

GENERATING, ASSIGNING AND PUBLISHING A SCHEDULE

CREATE UNPUBLISHED SHIFTS

You must have a Shift Template to create unpublished shifts.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Only Unpublished and Unassigned Shifts can be sent to a Self Schedule Process.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 Also select the radio button next to **Create as unpublished shifts**.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you want to generate and then select the checkbox next to Generate unassigned shifts and the radio button for Create as unpublished shifts.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

ASSIGN SHIFTS TO STAFF

While remaining in the Advanced Schedule View, you can begin assigning shifts to staff.

Assigning single shifts to staff:

1. The default view is Details Edit mode. Click on an unassigned shift.

2. You will see a drop down menu to the left of the expanded shift. Here you can select the employee who this shift should be assigned to.
3. Click Save. You can now see the shift assigned to the employee.

Assigning multiple shifts to a single staff member:

1. To assign multiple shifts at once to a single employee, you will need to change your view to Mass Edit mode. Click the wand in the upper-righthand corner with a star.
2. Select Mass Edit.
3. Select multiple shifts across days/weeks. As you select each shift, the background of the shift turns green.
4. To assign the shifts to a single employee, click the pencil icon in the upper-righthand corner.
5. Click Assign.
6. Choose the employee you would like to assign the highlighted shifts to.
7. Click Save.
8. All of the shifts now appear for the employee.

PUBLISH THE SCHEDULE

After you have completed assigning shifts to staff, 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)