

Supervisor Overview for Staffing and Scheduling

Log In and Home Screen

API HEALTHCARE

Time and Attendance Staffing and Scheduling

2015.1

Take control of your employee data and achieve a better work-life balance with API Healthcare's Time and Attendance and Staffing and Scheduling Solution. Review your time cards, track hours worked, view your schedule, request open shifts and more when it's convenient for you.

API HEALTHCARE

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Welcome

Please sign in to your account

User Name

Password

Domain

Quick Badge Only

Sign In

- On the login screen, enter your Active Directory User Name and Password, and click the Sign-in button. You will then be taken to your Home Page:

Home Quick Badge Employee Configuration Reports Actions Preferences Help Log Out

Good Afternoon, Rick

My Announcements
Announcements do not exist.
Add Announcement

My Unread Messages (36)

My Transaction Requests

My Requests to Work

My Unavailability Requests

My Trade Requests

My Schedule

My Calendar - Month View

My Bookmarks

Employees With Exceptions Counts

Employee Pending Requests

Employee Overtime Percentages (Actual)

Employee Approval Percentages

My Expiring Licenses

My Announcements and My Unread Messages Cards

- Announcements and messages are two methods of communicating within Staffing and Scheduling. The My Announcements card is updated when any special information needs to be communicated to all or groups of employees.
- My Unread Messages Card contains messages directed to you personally. You can click on the yellow folder next to a message to open a screen where you can delete or mark it as read or unread.

My Transaction Requests Card

- The My Transaction Requests Card displays requests that you have made for yourself for calendars, clockings and adjustments. In the status column a blue OK means the request has been approved. Requests that are still pending will have a checkmark and can be changed or cancelled. You can see more information by clicking the folder next to the request to open it.

My Unavailability Requests Card

- My Unavailability Requests Card is the area used for employees to request days to not be included on the schedule. For example, someone taking a class one day a week for a period of weeks can request to not be scheduled the days they have classes.

My Schedule Card

- Looking at the My Schedule Card will show schedules for 2 weeks starting from the current date. Viewing this schedule can be a quick way to see where or when an employee is working today and for the next two weeks. Keep in mind, this schedule will not show yesterday's schedule. The date is the start date of the shift.
- The Code column shows the Activity Code. An Activity Code is a shift to work. These will show as the start time in military time with a dash and the length of the shift.
- You are also given the start time and length of the shift in the time and hours columns, the department where you are scheduled to work, your job class and Profile. A Profile is the job or task to be worked that day. These will normally be named as an abbreviation with a dash and the location.

My Calendar - Month View Card

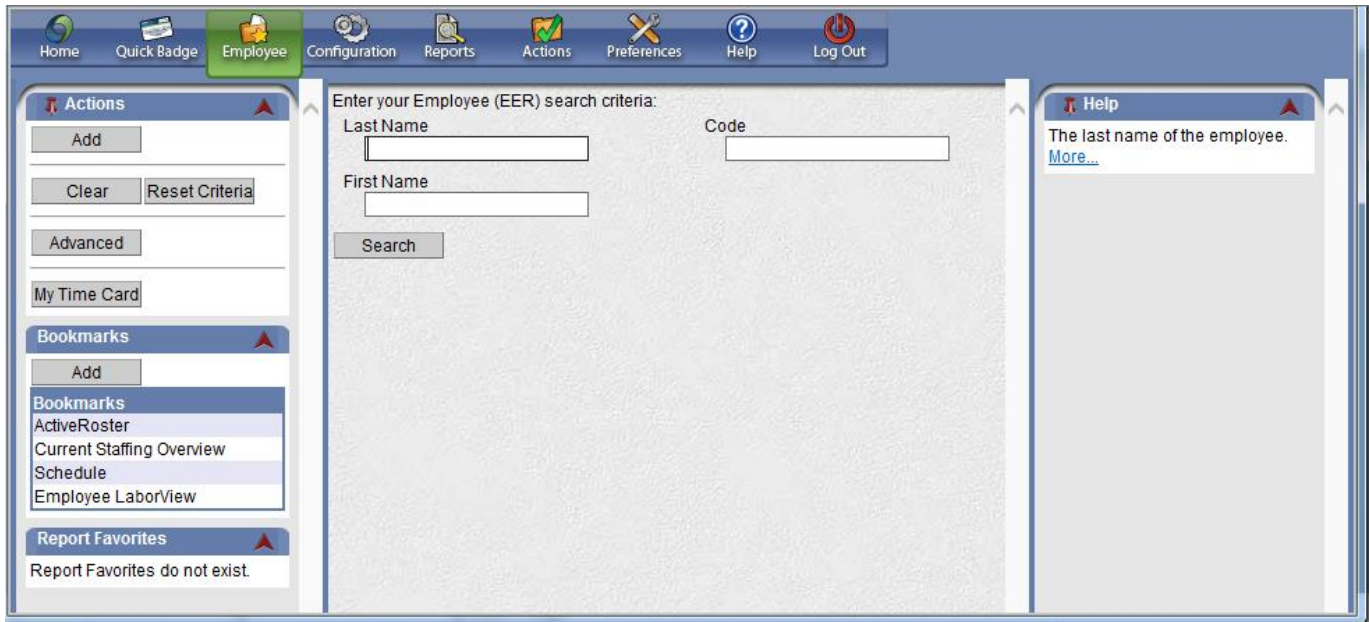
- The My Calendar - Month View Card allows you to see a view of your calendar a month at a time. The large letter "S" denotes a schedule. To see the details, rest your mouse on the "S". This view will also show requests and Calendars.

My Expiring Licenses Card

- You can view any licenses that are expiring within 90 days in My Expiring Licenses Card. If you are also going to be editing or approving employee's time cards, you will see other cards on the right side of your home screen. Most of your time in the solution will be spent looking at and working on employee's records.
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Employee Screen

Employee Search



- The first time you click on the Employee icon from the home page you are taken to the basic employee search screen. If you leave the fields blank and click Search it will return every employee currently assigned to you.
- The Advanced search option provides additional fields used to narrow your results. In the Advanced search are several tabs: General, Labor Distribution and Classification. The options in these tabs allow you to narrow down your employee search.
- For example, In the General Tab you may type codes into the empty fields to search by an employee's status, badge number or hire date.
- Once you click Search, you can click the check boxes next to individual employees, or click the "All" box at the top of the results list to select all employees.
- Clicking a folder next to an employee's name will take you to their Time Card Screen.
- When multiple employees are selected, you can toggle through all of them by using the RED arrows at the top of the Employee Navigator to take you to the next record or the previous one.
- To return to the Employee Search screen, click either Back to Search Results or the Search button.

Time Card Screen

The screenshot displays the Employee Time Card Screen for Vincent Smith (Employee ID: 100045) for the pay period 05/31/2015 - 06/13/2015. The interface is divided into several sections:

- Employee Navigator:** Shows employee details and navigation options.
- Transaction List:** A table listing transactions with columns for Transactions, Date, Time, Hours, Code, Department, and Job Class.

| Transactions | Date | Time | Hours | Code | Department | Job Class |
|--------------|----------------|-------|-------|--------|------------|-----------|
| | Thu 06/04/2015 | 08:00 | 8.00 | HONCL | 97632 | S40336 |
| IN | Tue 06/09/2015 | 08:00 | | CB---- | 97632 | S40336 |
| OUT | Tue 06/09/2015 | 12:00 | | CB---- | 97632 | S40336 |
- Employee Authorization Information:** A section for authorization details.
- Assignments:** A section for assignment details.
- Exceptions:** A table listing exceptions with columns for Posted, Description, Type, and Created.

| Posted | Description | Type | Created |
|------------|--|-------------|------------------|
| 06/04/2015 | Ineligible Pay Code submitted | Calculation | 01/21/2016 14:15 |
| 06/09/2015 | An ineligible employee used the Called-In Special Code | Calculation | 12/01/2015 10:29 |
- Benefit Balances:** A section for benefit balance information.
- Requests:** A section for request information.
- Notes:** A section for notes.
- Supervisors:** A section for supervisor information.
- Pay Distributions (Daily Hours):** A summary showing AH: 0.00 and Total: 0.00. It includes a table for Department 97632 and Job Class S40336.

| 31 | 1 | 2 | 3 | 4 | 5 | 6 | Totals |
|----|----|----|----|----|----|----|--------|
| Su | Mo | Tu | We | Th | Fr | Sa | |
| | | | | | | | 0 |
- Pay Distributions (Actual Hours):** AH: 0.00, Total: 0.00.
- Pay Distributions (Transactions):**
- Pay Distributions (Standard Categories):**

- The Employee Time Card Screen is divided into several sections.
- The top portion of the Employee Time Card Screen shows the list of transactions for a pay period. This is where you can see schedules, clockings, and calendar entries for requested and approved days off.
- The lower portion of the Employee Time Card Screen is divided into two sections. The left side shows information such as exception messages, benefit balances, pending requests, notes added on this employee's time card, and a list of supervisors. The right side shows paid information for the selected employee for the pay period.
- The left portion of the Employee Time Card Screen shows several different sections, including:
 - The Employee Navigator, which allows you to move forward or backward through the list of selected employees.
 - The Transaction List Items card offers some filtering options for what displays in the Transactions list. For example, when Clockings is unchecked, you will no longer see the in and out punches for the worked time.
 - The Transaction List Actions card contains action options that you will use if you have the permissions to approve, delete or edit items in the Transaction List.
 - The Employee Favorites card contains the most used buttons, such as, Add Calendar, Add Clocking, and TCS.
 - The Employee Actions card allows you to add an adjustment or a note to the time card.
 - The Employee Sections card allows you to view all information associated with the employee; general information, licenses, labor distributions, etc.

Calendars

- A Calendar is a scheduled activity where the employee is NOT clocked in and working. Some examples of calendar entries are vacation, sick time, family medical leave, and jury duty.
- Calendars can be added in two ways. One way is to choose the "Add Calendar" button under the Employee Actions card, and the other is using the Monthly View.

Rotating Schedules

- A Rotating Schedule is a set pattern of days and shifts to work. It could be Mon-Fri 8-5, or every other weekend or a pattern that repeats any number of weeks. The key to using Rotating Schedules is that the pattern repeats.
 - Schedulers are responsible for adding and maintaining rotating schedules for employees.
 - To add a Rotating Schedule, click the Rotating Schedules button on the lower left side and enter the following information:
 - Fill in all fields except the Expiration Date.
 - The Effective Date should be the Sunday of the first week in the rotation. This will normally be the first week of a (four week) schedule period.
 - The Expiration Date is not normally needed at this time. It could be used if this person was a student that was going back to school on a certain date.
 - The Number of Weeks is the number of weeks in the rotation. For an "every other weekend" rotation, set it to 2 (as shown here). If the pattern is the same every week (i.e. Mon-Fri 8-5) set this to 1.
 - Leave the Begin Week Number field at 1.
 - Click save.
 - After clicking Save, click Rotation to take you to the Rotation screen.
 - When selecting days you'll need to click on the dark, shaded part of each day.
 - Click the Add Activity button on the left side.
 - In the Position Code field, choose a Position from the right side of the screen. Most employees will only have one Position.
 - Next, select Profile Code and choose a Profile. Depending on the employee or department, you may see more than one Profile so it is important that you choose the correct one for this rotation.
 - Select Activity Code and choose the shift to be worked. The Activity Code has been entered in this example.
 - Click Save.
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The Schedule Screen

Open Schedule

- To open the schedule, click on Actions at the top of the screen and then click the Schedule button in the Scheduling Card.
 - The open schedule screen appears. Enter the Company and Cost Center. You will have the ability to set defaults for these fields, if desired.
 - After entering a valid Company and Cost Center, press the Tab key or click in another field, the schedule period dates are filled in by default with the schedule period that contains the current date. If this is the date range you want, click Open Schedule.
 - The schedule opens. This is a current schedule that has already been populated with shifts.
 - There are three main sections, the upper left pane shows your list of employees which are grouped by Job Class. Also shown above, next to the employees, is the Scheduled Hours column.
 - You can click and drag the thick vertical bar highlighted above to see more information such as Approved Hours (per pay period), OT Hours, Shift, Class, Home Distribution (Home Department) and Employee Code (employee number).
 - To sort in ascending or descending order, click on any of the column headers. Columns can also be rearranged into any order by clicking the column header, dragging left or right and dropping it where you'd like.
 - The upper right sections shows shifts by Activity Codes.
 - Approved Calendars show in the black "pill" format. Hovering your mouse over an Activity Code will show the details of that shift, as well as requests.
 - The lower portion of the screen is the Balancing Grid. Most departments have a base staffing level used to know they have enough people scheduled each day into the various jobs (called Profiles) based on the time of day. This is reflected here.
 - On the left side of the screen you will see profiles.
 - Moving to the right, red negative numbers indicate the shortage of people for each block of time.
 - If you rest your mouse over any of the numbers you can see what the need is and what the coverage is, that is the number of people scheduled, and the variance.
 - You can expand or collapse shifts by clicking the arrows in each blue shift heading. You can also use the scroll bar on the right side of the screen to scroll down to see the next day.
 - Now look at the Requests tab at the top of the Balancing Grid. The number on the tab indicates how many requests are pending in the (4 week) schedule. This tab will only show Calendar Requests. Any Clocking Requests should be viewed in the employee TCS screen.
 - The Requests tab shows all of the requests for this department that are due to occur in the date range open. Transaction is displayed by default. Use the drop down menu for the Select Request type field to change the type of request.
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- Look at the "When Requested" column. If more than one person requests the same time on the same day, you can see who requested first. And if you click this column header, it will sort them in order of when they were requested.
- You can check the box and approve, deny or delete the request, or double click the request to see more details.
- The Activity Balancing Grid displays the Department needs set by Activity Code rather than by time of day. As with the first Balancing Grid, the numbers are red when understaffed, they turn blue to show overstaffed and they will be grayed out when perfectly staffed.

Working with the Schedule Screen

- From the Schedule Menu, choose Create Employee Schedule. This option is used to create schedules for one employee at a time. If you normally create the monthly schedule, you would click on Create Schedule.
 - On the Create Employee Schedule pop-up window you do not need to change anything. The start and end dates will match the schedule period you are in. The Selection Style – CORE will ensure that the core schedule for the employee populates the schedule. The core schedule is defined in the solution with the base days and hours the employee is normally scheduled and expected to work. Click Finish.
 - A message will show that the job is being processed. When it is done, this pop up window will close and the schedule screen will refresh showing the new schedules.
 - These schedules are considered Pending, meaning the employee cannot see them yet. Most of your edits will be made to current, published Schedules on a daily basis.
 - The Pending Schedule for employee window will open. You can add and delete Activity Codes as follows:
 - Click the magnifying glass next to the Activity Code field to see a list of available activities.
 - Select a code from the list provided.
 - After choosing an Activity Code, many of the other fields will be automatically populated.
 - The field you need to pay close attention to is the Profile field. There could be more than one Profile available and there's no way to know what your intent is each time.
 - When you are certain that you want to schedule this shift and it's okay for the employee to see it, click the box that says "Publish the activity when saving". Otherwise, leave it unchecked if you are still balancing the schedule and may need to make more changes.
 - Click Save.
 - You may occasionally want to delete a Pay Code or an Activity Code. You can delete easily by right-clicking it and choosing Delete. You can also left-click on it and press the delete key on your keyboard.
 - Employee schedules can be easily copied or moved from one cell to another using the "drag-and-drop" method. By left-clicking on a shift and holding down the left mouse button, it can be dragged to a different day. You can see how the shift looks as you're dragging it.
 - Letting go of the mouse button places the shift on the new day and leaves the original shift where it was.
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- If you want to take a shift and move it completely off one day and onto another you would hold the SHIFT key down while dragging.
 - Keep in mind that when dragging a shift from one day to another you are moving everything, including the Profile. You are not simply moving the time of the shift.
 - You may occasionally need to edit an employee's schedule. For example if someone leaves early due to low census the scheduled time will need to be shortened. To edit the Activity Code to record this situation accurately, double click their shift.
 - First, the Hours field needs to be changed to reflect the amount of hours the employee did work. You can also add a Note to this schedule. The Notes section of the edit window can be expanded by clicking the small arrow next to Notes.
 - You may choose to write your own note which must include a subject line and something in the body of the note. Or you can choose a Predefined Note by clicking the magnifying glass to see a list to choose an appropriate note for the situation. After choosing a Predefined Note, you can save it as is or you can add more information to the note.
 - **It's important to know that all notes are PERMANENT.** They cannot be deleted and will become part of the employee's record, which may be visible to the employee. So please be careful what you write here because after you click Save, you will not be able to edit or delete the note! Click Save.
 - The brackets around the Activity Code are a visual indicator that the time and/or hours have been changed. You can see the actual time scheduled when resting the mouse over the Activity Code. Now you can easily see what shift the employee was originally scheduled for and what the time was changed to.
 - To widen a column place your mouse on the line between two days on the column headers. When you get the double headed left/right arrows, click and drag. Then place your mouse pointer in the blank area of the day with the adjusted Activity Code, but do not click on the code itself. Double click in the blank area.
 - The Pending Schedule window opens. Click the magnifying glass to see a list of Activity Codes.
 - After clicking the magnifying glass choose the appropriate Activity Code from the list. The code you use may vary based on the situation.
 - The Time field is filled in with the time the employee left work. The Hours/Units field is filled in with the remaining length of their shift. Click Save.
 - You now have a partial shift with an added Activity Code.
 - If you change the time or length of the schedule on the employee's Time Card Screen, it will be automatically updated on the schedule. If you delete it on the employee's Time Card Screen, it will also be deleted on the schedule.
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Current Staffing Overview

- The Current Staffing Overview screen is another way to manage schedules. It allows users to add and delete schedules, add schedule notes, float staff to other departments, add calendars and select the most qualified staff for scheduling.
 - The Current Staffing Overview displays staffing details in a simpler format than the Scheduling Screen. It allows you to quickly look at staffing needs one day at a time and make all the schedule adjustments you can on the Schedule Screen with a more focused interface.
 - It is best to use the Current Staffing Overview rather than the Schedule Screen for your day-to-day scheduling duties. To get to the Current Staffing Overview, click the Actions icon on the toolbar.
 - Click the Current Staffing Overview icon.
 - You can open the schedule for a specific department or a schedule group. You can also choose to view only a specific coverage set as well as a specific date.
 - If you do not choose a coverage set and date, you will see all coverage sets for the current date.
 - Click Open when the desired information is entered.
 - The Current Staffing Overview tab displays. You can move to different days by clicking the backward and forward date arrows. You can also shift which coverage set displays first by using the coverage set arrows.
 - If you need to change the department or schedule group click the Organization Unit tab to be taken back to the previous parameter screen.
 - The Staffing Summary area displays for each coverage period. The information includes the facility, organization unit, nurse-to-patient ratio, census, hours per patient day, staffing variance by profile groups, and the number of employees providing indirect coverage.
 - To view more detail about a specific profile, click in the profile's cell in the staffing summary area.
 - The staffing detail displays for the RN profile. This shows you the coverage, need, and variance. Notice in the Roster tab on the right side of the screen you can now see the scheduled employees for this profile during this coverage period.
 - Based on the Variance number, we can see that we need to schedule some staff for this coverage period. To quickly view who is qualified to come in and their availability, click on the Qualified Staff tab on the right.
 - The Qualified Staff tab will display staff by qualification levels. Select the profile by clicking the number in the variance column to see the list of qualifies. The criteria for these levels is set by your organization, but typically, Level 1 displays employees that work most often in the department you have displayed.
 - Let's say you would like to schedule all of the employees displayed in Level 1, but you need to make sure you do not put any of them into overtime. You will use the Compare feature to do this. Select the desired employees by checking the boxes next to their names. Then click on the Compare button.
 - Now you can see all selected employees and their approved and scheduled hours, the last time they were called in and the last time they floated outside their home department.
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- If the 'In Overtime' box is checked, scheduling them for this shift will put them into overtime. The employees that won't go into overtime have been selected.
 - To schedule them, click the Assign button.
 - You can see the number of employees you will be scheduling in the upper left corner. Select the desired Activity Code from the drop down list.
 - All required information defaults in for you. By scrolling down you can add notes to the schedules. You can also choose to publish the activity immediately upon saving or to set the schedules to pending.
 - You can now see that the employees are added to the roster and that the Coverage and Variance numbers have changed on the staffing detail.
 - Let's say that you made an error and you want to delete the schedule for one of the employees on the roster. To delete a schedule, click directly on the desired employee's schedule on the Roster tab.
 - Click the Delete button in the lower left corner of the pop up box.
 - The previously scheduled employee is now removed from the roster.
 - To add a calendar to an employee's schedule, select the employee's name from the Roster and click the Assign button.
 - You can add Schedules in this manner as well, but in this case we want to add a Calendar for PTO so the Calendar radio button has been selected.
 - Select the PTO Code from the list.
 - Enter the correct time and Hours/Units values. Then click Save.
 - To float an employee to another department from the current staffing overview, click the highlighted schedule in the Roster.
 - In the Labor Distribution area, select the department to float them to from the list.
 - Save your selections.
 - The employee no longer appears on the roster for the original department.
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Handling Transaction Requests

- You can view and handle requests from the employee's Time Card Screen, however, only one at a time. Handling them from the schedule is more efficient, because you can see all requests due to occur in this time frame and who requested them first by looking at the Request tab. Additionally, you can see how many people are already off and whether or not they may be needed on the day they are asking off.
- Unavailability Requests are shown as a green bar with a gold star. Schedulers will be managing the Unavailability Requests in one of two ways.
 - First, by double clicking on the icon. This allows you to see the Pay Code and the reason they gave for the request off. You can also see their benefit balances. You would make your decision and Approve or Deny the request.
 - Second, you can also handle requests from the Request Tab on the bottom of the screen. While you could simply select the box and click Approve, you don't see what type of Calendar the employee is requesting. Double clicking on the Request will give you a pop up with more information about the Request.
- After approving, you can see the changes on the schedule. A Calendar Request will be replaced with the black Pay Code icon.
- If requests are made farther into the future, you can see them by going back to the main application and opening the Actions section. The first card on this screen is called Approval. This is where you can see all requests, including your own.

Filters

- Filters allow you to look at smaller sets of records.
 - There will be times when you want to look for specific people or circumstances. For example, if someone calls in sick, rather than scrolling up and down looking for the employee, you can use the Filter, which is located in the top right portion of the Schedule Screen.
 - Let's say an employee calls in sick. You can type their first or last name in the filter box and press the Enter key or click the Apply Filter button. Everyone will be hidden except anyone with the first or last name you typed in the box. You can make your changes and when you're finished, click the Clear Filter box.
 - You can also create and save filters that you use on a regular basis.
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Publish a Schedule

- Schedules must be published in order for employees to see their schedules.
- When a schedule is first created - whether it is a single day or the entire Department schedule - the Activity Codes will be pending. Published shifts are shown with a bright color, while Pending schedules are grayed out.
- A completed schedule could have hundreds or even thousands of activities depending on the size of the Department. Typically when schedulers are building the schedule, the entire schedule would be published at once. As a manager you can right click on an Activity Code and choose Publish to publish one activity at a time. This is required in order for the employee to view the changes to their schedule.
- When the schedule is ready for viewing by the entire department, the scheduler will click Publish Schedule on the Schedule menu and publish the final schedule.
- Now you can see that all Activity Code colors are bold meaning they are published. These activities can now be seen by employees by looking at their 'My Calendar' card on the Home page, as well as on their Monthly View.

Self-Scheduling

- This section explains self-scheduling and how the scheduler manages the requests.
 - The Self-Scheduling feature allows employees to pick the days and shifts they would like to work. When a schedule is opened, employees log in and select their desired shifts.
 - Employees are then locked out while their requests are reviewed by the manager or scheduler, and accepted or denied based on the what is needed to balance the schedule. This means "self-scheduled" shifts may change after the employees are done making self-scheduling requests.
 - Program settings prevent employees from doing things like scheduling into overtime, scheduling too many days in a row or scheduling themselves into jobs they aren't qualified for.
 - Self-Scheduling will be configured to open to the employees at a pre-determined time. For example, you want to give them a couple of weeks to choose their shifts. Following this period of choosing shifts, the scheduler will need a week or two to balance and finalize the schedule. Combine this with needing to have the schedule ready for the employees 2-weeks before it starts, meaning Self-Scheduling will open about 46 days before the start of that schedule.
 - At some point before Self-Scheduling opens, the person in charge of creating the schedule will open a new, blank schedule period, handle any requests for days off and run the Core Schedule Pass.
 - To create a new schedule you will click Schedule on the Menu Bar, then click Create Schedule. The "Create Schedule" process should only be run once, to avoid deleting a schedule that may have already been created.
 - When creating a schedule, the Start Date and End Date will match the schedule period you have open.
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- The Selection Style says "Core". This will import the employee's Rotating Schedules. The Selection Style determines what rules are validated during this automatic schedule pass. For example, an employee will not be scheduled into overtime and will not get scheduled into a job for which they are not qualified.
 - The 'Opening Schedule' message box appears. When it is finished - usually in a minute or two - all employees who have a Rotating Schedule will be scheduled.
 - When it is finished, this window will close, the Schedule Screen will refresh and you will see pending schedules. In a Self-Scheduling department, this is most often weekend rotations but some employees could have rotations that give them all of their hours every week.
 - To publish a schedule, click on Schedule in the menu at the top left corner and choose Publish Schedule.
 - The Schedule confirmation box opens giving you a chance to cancel publishing. Click Publish.
 - Your schedules are now published so the employees cannot change these shifts during Self-Scheduling period. After the final schedule is published, they can trade shifts if allowed.
 - To Self-Schedule, an employee must first navigate to the Employee section of their Time Card Screen. Then they will click on the Open Self Schedule button on the left side of the screen.
 - On the left side under "Current Display" is the date range. This will show the (4 week) schedule period the person is working in. This will always be in the future.
 - Below the date range, the Cost Center they are scheduling into displays. It is possible to belong to more than one Self-Scheduling Cost Center. If so, the employee would see a drop-down arrow here, allowing them to change the Cost Center and self schedule into another one.
 - Checking the Profile filter displays only those Profiles for which the employee is qualified.
 - The Schedule Screen is not only where employees will pick their shifts but this is the only screen an employee has that allows them to see the entire Department Schedule. This is not a screen that would allow a supervisor or scheduler to make any changes to the Department schedule.
 - The employee's schedule will appear along the top of the screen. Below each day is a drop-down box. This is where they will choose their shifts. Below the arrows, you can see some red numbers which indicate the needs for each day, evening and night shift.
 - To Self-Schedule, all an employee needs to do is click the drop-down arrow on the days they want to work and choose an Activity Code.
 - When all the desired shifts have been entered, the employee clicks the Save button in the left pane.
 - If the employee selects too many shifts or if the shifts they select conflict with any other scheduling parameters set up in the system, they will receive a warning box alerting them of these exceptions. The system will not allow them to schedule any shifts that generate an exception message..
 - To remove a shift that has generated an exception, they can click the drop down arrow for the date they wish to clear a shift and click in the blank area. Then they click the Save button under the Self-Scheduling Actions card in the left pane.
 - During the open Self-Scheduling timeframe employees can click on a pending schedule and change it.
 - With a pending schedule employees do have the option to choose another shift using the drop down arrow in the Activity field. Or they can delete the shift by selecting the Delete button. However, if they click
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on a shift that has been published, there is no option to change or delete the shift.

- When the employee has picked all of their shifts and clicked the Save button, they can click the “Validate Me Now” button on the left. The system will generate one or more messages if they haven’t picked enough hours.
- Back on the Schedule Screen, the scheduler will be able to see the pending shifts that employees have entered. When the Self-Schedule period closes, the scheduler can now move shifts around and add more as needed to meet the needs on the bottom of the screen.

Request to Work

- Request to Work is a feature that allows employees to pick up extra shifts in the current schedule.
- This feature is not likely to be used by supervisors or managers but it’s important to see how the employees can work with their schedule.
- Where Self Scheduling allows employees to interact with future schedules, Request to Work is designed to help fill more immediate needs in the current schedule.
- On the Monthly View you can see Vacancy buttons on many days. Note, you’ll never see a Vacancy button on a date in the past because you cannot request a shift in the past. Clicking on a Vacancy button will display available shifts for employees to choose from.
- The Vacancy panel appears displaying available shifts to work. To request to work a particular shift, the employee selects the Request button next to the desired shift.
- A box will appear where the employee can add a note to the person handling the requests if needed. Then they click the Submit button.
- The request icon now appears on the Monthly View screen.

Archiving a Schedule

- Creating an archive of the schedule gives you a read-only copy of the schedule. It is the organization’s goal to have an archived copy of the schedule as it looked when it was first completed and published, a copy right before it begins and a copy at the end of the (four-week) schedule period.
 - This can be helpful if, for example, a schedule gets changed in error you can go back to see what was there at the start of the schedule. Archiving is very simple. Click Continue to learn how.
 - From the Schedule Menu, select the Archive option.
 - In the box you are asked to type in a description. Type ‘Publish’ along with the date the archive is being created and click Create Archive. You won’t see any changes to the screen when you archive a schedule, so it’s important to realize that you are still in the current, editable schedule.
 - If you need to open an archived schedule, go to the Actions section and click on Schedule as if you were opening a regular schedule.
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- However, this time select the Open Archive tab. Type in the Company and Cost Center and click the Search button. If you are looking for an archive of a specific date range it would be best to use the "Contains Date" field and enter a date for the archived schedule you want. Click Search.
- The search results will be listed in the box at the bottom of the screen. Select the item and click Open Schedule to open the archived copy.
- The schedule that opens will look very similar to the others we've seen but notice in the upper left corner over the date range it says [Archive] next to a pair of glasses, which denotes read only.
- When you double click on a shift on an archived schedule you will see everything is grayed out. No changes can be made to an archived schedule - not even by a system administrator.

Reports

- Reports available in Staffing and Scheduling can be printed, saved and managed using report tools
 - Schedules can be printed from the Reports section.
 - Clicking 'Reports' on the sections toolbar will take you to the reports list. There are Employee, Productivity and Scheduling reports. Click the Scheduling button in the Report Groups card in the left pane to just show reports related to scheduling.
 - You will see several types of Schedule Reports. Legal or Letter next to a report denotes the paper size.
 - Some reports print Archived schedules, as you can see by the names. There are also Variance reports which will show the Coverage, Need and Variance each day for a given date range. These are based on the Balancing Grid at the bottom of the Schedule Screen.
 - There are also Schedule Reports by Profile. These reports show each Profile in its own section.
 - To run a report, click the folder next to the report name.
 - The "Report Parameters" screen opens, allowing you to adjust how the report looks. You can choose how employees are loaded and whether or not to show only Published, Pending or both types of shifts. You will need to fill in the appropriate Organization Unit information.
 - It's important to note that the Start Date will always default to the current date, so you'll need to make sure you change this to the start date of the schedule you want to print.
 - There are report tools on the left side you can use to move through the pages. You can zoom in or out and print using the Print button. The Print button will open a window where you can choose a printer.
 - The Change Parameters button is used to change something in the way this report was set up. For example, if you entered the wrong date, you can click Change Parameters which will bring you back to the original parameters you used so you can make a change while saving all your other settings.
 - The Export format is set to Acrobat PDF. Selecting the Export button will allow you to download a PDF copy of the report.
 - The last item in the Report Tools is the Document Map. Think of the Document Map as a table of contents for your report. You can expand the topics by clicking the plus (+) symbols.
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Toolbar Sections

- The Preferences section provides tools for creating bookmarks; a means of setting your default organization unit, Schedule Groups, and Event Subscriptions.
 - You can use preferences to manage some of the features in the solution to make it more convenient for you.
 - The Default Organization Unit lets you enter a default Pay Company (Facility) and Cost Center. Setting up a Default Organization Unit will save you some time as you won't have to type in this information each time you open a schedule. Click the Default Organization Unit icon now.
 - Fill in the appropriate Organization Unit information, then click Save.
 - Now when you launch the Schedule Screen the information you just saved will auto populate the fields as seen here.
 - Back in Preferences we will look at the Default Schedule Group. A schedule group lets you group together two or more Cost Centers for scheduling and/or reporting. If you supervise more than one Cost Center you will want to work with your FSA to build a Schedule Group. Click the Default Schedule Group icon.
 - This screen lets you set your Schedule Group as the default when you open your schedule and run reports. After it is built, you would open your preferences, click in the Schedule Group field and choose your group. You can then set the Override Default Organization Unit to 'Yes' if you want this to override your default Cost Center.
 - Important: You may see other Schedule Groups but you will not be able to use them if you have not been granted access to the Cost Centers held in those groups.
 - Event Subscriptions will show you a list of automatic notifications available to you. For example, as an employee you can subscribe to notifications when any of your licenses are about to expire. As a supervisor, you can receive messages when any of your employees have licenses about to expire. You can also get notifications when you have pending requests from your employees..
 - The Employee Transactions card is expanded and a couple of different options have been subscribed to. Checking the portal option will send the messages to the My Unread Messages card on the Home Page. Checking the email option will send the messages to your email account.
 - You may see some check marks in the Mandatory column. This means you have already been subscribed to these messages during the initial configuration of the system. You cannot unsubscribe to these.
 - It might be tempting to subscribe to everything but keep in mind that you could end up with more messages than you would find necessary.
 - It is important to properly log out of the system when you are finished to ensure confidentiality. To log out safely, click on the Log Out button on the toolbar.
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