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Generate Skeletal Schedule
What is the skeletal schedule?
The skeletal schedule consists of patterns and any requests that have been pre-approved.
Example: a pre-approved request would be vacation time.

What is a pattern?
A pattern is a schedule that repeats throughout a schedule cycle. Example: A RN works every other Monday from 0700 to 1900.

Accessing Employee Info
1. Patterns are assigned to employees by accessing the Employee Info window. To open Employee Info, click the icon in the top left hand corner of your screen in Schedule Navigator. Example below.

2. You have now opened the Employee Info window.

Look at the very top of your page to quickly tell if you are on the Schedule Navigator Page.
Adding a Pattern

1. Use the arrow keys in the top right corner of the Employee Info screen until you see “Patterns.”

2. Click on the “Patterns” tab.

3. We are now ready to assign patterns. Select the correct Employee on the left (A) and then select the correct shift from the dropdown menu (B).

4. Select the empty cell that correlates to the correct day of the week that you want to set a pattern, and click “Assign” at the bottom of the window.

   - Hold down the control key (Ctrl) to select multiple days
   - Use the scroll bar (below) to view more weeks. Patterns need to be entered for each week accordingly.
Accessing Schedule Editor

Schedule Editor is where you will be creating your schedule.

1. To access Schedule Editor, click “Maintain” in the top left corner of your screen. Select “Schedule Editor” from the drop down menu.

Run the Triple Check

Before generating we want to go over the Triple Check:

1. Are you in the correct profile (unit)? (A)
2. Is the date selected the start of your schedule? (B)
3. Schedule to staff size is selected. (C)

Click the green check mark after changing the date.

10 Generate Skeletal Schedule
Check your Editor Setup

1. Select “Format” on the top of your screen.

2. From the drop down menu select “Editor Setup”

3. Change your “Weeks in view” to reflect the length of your schedule cycle.

Opening the Schedule Generation Window

1. Select “File” in the top left hand corner of your screen.

2. From the drop down menu select “New Schedule.” You have now accessed the schedule generation window.

Changing the Editor Setup only needs to be done once.
The Schedule Generation Window

1. Select the correct date range for the schedule cycle.
2. Keep “Approved Requests” and “Patterns” checked. This creates the skeletal schedule.
4. Click “Select All” to highlight all tasks (shifts).
5. Click generate to create the schedule.

Selecting “Default Dates” will automatically enter the correct date range.

‘Generate’ won’t delete old data, it only adds new data onto the schedule. Remake will erase the old schedule and only bring on data from the newest generation.
What is a Conflict?

A conflict will arise when scheduling an employee breaks a rule that is set up in the system. A conflict is not an error, it is showing up for a reason. The following conflicts are common conflicts that you may encounter.

Max Hours Conflict

The max hours conflict will arise when you try to schedule an employee over their max hours, as set under the Limits tab found within Employee Info.

In the example below, the conflict is listed on the right (A) and the description is near the bottom of the page (B).

Ignoring the request will not add this task to the schedule, processing will override the conflict and add it to the schedule (C).

- Conflicts can be overridden!
- Processing will not approve the request.
- Ignoring will not deny the request.
Sameday Compatibility Conflict

The Sameday conflict will arise when two shifts are scheduled during the same day.

In the example below, the conflict is listed on the right (A) and the description is near the bottom of the page (B).

Ignoring the request will not add this task to the schedule, processing will override the conflict and add it to the schedule (C).

Processing a Sameday conflict will cause a new window to appear called the Conflict Resolution window. For more information on how to use the Conflict Resolution window see the next page.

For assistance making tasks same day compatible please contact your system administrator.
Schedule Conflict Resolution

The Schedule Conflict Resolution window gives further options on how to proceed with the sameday conflict.

“Add new Task” will add the new shift and will not delete the shift that caused the conflict.

“Replace overlapping Task” will add the new shift to the schedule and remove the shift that it conflicts with.

“Edit Task times” opens a new window allowing you to change the times of your shifts and remove unwanted shifts. See Image A for more on editing task times.

![Schedule Conflict Resolution](image)

Check the remove box (B) to delete the task.

16 Schedule Conflicts
Shift Full Conflict

The shift full conflict indicates that you do not have room on your schedule to add a shift.

In the example below, the conflict is listed on the right (A) and the description is near the bottom of the page (B).

Ignoring the request will not add this task to the schedule, processing will override the conflict and add it to the schedule (C).

Right click on a cell and select “Increase Slot Size” to add an additional slot for one shift on the schedule.

See your system administrator to permanently increase the slots available for a task (shift). The system administrator will increase the staff number stored in Assignment Info to fix this conflict.
Staff List Conflict

The staff list conflict appears when an employee is trying to be scheduled for a shift and they are not listed in the staff list.

Staff list is a feature within the assignment info window. Contact your system administrator to make changes to the staff list.

In the example below, the conflict is listed on the right (A) and the description is near the bottom of the page (B).

To add an employee to the correct staff list, please contact your system administrator.
What is Publishing?
Publishing will allow employees to view the schedule, for a specific date range.

When the schedule is published employees will be able to see their patterns and requests that have been approved.

Now that the schedule is published, employees will make requests for working shifts.

How to Publish?
1. From Schedule Editor, click “Options”
2. From the dropdown menu select “Publish.”
3. Change the End Date to reflect the end of the schedule cycle, and do not change the Start Date.
4. Hit “OK” to Publish.

Not changing the Start Date allows employees to view previous schedules.
Primary Scheduler Guide

Employees Enter Requests
Employees Enter Requests

Now that the schedule has been published, your employees will have make requests in Clairvia Web.

Requests can be made for working shifts (0700 1530 RN) as well for vacation time.

Additional Resources

For additional resources regarding making requests in Clairvia Web, access the Tips and Tricks videos found here: https://connect.ucern.com/groups/workforce-management-community/projects/clairvia-tips-and-tricks

Select the video labeled “Make a Request” underneath the “Staff Manager/Physician Scheduler” heading.

Don’t generate the schedule during this request period.
Primary Scheduler Guide

Un-Publish the Schedule
What is Un-Publishing the Schedule?

Un-Publishing the schedule will hide it from the employees while you balance and make changes.

Un-Publishing can also be though of as taking the schedule off the wall.

Once the schedule is un-published you (the scheduler) will have time to balance the schedule.

How to Un-Publish the Schedule?

1. From Schedule Editor, click “Options”
2. From the dropdown menu select “Publish.”
3. Change the End Date to reflect the last day of the previous schedule cycle and do not change the Start Date.
4. Hit “OK” to Close (Un-Publish) the schedule.

Not changing the Start Date allows employees to view previous schedules.

24 Close the Schedule
Generate Pending Requests
Generate Pending Requests

Now that the employees have made their requests, you want to bring those requests onto your schedule.

1. Access Schedule Editor (for a refresher, please reference page 7 of this booklet).
2. Open the Schedule Generation window. (File > New Schedule)
3. Select the correct dates (A) and Pending Requests (B)
4. Keep Overwrite Planner Data checked (C)
5. Click “Select All” (D) and then Generate (E)

For help managing conflicts please see page 13.
Navigating Schedule Editor
Use the Scroll Bar

Navigate Schedule Editor using the scroll bar at the bottom of the editor screen (A).

Using the arrow buttons (B) to scroll could put your schedule into a different date range.

Highlight an Employee

Within the Assignment view you can highlight an employee to quickly see them in Schedule Editor.

1. Select an employee from the Drop Down (A)
2. Click the yellow light bulb to highlight (B)

Everywhere that employee is listed will now be highlighted

Read Only Mode

If you open a new dialog box and you get a notification that says you are in “Read Only Mode,” close out of Schedule Editor and try again. If you are still in read only mode, contact a system administrator for further assistance.

Select an employees name in a cell within Schedule Editor and then click the highlight button for an alternative way to highlight an employee.
**Hide Empty Rows**

The hide empty rows icon will hide any rows that do not have schedule data in them. See Example A.

**View by Assignment and View by Employee**

Viewing by assignment will display the shifts on the left hand side of the schedule editor, and the employees who fill those shifts within the grid.

Viewing by employee will display the employees on the left hand side of the schedule editor, and the shifts that employee is assigned will appear in the grid.
Zoom

Adjusting this feature will zoom in or zoom out the screen based on the number selected.

Click the arrow (A) and select a new value to either zoom in or zoom out the schedule editor.

Viewing the Display Order

Alphabetic sorts the shifts or employees alphabetically. Selecting “Custom” from the drop down menu (B) changes the order to the display order that is currently set.

Changing Font Size

To change the size of the font in the cells within schedule editor, select the large “A” (C) (above). Select the new font size from the drop down menu (D). See example on the right.

Type in the “Zoom” box for custom zooming!
Schedule Editor Color Code

Within Schedule Editor information is displayed in various colors. This page will detail the six most common colors that you will encounter in the schedule creation process.

**Purple** Font - This data has been manually added to the schedule using the Availability window (page x).

**Red** Font - Indicates an approved request

**Orange** Font - Indicates a pending request (not approved?).

**Green** Font - Indicates patterned data

**Pink** Font - Indicates an individual who is floating in from another department

**Black** Font - Indicates autostaffed data. If black font is showing up on your schedule it means that you selected “Autostaff” in the schedule generation window.

Click on the font window (page 30) and select the drop down menu (A) to get a review of the color scheme.
Introduction to Balancing

The following pages will detail how to use various tools to help with the balancing process.

The tools are not listed in a particular order, as some may be more useful than others and used more frequently based on your department.

Before balancing begins, change the staffing goal to “Schedule to Core Coverage” (A).

Schedule to Core Coverage will change who is available to work in the Availability and Float windows, based on the numbers listed in the Core Coverage table.

Schedule to Staff Size will change who is available to work in the Availability and Float windows, based on the numbers listed in the Staff Number table found within Assignment Info.

The Availability window and the Staffing Analyzer tool can be open while you balance!

Balance the schedule one week at a time.

33 Balance the Schedule
The Staffing Analyzer

The Staffing Analyzer tool will allow you to see how many hours your employees have worked in a designated time frame, show employees who haven’t met their minimum requirements and employees who are currently scheduled over their maximum limit.

To access the Staffing Analyzer:

1. Right click on a cell within Schedule Editor and select “View Analyzer” from the drop down menu. (If in Employee View, the button will say “Staffing Analyzer” in place of “View Analyzer.”)

2. Before viewing the Employee Summary, make sure that you are viewing for the correct date range (A). Hit update to make the changes.

3. Within the Staffing Analyzer you will be primarily using three tabs: the Employee Summary, Minimums and Maximums. Shown above (B).

- The Staffing Analyzer can be open while you make edits.
- Resize the Staffing Analyzer by dragging the edges.

34 Balance the Schedule
The Staffing Analyzer Employee Summary

The Employee Summary will give a quick overview of the employees in your unit. Displayed below are the employees paid hours (A) for the specified date range and how many tasks they have been scheduled to work or if they are scheduled to a nonworking task (B).

1. To view the Employee Summary select the “Employee Summary” tab within the Staffing Analyzer.

Staffing Analyzer Minimums tab

The minimums tab shows the employees who have not met their minimum requirements.

35 Balance the Schedule
The Staffing Analyzer Maximums Tab

The Maximums tab displays the employees who are scheduled over their maximum limit for the selected date range.

1. To access the Maximums tab, select “Maximums” within the Staffing Analyzer tool.

Maximum and Minimum limits are set within the Employee Info window.
The Availability Window

The Availability Window shows employees who are available to work a selected task. From this window you will have the option to manually add employees to the schedule, view conflicts and view employee details.

To access the Availability Window:

1. Double click on a cell within Schedule Editor.

2. If an employee is available a green check mark will be to the left of their name (A). If the employee has a conflict a red “X” will be to the left of their name (B). To see an employees conflict click the “Conflict” tab (C).

Select “All” if an employee does not appear in the Available list.
Adding Employees Manually
You can add employees to your schedule from the Availability window.

1. Access the Availability Window (See page 37).
2. Select an employee and drag them to the right cell.
   A. Double clicking a cell will also add the employee.
3. See Example A below:

   ![Example A Image]

   To add employees to multiple days at the same time, highlight multiple cells. See example B above.

   ![Example B Image]

   To delete a shift off of the schedule, select the shift and click the “Delete” button on your keyboard.
Using the Float Window

The Float Window is where you can pull employees from other units to schedule them to work in your unit.

To open the Float Window:

1. Right click on any cell within Schedule Editor, and select “View Float Window” from the drop down menu.

2. Units that have employees that can float to you will be shown with a plus sign (A). Click the plus sign to view the employees within and see their skill (B). For more information on availability and conflicts see page 13.

Employees must be given float permissions from their home profile in order for them to show up in this window.
Increasing Slot Size
Increasing the slot size will create an additional space for you to schedule an employee.

1. To increase the slot size, right click on a cell and select “Increase Slot Size.” Example of an increased slot is below.

<table>
<thead>
<tr>
<th>Staff Summary</th>
<th>Thu 7/23/2015</th>
<th>Fri 7/24/2015</th>
<th>Sat 7/25/2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assignment</td>
<td>Task</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1 DAY</td>
<td>0700 1100 : LPN</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1 DAY</td>
<td>0700 1100 : MGR</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1 DAY</td>
<td>0700 1100 : PA</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Changing Task Time
You have the ability to manually change the start and end times of shifts.

To change task times:

1. Right click on a shift and select “Change Time.”
2. Click on the time beneath “Start Time” or “End time” and change the times by typing or using the arrow keys.

Employees will see adjusted time in their schedules.
Adding Assignment Notes

A scheduler can create a note about a shift that a specific employee is assigned to. After an assignment note is created the selected cell will be highlighted with a light yellow background.

To create an assignment note:

1. Right click on a cell that has schedule data and select “Add/Edit Assignment Note.”
2. A free text box will appear. Write note here.
Accrual balances will not automatically update when an employee is scheduled to PTO, Vacation, PDO, etc. These balances will updated each pay period.

Accrual balances can also be viewed in the Availability Window, under the data tab.

Employees can see their own accrual balances in the Web via the Employee Dashboard.
Cut/Copy and Paste

Cut and paste deletes the data in the cell and moves it to the pasted cell.

To cut and paste:

1. Right click on a cell with schedule data that is to be cut and select “Cut selected region.”
2. Select the new cell that this data will be moved to and select “Paste selected region.”

The same instructions apply for Copy and Paste, except “Copy selected region” is selected in step 1.

⚠️ Only cut/copy and paste in the same task (shift). Task times will not change if added to a different time slot.

Swap Assignments

Swap Assignment will switch two shifts with each other.

1. Select the first shift that is to be swapped.
2. Hold down the “Ctrl” key and select the second shift that is to be swapped.
3. Right click and select “Swap Assignments.”

The two shifts have now traded places.

Swapped shifts can be done for different time slots. Times will change based on the shift that has been swapped.
Core Coverage Table

The Core Coverage table is found at the bottom of the Schedule Editor window.

Core Coverage is the estimated budgeted staff needs for the schedule cycle. These staff needs are broken out into different Shift Category Partitions. A shift category partition is a chunk of time that breaks the day into different segments.

**Blue** Font - Under the budgeted staff needs

**Red** Font - Over the budgeted staff needs

**Black** Font - Within an acceptable range of the staff needs

The top number is the actual number of shift category partitions being filled, and the bottom is the variance from the target staff need.

- **Actual**
  - 2.00 8.00 6.00
  - -4.00 2.00 0.00

**View Staff Totals**

Staff Totals gives a count of how many people are working a particular shift within a shift category partition.

Click “Staff Totals” at the bottom of the core coverage table. Make sure you are in “view by assignment” (page 29).
Primary Scheduler Guide

Approve and Deny Requests
Introduction to Approving and Denying

The following pages detail the approving and denying process. After you have generated for pending requests the schedule will display those requests in orange. Use the following steps to learn what to do with all of these pending requests.

The following pages will go into detail on these steps.

1. Run the Requests Details report to see any notes that the employee has written to the scheduler.

2. Delete the pending requests off of the schedule that will be denied.

Deleting will NOT deny the request. Deleted requests are pulled off of the schedule to be dealt with later.

3. Approve all of the requests left on the schedule.

4. Go to the Requests window to deny the pending requests that were deleted off of the schedule.

Remember to set a filter before denying requests.
Before Approving

Before approving and denying begins, run the requests detail report.

Requests Detail Report

The Requests Detail report should be run before approving requests. This report shows the notes that employees have created on their requests for you to view.

1. Click the “Reports” button on the top of your Schedule Navigator screen.

2. Hover over “Employee” and from the new drop down menu click “Requests Detail.”

3. Click “Select All” (A) on the Employee tab and on the Assignment tab (B). Then click “OK” (C)
Requests Detail Report continued

Once you have hit OK, a new window will appear allowing you set further parameters for this report.

Below is a recommended configuration for this report. The date range should be your schedule cycle start and end dates.

When the window looks like the example above, click OK

48 Approve and Deny Requests
**Approving Requests**

Now that you have deleted all of the pending requests that you are going to deny, you are ready to approve requests.

To Approve a Request:

1. Right click on a cell with orange font.
2. Hover over “Requests” and select “Convert to Approved Request.”

**Approve All Requests at Once**

All of the requests that are left on the schedule will be approved, because we have deleted all of the requests that are going to be denied.

To approve all of the remaining requests at once:

1. Click on the left side of the large empty rectangle (A). This highlights every cell in the schedule cycle.
2. Right click on any shift.
3. Hover over “Requests” and select “Convert to Approved Request.” This will approve all of the pending requests.
Deny Requests - Request Window

All of the pending requests that were deleted off the scheduled now need to be denied.

The first step is to access the Request Window

1. From the Schedule Navigator, select the icon below (A)

![Schedule Navigator Icon](image)

The new screen that appears is the Request Window. This is where all of the requests are stored. Before denying requests, a filter must be set.

Setting a Filter

1. Select the “Filter” button (A)

2. Change the date to reflect your schedule cycle (B)

3. Hit “OK” to complete

![Filter Options](image)
Deny Requests

Now that the filter is set, be sure to apply that filter by selecting the “Filtered” option (A).

The filter is now applied.

To sort the requests double click on “Status” in the top right hand corner of the window.

All of the Approved requests appear at the top, followed by denied requests, and lastly pending requests.

All of the deleted requests off of the schedule are still listed as pending requests.

To deny these requests quickly, select the cell one above the first pending request (A) then hit the down arrow on the keyboard, lastly tap the letter “D” on the keyboard.

Repeat steps 2 and 3 until all requests are denied.
Create Opportunities
Create Opportunities

Opportunities are the holes left in the schedule after balancing and after requests have been approved and denied.

There are two types of opportunities:

**Consider Me:** Multiple employees can offer to fill the opportunity, and the manager chooses who it is awarded to.

**Schedule Me:** The first employee to select the opportunity is awarded it. No manager approval is required.

To create an opportunity:

1. Select a cell within Schedule Editor
2. Click on the icon shown below (A)

3. An Open Opportunity is now displayed in the empty cell. The cell now looks like the image below.

   ![Open Oppty]

- Add several opportunities at once by selecting multiple cells at the same time.

- Delete an opportunity by hitting the “Delete” key on the keyboard. Delete several at once by selecting multiple opportunities and hitting the “Delete” key.
Opportunity Details

Change the details of the opportunities to reflect the correct type of opportunity that you want on the schedule.

To view the details for a single opportunity:
1. Right click on the opportunity
2. Select “Edit Shift/Opportunity Details”

From this new window you can change the type of opportunity (A) and allow employees who would go into overtime to select this opportunity as well (B). Hit “OK” to finish.

View all of the opportunities on the schedule by selecting the magnifying glass towards the top of the screen (C).

This new window details all of opportunities and allows edits to be made to these opportunities (D).
Publish Final Schedule
What is Publishing?
Publishing will allow employees to view the schedule, for a specific date range.
When the schedule is published employees will be able to see the final schedule.
Now that the schedule is published, the employees will fill opportunities and swap shifts if needed.

How to Publish?
1. From Schedule Editor, click “Options”
2. From the dropdown menu select “Publish.”
3. Change the End Date to reflect the end of the schedule cycle, and do not change the Start Date.
4. Hit “OK” to Publish.

Not changing the Start Date allows employees to view previous schedules.
Primary Scheduler Guide

Employees Fill Opportunities
& Shift Swap
**Employees fill Opportunities**

From the Employee Dashboard in the Web, the employees can check to see what opportunities are available.

An employee will only see an opportunity if they have the correct skill.

**Employees Swap Shifts**

Employees can also trade shifts with one another.

Shifts have to be the same length in order for a trade to happen.

Shift swaps can be approved automatically once both parties agree, or they can require manager approval once both parties agree to the swap.
Schedule Generation Checklist
Schedule Generation Checklist

- Have you Generated a schedule with patterns and pre-approved requests?
- Have your employees made requests?
- Have you generated for Pending Requests? (Pending requests appear in orange)
- Is your scheduled balanced?
- Have you approved and denied the pending requests?
- Have you created opportunities?
- Have you published the final schedule?
- Have your employees filled opportunities?

60 Schedule Generation Checklist
Primary Scheduler Guide

Reports
Staff Manager Reports

The following reports are run from the Schedule Navigator. Look at the top of your screen to see if you are in the Schedule Navigator.

Requests Detail Report

The Requests Detail report should be run before approving requests. This report shows the notes that employees have created on their requests for you to view.

1. Click the “Reports” button on the top of your Schedule Navigator screen.

2. Hover over “Employee” and from the new drop down menu click “Requests Detail.”

3. Click “Select All” (A) on the Employee tab and on the Assignment tab (B). Then click “OK” (C)
Requests Detail Report continued

Once you have hit OK, a new window will appear allowing you set further parameters for this report.

Below is a recommended configuration for this report. The date range should be your schedule cycle start and end dates.

![Screenshot of the window with configuration options]

- **Click to change date**
- **Select Yes**

⚠️ When the window looks like the example above, click OK

63 Reports
Assignment List by Employee Report

This report will list each Employee and the shifts they are scheduled to work for the schedule cycle.

1. Select “Reports” from the schedule navigator screen. Then hover over “schedule” and select “Assignment List by Employee.”
2. Click “Select All” (A) on the Employee tab and on the Assignment tab and be sure to select the correct date range within the date tab (B). Click OK to advance.

3. Include Assignment Notes within this report. See the example below.
**Float In/Out Reports**

The float in or out reports will show all of the employees floating in/out of your unit. The steps will be the same for either report that you choose to run.

1. Select “Reports” from the schedule navigator screen. Then hover over “Float” and select “Float In” or “Float Out.”

2. Select your home unit (A) and select the correct date range (pay period range or schedule cycle) (B).

3. Click “OK” to continue.

4. On the next window select “Yes” from the drop down to add assignment notes.

5. Click “OK” to run the report.
Competency Expiration Report

The Competency Expiration report gives a list of the employees in your unit and when their competencies will expire.

1. Select “Reports” from the schedule navigator screen. Then hover over “Employee” and select “Competency Expiration”
2. Select your home unit (A) and select the correct date range (current month or next two months) (B).
3. Click “OK” to continue.

4. On the next window select the options show to the right.
5. Click “OK” to run the report.
Absence Report

The Absence report shows all of the recorded absences for a selected date range.

1. Select “Reports” from the schedule navigator screen. Then hover over “Employee” and select “Absence.”

2. Select your home unit (A) and select the date range that you wish to view absences for (B).

3. Click “OK” to run the report.

Each day absent counts as an ‘incident’ on the report. Two days in a row will not record as a single incident.
Holiday History Report

The Holiday History report shows the employees who have worked holidays during a selected date range.

1. Click “Reports” from the schedule navigator screen. Hover over “Employee” and select “Holiday History.”

2. Select All Employees (A) and select all Assignments (B) and choose desired date range (C).

3. Click “OK” to run the report.
Web Reports
In this section all of the reports will be run from the Clairvia Web solution.

Schedule Report
1. In the Web hover over “Reports” from the blue toolbar (A)

2. Hover over “Schedule” and select “Schedule” from the second drop down menu.

3. Select your home unit, the correct shift category, and select all of the partitions with spillover, all of the skills and all of the tasks. See below for example.

Select all of the tasks quickly by clicking the topmost task, then hold down the shift key on the keyboard and select the bottom most task.
Schedule Report Continued

The following options are recommended settings.

When your options match those listed below, click “Run Report” to view the schedule report.

The options that have been selected will save, so the next time this report is run no changes will be needed.

70 Reports
Daily Staffing Board Report

The daily staffing board shows who is on the schedule for a single day.

1. In the Web hover over “Reports” from the blue toolbar.
2. Hover over “Schedule” and select “Daily Staffing Board” from the second drop down menu.
3. Select your home unit, and the correct shift category.
4. Select all partitions and all skill, as circled below.

5. Follow the recommended report settings below.
Housewide Staffing Report

The housewide staffing report provides daily staffing information just like the daily staffing board but for multiple units at the same time.

1. Hover over “Reports” then hover over “Schedule” and select “Housewide Staffing” from the second drop down.

2. Use the following examples to set the correct parameters for the housewide staffing report.

3. Click “Run Report” to view the report.
Filled Opportunities Report

The filled opportunities report details which employees have filled opportunities during the selected date range.

1. In the Web hover over “Reports” from the blue toolbar.
2. Hover over “Schedule” and select “Filled Opportunities” from the second drop down menu.
3. Follow the parameter guide below to use the recommended settings.

4. Click “Run Report” to view the report.