

Chapter 5: Scheduling

Outline

In this module we will cover:

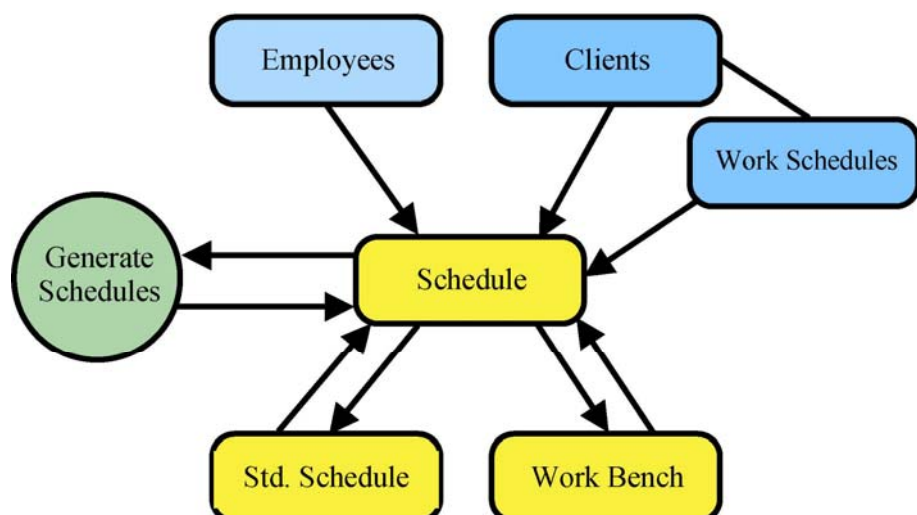
1. Overview
2. Creating Schedules
3. Maintain Standard Schedules
4. Generate Schedule
5. Print Schedules
6. Scheduling Work Bench

Overview

The Scheduling system is used to create and maintain the schedules (rosters) by combining the client information and the employee details.

A schedule consists in basic terms of a task to perform and people to do the task.

In PowerForce, we define the task by creating a client and then defining work schedules for that client. These tasks are then available to be assigned in “Maintain Standard Schedules” and “Scheduling Workbench”.



You will also need people to do these tasks. Employees are selected based on the details in the “Operational Details” window from the “Biographical” menu.

Creating Schedules

The schedules can be created in two different ways, depending on how your business runs.

Maintain Standard Schedules

This allows you to assign employees to shifts forming a schedule template. The template is then used to generate the same roster as many times as is needed.

This feature is ideal for maintaining low maintenance repeating schedules.

Workbench

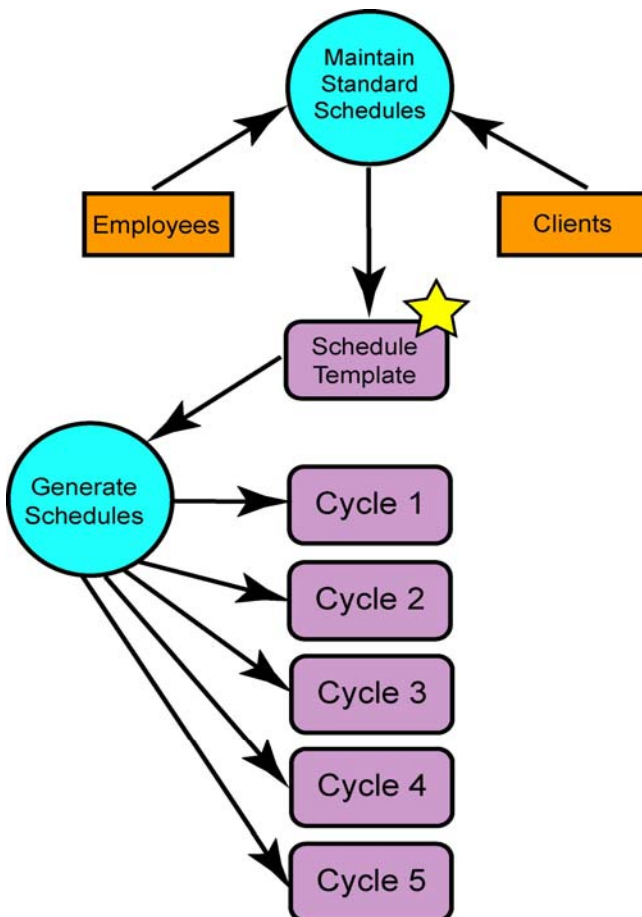
Use the “Scheduling Workbench” to create schedules based on client details or to define client details from scratch.

This window also allows you to directly edit individual shifts that have been generated from Maintain Standard Schedules.

Maintain Standard Schedules

Outcome: *Explain where in the window it indicates hours allocated to an employee
Describe where in the window it indicates the shift hours*

This window uses the data collected in the Client Work Schedules window and displays it as a series of un-allocated shifts. Employees are then assigned to shifts creating an employee schedule template structure that is used to generate employee schedules over and over, rather than assigning employees to schedules every week.



Fields to Note	
Rotation	<p>These fields allow shifts to be based on “Single Rotation” (single week), “Multiple Rotations” (changing rotations over multiple weeks) or “Pattern Rotation” (multiple weeks based on a defined rotation pattern).</p> <p> <input checked="" type="radio"/> Single Rotation <input type="radio"/> Multiple Rotation <input type="radio"/> Pattern Rotation </p> <p>When “Multiple Rotation” is selected these additional options are displayed in the top right of the window.</p> <div style="border: 1px solid gray; padding: 5px; background-color: #f0f0f0;"> Days/Rotation: <input type="text" value="7"/> Last Rotated Cycle: <input type="text" value="1"/> Rotations/Cycle: <input type="text" value="1"/> </div> <p>Selecting “Pattern Rotation” adds the “Rotation Pattern” list box. This allows you to select from the rotation patterns you have designed.</p> <div style="border: 1px solid gray; padding: 5px; background-color: #f0f0f0;"> Days/Rotation: <input type="text" value="7"/> Last Rotated Cycle: <input type="text" value="1"/> Rotations/Cycle: <input type="text" value="1"/> Rotation Pattern: <input type="text"/> </div>
<div style="border: 1px solid gray; padding: 2px; background-color: #f0f0f0; width: fit-content; margin: auto;">Delete</div>	<p>Click this button to remove all employee information from the schedule, thus removing the schedule template. You can still open the window again and see the shift definitions as these are not the template but data read straight from the client files.</p>


Summary Tab

1. This display is divided into 3 related sections
 - A. Employees
 - B. Days
 - C. General Information

Employee Section

1. This shows the employees used in this template and the shifts names still to be allocated

Employee	Max	Allc	Base
Brown, John	72.0		1
NI/Security Guar		120.0	
DAY/Security Gu		120.0	
AFT/Security Gu		120.0	1

Fields to Note	
Max	The maximum hours available for this employee to work, without going into overtime, over all the rotations of the cycle.
Allc	This is the number of hours allocated to the employee or the shift over all rotations in the cycle.
Base	When a pattern rotation is used this number indicates which rotation of the pattern is the starting point for the employee.
Double Click  in the Employee Column.	This allows the user to: “Add an Employee” – an employee is added to the display allowing shifts to be allocated to that person. “Select all shifts” – all shifts of the highlighted shift type will be selected, preparing them to be allocated to an employee. “Split Shiftline” – the highlighted employee will be duplicated, allowing multiple shifts or split shifts to be assigned on the same day.

Days

1. This display shows the shift type for the day of the week.



Mon	Tue	Wed	Thu	Fri	Sat	Sun
Off	Off	Off	Off	Off	Off	Off
0000-0800	0000-0800	0000-0800	0000-0800	0000-0800		
0800-1600	0800-1600	0800-1600	0800-1600	0800-1600		
1600-0000	1600-0000	1600-0000	1600-0000	1600-0000		

General Information

- This display shows the hours to shifts ratio

Shift/Hrs	Rotation	Average
5/40.0	10/80.0	5.00/40.0
2/24.0	4/48.0	2.00/24.0
2/24.0	4/48.0	2.00/24.0
5/40.0	10/80.0	5.00/40.0
5/40.0	10/80.0	5.00/40.0
1/8.0	2/16.0	1.00/8.0

Fields to Note	
Shift/Hrs	The number of shifts / total hours allocated in the current rotation.
Rotation	As for “Shift/Hrs” except for all rotations.
Average	As for “Shift/Hrs” except averaged over all rotations.

Note: If the “Rotation Selection” buttons   are used the “General Information” display resets to “Shift/Hrs”.

Allocation Tab

- This view shows all the shifts allocated to the person highlighted in the “Summary Tab”

Note: Allocated shifts are shown as time ranges eg “1545-0000”, unallocated shifts are shown as descriptions.



Rotation	Type	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
1	0000-0800	0000-0800	0000-0800	0000-0800	0000-0800	0000-0800	Off	Off
2	Off	Off	Off	Off	Off	Off	Off	Off
3	Off	Off	Off	Off	Off	Off	Off	Off

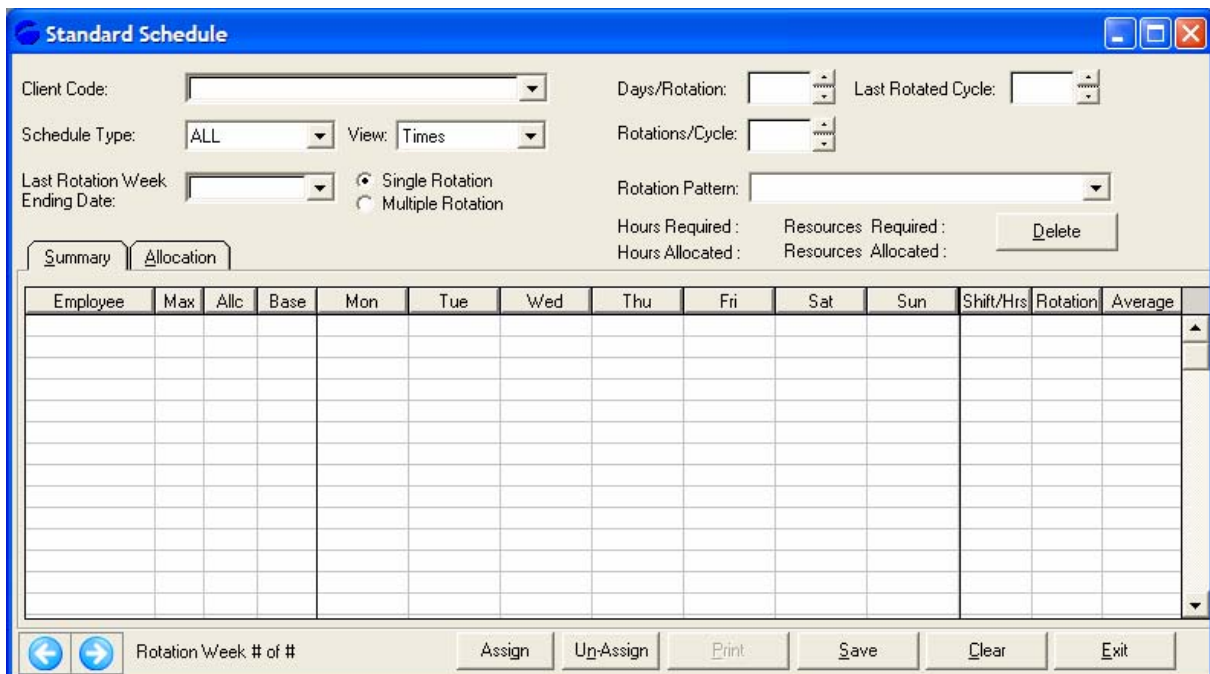
Fields to Note	
Shift	Select a “Shift” from the list box and then double click the desired day of a rotation and that shift will be applied, or if already applied, it will be cleared.
Rotation	This is the rotation within the cycle.

Practice

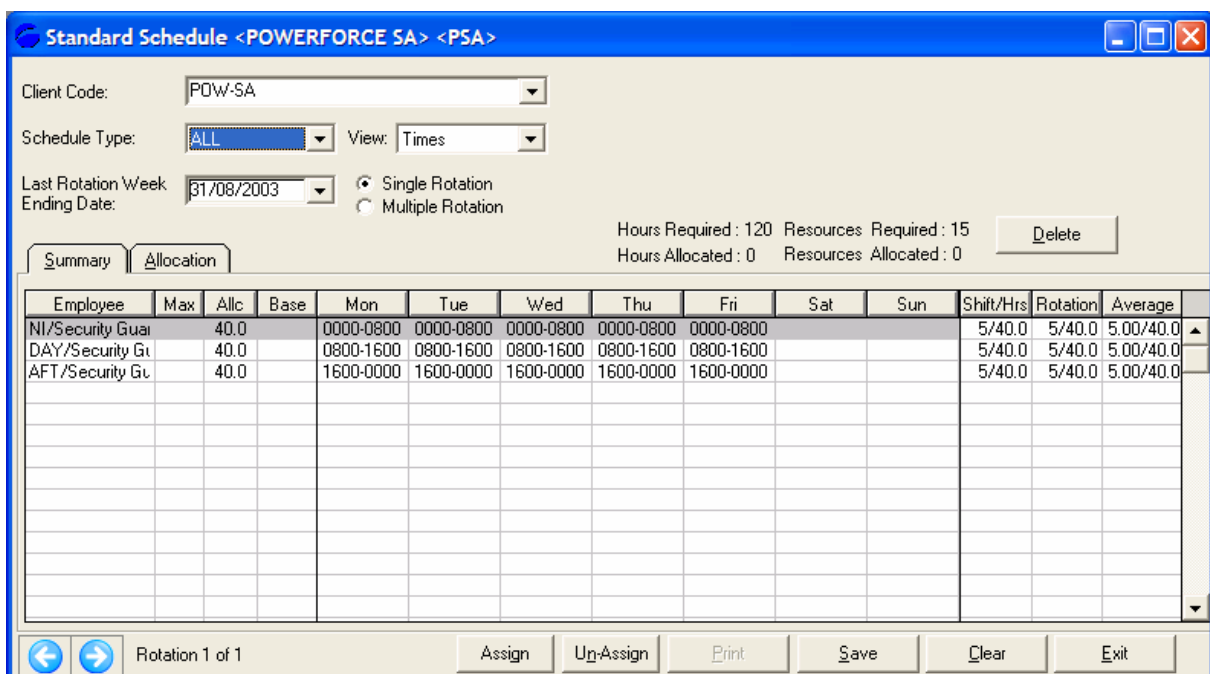
Outcome: *Demonstrate how to set the rotations per cycle*
 Show how to add an employee to a standard schedule
 Demonstrate how to assign an employee to a shift


For our practice we will assign 3 employees to work a 3-week cycle with each employee working a week on days, afternoons and nights.

1. In the Navigator click  “Scheduling”
2. In the right pane double click  “Maintain Standard Schedules”



3. In the “Client Code” field enter “POW-SA” and press “Tab”



4. Click  “Multiple Rotation”
 - A. The fields “Days / Rotation”, “Rotations / Cycle” and “Last Rotated Cycle” will now be displayed

Client Code: POW-SA Days/Rotation: 7 Last Rotated Cycle: 1

Schedule Type: ALL View: Times Rotations/Cycle: 1

Last Rotation Week Ending Date: 31/08/2003 Single Rotation Multiple Rotation

Hours Required : 120 Resources Required : 15 Delete

Hours Allocated : 0 Resources Allocated : 0

Employee	Max	Allc	Base	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Shift/Hrs	Rotation	Average
NI/Security Guar	40.0			0000-0800	0000-0800	0000-0800	0000-0800	0000-0800			5/40.0	5/40.0	5.00/40.0
DAY/Security Gu	40.0			0800-1600	0800-1600	0800-1600	0800-1600	0800-1600			5/40.0	5/40.0	5.00/40.0
AFT/Security Gu	40.0			1600-0000	1600-0000	1600-0000	1600-0000	1600-0000			5/40.0	5/40.0	5.00/40.0

Rotation 1 of 1 Assign Un-Assign Print Save Clear Exit

5. Change “Rotations / Cycle” to 3
 - A. This allows an employee to rotate through Days, Afternoons and Nights.
6. Change “Last Rotated Cycle” to 3
 - A. This indicates the last rotation generated as a roster was rotation 3 of 3, so the next to be generated will be 1 of 3.
7. Click Save
 - A. The window will now close
 - B. Open the window again for POW-SA
 - C. The bottom left corner will now say “Rotation 1 of 3”

Client Code: POW-SA Days/Rotation: 7 Last Rotated Cycle: 3

Schedule Type: ALL View: Times Rotations/Cycle: 3

Last Rotation Week Ending Date: 31/08/2003 Single Rotation Multiple Rotation

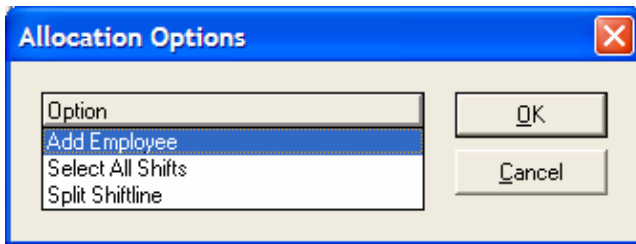
Hours Required : 360 Resources Required : 45 Delete


Hours Allocated : 0 Resources Allocated : 0

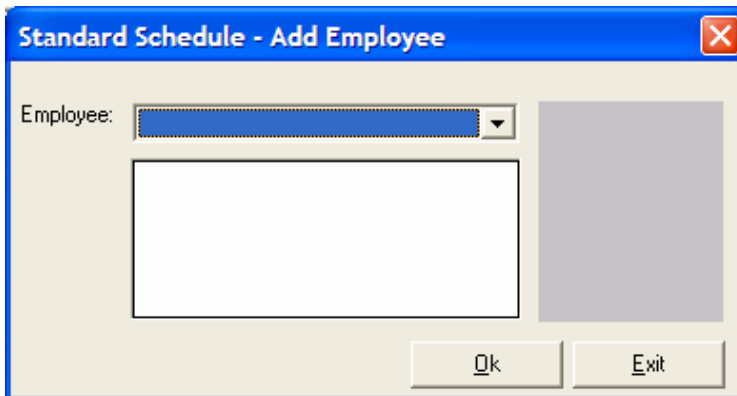
Employee	Max	Allc	Base	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Shift/Hrs	Rotation	Average
NI/Security Guar	120.0			0000-0800	0000-0800	0000-0800	0000-0800	0000-0800			5/40.0	5/120.0	5.00/40.0
DAY/Security Gu	120.0			0800-1600	0800-1600	0800-1600	0800-1600	0800-1600			5/40.0	5/120.0	5.00/40.0
AFT/Security Gu	120.0			1600-0000	1600-0000	1600-0000	1600-0000	1600-0000			5/40.0	5/120.0	5.00/40.0


Rotation 1 of 3 Assign Un-Assign Print Save Clear Exit


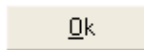
8. Double click in the first blank row in the “Employee” column



9. Double click  “Add Employee”




10. Click  the down arrow for a list of employees

11. Select Brown John from the list and then click  

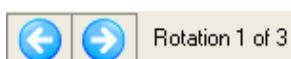
Employee	Max	Allc	Base
Brown, John	72.0		1
NI/Security Guar		120.0	
DAY/Security Gi		120.0	
AFT/Security Gu		120.0	


12. “Brown, John” has now been added to the employee list

Employee	Max	Allc	Base	Mon	Tue	Wed	Thu	Fri	Sat	Sun
Brown, John	72.0		1	Off	Off	Off	Off	Off	Off	Off
NI/Security Guar		120.0		0000-0800	0000-0800	0000-0800	0000-0800	0000-0800		
DAY/Security Gi		120.0		0800-1600	0800-1600	0800-1600	0800-1600	0800-1600		
AFT/Security Gu		120.0		1600-0000	1600-0000	1600-0000	1600-0000	1600-0000		

13. Click  each of the 5 “NI” shifts (row 2)

14. Click the right arrow at the bottom left of the window to show the second week in the schedule cycle




15. For the second week click  all the DAY shifts (row 3)

16. Click the right arrow at the bottom left of the window to show the third week in the schedule cycle



17. For the third week select all the AFT shifts (row 4)



18. Click  “Brown, John”

19. Click  the  button

20. John Brown has now been assigned to

- A. Week 1 as Nights
- B. Week 2 as Days
- C. Week 3 as Afternoons

21. This can be checked by

- A. Click  “Brown, John”
- B. Click  the “Allocation” tab

Rotation	Type	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
1		0000-0800	0000-0800	0000-0800	0000-0800	0000-0800	Off	Off
2		0800-1600	0800-1600	0800-1600	0800-1600	0800-1600	Off	Off
3		1600-0000	1600-0000	1600-0000	1600-0000	1600-0000	Off	Off

22. Repeat this process for another 2 employees
 - A. Select from the remaining shifts
 - B. Employees “Debbie Lithgow” and “William Stevens” are available to schedule

23. Click   when finished

Generate Schedules

Outcome: *Demonstrate how to generate 4 cycles of a standard schedule*

This window is used to generate weeks of a “Standard Schedule” created in the “Maintain Standard Schedules” window.

Practice

Use the values displayed in this window for your practice.

We are going to generate the schedules for the month of April 2002, for the clients POW-NSW, POW-ACT and POW-WA.

Company: PWRTRN Start Date: 01/04/2002

Weeks to generate: 4 Add Standard Scheduling Sites: Re Generate

	Site	Name	Last Cycle	Last Date	Hours	
1	POW-ACT	POWERFORCE ACT	2	17/02/2002		▲
2	POW-NSW	POWERFORCE NSW	1	03/03/2002		
3	POW-WA	POWERFORCE WA	2	03/03/2002		
4						
5						
6						
7						
8						
9						
10						
11						
12						▼


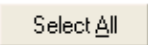
Generate Clear Exit

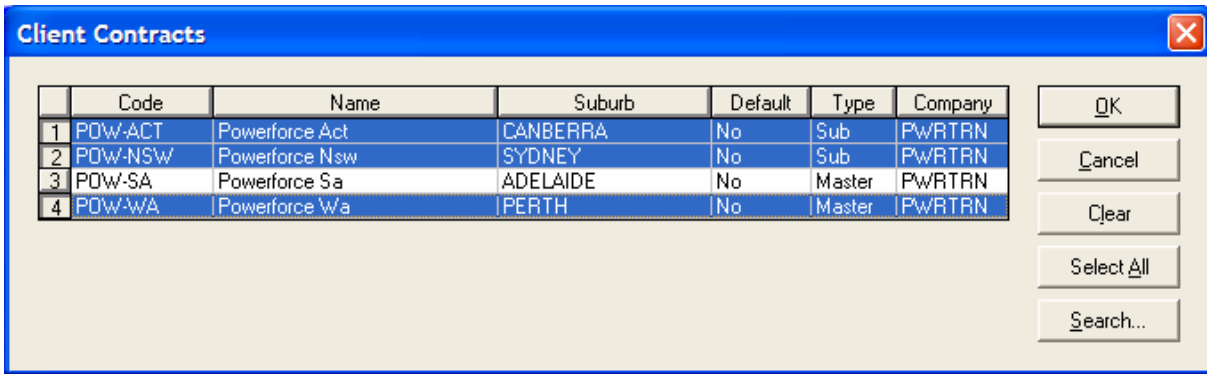
1. Open the window from the Navigator “Scheduling / Generate Schedules”
2. Select PWRTRN as the company code
 - A. This would normally be your company code
3. Select the first Monday in April as the start date
 - A. This is because all our schedules start on a Monday

April 2002

S	M	T	W	T	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

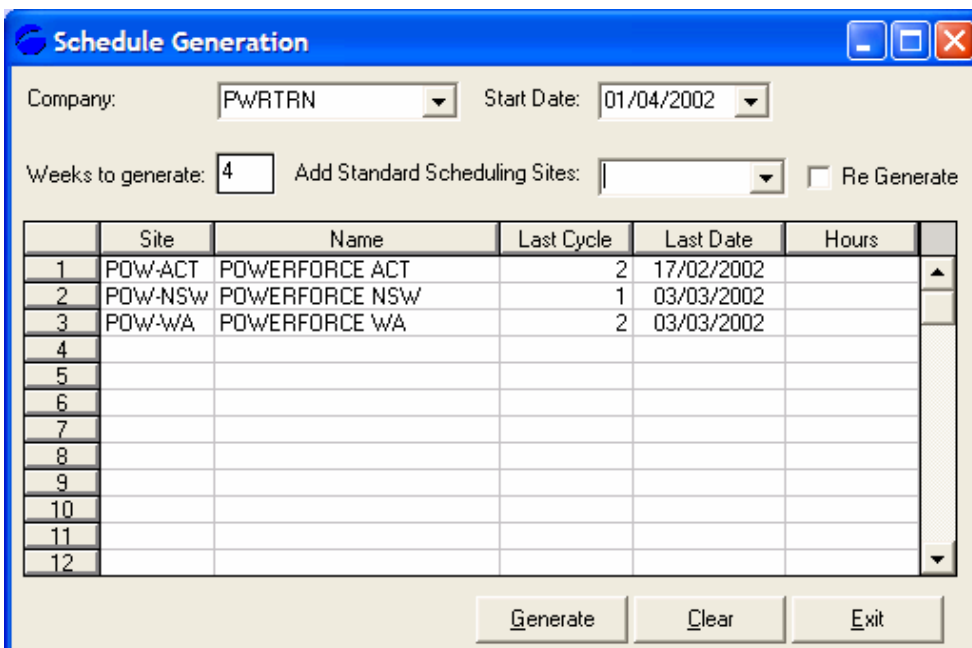
4. In the “Cycles to Generate” field enter 4
 - A. This is because we wish to generate 4 weeks of schedules

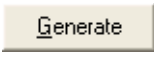
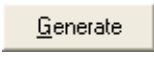
Weeks to generate: 4
5. Click the “Add Standard Schedules Site” list box, select POW-ACT, POW-NSW and POW-WA
 - A. Click  each row individually
 - Or
 - B. Click the  button



C. Click the  button

6. The window should now look as shown



7. To generate the schedules, click  the  button

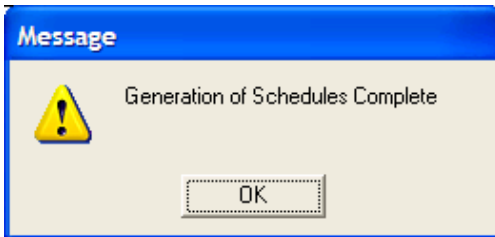
A. Check the “Re Generate” check box if you wish to regenerate existing schedules in the date range

Re Generate

8. Various messages will be displayed indicating the progress of the process



9. Once complete the following will be displayed

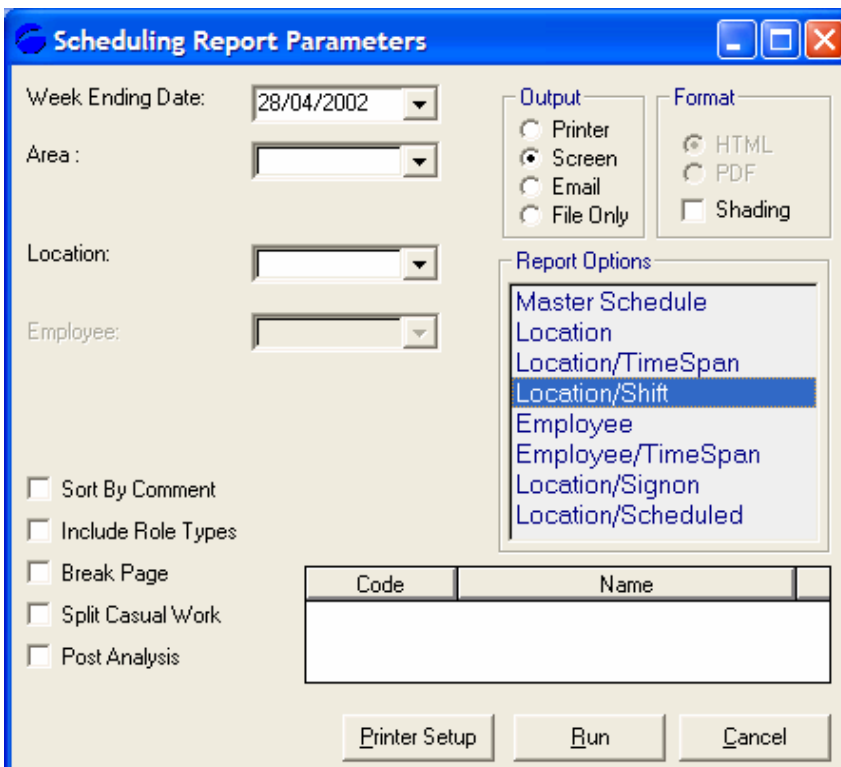


Print Schedules

Outcome: Demonstrate how to create a Location / Shift Report

Practice

1. Run a report to check the shifts generated
2. Open the Scheduling Report window from the Navigator “Scheduling / Scheduling Report”



3. Select the “Week Ending Date” as the last Sunday in April, 28/04/2002
4. Under “Report Options” click “Location / Shift”
5. Click

SCHEDULING REPORT
SCHEDULE FOR WEEK ENDING 28/04/2002

Location	Monday 22/04/2002	Tuesday 23/04/2002	Wednesday 24/04/2002	Thursday 25/04/2002	Friday 26/04/2002	Saturday 27/04/2002	Sunday 28/04/2002	Total Hours
POWERFORCE ACT	Lithgow J 00:00-08:00	Lithgow J 00:00-08:00	Lithgow J 00:00-08:00	Lithgow J 00:00-08:00	Lithgow J 00:00-08:00			40.00
						Brown W 06:00-18:00	Brown W 06:00-18:00	24.00
	Stevens A 08:00-16:00	Stevens A 08:00-16:00	Stevens A 08:00-16:00	Stevens A 08:00-16:00	Stevens A 08:00-16:00			40.00
	Adams J 16:00-00:00	Adams J 16:00-00:00	Adams J 16:00-00:00	Adams J 16:00-00:00	Adams J 16:00-00:00			40.00
						Brown D 18:00-06:00	Brown D 18:00-06:00	24.00
POWERFORCE NSW					Adams A 00:00-03:15			3.25
	Adams A 00:00-08:00	Adams A 00:00-08:00	Adams A 00:00-08:00	Adams A 00:00-08:00	Adams A 00:00-08:00			40.00
	Lithgow A 08:00-16:00	Lithgow A 08:00-16:00	Adams J 08:00-16:00 Lithgow A 08:00-16:00	Lithgow A 08:00-16:00	Lithgow A 08:00-16:00			48.00
				Adams A 13:00-00:00				11.00
	Stevens J 16:00-00:00	Adams J 16:00-00:00 Stevens J 16:00-00:00	Stevens J 16:00-00:00	Stevens J 16:00-00:00	Stevens J 16:00-00:00			48.00
POWERFORCE WA	Adams W 00:00-08:00 Stevens A 00:00-08:00	Adams W 00:00-08:00 Stevens A 00:00-08:00	Adams W 00:00-08:00 Stevens A 00:00-08:00	Adams W 00:00-08:00 Stevens A 00:00-08:00	Adams W 00:00-08:00 Stevens A 00:00-08:00			80.00
	Lithgow W 08:00-16:00 Stevens D 08:00-16:00	Lithgow W 08:00-16:00 Stevens D 08:00-16:00	Lithgow W 08:00-16:00 Stevens D 08:00-16:00	Lithgow W 08:00-16:00 Stevens D 08:00-16:00	Lithgow W 08:00-16:00 Stevens D 08:00-16:00			80.00
	Adams D 16:00-00:00 Lithgow A 16:00-00:00	Adams D 16:00-00:00 Lithgow A 16:00-00:00	Adams D 16:00-00:00 Lithgow A 16:00-00:00	Adams D 16:00-00:00 Lithgow A 16:00-00:00	Adams D 16:00-00:00 Lithgow A 16:00-00:00			80.00

Scheduling Work Bench

Practice

Outcome: *Demonstrate how to open a generated shift in the Scheduling Workbench*

- Shift details can also be displayed and edited in the “Scheduling Workbench”

Note: The Scheduling Workbench is discussed in detail in the User manual.

Scheduling Workbench <Site Location>

Powerforce Nsw
(POW-NSW) NSW
25 SYDNEY ROAD
SYDNEY NSW 2000

Rotation Start: 00:00 End: 23:59 Comment: Available
Book: 00:00 Post: 00:00
(PWR-201) STEVENS, JOH

Stevens John
W/End: 28/04/2002
Book: 120.00
Ovr/Std: 00

APR 2002	Mon 22	Tue 23	Wed 24	Thu 25	Fri 26	Sat 27	Sun 28
Adams Tony-PWR-0C	00:00-08:00	00:00-08:00	00:00-08:00	00:00-08:00	00:00-08:00		
Lithgow Alison-PWR-1	08:00-16:00	08:00-16:00	08:00-16:00	08:00-16:00	08:00-16:00		
Stevens John-PWR-2	16:00-00:00	16:00-00:00	16:00-00:00	16:00-00:00	16:00-00:00		

Resources/Hours: 3/24.00 3/24.00 3/24.00 3/24.00 3/24.00

Legend
 Morning (Yellow) Afternoon (Cyan) Nocharge (Orange)
 Day (Green) Night (Grey) Multiple Times (Red)

Booked Time: 120.00 Standard Hours: 120.00 Casual Hours: .00
 Chargeable Time: 120.00 Booked Std Hours: 120.00 Paid Normal: 112.00
 Non Chargeable Time: .00 Over Standard: .00 Paid O/Time: 8.00

2. Open from the Navigator “Scheduling / Scheduling Workbench”
 - A. Select “PowerForce NSW” as the site
 - B. Select the Week Ending (W/End) as the last Sunday in April 28/04/2002
 - C. Click the “Site” tab to update the display

Note: These are the shifts created in the Generate Schedules section.

Editing a Shift

1. To edit a shift double click the desired shift
 - A. Double clicking a blank shift will create a new shift
 - B. This is known as an Ad-Hoc shift
 - C. You will have to assign the times for the shift
2. This will display the “Booking Window”

Editing Booking for JOHN ADAMS At POWERFORCE NSW

Times | Comments | Pay | Memo | Order | Costs | Allowances | Tasks | Normal Day

Book Start: 24/04/2002 08:00
 Book End: 24/04/2002 16:00
 Post Start: 24/04/2002 08:00
 Post End: 24/04/2002 16:00

Charge on booktime
 Charge on Post Time
 Tentative Split Shift
 Queue O/T Authorised
 Close Shift Extend Base

Morning
 Day
 Afternoon
 Night
 Rotating



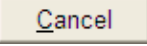
08:00-16:00 DAYS DAYS | SG

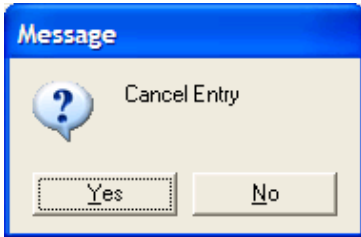
Standard Shifts | Role Types | Ok | Cancel

3. This allows you to edit Start / End times and numerous other details

Canceling a Shift

Outcome: *Demonstrate how to cancel a shift*

1. Click  the shift to select the entry
2. Click  the  button located immediately above the shifts






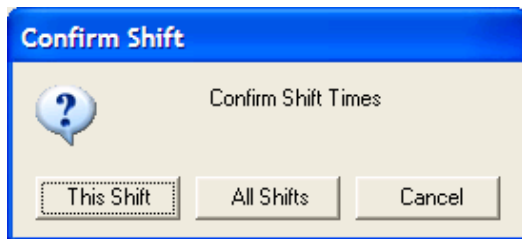
3. The selected shift will be removed

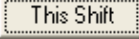
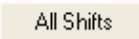
APR 2002	Mon 22	Tue 23	Wed 24	Thu 25	Fri 26	Sat 27	Sun 28
Adams Tony-PWR-0C		00:00-08:00	00:00-08:00	00:00-08:00	00:00-08:00		
Lithgow Alison-PWR-1	08:00-16:00	08:00-16:00	08:00-16:00	08:00-16:00	08:00-16:00		
Stevens John-PWR-2	16:00-00:00	16:00-00:00	16:00-00:00	16:00-00:00	16:00-00:00		

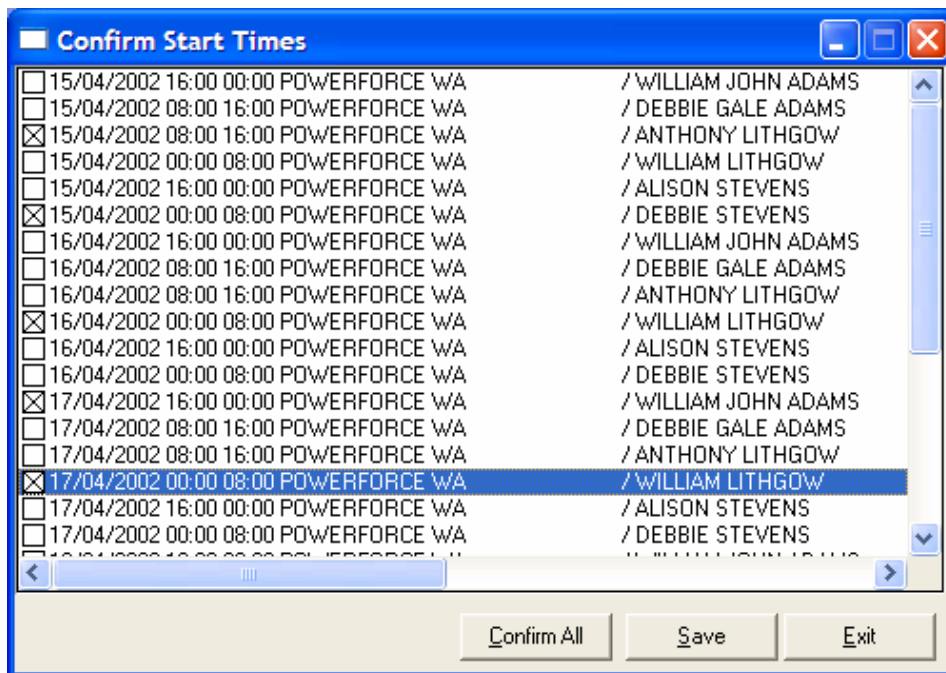
Confirming a Shift




Outcome: *Describe how to confirm shift times*
Describe how to confirm a shift was worked

1. PowerForce offers 2 confirmation checks
 - A. Confirm Times
 - 1) This may be used to confirm arrival of the employee
or
 - 2) Confirm shifts have been issued to the employee
 - B. Confirm Shifts
 - 1) This confirms that the times indicated were worked
 - 2) This must be confirmed for the shift to be paid or charged out to the client
2. To Confirm Times
 - A. Click  a shift in the window
 - B. Click  the  button at the top left of the window



- C. Click  to confirm the current shift
or
D. Click  to choose which shifts to confirm



- E. Check the box of the shifts you wish to confirm
2. To Confirm Shifts
- A. Click  a shift in the window
- B. Click  the  button at the top left of the window
- C. The rest is the same as confirming times

Note: A shift must be confirmed to be paid or billed.