Using Scheduler for Enhanced Time & Attendance
Parts 1 and 2

Handout Manual
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Course Introduction

Course Purpose

This course prepares you to use Scheduler to estimate coverage needed to meet workload demands, create and assign employees to schedules, and evaluate and maintain schedules.
Course Agenda

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<th>Modules</th>
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</thead>
<tbody>
<tr>
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<td>Module 1: Scheduler Overview</td>
</tr>
<tr>
<td></td>
<td>Module 2: Estimating Coverage</td>
</tr>
<tr>
<td>Part 2: Creating Schedules with Scheduler</td>
<td>Module 3: Working with Employee Availability</td>
</tr>
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<td>Module 4: Assigning Schedules to Employees</td>
</tr>
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<td></td>
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</tr>
<tr>
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<td>Module 6: Evaluating Schedules</td>
</tr>
<tr>
<td></td>
<td>Module 7: Managing Schedules</td>
</tr>
</tbody>
</table>

Implementation Questions

Use the following table to list any follow-up items that you may need to discuss with your implementation consultant (IC)/implementation specialist (IS):

<table>
<thead>
<tr>
<th>Questions for my IC/IS:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
</tbody>
</table>
Part 1 Introduction

In this part:

<table>
<thead>
<tr>
<th>Module 1: Scheduler Overview</th>
</tr>
</thead>
<tbody>
<tr>
<td>Module 2: Estimating Coverage</td>
</tr>
</tbody>
</table>

Module 1 Introduction

Purpose

This module prepares you to begin working with the various components of Scheduler.

Topics

This module includes the following topics:

- Introduction to Scheduler
- Using Scheduler in Your Company
Introduction to Scheduler

Overview
Scheduler is a Web-based scheduling application that is integrated with ADP’s Enhanced Time & Attendance.

What Is Enhanced Time & Attendance?

Overview
ADP's Enhanced Time & Attendance is a Web-based time and labor management system that includes components that allow you to collect and maintain timecard data, track employee activities, analyze labor, and schedule employees.

Example
The following diagram illustrates the Enhanced Time & Attendance components:

![Diagram of Enhanced Time & Attendance components]

Important Information
The Schedule Editor is a tool that comes with the standard Enhanced Time & Attendance. The Schedule Editor enables management to create and maintain non-complex schedules for employees who are licensed to use Enhanced Time & Attendance.
What Is Scheduler?

Overview
Scheduler provides the tools necessary to enable you or your employees to define their availability status for different periods. It is an optional component that is integrated with Enhanced Time & Attendance that provides greater functionality to accommodate complex scheduling needs. It provides advanced functionality to help you manage nonstandard and overlapping shifts, fluctuating coverage requirements, and schedule restrictions and requirements dictated by regulatory boards, unions, company policies, and minor laws.

Scheduler grants instant access to essential decision-making criteria used to schedule the most qualified employees for a particular job, thus making optimal use of your organization’s workforce.

Note: During implementation, your company configures scheduling criteria to reflect your specific business needs.

Example
Scheduler streamlines the scheduling process by tracking real-time information that enables managers to estimate, create, evaluate, post, and maintain schedules more efficiently.

The following are examples of the types of information that Scheduler tracks:

- Number and type of staff required
- Time off and sick days
- Hours each employee is scheduled to work, including where and when
- Employee availability and schedule preferences
- Skills or certifications
- Seniority levels

Important Information
Scheduler tracks all scheduling-related data using one real-time database integrated with Enhanced Time & Attendance.
**Scheduler Components**

**Overview**

Scheduler includes several components that you use to track essential decision-making criteria that enable you to make optimal use of your organization’s workforce by scheduling the most qualified employees for the right jobs.

**Components and Descriptions**

The following table describes each Scheduler component.

<table>
<thead>
<tr>
<th>Component</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Workload Planner</td>
<td>Allows scheduling managers to track and edit the organization’s staffing plan. The optional Workload Generator is used to determine staffing requirements based on the expected amount of work that needs to be completed.</td>
</tr>
<tr>
<td>Schedule Planner</td>
<td>Allows managers to view and edit schedules for their employees and jobs, including any time off and hours scheduled to work. The optional Schedule Generator creates or assigns open shifts according to your workload and rules. The optional Priority Scheduling Engine automatically assigns open shifts to employees based on rules that align with your production schedules, labor standards, and employee requests.</td>
</tr>
<tr>
<td>Supporting data tabs</td>
<td>These tabs appear at the bottom of the Schedule Planner workspace and provide access to tools that help you create, evaluate, and maintain your schedule tools.</td>
</tr>
</tbody>
</table>
| Employee Self-Scheduling   | Enables individual employees to use automated workflow processes and tools to:  
   - Sign up for open or available shifts  
   - Submit a request to swap shifts  
   - Request to cover shifts |
| Additional reports         | Additional Enhanced Time & Attendance reports commonly used in the scheduling process. |


What Is the Workload Planner?

Overview

The Workload Planner is a tool that you use to maintain the amount of staff required by job, time span and shift, and location. It allows you to track and edit your staffing plan, which is the number of employees that management predicts that a location will need for each job and time span within a specific time period.

For each location to which you have access, the Workload Planner displays the number of workers needed for each shift or schedule zone and job and calculates the difference between the number of planned and scheduled staff.

Example

The following is an example of the Workload Planner page.

![Workload Planner Page](image)

Views and Descriptions

Depending on your company's setup, you may have access to up to three Workload Planner views. The following table describes each view.

<table>
<thead>
<tr>
<th>View</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Calendar</td>
<td>Shows the staffing plan, week to week, for the time period that you specify. Use this view when staffing levels do not follow a weekly pattern or when you need to make an adjustment to specific dates in the staffing plan.</td>
</tr>
<tr>
<td>Pattern</td>
<td>Allows you to add and modify patterns that repeat from week to week. Use this view if you have standard or repeating staffing requirements or both. Pattern data automatically displays in the Calendar view for the time period that you specify.</td>
</tr>
<tr>
<td>Volume</td>
<td>Allows you to enter and display the volume of work for the location and time period you select. For example, in a healthcare organization, volume may reflect the number of patients and may be weighted based on the level of care (acuity) they need.</td>
</tr>
</tbody>
</table>
Example

The following is an example of the Pattern view of the Workload Planner.

Elements and Descriptions

<table>
<thead>
<tr>
<th>Elements</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Filter by Location field</td>
<td>Select a location to show its staffing plan.</td>
</tr>
<tr>
<td>Job column</td>
<td>Lists all the jobs that need to be filled for the selected location</td>
</tr>
<tr>
<td>Span column</td>
<td>Indicates time spans where coverage is needed</td>
</tr>
<tr>
<td>Staffing matrix</td>
<td>Indicates the number of staff anticipated for each span of time on each day for each job</td>
</tr>
</tbody>
</table>

Note: Your implementation consultant sets up the Job and Span columns and the locations that display in the Filter by Location field.

Tip

If your staffing plan varies during the year, you can create multiple patterns with different effective dates. For example, a retailer could create a pattern for the holiday shopping season that reflects additional staffing requirements.
What Is the Schedule Planner?

Overview
The Schedule Planner is a component that allows managers to view and edit schedules for employees, jobs, and schedule groups. The Schedule Planner displays all jobs for a particular location and any sublocations.

Example
The following is an example of the By Employee view of the Schedule Planner page.
What Is Employee Self-Scheduling?

Overview

Employee Self-Scheduling is a Scheduler component that allows employees to use automated workflow processes to do the following:

- Sign up for open shifts.
- Sign up for available shifts.
- Request to swap shifts.
- Request to cover shifts.

Employee Self-Scheduling allows employees some measure of control over their own schedules, thus improving employee satisfaction and retention. This feature also benefits managers by allowing them to spend more time on critical tasks and less time creating schedules.

Example

Keith is scheduled to work the 3 p.m. to 11 p.m. shift on Thursday but would like to swap shifts with Rebecca so that he can attend his son's band concert. Keith uses Self Service to request a swap with Rebecca. Rebecca agrees to swap her 7 a.m. to 3 p.m. shift with Keith. Their manager approves this change and it is now reflected in the schedule.

Important Information

To use Employee Self-Scheduling, your company must provide a Scheduler license to each employee.
Using Scheduler in Your Company

Overview

Your organization may have different types of Scheduler users, such as scheduling managers. Users have different access rights depending on their roles in the organization.

Scheduler Users

Many organizations set up Scheduler so that each scheduling manager can view only his or her unit’s employees, jobs, and location information. These organizations can also have a central staffer who can view scheduling information for the entire organization’s workforce.

For example, a typical healthcare facility could have dozens of nurse managers throughout the organization working with Scheduler, along with a central staffer who has ultimate control over all schedules.

User Types, Descriptions, and Examples

The following table describes each type of Enterprise Scheduler user.

<table>
<thead>
<tr>
<th>User Type</th>
<th>Description</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scheduling manager</td>
<td>Administrative role with responsibilities for budgets and scheduling within a unit</td>
<td>Dot is a nurse manager who manages scheduling for several full- and part-time employees, including registered nurses, licensed practical nurses, and licensed nursing assistants. In Dot's organization, numerous nurse managers also use Scheduler to manage scheduling for their own groups of employees.</td>
</tr>
<tr>
<td>Central staffer</td>
<td>Full-time administrative role responsible for all staffing requirements for the entire organization</td>
<td>Pat is the central staffer in Dot's organization. She works with all nurse managers, including Dot, to ensure proper staffing of the entire facility. She also has access to scheduling information for all internal staff in the organization as well as information from external staffing agencies.</td>
</tr>
</tbody>
</table>
Scheduler Features and Benefits

Overview

Organizations face many challenges in attempting to optimize their employees' work schedules. Scheduler includes features that help to overcome these challenges so your managers can focus on more important tasks.

Example

Dot just received word that one of her nurses called in sick today. She wants to call Christine in to cover this open shift but checks Scheduler first and notices that Christine has already worked 40 hours this week whereas Sam has worked only 24 hours. Dot saves her organization in overtime costs by having Sam fill the open shift.

Features and Benefits

<table>
<thead>
<tr>
<th>Feature</th>
<th>Benefits</th>
</tr>
</thead>
</table>
| Automation of time-consuming administrative tasks related to schedule planning | - Reduces the time that scheduling managers need to spend scheduling employees  
- Frees managers' time to devote to other responsibilities  
- Increases efficiency by eliminating the pencil, paper, and spreadsheet methods used to create and maintain schedules |
| Real-time tracking of hours worked |  - Helps managers to control overtime costs  
- Reduces outsourcing expenses |
| Employee Self-Scheduling, allowing employees some measure of control over their own schedules | - Improves employee satisfaction  
- Reduces employee turnover |
| Tracking of employee qualifications and other criteria for compliance with government and labor agreements | - Avoids costly liabilities by applying criteria to staffing requirements  
- Ensures compliance with constantly changing legislative and union regulations and requirements |
The Scheduling Cycle

Overview

Scheduling is typically a cyclical, iterative process that includes the four distinct stages. The following diagram illustrates the scheduling cycle.

![Scheduling Cycle Diagram]

Description

The following table describes each stage in the scheduling cycle.

<table>
<thead>
<tr>
<th>Stage</th>
<th>Description</th>
<th>Answers This Question</th>
<th>Scheduler Components You Use</th>
</tr>
</thead>
</table>
| 1: Estimate | Define workload and coverage needed to meet that workload.                  | How many workers are needed?                                | Workload Planner  
Workload Generator *                  |
| 2: Create  | Create schedules based on coverage requirements identified in the Estimate stage. | Who will work where and when?                              | Schedule Planner (and supporting data tabs)  
Schedule Templates  
Schedule Generator *                  |
| 3: Evaluate | Evaluate schedules to determine if there is adequate coverage.             | Is the schedule ready to post?                              | Schedule Planner (and supporting data tabs)                  |
| 4: Manage   | Roll out schedules to employees and adjust as needed.                       | Is the schedule up to date?                                 | Reports  
Schedule Planner (and supporting data tabs)                  |

Note: Asterisks denote optional Scheduler components.
Learning Activity: Scavenger Hunt

Scenario
Dot Doting is a nurse manager and needs to navigate Scheduler to obtain answers to a few questions.

Instructions

<table>
<thead>
<tr>
<th>Question</th>
<th>Scheduler Page with Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>How many floor nurses are there?</td>
<td></td>
</tr>
<tr>
<td>Who are the registered nurses (RNs)?</td>
<td></td>
</tr>
<tr>
<td>What is Rolando Arturo's primary location?</td>
<td></td>
</tr>
<tr>
<td>In the Surgery unit, which employees, if any, are scheduled to start work at 9:00 a.m. today?</td>
<td></td>
</tr>
<tr>
<td>How long is the schedule period for the Surgery Unit (Sgry)?</td>
<td></td>
</tr>
<tr>
<td>In the next schedule period, who has the highest number of scheduled hours?</td>
<td></td>
</tr>
</tbody>
</table>
Module 1 Summary

Topics

This module included the following topics:

- Introduction to Scheduler
- Using Scheduler in Your Company

Knowledge Check

1. Identify the correct sequence of stages in the scheduling cycle.
   a. Evaluate, Create, Estimate, Manage
   b. Create, Estimate, Evaluate, Manage
   c. Estimate, Create, Evaluate, Manage
   d. Create, Evaluate, Estimate, Manage

2. Scheduling managers use the _____________ to track and edit their staffing plans.
   a. Workload Planner
   b. Schedule Planner
   c. Supporting data tabs
   d. Additional reports

3. An organization's _____________ is responsible for all staffing requirements for the entire organization.
   a. Scheduling manager
   b. Central staffer
   c. HR administrator
   d. Time and labor administrator

4. What question do you attempt to answer during the Create stage of the scheduling cycle?
   a. How many people are needed?
   b. Who will work where and when?
   c. Is the schedule ready for posting?
   d. Is the schedule up to date?
Using Scheduler for Enhanced Time & Attendance
Part 1 – Getting Started with Scheduler
Module 2: Estimating Coverage

Handout Manual
Module 2 Introduction

Purpose
This module prepares you to determine workload requirements in order to create staffing plans to meet those requirements.

Topics
This module includes the following topics:
- Workload Planning
- Working with Staffing Plans
Workload Planning

Overview

Workload planning is part of the Estimate stage of the scheduling cycle. It involves using the Workload Planner to create staffing plans.

Stage 1: Estimate
Define workload and coverage needed to meet workload.

Stage 2: Create
Create schedules based on coverage requirements.

Stage 3: Evaluate
Evaluate schedules for effectiveness and adequate coverage.

Stage 4: Manage
Release schedules to employees and adjust as needed.

What Is the Estimate Stage?

During the Estimate stage, management estimates their staffing needs. The Estimate stage consists of creating and adjusting staffing plans. The Estimate stage typically occurs annually for baseline staffing plans and as needed for adjusted staffing plans.

Example

Dot, the scheduling manager for the surgery unit, needs to estimate her staffing needs for the year.
**What Is a Staffing Plan?**

A staffing plan is an estimate of the number of employees required for each job and time span in a specific location.

Staffing plans are required to do the following:

- Evaluate coverage.
- Calculate open shifts.
- Enable employees to use Self Service to sign up for shifts during open sign-up periods.

**Example**

Dot needs to estimate the number of staff needed to fill positions and time spans for the upcoming year.

**Types and Descriptions**

<table>
<thead>
<tr>
<th>Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Baseline</td>
<td>Forecast of the staff needed based on the budget or volume for a period of time (for example, annually)</td>
</tr>
<tr>
<td>Adjusted</td>
<td>Adjustments made to the baseline staffing plan based on recent trends and anticipated changes in work volume</td>
</tr>
</tbody>
</table>
What Is a Baseline Staffing Plan?

Overview

The baseline staffing plan is generally created at the beginning of a forecasting period, such as for the upcoming year. It is based on the following:

- The company's defined workload based on headcount, jobs, and spans of time
- A historical pattern of the staffing requirements for each job, shift, or schedule zone

The Workload Planner tool is used to estimate staffing requirements.

Example

The following is an example of a baseline staffing plan.

![Workload Planner Example](image)

Important Information

The baseline staffing plan must be created before creating an adjusted staffing plan.
What Is an Adjusted Staffing Plan?

Overview

An adjusted staffing plan is a revised version of the baseline staffing plan. It has been adjusted to current staffing needs. The adjusted staffing plan is commonly created to reflect changes in an organization’s workload, which could not be predicted at the time the baseline plan was created.

Example

Dot needs to adjust her current staffing plan to meet the needs of an increase in workload for the night shift registered nurses in the surgery unit. The needs were not anticipated when she created the baseline staffing plan, as depicted here.

Important Information

An adjusted staffing plan cannot be created if a baseline staffing plan does not exist for the selected time period.
How Do I Create a Staffing Plan?

Overview

You create and manage staffing plans in the Workload Planner. Managers can use created staffing plans to evaluate coverage and, if necessary, adjust the schedule to meet the plan.

You can import staffing data such as volume or census from another source to generate the headcount needed for a particular unit.

Example

To define a staffing plan, nurse managers access their unit’s Workload Planner and enter the number of staff required for each day as well as the start and end dates for the time period.

Methods and Descriptions

<table>
<thead>
<tr>
<th>IF you want to:</th>
<th>THEN use this view:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Make adjustments to the staffing plan for specific</td>
<td>Calendar</td>
</tr>
<tr>
<td>dates</td>
<td></td>
</tr>
<tr>
<td>Add patterns that repeat from week to week</td>
<td>Pattern</td>
</tr>
<tr>
<td>Enter the volume of work that needs to be completed</td>
<td>Volume</td>
</tr>
</tbody>
</table>

Important Information

- The system administrator is responsible for setting up the Job and Span columns and the location area.
- Use the Workload Generator feature to import staffing data, like volume or census, to generate the headcount needed.
Working with Staffing Plans

Overview

You use the Workload Planner to create and adjust your staffing plans.

Creating a Baseline Staffing Plan Job Aid

Scenario

You are estimating your staffing needs for the upcoming month and want to create a baseline staffing plan.

Instructions

Starting Point: Related Items > Workload Planner – Surgery

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Select the Pattern tab.</td>
</tr>
</tbody>
</table>
| 2    | In the Filter by Location field, select the appropriate location.  
  Note: If the desired location is not listed, select the desired location from the Show list.  
  Result: The related jobs display in the grid for the assigned time spans. |
| 3    | Select Pattern > New > Baseline. |
| 4    | In the Start Date and End Date fields, select the dates for the pattern duration.  
  Note: If the end date is unknown, select Forever. |
| 5    | In each cell, enter the number of staff required for each job and time span. |
| 6    | Click Save. |

Important Information

- If you change the baseline staffing plan and click Save, the changed plan overrides the existing baseline plan to become the new baseline plan.
- The baseline staffing plan overrides any adjusted staffing plan for the same time period.
Creating an Adjusted Staffing Plan Job Aid

Scenario

Based on the workload of the past two weeks, you realize you need to adjust your baseline staffing plan to meet the needs of the upcoming week.

Instructions

Starting Point: Related Items > Workload Planner – Surgery

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1    | From the Show list, select the desired location and click OK.  
**Note:** You can also select a location in the Filter By Location field. |
| 2    | In the Time Period field, select the desired time period. |
| 3    | Select the Pattern tab. |
| 4    | Select Pattern > Choose Another Pattern.  
**Result:** Patterns effective during the selected time period display. |
| 5    | Select a pattern and click OK. |
| 6    | Select the start date and end date.  
**Note:** Select Forever if you do not know the end date. |
| 7    | Make the necessary changes in the appropriate cells. |
| 8    | IF you are editing a/an:  
AND clicking:  
THEN Scheduler: |
| Baseline staffing plan | Save as Adjusted | Creates an adjusted staffing plan |
| Baseline staffing plan | Save | Changes the baseline staffing plan |
| Adjusted staffing plan | Save as Baseline | Creates a baseline staffing plan that includes your changes |
| Adjusted staffing plan | Save | Changes the adjusted staffing plan |
| 9    | When the application prompts you to save the baseline pattern as an adjusted plan, click Yes to save or No to cancel.  
**Result:** The adjusted plan becomes the default view in Workload Planner. |

Important Information

- You can only edit a pattern with a current or future start date. If you need to edit a pattern with a past start date, create a new pattern and save it as a new baseline or adjusted pattern.
- When you make changes to the staffing plan due to changes in demand or productivity, you edit the adjusted plan.
Comparing Baseline Plans with Adjusted Plans

Overview

The baseline plan represents the headcount you predicted that you would need, while the adjusted plan reflects the headcount you actually ended up needing. Having both a baseline and an adjusted staffing plan allows managers to compare them to better plan for the future.

Example

You can view the difference between specific dates within the baseline and adjusted plans by selecting the Calendar tab and selecting View > Baseline vs. Adjusted.

<table>
<thead>
<tr>
<th>Job</th>
<th>Span</th>
<th>Sun 7/22</th>
<th>Mon 7/23</th>
<th>Tue 7/24</th>
<th>Wed 7/25</th>
</tr>
</thead>
<tbody>
<tr>
<td>RN</td>
<td>D8</td>
<td>1/1</td>
<td>2</td>
<td></td>
<td>2/2</td>
</tr>
<tr>
<td></td>
<td>E8</td>
<td>1</td>
<td>1/2</td>
<td>1/2</td>
<td></td>
</tr>
<tr>
<td></td>
<td>N8</td>
<td>1/1</td>
<td>2</td>
<td></td>
<td></td>
</tr>
<tr>
<td>LPN</td>
<td>D8</td>
<td>1/1</td>
<td>2</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>E8</td>
<td>1</td>
<td>1/2</td>
<td>1/2</td>
<td></td>
</tr>
<tr>
<td></td>
<td>N8</td>
<td>1/1</td>
<td>2</td>
<td></td>
<td></td>
</tr>
<tr>
<td>LNA</td>
<td>D8</td>
<td>1/1</td>
<td>2</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>E8</td>
<td>1</td>
<td>1/2</td>
<td>1/2</td>
<td></td>
</tr>
<tr>
<td></td>
<td>N8</td>
<td>1/1</td>
<td>2</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Important Information

You can create multiple baseline staffing plans, but only one plan is in effect for a given time period.

Note: If effective dates overlap for two plans, the newer plan takes precedence.

Once you save your first baseline plan, the adjusted plan view displays when you open Workload Planner.
Practice – Part 1: Creating a Baseline Staffing Plan

Scenario
You need to create a new baseline plan for the coming year for the float unit.

Instructions – Part 1: Create a New Baseline Staffing Plan

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Log on Enhanced Time &amp; Attendance using your assigned user name and password.</td>
</tr>
</tbody>
</table>
| 2    | Based on the scenario, create a new baseline plan for the float unit using the following information:  
  ▪ Add one staffing unit for the evening time span (E8) for all jobs for each day of the week in the plan including Sunday and the holiday.  
  ▪ Start date: Today's date  
  ▪ End date: Forever  
  Hint: To see the float location, in the Show field, select All Home. |

Practice Login Information
Record your login information here: ______________________________________________
Practice Results – Part 1: Creating a Baseline Staffing Plan

![Workload Planner](image-url)
Practice – Part 2: Creating an Adjusted Staffing Plan

Scenario
After creating the baseline plan, you realize that you do not need any RNs, licensed practical nurses (LPNs), or licensed nurse assistants (LNAs) for the evening span on Mondays.

Instructions
Edit the baseline staffing plan to reflect the revised staffing needs, saving it as an adjusted staffing plan.
Practice Results – Part 2: Creating an Adjusted Staffing Plan
Copy Workload Pattern Data

Overview

You can copy workload pattern data (the workload plan) to other locations (or to themselves) and time periods. You can copy and save the data to a new location and time period as a new baseline plan or new adjusted plan. This option saves you from having to enter a pattern for every job each time you create a new pattern.

Note: In order to use this function, you must already have a staffing plan open, because “current data” pertains only to the data currently viewable.

Example

Dot is the scheduling manager for the surgery and float units. She wants to copy headcount data from one location to another, thus avoiding having to enter the same headcount information manually for the other location.
What Gets Copied and What Does Not

Be careful when you copy data to a location that does not have a workload plan with the same shifts, zones, and time spans. Data will not be copied for any shifts or zones that do not match exactly.

Example

You are copying a pattern that contains three shifts as shown in the first column of the table below. You copy the pattern to a destination location that uses two of the same shifts and one different shift. The copying function only allows the data for the matching shifts to copy.

The following table illustrates this example.

<table>
<thead>
<tr>
<th>Shifts in the pattern you are copying:</th>
<th>Shifts in the destination location:</th>
<th>Shifts in the destination location after patterns are copied:</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>7:00a - 3:00p</td>
<td>7:00a - 3:00p</td>
<td>7:00a - 3:00p</td>
<td>Copied successfully because shifts match</td>
</tr>
<tr>
<td>3:00p - 7:00p</td>
<td></td>
<td></td>
<td>No data is copied because shifts do not match.</td>
</tr>
<tr>
<td>3:00p - 11:00p</td>
<td></td>
<td></td>
<td>No data is copied because shifts do not match.</td>
</tr>
<tr>
<td>11:00p - 7:00a</td>
<td>11:00p - 7:00a</td>
<td>11:00p - 7:00a</td>
<td>Copied successfully because shifts match</td>
</tr>
</tbody>
</table>

Caution

The headcount data is copied, not the structure of the workload shift set or schedule zone set used by the location. The headcount data that is copied is only the data that matches the workload shifts and schedule zones at the destination. If there is headcount data that does not match, it will not copy over.

Important Information

You cannot copy an adjusted plan to a destination location that does not have a baseline plan already defined.
### Copying Workload Pattern Data Job Aid

#### Scenario

You want to copy pattern data from one location to another.

#### Instructions

**Starting Point:** Related Items > Workload Planner – Surgery

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1    | Select a location and time period. Make sure that the location that you choose includes the following:  
  - The location from which you are copying a pattern  
  - The destination location (or locations) to which you will copy the pattern |
| 2    | Select the Pattern tab, if necessary. |
| 3    | Select **Pattern > Choose Another Pattern**.  
  **Result:** Patterns effective during the selected time period display. |
| 4    | Select the pattern that you want to copy and click **OK**.  
  **Result:** The workload plan for the location displays. |
| 5    | To copy this pattern, select **Pattern > New > Baseline with Current Data** (or if you want to save this pattern as an adjusted pattern, select **New > Adjusted with Current Data**).  
  **Result:** The New Baseline with Current Data window opens. |
| 6    | In the **Location for New Pattern** field, select the destination location for the copy. |
| 7    | Enter start and end dates, or select **Forever** if you do not want to specify an end date. |
| 8    | Proceed as follows:  
  | **IF:** You want to save the copy immediately or copy the pattern data to multiple locations  
  **THEN:** Select the check box  
  | **IF:** You want to review the copy before you save it  
  **THEN:** Clear the check box |
| 9    | Click **OK**. |
| 10   | If you selected the check box in step 8 and want to copy the same pattern data to additional locations, repeat steps 6 - 8. |
| 11   | If you want to view your changes after the copy is complete, select the new location and time period. |
| 12   | To display the copied data, select **Pattern > Choose Another Pattern**. |
**Modifying a Staffing Plan Job Aid**

**Overview**

The Workload Planner Calendar view enables you to edit or change staffing plans for specific days without affecting the headcount for the rest of a staffing plan’s schedule pattern. If the change to the adjusted plan is for specific dates, rather than make a permanent change to the weekly pattern, use the Calendar tab to make the changes, and then save the edited plan as an adjusted plan.

**Example**

A special event requires extra staff for two days next week. Use the Calendar tab view to edit those dates in the adjusted plan.

Alternatively, a location is shutting down for a day or a week due to renovations. Use the Calendar tab view to zero out the staff requirements for that time period.

---

**In this example, the surgery unit will be closed for renovations May 8-9.**

---

**By using the Calendar view, you can delete the headcount for these particular dates and save the changes to the adjusted staffing plan.**
Scenario
Renovations are scheduled to take place this Saturday and Sunday of the current schedule period, causing the surgery unit to close with no personnel required on these days. Dot wants to modify the adjusted staffing plan and then compare it to the baseline plan.

Instructions
Starting Point: Related Items > Workload Planner – Surgery

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Select the Calendar tab.</td>
</tr>
<tr>
<td>2</td>
<td>Make sure that you are viewing the adjusted staffing plan. Select View &gt; Adjusted.</td>
</tr>
</tbody>
</table>
| 3    | From the Show list, select the desired location.  
**Note:** If multiple locations are available in Workload Planner, you can use the Filter by Location list to select the desired location. You can also select a location from the Organizational Map. |
| 4    | In the Time Period field, select the appropriate time period. |
| 5    | Enter or edit the headcount in the appropriate cells. |
| 6    | Click Save.  
**Result:** Your changes are put into effect. Because you made your edits in the Calendar view, the pattern you established for your adjusted plan will be interrupted only on the dates that you actually changed. |
| 7    | Select View > Baseline vs. Adjusted. |

Important Information
If you make a change to the Calendar view and then delete the change, the original Pattern view data is not restored.

Best Practice
Enter zero (0) rather than deleting the value in a cell and leaving it blank.
Practice: Changing Adjusted Staffing Plans Using Different Views

Scenario
You have been informed that the float unit will undergo renovations and that the entire unit will be shut down on the first Saturday and Sunday of the next schedule period.

Instructions

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Enter this information in the adjusted plan and save the plan.</td>
</tr>
<tr>
<td>2</td>
<td>Confirm your changes by viewing the Baseline vs. Adjusted View.</td>
</tr>
</tbody>
</table>

Practice Login Information
Record your login information here: ______________________________________________
Practice Results: Changing Adjusted Staffing Plans Using Different Views

Calendar View

Baseline vs. Adjusted View
Deleting a Staffing Plan Job Aid

Scenario
You need to delete a staffing plan that you no longer need.

Instructions
Starting Point: Related Items > Workload Planner - Surgery

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Select the <strong>Pattern</strong> tab.</td>
</tr>
<tr>
<td>2</td>
<td>Select the location that has the staffing plan you want to delete.</td>
</tr>
</tbody>
</table>
| 3    | Select **Pattern > Choose Another Pattern**.  
**Result:** The Choose Another Pattern window opens. |
| 4    | Select the pattern that you want to delete and click **Delete**. |
| 5    | Click **OK**. |

Important Information

- If you have one or more adjusted staffing plans in the same date range, you must first delete the adjusted staffing plans from the date range before deleting the baseline staffing plan.
- If an adjusted staffing plan is deleted, the system will use the baseline staffing plan when determining headcount.
What Is the Workload Generator?

Overview

The Workload Generator is a component of the Workload Planner used to determine staffing requirements based on the expected amount of work to be completed. The Workload Generator allows you to automate the process of populating the Workload Planner based on the number of staff budgeted for certain volumes. The Workload Generator supports flex staffing by updating staffing requirements to reflect the work volume.

With the Workload Generator, you can define the budgeted staff, import and edit volume, transform the volume based on a defined weighting factor, view the weighted volume, and generate the workload based on the weighted volume.

When the Workload Generator is finished running, you see the recommended number of staff in each job required to perform the work – the locations staffing plan in the Workload Planner.

Example

In the healthcare industry, the Workload Generator is used to determine how many nurses are needed in a particular area of a hospital. The number of nurses needed is based on the number of patients that need care (census) and the level of care that those patients need (acuity).
Using Workload Generator Job Aid (Optional)

Scenario
Jim Leiby wants to determine how many workers will be required for the radiology unit based on the number of radiographs needed.

Instructions – Part 1: Entering the Work Volume
Starting Point: Related Items > Workload Planner – Surgery

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Select the location and schedule period for which you need to plan.</td>
</tr>
<tr>
<td>2</td>
<td>Select the Volume tab.</td>
</tr>
<tr>
<td>3</td>
<td>Select Actions &gt; Add Volume.</td>
</tr>
<tr>
<td>4</td>
<td>In the Volume Type field, select Projected.</td>
</tr>
<tr>
<td>5</td>
<td>In the Span field, select the spans for which you need to plan.</td>
</tr>
<tr>
<td>6</td>
<td>In the Volume field, enter the expected volume.</td>
</tr>
<tr>
<td>7</td>
<td>In the Start Date and End Date fields, enter the dates for which you need to plan.</td>
</tr>
<tr>
<td>8</td>
<td>Click OK.</td>
</tr>
</tbody>
</table>

Instructions – Part 2: Generating the Workload

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Select the Calendar tab.</td>
</tr>
<tr>
<td>2</td>
<td>Select Actions &gt; Generate Workload.</td>
</tr>
<tr>
<td>3</td>
<td>In the Type field, select Projected.</td>
</tr>
<tr>
<td>4</td>
<td>In the Staffing Matrix field, select the location for which you need to plan.</td>
</tr>
<tr>
<td>5</td>
<td>In the Start Date and End Date fields, enter the dates for which you need to plan.</td>
</tr>
<tr>
<td>6</td>
<td>Click OK.</td>
</tr>
</tbody>
</table>
Viewing a Workload Planner Audit Job Aid

Overview

The Workload Planner provides an audit trail that aids in the tracking of coverage changes. A typical use for the audit trail is for The Joint Commission (TJC) survey of a healthcare facility. Deleted staffing plans do not display in the audit.

Instructions

Starting Point: Related Items > Workload Planner – Surgery

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Select the Calendar tab.</td>
</tr>
<tr>
<td>2</td>
<td>Select a location.</td>
</tr>
<tr>
<td>3</td>
<td>Select View &gt; Workload Audits.</td>
</tr>
<tr>
<td>4</td>
<td>Click OK.</td>
</tr>
</tbody>
</table>
What Is a Time Span?

Overview
Scheduling managers use staffing plans to answer the question, “How many employees do I need in each job and time span to meet the coverage requirements of this unit?”

In Scheduler, a time span is a period of time for which coverage is needed for jobs in a location. A time span can be either of the following:

- A shift
- A schedule zone

Example
The schedules for the radiology unit use time spans based on shifts, whereas the schedules for the surgery unit use time spans based on schedule zones. The following illustrates how each unit handles coverage for the 9 a.m. to 5 p.m. time span.

<table>
<thead>
<tr>
<th>Unit</th>
<th>Time Span Type</th>
<th>9 a.m. to 5 p.m. Coverage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Radiology</td>
<td>Shift</td>
<td>Maura works the 9 a.m. to 5 p.m. shift.</td>
</tr>
<tr>
<td>Surgery</td>
<td>Schedule Zone</td>
<td>Justin works from 9 a.m. to 12 p.m.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Bridget works from 12 p.m. to 5 p.m.</td>
</tr>
</tbody>
</table>

Time Span Types and Descriptions
The following table describes each type of time span.

<table>
<thead>
<tr>
<th>Time Span Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shift</td>
<td>Use when an employee must work a particular shift in order for the time span to be covered.</td>
</tr>
<tr>
<td>Schedule Zone</td>
<td>Use when one or more employees may work various shifts in order for the time span to be covered.</td>
</tr>
</tbody>
</table>

Important Information
- Once your organization has determined which type of time span to use, your Scheduler system administrator is responsible for setting up shift or schedule zone time spans.
- Your company may use both shifts and schedule zones for different groups of employees.
What Is a Shift Time Span?

Overview

A shift time span is a period of time with a specific start time and end time, usually in one 24-hour period. When a shift represents the span, it defines the coverage as based on the start and end times that employees are scheduled to work. A shift set is a collection of shifts used to define staffing needs for a location.

Note: If you use shifts for your time spans, you can use the Calculate Open Shifts option to create any open shifts that may be needed.

When you use shift time spans, you ask the question, "How many people are working a particular shift?"

Example

The radiology unit organization has two shifts that the majority of employees work: 9 a.m. to 5 p.m. and 5 p.m. to 9 p.m.
What Is a Schedule Zone Time Span?

Overview
A schedule zone time span is a period of time for which you need coverage for a specific job. However, you do not need a specific person to cover those specific hours. There can be multiple overlapping shifts within schedule zones.

Schedule zones provide you with a way to evaluate coverage for a period of time, rather than just a shift. It also makes it easier to evaluate coverage when there are overlapping shifts.

When you use schedule zone time spans, you ask the question, “How many people are covering a particular span of time?”

Example
In the surgery unit, the 9 a.m. to 5 p.m. time span represents a schedule zone that is covered by overlapping shifts. Employees are scheduled to work a variety of shifts. The following is an example of overlapping shifts:

Note: Shifts can exist within schedule zones.

Important Information
To use the Schedule Generator to create open shifts, your organization must configure time spans as schedule zones.
Viewing Coverage and Variances Job Aid

Overview

Variance is a comparison between headcount in your current schedule and staff requirements in the staffing plan. You can view variances in staffing plans and schedules on the Daily Coverage and Coverage tab views in the Schedule Planner.

Scenario

Dot checks the Daily Coverage view for registered nurses in the surgery unit and finds that under coverage exists. The following is an example of this page.

Instructions

Starting Point: Related Items > Schedule Setup (Schedule Planner)

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Select View &gt; Daily Coverage.</td>
</tr>
<tr>
<td>2</td>
<td>In the Job field, select the job for which you want to check coverage.</td>
</tr>
<tr>
<td>3</td>
<td>In the Span field, select the time span for which you want to check coverage.</td>
</tr>
</tbody>
</table>
Tip

Point to a cell in the View row to display details about the coverage for that day and time span.
Module 2 Summary

Topics
This module included the following topics:
- Workload Planning
- Working with Staffing Plans

Knowledge Check
1. Which of the following is a benefit of using Workload Planner?
   a. It allows you to view and edit schedules for your employees.
   b. It indicates times when the employee is available.
   c. It lets you track and edit your staffing plan in Scheduler.
   d. It provides guidance in choosing the most qualified employees for open shifts.

2. When you plan your workload, you begin with the ____________ and as changes occur over time, you create and work with the ____________.
   a. Workload plan, staffing plan
   b. Adjusted staffing plan, baseline staffing plan
   c. Baseline staffing plan, workload volume plan
   d. Baseline staffing plan, adjusted staffing plan

3. Which of the following questions do you attempt to answer during the Estimate stage of the scheduling cycle?
   a. Is the schedule ready to post?
   b. How many people are needed?
   c. Who will work where and when?
   d. Is the schedule up to date?
Part 1 Closing

Part 2 Preview

The next part of the course includes the following topics:

- Use the Schedule Planner
- Determine employee availability
- Work with availability patterns
- Work with availability templates
- Work with availability overrides
Using Scheduler for Enhanced Time & Attendance

Part 2: Creating Schedules with Scheduler
Module 3: Working with Employee Availability

Handout Manual
Part 2 Introduction

In this part:
Module 3: Working with Employee Availability

Module 3 Introduction

Purpose
This module prepares you to work with employee availability to create schedules.

Topics
This module includes the following topics:
- Using the Schedule Planner
- Determining Employee Availability
- Working with Availability Patterns
- Working with Availability Templates
- Working with Availability Overrides
Using the Schedule Planner

Overview
You use the Schedule Planner during the Create stage of schedule planning to create schedules. You can use four different views in Schedule Planner — By Employee, By Job, By Group, and By Employment Terms.

What Is the Create Stage?

Overview
The Create stage of the scheduling cycle involves tasks you perform to create schedules based on your staffing plan. Typically, you create schedules for one schedule period. You create future schedules while the current schedule is in effect, which allows time for employees to request shifts and time off.

Example
You need to create a schedule for next month based on employee availability.
What Are the Schedule Planner Views?

Overview

The Schedule Planner is a Scheduler feature that allows management to view, create, and edit schedules for employees and jobs for which they have responsibility, including accounting for any time off or sick time, hours scheduled or planned to work, and an employee’s availability to work.

The Schedule Planner displays all jobs for a selected location and its sub locations.

Example – By Employee View

The following is an example of the Schedule Planner By Employee view:

<table>
<thead>
<tr>
<th>View</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>By Employee</td>
<td>Provides the week-to-week schedule for your employees. You can view the</td>
</tr>
<tr>
<td></td>
<td>information in any of the following time intervals:</td>
</tr>
<tr>
<td></td>
<td>▪ Daily</td>
</tr>
<tr>
<td></td>
<td>▪ Four-hour or one-hour</td>
</tr>
<tr>
<td></td>
<td>▪ Fifteen-minute</td>
</tr>
<tr>
<td>By Group</td>
<td>Provides the same time interval views as the By Employee view, with schedules</td>
</tr>
<tr>
<td></td>
<td>organized by employee schedule groups</td>
</tr>
<tr>
<td>By Job</td>
<td>Provides a graphical timeline arranged by job rather than employee</td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> To view data on this tab, employees must first be loaded to</td>
</tr>
<tr>
<td></td>
<td>Enterprise Scheduler.</td>
</tr>
<tr>
<td>By Employment Terms</td>
<td>Provides a view of coverage, open shifts, and gaps between shifts to assist</td>
</tr>
<tr>
<td></td>
<td>in managing contractual relationships between your company and an employee</td>
</tr>
<tr>
<td></td>
<td>or group of employees</td>
</tr>
</tbody>
</table>
Schedule Planner – By Group View

A schedule group is a way to group employees who have similar schedules and working characteristics. Grouping employees allows you to select employees with similar schedules and to make changes. Employees can belong to many groups at the same time. For example, you can assign a group of employees working on a pilot project to the same schedule group. This allows you to easily view all hours scheduled for that project.

The By Group tab provides the same formats as the By Employee tab, with employee schedules organized by their schedule groups. Employees with no association to a group are shown first, under the heading "Ungrouped Employees." Empty groups are not displayed.

Additional Resources

For more information about the supporting data tabs that display at the bottom of the Schedule Planner, refer to the "Supporting Data Tabs" topic in the appendix.
Explore: Schedule Planner – By Job View

The By Job tab displays a graphical view of the schedule by location and job. The locations and jobs appear on the left. Employee names appear in the cells with their shifts.

The following is an example of the Schedule Planner By Job view.

Colors and Types of Shifts

The following table lists the colors used in the Schedule Planner interval views to distinguish one shift from another.

<table>
<thead>
<tr>
<th>Color</th>
<th>Type of Shift</th>
</tr>
</thead>
<tbody>
<tr>
<td>Blue</td>
<td>Shifts</td>
</tr>
<tr>
<td>Yellow</td>
<td>Pay codes</td>
</tr>
<tr>
<td>Green</td>
<td>Accrual amounts</td>
</tr>
<tr>
<td>Aqua</td>
<td>Available days</td>
</tr>
<tr>
<td>Rose</td>
<td>Unavailable</td>
</tr>
<tr>
<td>Orange</td>
<td>Off days</td>
</tr>
</tbody>
</table>

Important Information

- Open shifts are displayed by job and are outlined in red.
- Various colors indicate the type of shift, pattern, or pay code that is scheduled.
- You can view the full employee name and shift details by pointing to the shift.
Determining Employee Availability

Overview

Determining employee availability is a critical step in creating schedules. You can view different types and levels of availability in Scheduler.

What Is Availability?

Availability is a Scheduler feature that enables management to track the following:
- Which employees are available to work
- When employees are available to work
- When employees are not available to work
- When employees prefer to work
- When employee availability is unknown

You determine whether you want to take advantage of this optional functionality when creating schedules.

The availability feature has the following benefits:
- Saves managers time by identifying available employees to fill open shifts
- Increases employee satisfaction and thereby improves employee retention

Example

This is an example of viewing availability by employee in Schedule Planner.

Important Information

- Knowing an employee's availability status makes scheduling more efficient because you can immediately determine if an employee is available to work a shift.
- Employees with access to Self Service may be allowed to define their own availability status for specific periods.
- You must select View > Availability to see an employee's availability in the Scheduler Planner.
### Types, Descriptions, and Colors

<table>
<thead>
<tr>
<th>Type</th>
<th>Description</th>
<th>Color</th>
</tr>
</thead>
<tbody>
<tr>
<td>Available</td>
<td>You can schedule an employee to work during this time.</td>
<td>Light green</td>
</tr>
<tr>
<td>Unavailable</td>
<td>The employee is not available to work during this time. If employees are</td>
<td>Purple</td>
</tr>
<tr>
<td></td>
<td>scheduled for a time during which they are unavailable, the system can be</td>
<td></td>
</tr>
<tr>
<td></td>
<td>set up to generate a schedule rule violation.</td>
<td></td>
</tr>
<tr>
<td>Unknown</td>
<td>Employee availability is not known. If employees are uncertain of their</td>
<td>White</td>
</tr>
<tr>
<td></td>
<td>availability for a period of time and would like to be considered to work,</td>
<td></td>
</tr>
<tr>
<td></td>
<td>their availability can be entered as Unknown.</td>
<td></td>
</tr>
<tr>
<td>Preferred</td>
<td>The employee prefers to work during this time.</td>
<td>Dark green</td>
</tr>
</tbody>
</table>
What Are Availability Levels?

Availability levels are ways in which you can assign availability in your organization. They allow you to create repeating patterns of availability types for specific people, locations, and periods of time.

Example 1

A retail company with stores in a “blue law” county assigns all locations in that county asUnavailable on Sundays.

Availability Levels and Descriptions

<table>
<thead>
<tr>
<th>Availability Level</th>
<th>Description</th>
</tr>
</thead>
</table>
| Global             | - The most basic availability level — an enterprise-wide setting that assigns one availability type to all employees
|                    | - You can set patterns to available, unavailable, or unknown. The “Preferred” availability type is not an option.
|                    | - This is the default availability level. |
| Location           | - Assigned to locations, such as surgical unit, pediatrics unit, and so on
|                    | - All employees with primary jobs in a location inherit the location availability pattern.
|                    | - Used when several employees in a location share the same availability patterns
|                    | - You can set patterns to available, unavailable, or unknown. The “Preferred” availability type is not an option.
|                    | - Location availability patterns override global availability. |
| Base Employee      | - An individual’s availability pattern that shows when the employee:
|                    | - Is available to work (Available)
|                    | - Is not available to work (Unavailable)
|                    | - Prefers to work (Preferred)
|                    | - Availability is unknown (Unknown)
|                    | - Prefers not to work (Preferred Time Off)
|                    | - Overrides location and global availability levels |
| Employee Override  | - Temporarily overrides all other availability levels with temporary availability patterns covering a specific period of time
|                    | - When the temporary availability period ends, the next highest availability level is reinstated.
|                    | - Used when employees cannot work their regular shift due to training or temporary personal reasons |
Example 2

In this base employee availability level example, Martha is available to work from 6 a.m. to 5 p.m. She is unavailable from midnight to 6 a.m. and from 5 p.m. to midnight. Her preference is to work 7 a.m. to 3:30 p.m.

<table>
<thead>
<tr>
<th>Name</th>
<th>Totals</th>
<th>Unit</th>
<th>Job</th>
<th>Tue</th>
<th>03</th>
<th>8p</th>
<th>4a</th>
<th>8a</th>
<th>12p</th>
<th>4p</th>
<th>8p</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gavin, Martha</td>
<td>160.00</td>
<td>3/CityWest</td>
<td>LPN</td>
<td></td>
<td></td>
<td>8p</td>
<td>4a</td>
<td>8a</td>
<td>12p</td>
<td>4p</td>
<td>8p</td>
</tr>
</tbody>
</table>

Unavailable  Preferred  Unavailable

6 a.m. to 5 p.m. Available
Working with Availability Patterns

Creating Base Employee Availability Patterns Job Aid

Overview

The base employee availability pattern represents an employee's individual availability status and shows the following:

- When he or she is available to work (Available)
- When he or she is not available to work (Unavailable)
- When he or she prefers to work (Preferred)
- When his or her availability is unknown (Unknown)
- When he or she prefers not to work (Preferred Time Off)

You create base employee availability patterns in the Schedule Planner.

Scenario

You need to create a base employee availability pattern for a registered nurse in the float unit, making sure that it reflects the employee's availability pattern of 7 a.m. to 3:30 p.m., Monday through Friday (7 a.m. to 3:30 p.m. is preferred, while all other times are available).

Instructions

Starting Point: Related Items > Schedule Setup (Schedule Planner)

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Select the <strong>By Employee</strong> tab.</td>
</tr>
</tbody>
</table>
| 2 | Select the employee name and then select **Availability > Add Pattern**.  
**Result:** The Add Availability Pattern window opens. |
| 3 | In the **Pattern Name** field, enter a pattern name. |
| 4 | In the **Pattern Type** field, select **Base**.  
**Note:** If you want to insert an availability template, click Insert Pattern. |
| 5 | In the **Pattern Start Date** field, select the start date on which the pattern begins.  
**Note:** The application defaults to the first day of the current week. You can edit the date. |
| 6 | In the **Availability Start Date** field, select the date on which the availability takes effect.  
**Note:** The availability start date can be different from the pattern start date. Additionally, if you decide to insert an availability template, you need to override these dates. |
| 7 | In the **Availability End Date** field, select the date on which the availability pattern ends or select **Forever** to have the pattern repeat until otherwise indicated. |
| 8 | In the **Recurring** field, select the number of days or weeks in the pattern. |
| 9 | Select the day or days on which the same availability applies. Click and drag to select a range of days or press **Ctrl** and click to select noncontiguous days. To enter availability for part of a day, click **Hours Editor**. You can enter availability by whole hours or for part of an hour. |
| 10 | Click **OK** twice. |
Practice: Creating a Base Employee Availability Pattern

Scenario
Dot Doting is gathering her employees' base employee availability information so she can fill open shifts as they occur. Megan Johnson is available Monday through Friday from 7 a.m. to 4 p.m. Her preference is 7:30 a.m. to 3:30 p.m. Starting next week, Megan may also be able to work extra shifts on Saturday from 8 a.m. to 2 p.m. but is unavailable all other times.

Instructions
Enter a base employee availability pattern for Megan Johnson, selecting the next schedule period for time period. Reference the job aid on the previous page as needed.

Practice Login Information
Record your login information here: ________________________________
Practice Results: Creating a Base Employee Availability Pattern

Add Availability Pattern

Schedule Planner Availability View
Editing Base Employee Availability Patterns Job Aid

Overview
Permanent changes can be made to an employee’s base employee availability pattern. For example, a permanent change to an employee’s base availability pattern may be necessary when an employee changes from part-time to full-time status.

Scenario
Cliff Aceman prefers to work the 7 a.m. to 3:30 p.m. shift on weekdays. Although he is available during that same time on Saturdays, he is not available during any other time during the week.

Instructions
Starting Point: Related Items > Schedule Setup (Schedule Planner)

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1    | Select the employee name and select Availability > Edit Pattern.  
*Result:* The Edit Availability Pattern window opens. |
| 2    | Edit the availability start date, if necessary.  
*Note:* This date cannot be a date that is before the employee’s signoff date on the timecard. |
| 3    | Enter the availability end date. |
| 4    | Make the required edits. |
| 5    | To close the Edit Hours window, click OK. |
| 6    | To close the Add Availability Pattern window and save the edits, click OK. |

When you edit a base availability pattern, you cannot restore the original pattern.

Important Information
When you edit a base availability pattern, you do not need to click Save; your changes are automatically saved.
Working with Availability Templates

Overview
You can create availability templates and use them repeatedly for different employees and locations saving you time by eliminating the need to create separate base availability patterns for each individual employee.

What Are Availability Templates?
Availability templates contain repeating patterns of availability settings that can be assigned to individual employees and locations. All employees whose primary jobs are in that location inherit the availability settings. You can apply availability templates to an employee’s base employee pattern.

Example
You can create one template for several nurses within the same location who typically prefer to work the eight-hour day shift (D8) on weekdays but who are available to work any time during weekends.

The Difference between Availability Patterns and Templates
Availability templates differ from availability patterns in that templates are reusable -- they do not contain dates or employee assignments. Availability patterns are created for specific people and time periods and cannot be reused.
**Important Information**

- Editing or deleting an availability template after assigning it to an employee will not affect that employee's base employee availability pattern. The edit will only affect employees who are assigned the template in the future.

- You must reassign any revised availability templates to employees for those revisions to take effect in their base employee availability pattern.

**Best Practice**

Use recognizable names when saving availability templates so they are easy to locate when you want to use them again.
Creating Availability Templates Job Aid

Overview

There are the following two ways to create an availability template:
- Duplicate an existing template and edit it.
- Create a new template.

Scenario

You want to create an availability template that reflects the following:
- Available: D8 (7a – 330p) Monday through Friday
- Unknown: All other hours from Monday through Friday
- Unavailable: On weekends

Instructions

Starting Point: Related Items > Admin Quick Links

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Select <strong>Availability Templates</strong>.&lt;br&gt;<strong>Result:</strong> The Availability Templates page displays.</td>
</tr>
<tr>
<td>2</td>
<td>Select the <strong>Create/Edit</strong> tab.</td>
</tr>
<tr>
<td>3</td>
<td>Click <strong>New</strong>.</td>
</tr>
<tr>
<td>4</td>
<td>In the <strong>Name</strong> and <strong>Description</strong> fields, enter a name and description for the availability template.&lt;br&gt;<strong>Note:</strong> The Name field has a maximum of 30 characters.</td>
</tr>
<tr>
<td>5</td>
<td>In the <strong>Recurring</strong> field, select the number of days or weeks that the pattern will repeat.</td>
</tr>
<tr>
<td>6</td>
<td>In the <strong>Rotation</strong> section, select the day or days that apply to this template.&lt;br&gt;<strong>IF:</strong>&lt;br&gt;The days are contiguous&lt;br&gt;The days are not contiguous&lt;br&gt;<strong>THEN,</strong> to select the days:&lt;br&gt;Click and drag across the days&lt;br&gt;Press <strong>Ctrl</strong> and click the specific days</td>
</tr>
<tr>
<td>7</td>
<td>Click the icon for the desired availability type (Unavailable, Unknown, Available, or Preferred).</td>
</tr>
<tr>
<td>8</td>
<td>If certain hours of the day have different availability types, click <strong>Hours Editor</strong>.&lt;br&gt;<strong>Note:</strong> For each segment of the 24-hour time period, enter the start time and end time, and select the desired availability type.</td>
</tr>
<tr>
<td>9</td>
<td>To apply the pattern and return to the Availability Templates page, click <strong>OK</strong>.</td>
</tr>
<tr>
<td>10</td>
<td>Click <strong>Save</strong>.&lt;br&gt;<strong>Result:</strong> The template displays in the pattern name list and can now be applied to employees.</td>
</tr>
</tbody>
</table>

Important Information

You can create as many availability templates as you need. However, the templates must have unique names.
Assigning Availability Templates to Employees Job Aid

**Overview**
When you assign availability templates to an employee, you are actually creating a base employee availability pattern for that employee.

**Scenario**
Assign the D8 M-F availability template to Rachel Knoff, RN.

**Instructions**
Starting Point: Related Items > Schedule Setup (Schedule Planner)

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Select the employee to whom you wish to assign an availability template.</td>
</tr>
<tr>
<td>2</td>
<td>Select Availability &gt; Add Pattern.</td>
</tr>
<tr>
<td>3</td>
<td>Click Insert Pattern.</td>
</tr>
</tbody>
</table>
| 4    | In the Insert Pattern field, select an availability pattern template and click OK.  
**Result:** The template is inserted into the employee's availability pattern. If necessary, edit the pattern. |
| 5    | Select the availability start date (the date the availability takes effect for this employee). |
| 6    | Select the availability end date or select Forever if no end date is known. |
| 7    | Click OK.  
**Result:** The availability pattern is saved. |
# Assigning Availability Templates to Locations Job Aid

## Overview

By assigning an availability template to a location, you are creating a location availability pattern that applies to employees in that location. This means that all employees whose primary job is in that location will inherit the availability template settings that have been assigned. This applies only to employees who do not have a base employee availability pattern already assigned to them because that base employee availability pattern overrides location availability patterns.

## Instructions

### Starting Point: Related Items > Admin Quick Links

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Select Availability Templates.</td>
</tr>
</tbody>
</table>
| 2    | Select the Assign to Location tab.  
**Result:** The workspace lists all availability templates that have been assigned to locations.  
| 3    | Click Add.  
**Result:** The Assign To Location window opens. |
| 4    | Under Availability Templates, select a template from the list in the Pattern Name column.  
**Result:** The name of the template populates the Pattern Name field under Names and Dates.  
| 5    | Select the location from the Organizational Map. |
| 6    | In the Names and Dates section, select the availability start date, which is the calendar date when the availability pattern begins its cycle. |
| 7    | Select the availability end date or, to keep the pattern running indefinitely, select **Forever**. |
| 8    | Click **OK**. |
Practice: Creating and Assigning Availability Templates

Scenario
Earl Whaley and Calvin Tims work part-time and are only available on weekends from 7 a.m. to 3:30 p.m. Dot needs to create an availability template to reflect this.

Instructions

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Create the availability template.</td>
</tr>
<tr>
<td>2</td>
<td>Assign the availability template to the employees.</td>
</tr>
</tbody>
</table>

Practice Login Information
Record your login information here: ______________________________________________
Practice Results: Creating and Assigning Availability Templates

Create Availability Template

<table>
<thead>
<tr>
<th>Pattern Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>All Hours Available M-F</td>
<td>All Hours Available M-F (Weekends Unavailable)</td>
</tr>
<tr>
<td>Always Available</td>
<td>24x7</td>
</tr>
<tr>
<td>D 12 M-F</td>
<td>Available 7am to 7pm M-F</td>
</tr>
<tr>
<td>DB M-F</td>
<td>Available 7am-3:30pm M-F (unavailable weekends and all other times)</td>
</tr>
<tr>
<td>DB Weekends Only</td>
<td>Available 7am-3:30pm M-F (unavailable all other times)</td>
</tr>
</tbody>
</table>

Assign Availability Template

<table>
<thead>
<tr>
<th>Name</th>
<th>ACA No.</th>
<th>Status</th>
<th>Shift</th>
<th>Pay Code</th>
<th>Availability</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>James</td>
<td>123</td>
<td>Full Time</td>
<td>M-F</td>
<td>1234</td>
<td>Available</td>
<td></td>
</tr>
<tr>
<td>Sarah</td>
<td>456</td>
<td>Part Time</td>
<td>M-F</td>
<td>1234</td>
<td>Available</td>
<td></td>
</tr>
</tbody>
</table>

Schedule Planner for ACA - SCH

<table>
<thead>
<tr>
<th>Day</th>
<th>Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Thu</td>
<td>7am</td>
</tr>
<tr>
<td>Thu</td>
<td>12pm</td>
</tr>
<tr>
<td>Thu</td>
<td>5pm</td>
</tr>
<tr>
<td>Fri</td>
<td>7am</td>
</tr>
<tr>
<td>Fri</td>
<td>12pm</td>
</tr>
<tr>
<td>Fri</td>
<td>5pm</td>
</tr>
</tbody>
</table>

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Guided Practice: Creating a Base Employee Availability Template (Optional)

Scenario

A few of the LNAs typically prefer to work the N8 (11 p.m. to 7:30 a.m.) shifts on weekdays but are available to work any time including weekends. Dot needs to create an availability template for this pattern and assign it to Joe Blue.

Instructions, Part 1 – Creating the Availability Template

Starting Point: Workspaces > Related Items > Admin Quick Links

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Select Availability Templates.</td>
</tr>
<tr>
<td>2</td>
<td>Select the Create/Edit tab and click New.</td>
</tr>
<tr>
<td>3</td>
<td>In the Name and Description fields, enter N8 and 11 PM to 7:30 AM shift (weekdays).</td>
</tr>
<tr>
<td>4</td>
<td>Select Monday through Friday as the days that apply to this template.</td>
</tr>
<tr>
<td>5</td>
<td>Click the Preferred icon.</td>
</tr>
<tr>
<td>6</td>
<td>Click OK and then click Save.</td>
</tr>
</tbody>
</table>

Instructions, Part 2 – Assigning the Availability Template to an Employee

Starting Point: Related Items > Schedule Setup (Schedule Planner)

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Select Joe Blue.</td>
</tr>
<tr>
<td>2</td>
<td>Select Availability &gt; Add Pattern.</td>
</tr>
<tr>
<td>3</td>
<td>Select Insert Pattern.</td>
</tr>
<tr>
<td>4</td>
<td>In the Insert Pattern field, select N8 and then click OK.</td>
</tr>
<tr>
<td>5</td>
<td>Click OK.</td>
</tr>
</tbody>
</table>
Working with Availability Overrides

Overview
Scheduler gives you the ability to temporarily override employee availability. This allows you to change an employee’s schedule without impact to the base availability pattern.

You have three methods for overriding availability:
- Add Pattern
- Add Override
- Pay Code Editor

What Is an Availability Override?
An availability override is a temporary replacement of an employee’s normal availability pattern for a specific time period. You can apply it if the employee has a base employee pattern. An employee override supersedes all other availability settings. It will override any existing availability pattern the employee may have for a specific period of time, after which the employee’s next assigned level of availability is automatically reinstated.

Example
An employee is attending a class on Wednesday evenings for several months and cannot work evening shifts during this period. You can enter a temporary availability override for that period using the Add Pattern method. After three months, the original pattern restarts.

When to Use Availability Overrides
The following table identifies which override method to use in a given situation.

<table>
<thead>
<tr>
<th>IF you want to:</th>
<th>THEN use:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Make temporary, extended term pattern changes to an employee’s base employee availability pattern</td>
<td>Add Pattern</td>
</tr>
<tr>
<td><strong>Example:</strong> An employee is in training during the week and cannot work the regular shift.</td>
<td></td>
</tr>
<tr>
<td>Make a temporary, one-time event change to any existing availability pattern that an employee may have</td>
<td>Add Override</td>
</tr>
<tr>
<td><strong>Example:</strong> An employee cannot get to work due to automobile problems.</td>
<td></td>
</tr>
<tr>
<td>Make a temporary, one-time, planned time-off event change, such as when a pay code is used to account for an employee's time (for example, vacation, sick, jury duty, and so on).</td>
<td>Pay Code Editor</td>
</tr>
<tr>
<td><strong>Example:</strong> An employee is taking vacation time.</td>
<td></td>
</tr>
</tbody>
</table>
Creating Availability Overrides Using the Add Pattern Method Job Aid

Overview
Use the Add Pattern method to make temporary, extended term pattern changes to an employee’s base employee availability pattern.

Scenario
Cliff Aceman will be in training and unavailable to work on Mondays and Tuesdays for the next three weeks. Edit his base employee availability pattern as follows:
- Unavailable: 12 a.m. to 6 a.m. and 6 p.m. to midnight
- Available: 6 a.m. to 6 p.m.
- Preferred: 7 a.m. to 3:30 p.m.

Override Cliff’s availability pattern for the next three weeks to indicate that he is unavailable on Mondays and Tuesdays.

Instructions -- Overiding an Availability Pattern
Starting Point: Related Items > Schedule Setup (Schedule Planner)

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Select the By Employee tab.</td>
</tr>
<tr>
<td>2</td>
<td>Select the employee name and then select Availability &gt; Edit Pattern.</td>
</tr>
<tr>
<td>3</td>
<td>In the Pattern Name field, enter a pattern name.</td>
</tr>
<tr>
<td>4</td>
<td>In the Pattern Type field, select Override.</td>
</tr>
<tr>
<td>5</td>
<td>Enter the temporary availability pattern or, to insert an existing availability pattern template, click Insert Pattern.</td>
</tr>
<tr>
<td>6</td>
<td>Enter the pattern start date, availability start date, and availability end date.</td>
</tr>
<tr>
<td>7</td>
<td>To save the edits and close the window, click OK.</td>
</tr>
</tbody>
</table>

Make sure the Override option is selected.

Instructions -- Deleting a Pattern Override
Starting Point: Related Items > Schedule Setup (Schedule Planner)

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Select the employee name and select Availability &gt; Delete Pattern.</td>
</tr>
<tr>
<td>2</td>
<td>Select the override pattern and click Delete.</td>
</tr>
<tr>
<td>3</td>
<td>Click OK.</td>
</tr>
<tr>
<td>4</td>
<td>To confirm the deletion, click Yes.</td>
</tr>
</tbody>
</table>
■ **Important Information**

Overriding a base employee availability pattern, as opposed to editing it, ensures that if you remove the override, the employee’s underlying availability pattern is restored.

■ **Best Practices**

- After saving the new pattern, view it in the Availability View of the Schedule Planner.
- When the override pattern expires, delete it.
Creating Availability Overrides Using the Add Override Method Job Aid

Overview
Use the Add Override method to make a temporary, one-time event change to any existing availability pattern an employee may have.

Scenario
Rolando Arturo's car broke down, and he will not be able to work tomorrow while his car is being repaired.

Instructions
Starting Point: Related Items > Schedule Setup (Schedule Planner)

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Select the employee name and then select Availability &gt; Add Override.</td>
</tr>
<tr>
<td>2</td>
<td>In the Start Time and End Time fields, enter the start time and end time to cover the time span to override.</td>
</tr>
<tr>
<td>3</td>
<td>In the Type field, select the availability type.</td>
</tr>
<tr>
<td>4</td>
<td>In the Number of Days field, select the number of days for which the override applies.</td>
</tr>
<tr>
<td>5</td>
<td>Click OK. Result: The employee's availability pattern now reflects the temporary availability override in the Schedule Planner.</td>
</tr>
</tbody>
</table>

Important Information
The override starts on the date selected in the Schedule Planner and continues for the number of calendar days you select. Therefore, you do not need to reapply the same override to each consecutive day.
Practice: Working with Employee Availability (Optional)

Scenario

Jim is gathering his employees’ base employee availability information so he will know who can fill shifts when openings occur.

- Kevin Holbrooks is available from Monday through Friday 7 a.m. to 4 p.m. He may also be able to work extra shifts on Saturday but is unavailable all other times.
- George Marsch is available Monday through Friday from 1 p.m. to 12 a.m. He may also be able to work extra shifts on weekends but is unavailable all other times.
- A few of Jim’s technicians typically prefer to work the E8 (3:00p – 11:30p) shift on weekdays but are available to work any time including weekends.
- RP McMurphy normally works during the day and is unavailable for extra shifts because her husband works nights. Next week, however, she is available for a few evenings and would be willing to work a couple of evenings if needed. She is available Wednesday and Thursday from 6 a.m. to 11:30 p.m. though she prefers to work her regular 7 a.m. to 4 p.m. shift.

Instructions

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
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<tbody>
<tr>
<td>1</td>
<td>Add an availability pattern for Kevin Holbrooks starting with the next schedule period.</td>
</tr>
<tr>
<td>2</td>
<td>Assign a base employee availability pattern to George.</td>
</tr>
<tr>
<td>3</td>
<td>Create a template called “E8 Preferred” for which the shift is 3 p.m. to 11:30 p.m. weekdays and any time on the weekends. Assign the new template to David Nash, one of Jim’s technicians.</td>
</tr>
<tr>
<td>4</td>
<td>Override RP McMurphy's availability pattern to reflect the additional time she is available next week.</td>
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Practice Login Information

Record your login information here: ____________________________________________________
### Practice Results: Working with Employee Availability

![SCHEDULE PLANNER FOR ACA - SCH](Image)

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<tbody>
<tr>
<td>Smith, John</td>
<td>Part Time</td>
<td>0.000</td>
<td>0.00</td>
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<tr>
<td>Brown, Mary</td>
<td>Full Time</td>
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<td>0.00</td>
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<tr>
<td>Jones, Alex</td>
<td>Part Time</td>
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<td>0.00</td>
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<tr>
<td>Rodriguez, Maria</td>
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<tr>
<td>Garcia, Pedro</td>
<td>Full Time</td>
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<td>0.00</td>
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Module 3 Summary

Topics
This module included the following topics:
- Using the Schedule Planner
- Determining Employee Availability
- Working with Availability Patterns
- Working with Availability Templates
- Working with Availability Overrides

Knowledge Check

1. Which of the following can you track using availability? (Select all that apply.)
   a. When an employee is or is not available to work
   b. When an employee is scheduled to work
   c. When an employee prefers to work
   d. Which employees are available to work

2. Which of the following are types of availability? (Select all that apply.)
   a. Preferred
   b. Not Preferred
   c. Unavailable
   d. Available

3. Megan can work from 9 a.m. to 5 p.m. on weekdays. Her availability is reflected in _____.
   a. Her location's availability pattern
   b. Her base employee availability pattern
   c. Her location's availability template
   d. Her job's availability pattern

4. Which of the following are methods to override availability? (Select all that apply.)
   a. Add Pattern
   b. Add Template
   c. Add Override
   d. Pay Code Editor

5. Which availability level is the default availability setting?
   a. Base Employee
   b. Employee Override
   c. Global
   d. Location
Part 2 Closing

Part 3 Preview

Upon completing the next part of the course, you will be prepared to:

- Assign schedules to employees
- Work with open shifts