Day	Tuesday	Wednesday	Thursday	Friday
2 16 20	4 8 12 16 20	4 8 12 16 20	4 8 12 16 20	4 8 12

## SETUP A BASE AVAILABILITY PATTERN FOR AN EMPLOYEE

**11** Select an **Availability Type**.

A row of five buttons for selecting an availability type: 'Unavailable' (light blue), 'Unknown' (light grey), 'Available' (light green), 'Preferred' (dark green), and 'Preferred Time Off' (purple).

**12** (Optional) Continue to select a **Day** cell and **Availability Type** for each additional day. Use the Hourly View to enter availability for a portion of a day.

The 'Hourly view' interface shows a calendar grid with days of the week (Sunday through Saturday) and time slots (4, 8, 12, 16, 20). Each cell contains a color-coded availability type. The 'No' column is also visible. The interface includes a toolbar with availability type buttons and an 'Insert Template' dropdown.

**13** Click the calendar icon in the **Availability Start Date** field and select the date when the pattern begins.

The 'Availability Start Date' field shows the date '8/02/2020' with a calendar icon. Below it, the 'Pattern Type' is set to 'Base' (selected) with a radio button, and 'Override' is unselected.

**14** Click the calendar icon in the **End Date** field and select the last effective date of the pattern. To have the pattern in effect with no end date, select **Forever**.

The 'End Date' field shows a calendar icon and a 'Clear' button. Below it, the 'Forever' option is selected with a radio button.

**15** Click the **Pattern Name** field and enter the pattern name.

The 'Pattern Name' field shows an input box with the text 'Eileen A'. Above it, the 'Anchor Date' is set to '8/02/2020' with a calendar icon.

**16** Select **Base** for the Pattern Type.

The 'Pattern Type' selection shows 'Base' (selected) and 'Override' (unselected) with radio buttons. The 'Anchor Date' is '8/02/2020' and the 'Availability Start Date' is '8/02/2020'.

**17** Click **Apply**.

Two buttons: 'Cancel' and 'Apply'.

## SETUP A BASE AVAILABILITY PATTERN FOR AN EMPLOYEE

**18** Review the availability assignment and click **OK**.

Assigned to  
ADDONISIO, EILEEN Primary job [UMMS/SJMC/SJ HOS/UMSJ Hosp/NURSING IP/ACUTE IP/2 Ctrl/RN]

Pattern Name	Type	Start Date	End Date	Rotation
Eileen A	Base	8/02/2020	Forever	1 Week: Available(Sun,Mon,Tue,Wed,Thu,Fri,Sat)

Add Pattern OK

### ADDITIONAL INFORMATION

- When applying availability, the Current Schedule widget is automatically updated and you are not required to click save.
- Codes are configured in Advanced Scheduling indicating that employees were hired into or expected to work in a day, evening or night shift for example.

## WORKING WITH SCHEDULE GROUPS

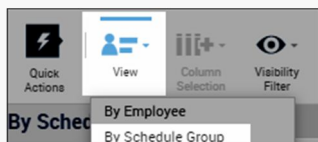
The View icon located in the toolbar sorts employees by schedule group name. This allows you to organize and view employees by job or shift assignment. For example, First Shift, Second Shift, Exempt, Laundry, Food Services, etc. The schedule group name displays on a separate line and employees assigned to that group are listed in alphabetical order underneath. Schedule assignments and edits follow the same process in both the By Employee and By Group options.

### LEARNING SCENARIO

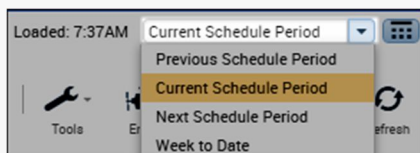
You need to assign an employee to the first shift schedule group so you can easily view and evaluate their schedule with the other first shift employees.

## ASSIGN AN EMPLOYEE TO A SCHEDULE GROUP

**1** Click the **View** icon and select **By Schedule Group**.



**2** Click the drop-down arrow in the **Context Selector Time Period** field and select a date to view.



## ASSIGN AN EMPLOYEE TO A SCHEDULE GROUP

- 3 Right-click the employee's **Name**.

By Schedule Group		
Name	Sun 2/02	Mon 2/03
Ungrouped Emplo...		
Gretsky, Wayne S		
Krenicky, Mary E		
Montana, Joe H		

- 4 Select **Add to Group**.

By Schedule Group	
Name	Sun 2/02
Ungrouped Emplo...	
Gretsky, Way	
Krenicky, Ma	
Montana, Jo	

Schedule Pattern

Add to Group

Remove from Group

Add shift

Add Pay Code

- 5 Select the appropriate **Schedule Group** from the drop-down menu.

### Add to group

Name: Gretsky, Wayne S

Job:

Job path:

Schedule group: First Shift

Start date: \*

End date: \*

☐ Remove employees from date range.

selected

Cancel Apply

Search

First Shift

Food Services

Laundry

Maintenance

Second Shift

- 6 Click the calendar icon in the **Start Date** field and select the date the group assignment begins.

Schedule group: First Shift

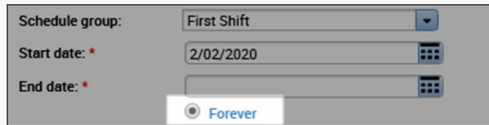
Start date: \* 2/02/2020

End date: \*

☒ Forever

## ASSIGN AN EMPLOYEE TO A SCHEDULE GROUP

- 7 Click the calendar icon in the **End Date** field and select the date the group assignment ends. If there is no foreseeable end to the group assignment, select **Forever**.



Schedule group: First Shift  
Start date: 2/02/2020  
End date: Forever

- 8 Click **Apply**.



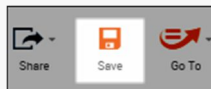
Cancel Apply

- 9 Validate that the employee has now been assigned to the new **Schedule Group**.



By Schedule Group	
Name	Sun 2/02
Ungrouped Emplo...	
Krenicky, Mary E	
Montana, Joe H	
First Shift	
Gretsky, Wayne S	

- 10 Click **Save**.



Share Save Go To

## ADDITIONAL INFORMATION

An employee can be assigned to more than one schedule group at the same time.

# MODULE 5: WORKLOAD PLANNER

---

## ***MODULE OBJECTIVES:***

- Overview of the Workload Planner.
- Update a Workload Plan.

## ABOUT THE WORKLOAD PLANNER

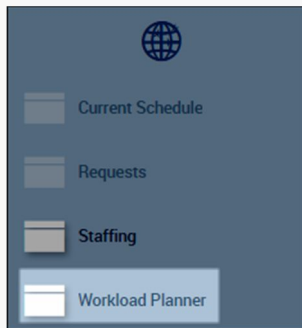
Advanced Scheduling assists with identifying labor needs and planning staffing resources to ensure that your staff is aligned with the amount of work that needs to be completed. Building the staffing matrix is the first element completed during the Plan phase. The main tool used to support this process is called Workload Planner. The Workload Planner is configured and updated based on annual budget matrices and the department core baseline staffing matrix.

### LEARNING SCENARIO

You want to access and view the workload plan in the Workload Planner.

#### ACCESS THE WORKLOAD PLANNER

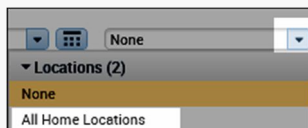
- 1 Click to open the **Workload Planner** from the Related Items pane.



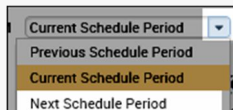
- 2 Click the **Maximize** icon to expand the Workload Planner workspace.



- 3 Click the drop-down arrow in the **Show** field and select which location to view in the Workload Planner.



- 4 Click the drop-down arrow in the Time Period field and select **Next Schedule Period**.

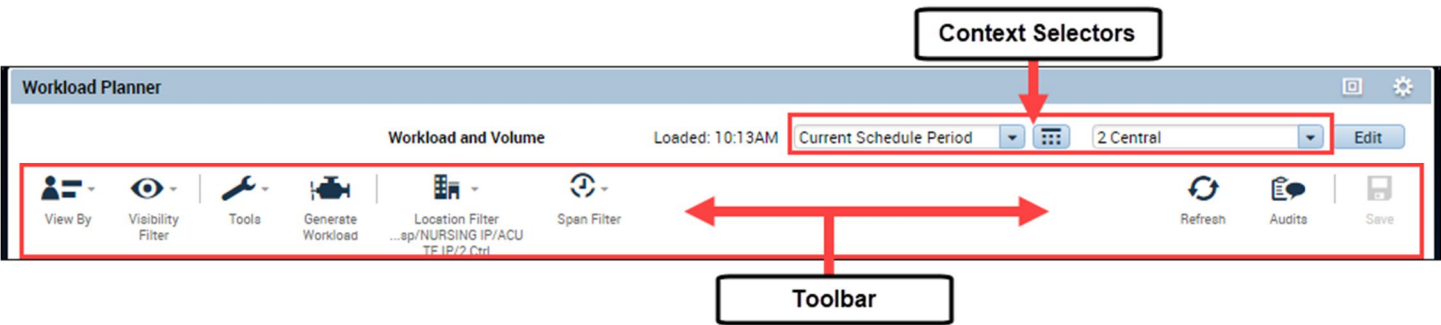


WORKLOAD PLANNER OVERVIEW

The Workload Planner includes two main areas; Header and Workspace. Both areas are described below.

HEADER

The header of the Workload Planner contains the following components:



Element	Description
Context Selectors	<p><b>Time Period</b> - Allows you to determine the timeframe you want to view. The time period you select determines what you see in the workspace.</p> <p><b>Show Field</b> - Determines which locations display in the Workload Planner workspace. The default is All Home locations.</p>
Toolbar	<p>Provides options for viewing and editing the workload plan.</p> <ul style="list-style-type: none"><li>• <b>View By</b> – Allows you to view Skill and Certification Profiles.</li><li>• <b>Visibility Filter</b> – Allows you to add or remove rows and columns.</li><li>• <b>Tools</b> – Allows you to:<ul style="list-style-type: none"><li>○ Add Volume</li><li>○ Add Workload Pattern</li><li>○ Lock</li><li>○ Unlock</li></ul></li><li>• <b>Generate Workload</b> – Allow you to run the Workload Generator. The Workload Generator is an Advanced Scheduling tool that generates staffing plans based on budget, plan or actual work volumes. For your organization, this is an automated process.</li><li>• <b>Location Filter</b> – Allows you to select another location. Other locations must be initially selected in the show field.</li><li>• <b>Span Filter</b> – Allows you to select or de-select spans.</li><li>• <b>Refresh</b> – Updates the information in the workspace with the most current data.</li><li>• <b>Audits</b> - Displays all workload audits made for the location selected.</li><li>• <b>Save</b> - Saves any changes to the database. The Save button illuminates when you need to save your changes.</li></ul>



## WORKSPACE

The Workload Planner allows you to view the staffing plan for your location. The graphic below illustrates the layout of the workspace.

Type

Required Staff

Job	Span	Type	Sun 8/02			Mon 8/03			Tue 8/04			Wed 8/05			Thu 8/06			Fri 8/07			Sat 8/08		
			Budg...	Plan	Actual	Budg...	Plan	Actual	Budg...	Plan	Actual	Budg...	Plan	Actual	Budg...	Plan	Actual	Budg...	Plan	Actual	Budg...	Plan	Actual
	Eve2	Volume																					
	Night	Volume																					
Clerk	Night	Workload																					
CNA	Day	Workload	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2
CNA	Eve1	Workload	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2
CNA	Eve2	Workload	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2
CNA	Night	Workload	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2
CNA	Day	Workload																					

Job

Time Span

Element	Description
Job	Lists each job in the selected location.
Time Span	Displays the zone category or shift times for the displayed job. <ul style="list-style-type: none"> <li><b>Zone</b> – A unique span of time during a workday for which coverage is measured. Used in units that schedule many shifts of varying lengths.</li> <li><b>Shift Set</b> – A collection of shifts for which coverage is measured. Contains definitive start and end designations for a time period for which work consistently needs to be measured.</li> </ul>
Type	Displays volume or workload.
Required Staff	Displays the coverage requirements for each date in the selected time period and job.

### ADDITIONAL INFORMATION

Staffing plans are automatically updated with the current census information during the Current Pay Period. Patient census comes from an import.

## UPDATING A WORKLOAD PLAN

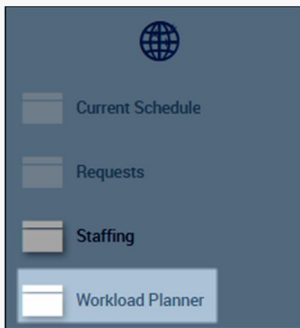
In Advanced Scheduling, your staffing requirements are referred to as workload requirements and are stored in the Workload Planner. If your staffing needs change for the target week, you can make adjustments to the workload plan before the schedule is generated.

### LEARNING SCENARIO

Due to the upcoming flu season, your workload needs to be updated so you can staff accordingly. Update the workload plan for the first week in the next schedule period.

#### UPDATE A WORKLOAD PLAN

- 1 Access the **Workload Planner**.



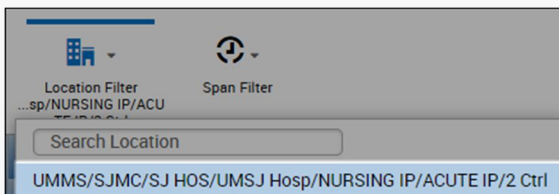
- 2 From the **Time Period** drop-down list, select the specific time period.



- 3 From the **Show** field select the appropriate location.



- 4 Click the **Filter by Location** drop-down arrow and select the workload plan you want to adjust.

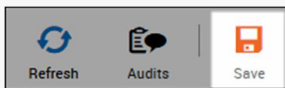


## UPDATE A WORKLOAD PLAN

5 Click the **Date** cell with the job and time span, and enter the number of employees needed.

Job	Span	Type	Sun 8/02			Mon 8/03			Tue 8/04		
			Budget	Plan	Actual	Budget	Plan	Actual	Budget	Plan	Actual
Clerk	Eve2	Workload									
Clerk	Night	Workload			2			2			
CNA	Day	Workload	2	2	2	2	2	2	2	2	2
CNA	Eve1	Workload	2	2	2	2	2	2	2	2	2

6 Click **Save**.



# MODULE 6: SCHEDULE GENERATION

---

## **MODULE OBJECTIVES:**

- Overview of open shifts.
- Review the open shifts batch process.
- Understand the steps to generate open shifts.

## OPEN SHIFT OVERVIEW

An open shift is a shift that is approved but has not been assigned to an employee.

## GENERATING OPEN SHIFTS

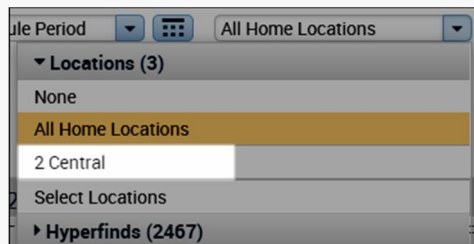
The Schedule Generator compares the workload plan to the existing scheduled shifts and identifies how many open shifts are needed in order to meet the staffing requirements. Open shifts are shifts that have been added to the schedule and have not been assigned to an employee. The Schedule Generator is accessible from the Current Schedule widget.

### LEARNING SCENARIO

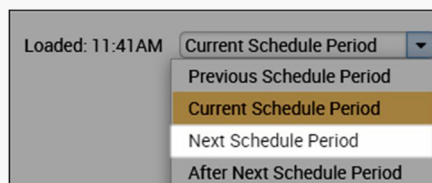
Known portions of the schedule are entered into the schedule for the next schedule period. You want to generate your open shifts so your employees can begin self-scheduling. Run the Schedule Generator for the next schedule period.

#### GENERATE OPEN SHIFTS

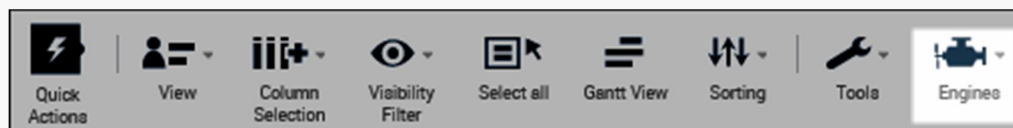
- 1 Click the drop-down arrow in the **Show** field and select the location for which you want to run the Schedule Generator.



- 2 From the **Time Period** field, click the drop-down arrow and select the date range for which you want to run the Schedule Generator.

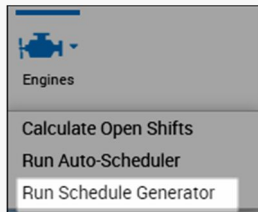


- 3 Click the **Engines** icon.

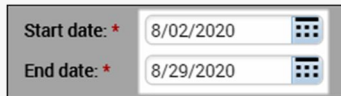


## GENERATE OPEN SHIFTS

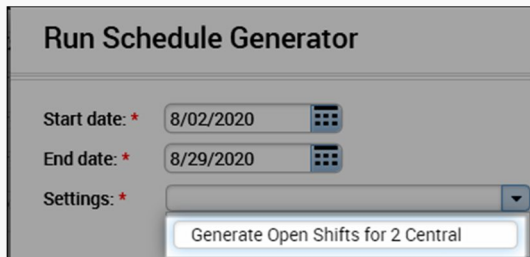
- 4 Select the **Engine** configured for your location.



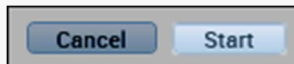
- 5 Use the Calendar icons to select the **Start** and **End Dates** for the time period you want to create open shifts.



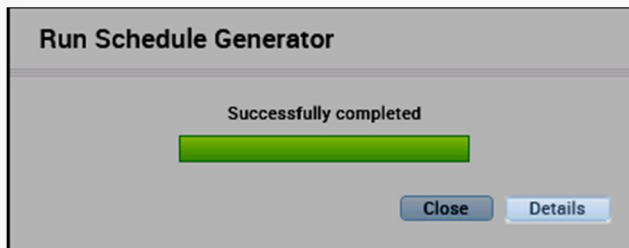
- 6 Select one of the options from the **Settings** drop-down list.



- 7 Click **Start**. The Schedule Generate displays a bar indicator while processing.

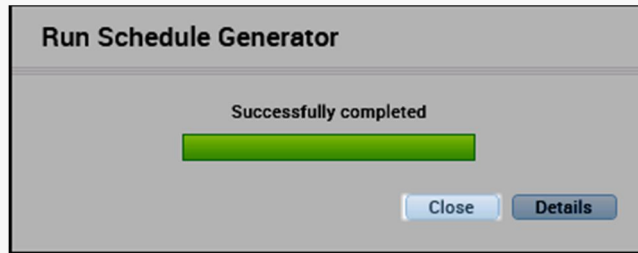


- 8 Optionally, click **Details** to view a list of actions that took place during the generation of shifts.

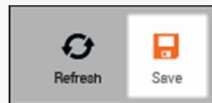


## GENERATE OPEN SHIFTS

9 Click **Close**.



10 Click **Save**.



### ADDITIONAL INFORMATION

- Some departments may not have the option to generate open shifts.
- At this point in the Scheduling Process, the self-scheduling request period is opened for those locations that self-schedule. You can learn about opening request periods in the web-based tutorial named Generating Shifts.

# MODULE 7: EVALUATING AND BALANCING THE NEXT SCHEDULE

---

## **MODULE OBJECTIVES:**

- Evaluate schedule coverage.
- Adjust schedule to meet updated staffing requirements.
- Identify and resolve schedule rule violations.
- Manually insert open shifts.
- Respond to open shift requests.
- Assign an open shift to an employee.
- Attach comments and notes.



## EVALUATING THE NEXT SCHEDULE

Many of the tabs in the Schedule Planner provide information to help you evaluate and balance your schedule, such as the Daily Coverage tab, Staffing Assistant tab and Rule Violations tab.

### EVALUATING SCHEDULE COVERAGE FROM THE DAILY COVERAGE TAB

The Daily Coverage tab helps you evaluate the schedule and determine coverage options for the next schedule period. The table below provides a description of coverage row display options:

View Options

Daily Coverage    Staffing Assistant    Rule Violations											
View	Counts	Job	NURSING IP/ACUTE IP/2 Ctrl/RN	Time Span	View All						
Day	4/4	6/4	5/4	1/4	1/4	1/4	0/4	0/4	1/4	1/4	
Eve1	3/4	5/4	4/4	1/4	1/4	1/4	0/4	0/4	1/4	1/4	
Eve2	0/4	0/4	0/4	0/4	0/4	0/4	0/4	0/4	0/4	0/4	
Night	0/4	0/4	0/4	0/4	0/4	0/4	0/4	0/4	2/4	0/4	0/4

Coverage Row Options

Daily Coverage    Staffing Assistant    Rule Violations											
View	Coverage	Job	NURSING IP/ACUTE IP/2 Ctrl/RN	Time Span	View All						
Day	4	6	5	1	1	1	0	0	1	1	
Eve1	3	5	4	1	1	1	0	0	1	1	
Eve2	0	0	0	0	0	0	0	0	0	0	
Night	0	0	0	0	0	0	0	0	2	0	0

#### Element

#### Description

#### View Options

Provides options for viewing coverage row data in different formats:

- **View**— Allows you to display your coverage row data in Counts or Coverage format.
- **Job** – Allows you to view your daily coverage one location and job at a time by making a selection from the job field.

Element	Description
Coverage Row Data	<ul style="list-style-type: none"> <li><b>Span</b> – Allows you to view your daily coverage for each zone. Zones split a 24 hour time span into 4-hour increments to easily identify a part of a day that is over or under covered.</li> </ul> <p>Provides daily coverage row data to quickly identify when there is more or less coverage than required for the View and Job selected:</p> <ul style="list-style-type: none"> <li><b>Counts</b> - Numerically displays scheduled and planned coverage data. i.e. 0/1 = under coverage by one employee (zero scheduled and one planned).</li> <li><b>Coverage</b> – Graphically displays scheduled and planned coverage data. The numeric value represents the number of employees scheduled and the bar graph color indicates if you are under, over, or fully staffed. Hold your cursor over the graph bar to locate specific time span gaps.</li> </ul>

### ADDITIONAL INFORMATION

If you discover that there are too many or too few employees scheduled, you can modify the schedule by adding or deleting shifts to meet the workload.


## STAFFING ASSISTANT

The staffing assistant tab allows you to select employees to fill open shifts based on a configured procedure set. A procedure set is a set of criteria defined by your organization to determine who would be the best fit to fill an open shift.

Daily Coverage   Staffing Assistant   Rule Violations						
Tue 8/04 12:00 am - 6:30 am ...ACUTE IP/2 Ctrl/RN   2 Central   Edit   1- PJ No OT   Load   Y						
No.	Outcome	Contacted On	On Premises	Person Name	Person ID	Job
1	Select	-		ADDONISIO, EILEEN	WFI-ADDONI...	RN
2	Select	-		Test, Manager or Timekeeper	WFI-TESTM...	RN
3	Select	-		Test, TimestampEETO	WFI-EMPLO...	RN
4	Select	-		Smith, Kara	WFI-SMITH	RN

## REVIEWING SCHEDULE RULES

A schedule rule violation occurs when a schedule breaks a predefined scheduling rule. As you review and adjust your upcoming schedule, you can check rule violations to evaluate compliance with your schedule policies and guidelines. If you encounter a schedule rule violation, you must revise the employee's schedule so it complies with the rules. There are two severity levels 1) Warning – You can correct or ignore a warning rule violation. A warning rule violation is saved in the database, and 2) Informational – a guideline was broken, but one with the lowest level of severity.

Daily Coverage   Staffing Assistant <b>Rule Violations</b>					
				Loaded 8/19/2020 2:30PM	
Date	Severity	Employee/Org.	Rule Type	Name	Description
8/02/2020	! Informational	Employee	The employee is sc...	Echronos	Not eligible to work the job Sitter in the shift star...

## LEARNING SCENARIO

As part of your evaluations you check to confirm whether the schedule is violating any schedule rules. If so, you make adjustments to the schedule and recheck the rules.

### REVIEW SCHEDULE RULES

- 1 Select the **Rule Violations** tab.


Daily Coverage   Staffing Assistant   **Rule Violations**

- 2 Optionally, select the **Filter** icon to sort the violations.



Date	Severity	Employee/Org.	Rule Type	Name
	(Select Filter)	(Select Filter)	(Select Filter)	

- 3 Review the details of each rule violation.

Daily Coverage   Staffing Assistant <b>Rule Violations</b>					
				Loaded 8/19/2020 2:30PM	
Date	Severity	Employee/Org.	Rule Type	Name	Description
8/02/2020	! Informational	Employee	The employee is sc...	Echronos	Not eligible to work the job Sitter in the shift star...

REVIEW SCHEDULE RULES

4

Perform the necessary schedule adjustments to remove the violation.

By Employee									
On P...	Person Name	Person ID	Job	Phon...	weekl...	Sche...	FTE	Skill	
Open Shifts[1] ▶									
	ADDONISIO, El...	WFI-ADDON...	RN	1222...	0.00	0.00 -...		CHG	
	E Kronos	EKRONOS	RN	1236...	36.00	36.00...			

Sun 8/0...

E Kronos

0700-1930

1. 7:00AM [12:30]: Transfer

UMMS/SJMC/SJ HOS/UMSJ Hosp/NURSING IP/ACUTE IP/2 Ctrl/Sitter

7:00AM - 7:30PM			
7:00AM - 7:30PM (x)	7:00AM - 7:30PM	7:00AM - 7:30PM	

## MAKING SCHEDULE ADJUSTMENTS

After evaluating coverage, hours, and rule violations, you might need to apply edits before posting the schedule. Editing schedules can include previously covered tasks such as:

- Assigning any remaining open shifts.
- Adding or extending shifts to address under coverage.
- Deleting or shortening shifts to address over coverage.

## CREATING OPEN SHIFTS MANUALLY

You can create open shifts as placeholders for shifts that you need to fill to meet your coverage requirements.

### LEARNING SCENARIO

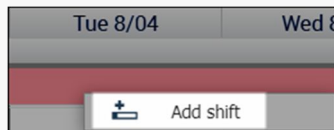
After the schedule for the next period is evaluated, you determine you need two new shifts for the first Saturday.

#### CREATE AN OPEN SHIFT

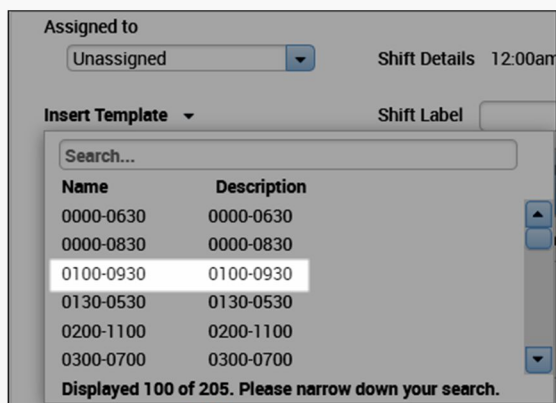
- 1 Right-click the **Date** cell for the day you want to create a shift in the pink **Open Shifts** area of the schedule grid.

By Employee		8/02 - 8/08	8/09 - 8/15	8/16 - 8/22	8/23 - 8/29
On P...	Person Name	Sun 8/02	Mon 8/03	Tue 8/04	Wed 8/05
Open Shifts[1] ▾		1			
...ITE IP/2 Ctrl/RN		9:00AM - 9:00PM			

- 2 Select **Add Shift**.



- 3 Click **Insert Template** and select the applicable shift template.



## CREATE AN OPEN SHIFT

4 Click the **Job Transfer** field.

Assigned to  Shift Details 12:00am-6:30am(6:30h) Primary Job None

Insert Template  Repeat this shift for  days

	Start Date	Type	Start Time	End Time	End Date	Duration	Job Transfer	Labor Level Transfer	Work Rule Transfer
<input type="button" value="+"/> <input type="button" value="x"/>	8/04/2020	Regular	12:00am	6:30am	8/04/2020	6:30	<input type="text" value=""/>		

5 Select **Search**.

Insert Template  Repeat this shift for  days

	Start Date	Type	Start Time	End Time	End Date	Duration	Job Transfer	Labor Level Transfer
<input type="button" value="+"/> <input type="button" value="x"/>	8/04/2020	Regular	12:00am	6:30am	8/04/2020	6:30	<input type="text" value=""/>	

UMMS/SJMC/SJ HOS/UMSJ H

Search...

6 In the **Transfer** dialog box, click the plus signs + to expand the organizational map and select the location and job for which you want to create an open shift.

- ☐ ACUTE IP 6/11/2020 - Forever
- ☒ 2 Ctrl 6/11/2020 - Forever
  - ☐ Chg 6/11/2020 - Forever
  - ☐ Clerk 6/11/2020 - Forever
  - ☐ CNA 6/11/2020 - Forever
  - ☐ Coord 6/11/2020 - Forever
  - ☐ NM 6/11/2020 - Forever
  - ☐ Orient 6/11/2020 - Forever
  - ☐ RN 6/11/2020 - Forever

7 Optionally, enter the number of consecutive days to repeat the shift in the **Repeat this shift for** field.

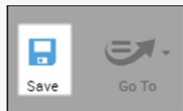
Primary Job None

Repeat this shift for  days

8 Click **Apply**.

## CREATE AN OPEN SHIFT

9 Click **Save**.



## ASSIGNING REMAINING OPEN SHIFTS

An open shift is identified in red font and is located in the workspace of the Current Schedule widget. Advanced Scheduling provides different methods for assigning an employee to an open shift. You can assign employees using one of the following methods:

- **Staffing Assistant** – used when choosing an employee to assign the entire shift and who matches 100% of the qualification criteria.
- **Designate an Employee** – used when you know which employee is filling the shift.

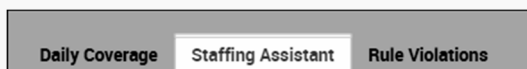
## USE THE STAFFING ASSISTANT TAB TO ASSIGN AN OPEN SHIFT

### LEARNING SCENARIO

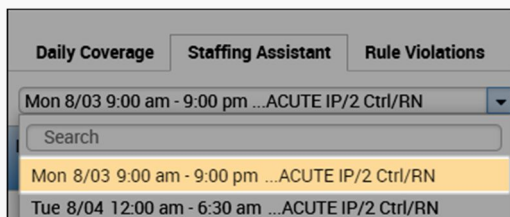
You have an open shift in the next schedule period, you use the Staffing Assistant to review employee availability and assign the open shift to the most eligible employee.

## ASSIGN AN OPEN SHIFT USING THE STAFFING ASSISTANT TAB

1 Click the **Staffing Assistant** tab.



2 Click the **Shift** drop-down arrow and select the open shift you want to assign.



## ASSIGN AN OPEN SHIFT USING THE STAFFING ASSISTANT TAB

- 3 Click the drop-down arrow in the **Sorting and Matching Procedure** field and select a procedure set.

A screenshot of a software interface showing a dropdown menu for 'Sorting and Matching Procedure'. The menu is open, displaying several options: '1- PJ No OT', '2- PJ and JTS No OT', '3- PJ allow OT', '4 - PJ and JTS allow OT', 'Can cover for selected job', 'Primary Job and Available', 'Primary Job and Most Senior', and '1- PJ No OT' at the bottom. A 'Load' button is visible to the right of the dropdown.

- 4 Click **Load**.

A screenshot of a software interface showing a dropdown menu with the text 'Can cover for selected job' and a 'Load' button next to it.

- 5 Click the drop-down arrow in the **Outcome** field to assign the employee to the shift.

No.	Outcome	Contacted On	% M...	Name	Primary Org	Job	Selected Job Seniority	Expected t Week
1	Select	-	0	Kronos	...NURSING IP/ACUTE IP/2 Ctrl	RN	n/a	36:00
2	Select	-	0	Test, Timestamp...	...NURSING IP/ACUTE IP/2 Ctrl	RN	n/a	0:00
3	Select	-	0	Smith, Kara	...NURSING IP/ACUTE IP/2 Ctrl	RN	n/a	0:00
4	Select	-	0	ADDONISIO, EILE...	...NURSING IP/ACUTE IP/2 Ctrl	RN	n/a	0:00

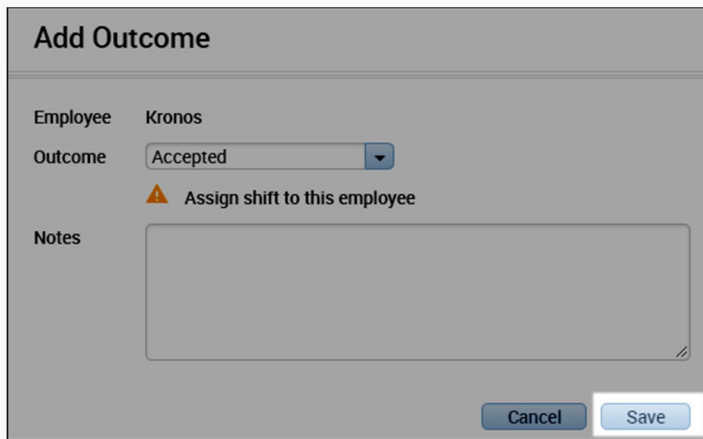
- 6 Click **Accepted**.

No.	Outcome	Contacted On
1	Please Choose:	-
2	Accepted	-
3	ESS	-



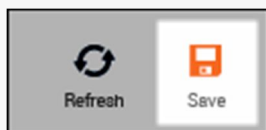
## ASSIGN AN OPEN SHIFT USING THE STAFFING ASSISTANT TAB

- Review the Add Outcome dialogue box and click **Save**.



The 'Add Outcome' dialogue box is shown. It has a title bar 'Add Outcome'. Inside, there is a label 'Employee' with the value 'Kronos'. Below it is a label 'Outcome' with a dropdown menu showing 'Accepted'. A warning icon (yellow triangle) is next to the text 'Assign shift to this employee'. There is a large text area for 'Notes'. At the bottom right are two buttons: 'Cancel' and 'Save'.

- Click **Save**.



## ASSIGN AN OPEN SHIFT MANUALLY

### LEARNING SCENARIO

To address under coverage in the next schedule period, you assign an open shift to an employee using Quick Actions.

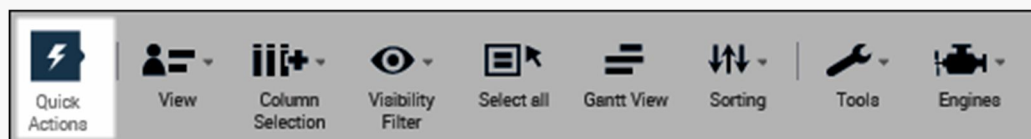
#### DESIGNATE AN EMPLOYEE TO AN OPEN SHIFT

- Click the red **Open Shifts** link at the top of the schedule to expand the open shifts area.



The 'By Employee' table is shown. It has a header row with columns: 'Name', 'Sch...', 'L...', 'J...', and 'S...'. Below the header, there is a row with the text 'Open Shifts[30...' in red.

- Click the **Quick Actions** icon.



## DESIGNATE AN EMPLOYEE TO AN OPEN SHIFT

3 Select **Assign**.



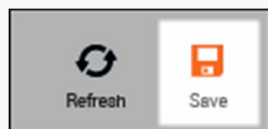
4 Click the **Open Shift** you want to assign to an employee.

By Employee								8/		
On P...	Person Name	Job	Phon...	weekl...	Sche...	FTE	Skill	S 02	M 03	T 04
Open Shifts[1] ▾								1		
... E IP/7 West/RN								5:30A		

5 Click the **Date** cell for the employee to which you want to assign the shift.

By Employee								8/		
On P...	Person Name	Job	Phon...	weekl...	Sche...	FTE	Skill	S 02	M 03	T 04
Open Shifts[1] ▾								1		
... E IP/7 West/RN								5:30A		
	ADDONISIO, El...	RN	1222...	0:00	0:00 -...		CHG	7:00A	7:00A	7:00A
	!Ekronos	RN	1236...	36:00	36:00...			7:00A	7:00A	7:00A
	Grayson, Wayn...	RN	1555...	40:00	57:30...			Absen	9:00A	
	!Kronos	RN	1222...	36:00	20:00...		CHG	7:00A		1:00A

6 Click **Save**.



## DELETING A SHIFT VS. UNASSIGNING A SHIFT

If an employee is no longer working a specific shift, and the shift does not need to be filled, you can delete the shift from the schedule. If the employee's schedule changes, you are expected to update the Current Schedule widget accordingly, so the employee does not receive an exception in the timecard. If an employee can no longer work a shift, you can unassign the employee's shift. This removes the shift from the employee's schedule and creates an open shift.

## UNASSIGNING A SHIFT

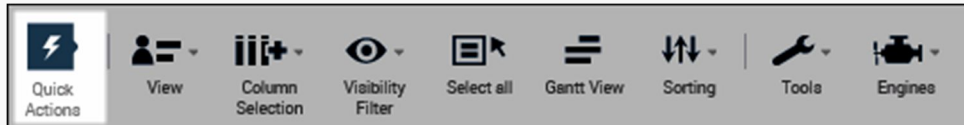
An employee is unavailable to work an assigned shift. You can unassign the shift so it can be reassigned to someone else.

### LEARNING SCENARIO

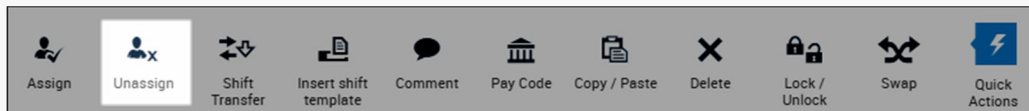
Your employee is unavailable to work an assigned shift. You unassign the shift so it can be reassigned to someone else.

#### UNASSIGN AN OPEN SHIFT

- 1 Click the **Quick Actions** icon.



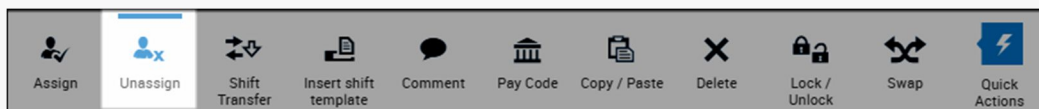
- 2 Select **Unassign**.



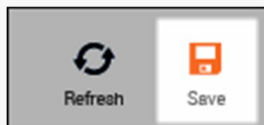
- 3 Click the shift you want to unassign.

By Employee								8/02 - 8/05			
On P...	Person Name	Job	Phon...	weekl...	Sche...	FTE	Skill	S 02	M 03	T 04	W 05
Open Shifts ▾											
	ADDONISIO, EI...	RN	1222...	0:00	0:00 - ...		CHG	7:00A	7:00A	7:00A	
	!Kronos	RN	1236...	36:00	36:00...			7:00A	7:00A	7:00A	
	Grayson, Wayn...	RN	1555...	40:00	57:30...				Absen	9:00A	9:00A
	!Kronos	RN	1222...	36:00	32:00...		CHG	7:00A	5:30A	1:00A	

- 4 Click the **Delete** icon to disable the action.



- 5 Click **Save**.



## ATTACHING COMMENTS AND NOTES

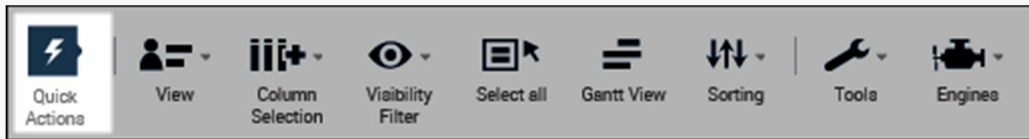
Comments provide additional useful information about a shift or a pay code edit. When attaching a comment, you can also add a free-form text note to provide additional details.

### LEARNING SCENARIO

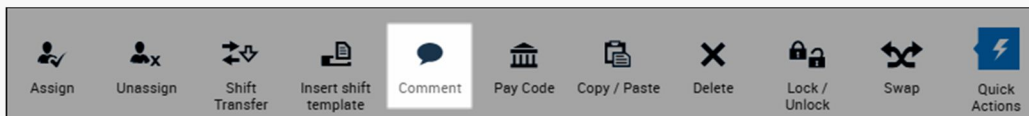
After an employee failed to show up for work you attach a comment.

#### ATTACH A COMMENT TO A SHIFT

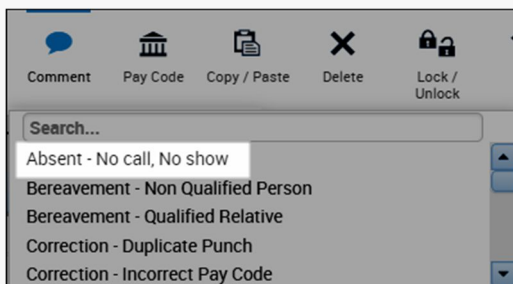
- 1 Click the **Quick Action** icon to expand the toolbar.



- 2 Click **Comment**.



- 3 Select the applicable comment from the drop-down list.



## ATTACH A COMMENT TO A SHIFT

4 Click the **shift** that requires a comment.

By Employee								8/02 - 8/08			8/09 -
On P...	Person Name	Job	Phon...	week...	Sche...	FTE	Skill	Sun 8/02	Mon 8/03	Tue 8/04	
Open Shifts											
	ADDONISIO, El...	RN	1222...	0:00	0:00 - ...		CHG	7:00AM - 7:30PM	7:00AM - 7:30PM	7:00AM - 7:30PM	
	!Ekronos	RN	1236...	36:00	36:00...			7:00AM - 7:30PM (x)	7:00AM - 7:30PM	7:00AM - 7:30PM	
	Grayson, Wayn...	RN	1555...	40:00	57:30...				Absent Without Pay [11:30]	9:00AM - 9:00PM	
	!Kronos	RN	1222...	36:00	32:00...		CHG	7:00AM - 7:30PM	5:30AM - 6:00PM (x)	1:00AM - 9:30AM (x)	

5 Hold your mouse over the shift to view the comment.

8/02 - 8/08		8/09 - 8/15	
n 8/02	Mon 8/03		8/05
		<b>Grayson, Wayne S</b> <b>Absent Without Pay (11:30 8/03)</b> Comments (1) Absent - No call, No show	
30PM	7:00AM - 7:30PM		
30PM (x)	7:00AM - 7:30PM		
Absent Without Pay [11:30]		9:00AM - 9:00PM	9:00AM - 9:00PM

6 Click the **Comment** icon to disable the quick action.

Assign	Unassign	Shift Transfer	Insert shift template	Comment	Pay Code	Copy / Paste	Delete	Swap

7 Click **Save**.

Refresh	Save

## ADDITIONAL INFORMATION

To add a note to a comment, you edit a shift or pay code. A text field labeled 'Add another note' displays under the comment where you can enter the applicable note.

# MODULE 8: FINALIZING THE NEXT SCHEDULE

---

## **MODULE OBJECTIVES:**

- Post the schedule.
- Manage posted schedules.
- Generate a printable schedule.

## POSTING THE NEXT SCHEDULE

When the schedule is satisfactory you can post it to make it available so that employees know when and where they are scheduled to work.

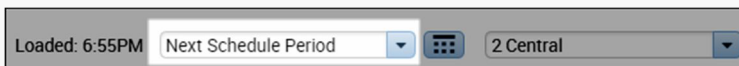
When you post a schedule in Advanced Scheduling, the system saves a copy of the schedule to the database and creates an audit trail. Marking a schedule as posted allows Advanced Scheduling to track the number of changes made to a schedule after it is completed.

### LEARNING SCENARIO

You have completed your schedule for the next schedule period and need to post the schedule for your employees. Post the schedule.

#### POST THE SCHEDULE

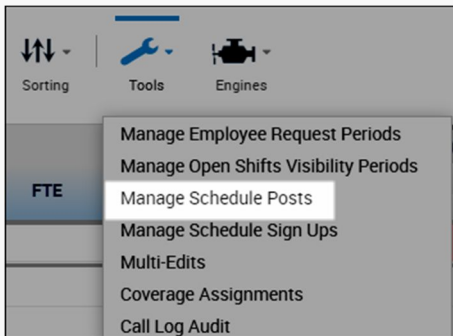
- 1 Click the drop-down arrow in the **Time Period** field and select **Next Schedule Period**.

A screenshot of a software interface showing a dropdown menu. The menu is open, displaying 'Next Schedule Period' as the selected option. To the left of the dropdown is a text field containing 'Loaded: 6:55PM'. To the right is a button with a grid icon and a dropdown menu showing '2 Central'.

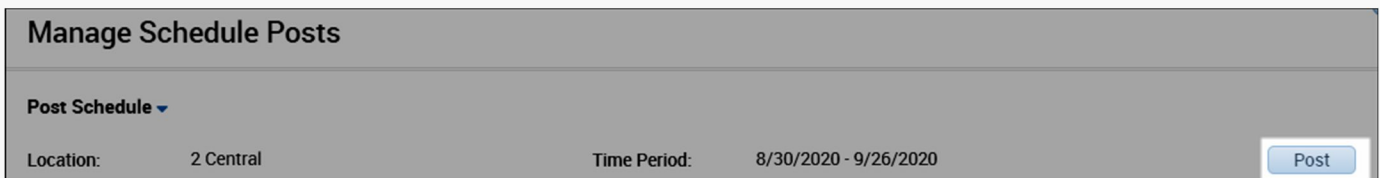
- 2 From the **Show** field select a location to post.

A screenshot of a software interface showing a dropdown menu. The menu is open, displaying '2 Central' as the selected option. To the left of the dropdown is a text field containing 'Loaded: 6:55PM'. To the right is a button with a grid icon and a dropdown menu showing '2 Central'.

- 3 Click the **Tools** icon and select **Manage Schedule Posts**.

A screenshot of a software interface showing a dropdown menu. The menu is open, displaying 'Manage Schedule Posts' as the selected option. The menu is titled 'Tools' and includes options: 'Manage Employee Request Periods', 'Manage Open Shifts Visibility Periods', 'Manage Schedule Posts', 'Manage Schedule Sign Ups', 'Multi-Edits', 'Coverage Assignments', and 'Call Log Audit'. To the left of the dropdown is a text field containing 'Loaded: 6:55PM'. To the right is a button with a grid icon and a dropdown menu showing '2 Central'.

- 4 Click **Post**.

A screenshot of a software interface showing a dialog box titled 'Manage Schedule Posts'. The dialog box has a 'Post Schedule' dropdown menu. Below the dropdown, there are two fields: 'Location:' with the value '2 Central' and 'Time Period:' with the value '8/30/2020 - 9/26/2020'. A 'Post' button is located in the bottom right corner of the dialog box.

## POST THE SCHEDULE

5 Click **Yes** to confirm the posting.

Post Schedule

⚠ Are you sure that you want to post the schedule for the displayed locations and jobs for time period?

8/02/2020 - 8/29/2020

Cancel Yes

6 Verify the schedule successfully posted and then click **Done**.

Manage Schedule Posts

Post Schedule ▶

Posted Schedules ▼

Filter by location: All Unpost

	Date	Time	User	Location	Job	Date Range
<input type="checkbox"/>	8/23/2020	11:15am	Kronos	...hosp/NURSING IP/ACUTE IP/2 Ctrl	RN	8/02/2020 - 8/29/2020

Audit ▶

Done

## POLICY

Not all units are required to post the schedule manually.

## ADDITIONAL INFORMATION

Once the schedule is posted, it is visible to the employees in Kronos Employees Self-Service and they are able to submit schedule requests (i.e. swap shifts).



## GENERATING SCHEDULE REPORTS

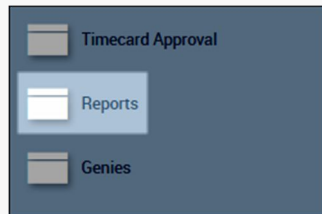
You can generate reports when you need a printed copy of scheduling information to support the daily evaluation process and quickly identify any schedule variances. Several reports are useful for evaluating the previous, current or next schedule.

### LEARNING SCENARIO

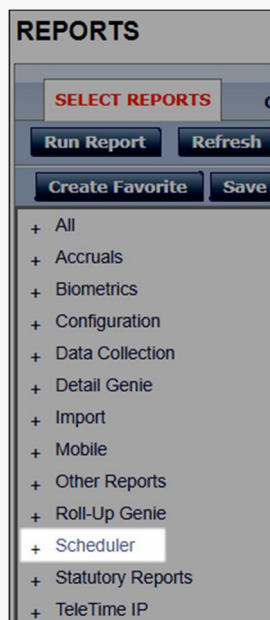
You want to post a copy of next week's schedule on the wall. You run the Location Schedule - Weekly or Location Schedule by Coverage report so employees can view their schedules.

#### GENERATE SCHEDULE REPORTS

- 1 Click **Reports** in the Related Items pane.



- 2 Click the **+** sign preceding the **Advanced Scheduling** report category.



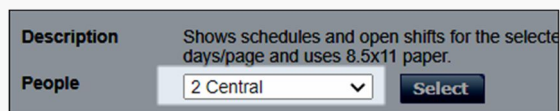
## GENERATE SCHEDULE REPORTS

- 3 Select the **Report Name** you want to generate.



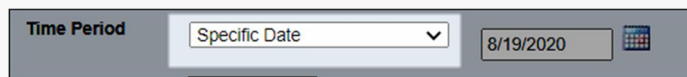
A screenshot of a dropdown menu for selecting a report name. The menu is open, showing a list of options. The first option, 'Location Schedule - Weekly', is highlighted with a light blue background. Other options include 'Location Schedule with Coverage', 'Location Schedule with Coverage (Spreadsheet Export)', 'Location Schedule with Coverage - 6 weeks', 'On Call', and 'Open Shifts - Monthly'.

- 4 Click the drop-down arrow in the **People** field and select the group of employees you want to include on the report.



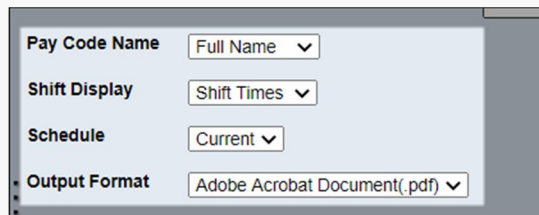
A screenshot of the 'People' field in the report generation interface. It shows a dropdown menu with '2 Central' selected. To the right of the dropdown is a 'Select' button. Above the dropdown, a description reads: 'Shows schedules and open shifts for the selected days/page and uses 8.5x11 paper.'

- 5 Click the drop-down arrow in the **Time Period** field and select the timeframe for the report.



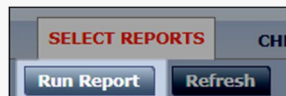
A screenshot of the 'Time Period' field. It shows a dropdown menu with 'Specific Date' selected. To the right of the dropdown is a date input field showing '8/19/2020' and a calendar icon.

- 6 Click the drop-down arrows in the fields to enter additional report options.



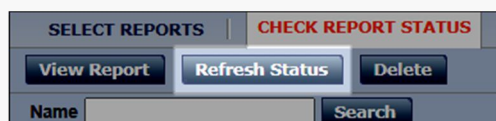
A screenshot of a panel for additional report options. It contains four dropdown menus: 'Pay Code Name' (set to 'Full Name'), 'Shift Display' (set to 'Shift Times'), 'Schedule' (set to 'Current'), and 'Output Format' (set to 'Adobe Acrobat Document(.pdf)').

- 7 Click **Run Report**. The application automatically displays the **Check Run Status** tab.



A screenshot of the report generation interface showing two buttons: 'Run Report' and 'Refresh'. Above them is a tab labeled 'SELECT REPORTS'.

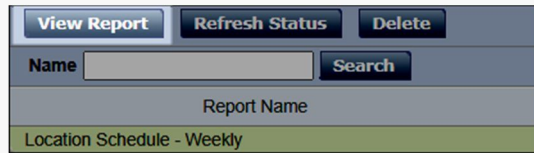
- 8 Click **Refresh Status** until **Complete** displays in the **Status** column.



A screenshot of the report generation interface showing a tab labeled 'CHECK REPORT STATUS'. Below the tab are three buttons: 'View Report', 'Refresh Status', and 'Delete'. At the bottom, there is a search bar with the label 'Name' and a 'Search' button.

## GENERATE SCHEDULE REPORTS

**9** To view the report, click **View Report**.



**10** Click **X** to close the report.



### ADDITIONAL INFORMATION

The parameters can vary for each report (and some reports have no parameters).

# MODULE 9: SMS QUICKFILL

---

## ***MODULE OBJECTIVES:***

- Overview of SMS QuickFill.

## SMS QUICKFILL OVERVIEW

With SMS QuickFill you can offer an open shift to the list of employees who meet the shift criteria. Once a response is received from an employee, the Current Schedule widget automatically assigns the employee to the shift or contacts you to perform the assignment, depending on the option selected in the How to assign field.

The screenshot shows the 'Contact' window with the following elements highlighted by callouts:

- Shift Details:** A red box highlights the 'Parameters' section, which includes:
  - Task: Fill Open Shift
  - Shift Date: 12/29/2014
  - Start Time: 7:00AM
  - Duration: 8:30
  - Location: (empty)
  - Job: RN
- Employee:** A red box highlights the 'Employees to Contact' table, which lists four employees: Johnson, Joe; Anderson, Jane; Jones, Mike; and Black, Alex. Each row has checkboxes for selection.
- Action Buttons:** A red box highlights the 'Send', 'Cancel', and 'Help' buttons at the bottom of the window.
- Contact Options:** A red box highlights the 'Open shifts to assign' (set to 1) and the 'How to assign' dropdown menu (set to 'Assign to First to Accept').

Element	Description
Shift Details	Lists the details of the open shift you are offering.
Employee List	Displays a list of Employees to Contact who are qualified to work the shift.
Action Buttons	Sends or cancels the notification.
Contact Options	<ul style="list-style-type: none"> <li>• <b>Open shifts to assign</b> – Allows you to change the total number of open shifts with the same date, times, and job you want to offer.</li> <li>• <b>How to assign</b> – Displays different options for assigning the shift:               <ul style="list-style-type: none"> <li>○ <i>Assign to First to Accept:</i> Automatically assigns the open shift to the first employee that accepts the open shift and sends an email to the Advanced Scheduling as to who accepted and filled the shift.</li> <li>○ <i>Offer to All, Assign to Match Order:</i> Allows you to specify the number of minutes for employees to respond. After the specified minutes have passed, you can choose from the match list of employees who responded and assign it to the employee who is most qualified or has the most seniority.</li> </ul> </li> </ul>

Element	Description
	<ul style="list-style-type: none"> <li>○ <i>Call Sequentially by Priority</i>: Allows you to specify the number of minutes between sequentially contacting employees and notifies you when an employee is located for assignment.</li> <li>• <b>Contact method</b> - Allows you to choose which method you want to use when you offer an open shift to employees. You can elect to send an SMS, Kmail, or both to employees. <ul style="list-style-type: none"> <li>○ <b>SMS</b> – Employee receives the notification via text message.</li> <li>○ <b>Email</b> – Employee receives the notification in their Kronos Inbox.</li> </ul> </li> </ul>

### ADDITIONAL INFORMATION

Assign to First to Accept is the only assignment option that automatically assigns an employee to the open shift. You need to manually assign the employee to the open shift when a different assignment option is selected.

## VIEWING SMS QUICKFILL NOTIFICATIONS

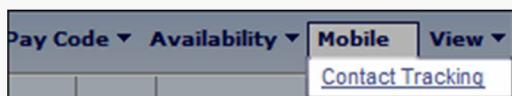
The Current Schedule widget saves notifications to the database and initiates an audit trail log to capture all of the contact tasks that have taken place and the current status of the notification.

### LEARNING SCENARIO

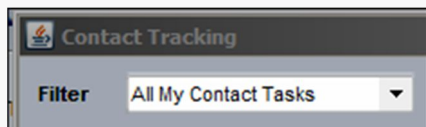
You want to check the status of a notification you sent out earlier in the day for an open shift.

#### ACCESS SMS QUICKFILL

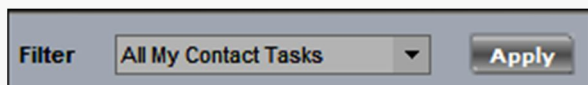
- 1 Select **Mobile>Contact Tracking** from the menu bar in the Current Schedule widget. The Contact Tracking window appears.



- 2 Click the drop-down arrow in the **Filter** field and choose a contact task to display (i.e. All or by employee name).

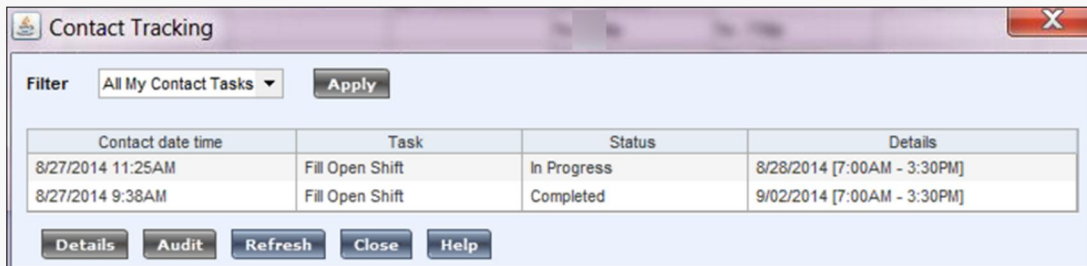


- 3 Click **Apply**.



## ACCESS SMS QUICKFILL

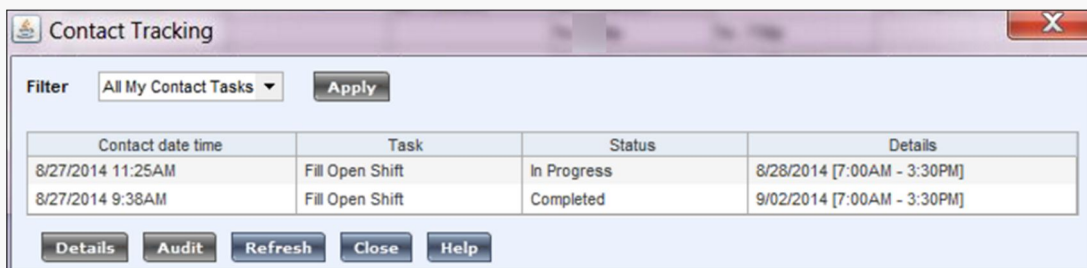
- 4 Review the list of **Contact Tasks** for the filter selected.



The screenshot shows a window titled "Contact Tracking" with a close button (X) in the top right corner. Below the title bar is a filter section with a dropdown menu set to "All My Contact Tasks" and an "Apply" button. Below the filter is a table with four columns: "Contact date time", "Task", "Status", and "Details". The table contains two rows of data. Below the table are five buttons: "Details", "Audit", "Refresh", "Close", and "Help".

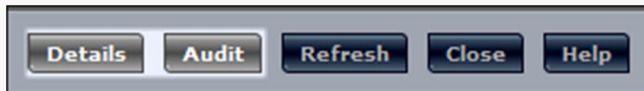
Contact date time	Task	Status	Details
8/27/2014 11:25AM	Fill Open Shift	In Progress	8/28/2014 [7:00AM - 3:30PM]
8/27/2014 9:38AM	Fill Open Shift	Completed	9/02/2014 [7:00AM - 3:30PM]

- 5 Review the list of **Contact Tasks** for the filter selected.



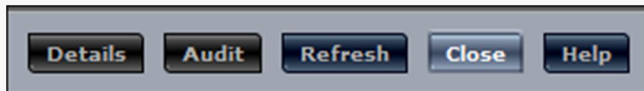
This screenshot is identical to the one above, showing the "Contact Tracking" window with the same filter, table, and buttons.

- 6 Optionally, select a contact task and click the **Details** or the **Audit** button to display additional details about a task.



A close-up of the button bar at the bottom of the window, showing the "Details", "Audit", "Refresh", "Close", and "Help" buttons.

- 7 Click **Close**.



A close-up of the button bar at the bottom of the window, showing the "Details", "Audit", "Refresh", "Close", and "Help" buttons.

## ADDITIONAL INFORMATION

Generate the Quickfill Details report when you need a printed copy of the Quickfill audit details.