

CREATE A SELF SCHEDULING PROCESS

Self scheduling processes are defined per team and can be used to allow employees to choose their work schedule from a selection of unpublished unassigned shifts. Employees must be eligible to work the job assigned to the shift.

Shifts sent to a self scheduling process are locked by the process and cannot be edited until the process closes.

CREATE SELF SCHEDULE GROUPS

Self Scheduling shifts are made available to Groups. You must create a group before you can have an open Self Schedule Process

1. Go to Scheduling / Self-Scheduling / Group
2. Press Create New Entry
3. Enter a Name and Description
4. Press Save
5. Add Employees to the Group Employee section. This is who will be able to self-schedule when creating the process. These groups will need to continue to be updated with new hires, transfers and terminations.

Scheduling / Self-Scheduling / Group / Create New / Details

✓ Your changes have been saved.

[Create New Entry](#)

Group - Details ...

Del	Group Name *	Group Description
<input type="checkbox"/>	EMVS TEAM	Entire Demo Team

[Save](#) [Return to form listing](#)

Group Employee [Find](#)

Employee *	Eff Start Date	Eff End Date
No Records Found		

[Save](#) [Return to form listing](#) [Top](#)

CREATE A SELF SCHEDULE GROUP SET

If you have made multiple Self Schedule Groups, you can add them all to one group set and apply the entire group set to a self-scheduling process at once.

1. Go to Scheduling / Self-Scheduling / Group Set
2. Click Create New Entry
3. Enter a Name, Description and Team that this group set will apply to
4. Click Save
5. Add Groups created in the previous section to the Group Set under the Group Set Association section.

Scheduling / Self-Scheduling / Group Set

✓ Your changes have been saved.

[Create New Entry](#)

Group Set - Details ...

Group Set Name *	Group Set Description	Team *
TEST		17020

[Save](#) [Return to form listing](#)

Group Set Association [Find](#)

Del	Group Name *
<input type="checkbox"/>	5E RN GROUP 2
<input type="checkbox"/>	3 IMCU

[Save](#) [Return to form listing](#) [Top](#)

Create Group Rules - Optional

You can create Self Scheduling Rules for your Group. These Rules can control how many or what type of Shifts you allow employees to choose when they make Self Schedule selections.

1. Go to Scheduling / Self-Scheduling / Group Rule

2. Press Create New Entry
 - a. The Self Schedule Group Rule page will open. Select your Group in the Group lookup. You can add as many Maximum or Minimum rules you like for your group. Each rule can contain Employee or Shift Constraints and can be applied to the employee selections or when they make their final submission or both. Each rule can also be an ERROR or a WARNING.
 - b. In the first picture a Maximum of 40 hours per week is being applied to the Job code 1000.
3. Pressing Add Rule creates the rule and allows you to create more rules.
4. Press Save when you have finished building the rule
 - a. This next screen shot is a rule applied to all employees and Jobs enforcing a minimum selection of 1 weekend shift per Scheduling Period.

Group Rule:

Self Scheduling Group Rule Parameters

Rule Constraints

Rule Enforcement: Level:

Employee Constraints

Employment Type:
 Jobs:

Default Hours: Minimum: Maximum:

FTE Parameter: Minimum: Maximum:

Work Type:

Shift Constraints

The Quantity of the:
 Where Number equals:
 of the Shift Type of:

On the following Day Type:

Period Parameter:

Self Scheduling Group Rule Parameters

Rule Constraints

Rule Enforcement: Level:

Employee Constraints

Employment Type:
 Default Hours: Minimum: Maximum:
 FTE Parameter: Minimum: Maximum:
 Work Type:

Shift Constraints

The Quantity of the: Where Number equals: of the Shift Type of:
 On the following Day Type:
 Weekend Definition: Start Day Of Weekend: End Day Of Weekend:
 Start Time Of Day: End Time Of Day:
 Period Parameter:

CREATE UNPUBLISHED SHIFTS

You must have a Shift Template to create unpublished shifts. If you need to create a new Shift Template, the steps can be found in the Advanced Scheduling workbook.

Only Unpublished and Unassigned Shifts can be sent to a Self Schedule Process. The best way to create these Shifts are with Shift Templates. Building Shift Templates can be found in the scheduling manual. Below is how to generate a template.

1. Go to Scheduling / Multi-view Scheduler / Schedule Template / Generate Schedule
2. Enter your cost center into the Unit field
 - a. Last Generated Date – Workload shows you the date that the workload was last generated through. The workload indicates how many staff you need per day, but not the shifts you need assigned.
 - b. Last Generated Date – Shifts shows you the date the shifts were last generated through. These are the yellow shifts that show up on your schedule to assign.
3. Enter the dates you want to generate the yellow shifts for in the Generate Dates fields. Remember to always start on a Sunday and end on a Saturday because that is how the templates are built.
4. Click Next
5. Select the Staffing Requirement Template and Shift Template you want to generate
6. Click Next
7. Select the checkbox next to both **Generate Workload based on Staffing Requirements** and **Generate unassigned shifts**. Also select the radio button next to **Create as unpublished shifts**.
 - a. Troubleshooting: When looking at the Last Generated Date for both workload and shifts, if only one of the dates is the date you want the schedule generated through, then you only need to select the templates and generate checkboxes for the one that does not have the correct date. For example, If the Last Generated Date – Workload is correct but the Last Generated Date – Shifts in not correct, you only

need to select the Shift Template you want to generate and then select the checkbox next to Generate unassigned shifts and the radio button for Create as unpublished shifts.

8. Click Generate

VERIFY THE SHIFTS GENERATED

After generating your templates, you want to verify that the shifts appear appropriately on the schedule prior to creating your self-scheduling process.

1. Go to Scheduling / Multi-view Scheduler / Enhanced Schedule View / Advanced Schedule View
2. Enter your cost center into the Unit field
3. Enter the dates of the next schedule period. You can only view up to 6 weeks at a time.
4. Click Load
5. Verify that yellow shifts appear under the correct jobs

CREATE A SELF SCHEDULING PROCESS

Go to Scheduling / Self-Scheduling / Process

1. Click Create New Entry
2. Choose your Unit
3. Enter a date range for the schedule. This date range will be the dates of available shifts that can be sent to the Process.
4. Click Create New Process
5. Choose your Window Start Date and Window End Date
 - a. A window is the range of time that the employees in your Group(s) will be able to access the self-scheduling process and select their shifts. Typically, these windows will be many days before the actual dates of the available shifts/schedule.
6. ***Select a Group Set – This step only needs to be completed if you created a Group Set for your cost center
 - a. A group set includes one or multiple groups of employees who have been given access to self-schedule.
 - b. If you entered a Group Set, all of the groups with in the set will appear
7. ***Click Add Window – This step only needs to be completed if you did not enter a Group Set in the step above. You can add as many Windows/Groups as you need here.
8. Once you have window(s) and Group(s) entered, you can add opening and closing messages for your Group(s) to receive. You must update the Send Before Open and Send Before Close days to fall within your window and schedule period. This indicates how many days before your window opens and closes that an employee will receive the given message.

Group Name	Window Start	Opening Message	Send Bef. Open	Window End	Closing Message	Send Bef. Close	Process Status
EMVS TEAM	04/10/2019 00:00	Default Opening Comment	60 Day	04/30/2019 00:00	Default Closing Comment	60 Day	

9. Next go to the Self Scheduling Shift Selection Form towards the bottom of the page. It will be grouped by job codes.
10. You can expand each job and choose a portion of your shifts, or you can press Offer All to send all the shifts to the self-scheduling process.

Self Scheduling Shift Selection 9

Display label	Start Time	End Time	Skill	Activity	05/26	05/27	05/28	05/29	05/30	05/31	06/01
1630					0/1	0/0	0/0	0/0	0/0	0/0	0/1
1649					0/1	0/0	0/0	0/0	0/0	0/0	0/1
1780					0/1	0/0	0/0	0/0	0/0	0/0	0/1

11. When you have finished adding your Windows and making your Shift Selections, click Save. Your self-scheduling process will automatically open when the Window Start date and time occurs. If you need to open the self-scheduling process now, you can click Open.

Self Scheduling Process Definition

Process Name: 12215 Process Description:
 Team: 14000 Schedule Start Date: 10/02/2022 Schedule Length: 35 Schedule End Date: 11/05/2022

Self Scheduling Window Definition

Window Start Date: 09/22/2022 Window End Date: 09/30/2022
 14:00 05:00
 Group Set: PCS SITTER/CNAS Process Status: pause close Save

Group Name	Window Start	Opening Message	Send Bef.	Open Window End	Closing Message	Send Bef.	Close Process Status
PCS SITTER	09/22/2022 14:00	Default Opening Comment	60	09/30/2022 05:00	Default Closing Comment	60	pause close
PCS SITTER/CNAS	09/22/2022 14:00	Default opening Comment	60	09/30/2022 05:00	Default Closing comment	60	pause close

Add Window

Self Scheduling Shift Selection

Display label	Start Time	End Time	Skill	Activity	10/02	10/03	10/04	10/05	10/06	10/07	10/08
1740					16/16	16/16	16/16	16/16	16/16	16/16	16/16
7480					4/4	4/4	4/4	4/4	4/4	4/4	4/4
7481					20/20	20/20	20/20	20/20	20/20	20/20	20/20

12. Once the self-scheduling process opens, employees will be able to select shifts in the WFM ETM application during the open window time range for any Group that they belong to.

PUBLISH THE SCHEDULE

After the self-scheduling process is complete, you should review the schedule, make adjustments as necessary and then publish the schedule. To publish the schedule, follow the steps below.

Go to Scheduling / Multi-view Scheduler / Enhanced Schedule View / Advanced Schedule View

1. Enter the cost center into the Unit field
2. Enter the dates of the next schedule period. You can only view up to 6 weeks at a time.
3. Click Load
4. Verify that shifts appear appropriately for the staff
5. Click the Publish icon in the top right (paper icon)

TROUBLESHOOTING FAQ'S

1. Why can't I see any of my shifts in the Self Scheduling Shift Selection section?
 - a. Your shift template may not be generated for the self-scheduling date range. Open your schedule to verify there are yellow shifts available to be assigned for the given date range. If there are not yellow shifts on your schedule, jump to the Create Unpublish Shifts section to complete the steps.
 - b. You may have published your shifts already. If yellow shifts appear on your schedule to be assigned but do not appear in self-scheduling, you may have already published those shifts. If this is the case, you will have to create a second shift template and re-generate it for the given time period.

2. Why can't my staff see the self-scheduling process?
 - a. They may not be in one of the groups or group sets included in the self-scheduling process. Jump to the Create a Self Schedule Group to find the groups you have assigned in the self-scheduling process. Verify the given employee is included in one of the groups in your process.

3. What is the difference between schedule date and window date?
 - a. The schedule start/end dates are the dates of the upcoming schedule that staff need to pick up shifts for. The window start/end dates are the dates that the self-scheduling process will be open for so that staff can pick their shifts.