

Scheduling How To

Creating Roster Patterns

Outcome: *Demonstrate how to create a “Roster Code”.*
 Explain how a “Pattern Code” can be re-used.
 Demonstrate how to create, a “Roster Pattern”.
 Describe how to copy a “Roster Pattern”.

Why Use

Roster patterns make it easier to plan a schedule by visually showing you how a person progress through the roster in each rotation.

Having created this visual representation it may then be applied to “Maintain Standard Schedules” to automate the insertion of each employee in the schedule, saving you a great deal of time.

Overview

Creating Pattern Codes

Creating Rotation Patterns

Copying a Pattern

Procedure

Pattern Codes

1. Set up a separate code for each shift in the client schedules
 - A. Open “Roster Pattern Codes” under “Optimised Scheduling” in the “Navigator”
 - 1) 06:00 – 14:00 (Day 1)
 - 2) 08:00 – 16:00 (Day 2)
 - 3) 16:00 – 24:00 (Aft 8)
 - 4) 24:00 – 08:00 (Nig 8)



2. The times in the codes are defaults only
 - A. They can be changed for each rotation pattern.

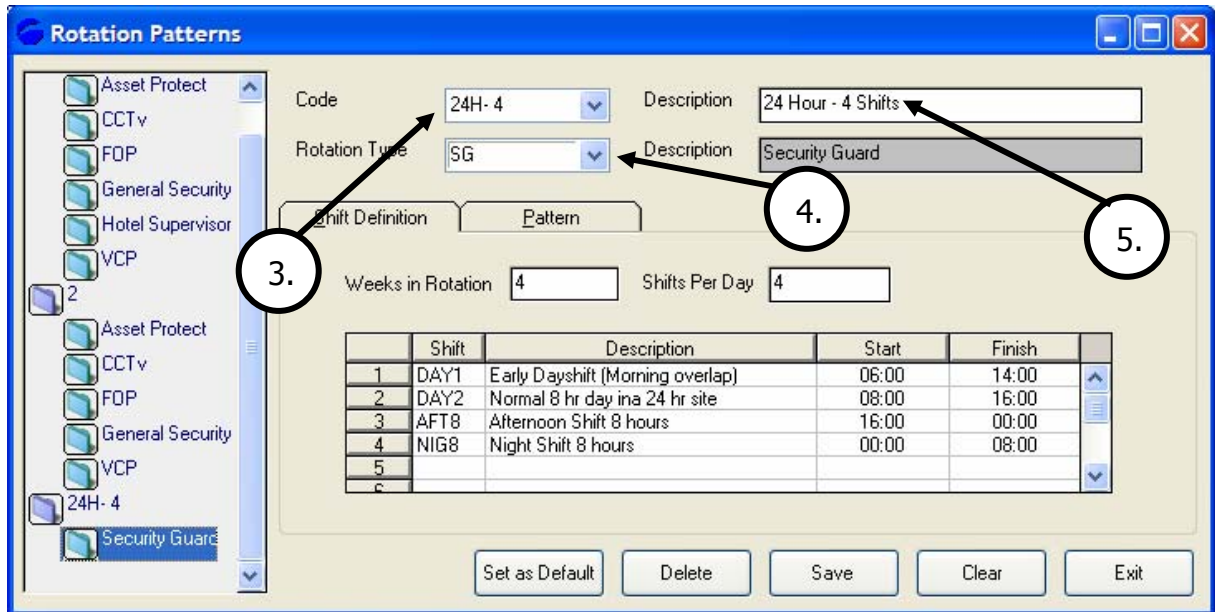
Note: A "Roster Pattern Code" is a "Code", "Description" and "Colour" where a "Rotation Pattern" is the use and arrangement of a collection of "Rotation Codes" used to form a "Rotation Pattern".



- B. A different "Roster Pattern Code" is needed for each shift type in the *same* "Rotation Pattern"
 - C. The same "Roster Pattern Code" can be used in *different* "Rotation Patterns" for similar but *different* shifts.
- Eg. The code "Day 1" could be used for:
- a) 06:00 – 14:00 in pattern A
and
 - b) 08:00 – 16:00 in pattern B

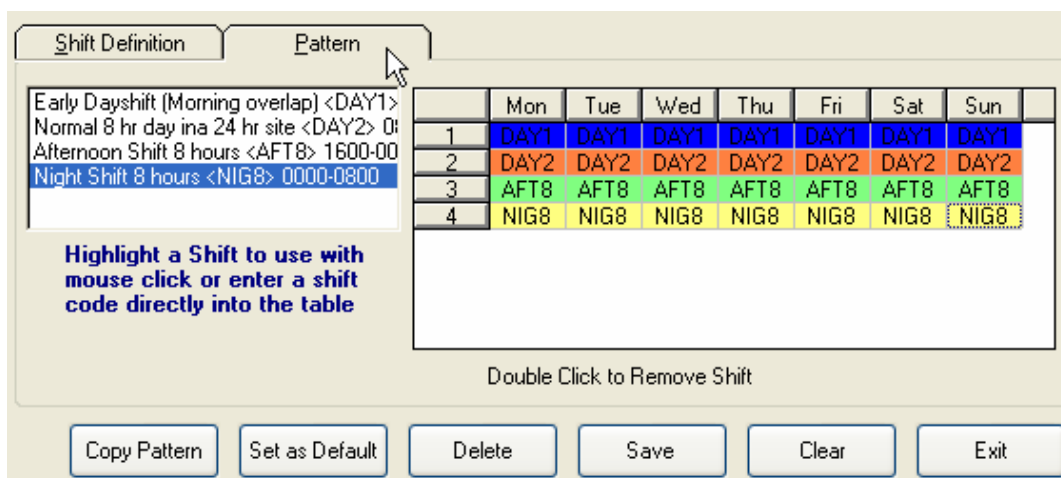
Rotation Patterns

1. A "Rotation Pattern" describes the sequence of shifts a group of people will rotate through.

- Using the “Navigator” open “Optimised Scheduling / Rotation Pattern”



- Type in a new code
 - It should be meaningful but 6 or less characters
- Choose a role type
 - “Role Types” are created in the “System Codes” menu under “Time Scheduling / Role Type”
- Enter a description for the pattern code
 - Try to explain the function of the code
- Double click  a free cell in the “Shift” column and choose a shift type
 - In the example we have used “Day1”
 - Change the “Start” and “Finish” times if required
- Repeat step 6 for each shift
- Click  the “Pattern” tab




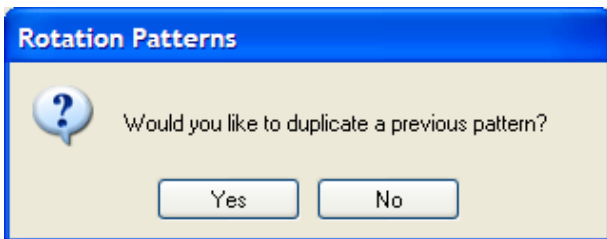
- Highlight the shift description
- Click day/s shift required


- A. If there are not enough rows in the pattern
 - 1) Save the record
 - 2) Open the record again and there will be more rows

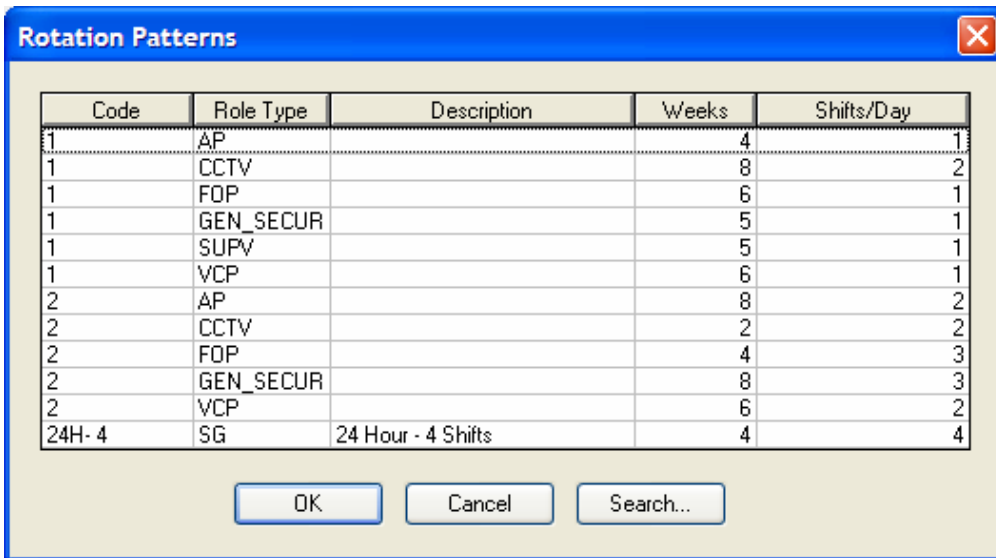
To Copy a Roster Pattern

Note: This pattern is chosen to contrast the previous pattern.

1. Create a new pattern as described in “Rotation Patterns” steps 1 to 8
 - A. The “Weeks in Rotation” must be the same as the pattern you are going to copy
 - B. The “Shift Codes” must be the same as the pattern you are going to copy
2. On the “Pattern” tab click  the Copy Pattern button
3. You will be asked if you like to duplicate a previous (an existing) pattern (layout only – no codes).



4. Click  Yes
5. Select a pattern to copy



6. A copy of the pattern layout will be placed in the window
-

	Mon	Tue	Wed	Thu	Fri	Sat	Sun
1	NIG8	NIG8	NIG8	NIG8			
2	DAY1	DAY1	DAY1		NIG8	NIG8	NIG8
3				DAY2	DAY2	DAY2	DAY2
4	DAY2						NIG8

Applying a Roster Pattern

Outcome: *Demonstrate how to design a schedule in “Maintain Standard Schedules” using a “Roster Pattern”.
Explain how to generate repetition of a “Standard Schedule”.
Demonstrate how to view generated schedules.*

Why Use

Roster patterns allow an existing plan of shift rotations to be applied to a client’s site saving time and reducing possible errors.

Overview

Design a Schedule in Maintain Standard Schedules

Generate repetitions of the schedule in “Generate Schedules”

View results of schedule generation in “Time Scheduling Workbench”

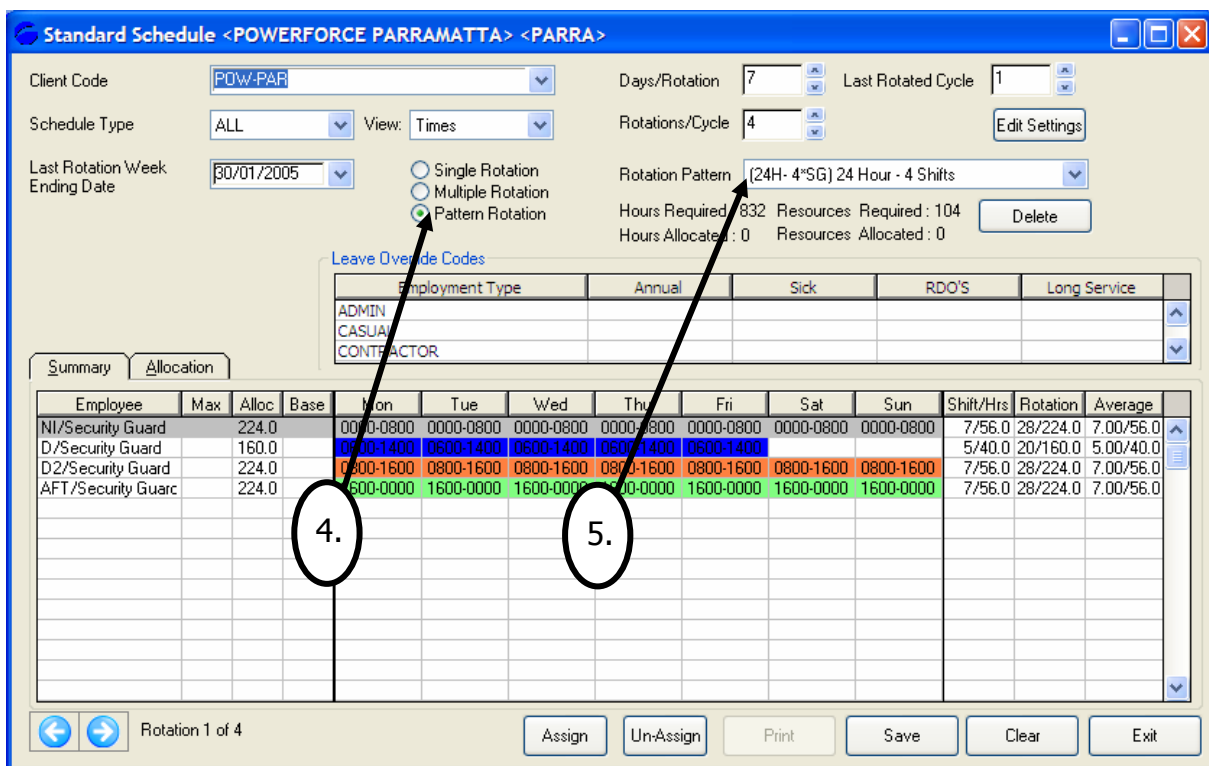
Procedure

Design a Schedule in Maintain Standard Schedule

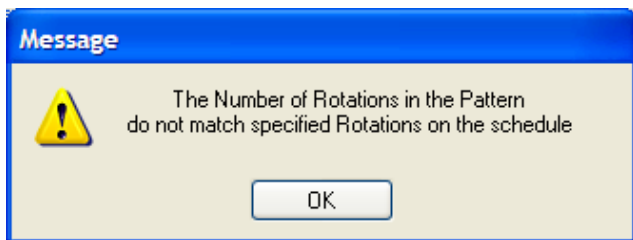
This window is used to design a “Standard Schedule” from which the weekly schedules are generated.

1. From the “Navigator” open “Scheduling / Maintain Standard Schedules”
2. Enter the client code

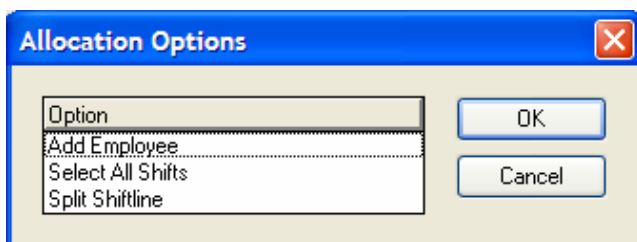
PowerForce User Training Manual



3. Choose the schedule type
 - A. ALL – ever day of the year
 - B. REGULAR – every day except public holidays
 - C. PHOLS – public holidays only
4. Select “Pattern Rotation”
5. Select the “Rotation Pattern”
 - A. The following message will appear



- B. This is because the window assumes 1 week when you open it but changes to the number of rotations when you choose the rotation pattern.
6. Double click the employee column
 - A. The following window will appear



- B. Select “Add Employee”

C. Select an employee

- 1) The “Rotation Pattern” will be applied to this employee

7. Highlight the employee

Employee	Max	Alloc	Base
Adams, Alison	168.0		1
NI/Security Guard		224.0	
D/Security Guard		160.0	
D2/Security Guard		224.0	
AFT/Security Guarc		224.0	

8. Click the “Allocation” tab

Rotation	Type	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
1		ayshift (Morning)	ayshift (Morning)	ayshift (Morning)	8 hr day ina 24	8 hr day ina 24	Off	Off
2		Off	ernoon Shift 8 ho	ternoon Shift 8 hou	ernoon Shift 8 hc	ernoon Shift 8 h	ernoon Shift 8 ho	Off
3		Off	Off	Night Shift 8 hours	light Shift 8 hour	ight Shift 8 hou	ight Shift 8 hour	Night Shift 8 hour
4		Off	Off	ternoon Shift 8 hou	ernoon Shift 8 hc	ernoon Shift 8 h	ernoon Shift 8 ho	Off

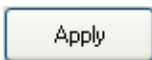
9. Select the “Base Work Pattern Rotation”

- A. The week of the rotation on which the employee will start
- B. It is easiest to have the first employee on week 1 of the rotation and the second on week 2 etc.

10. Click assign shifts

- A. All shifts in the pattern will now be assigned to the selected employee starting in week 1 of the pattern.

Rotation	Type	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
1		0600-1400	0600-1400	0600-1400	0800-1600	0800-1600	Off	Off
2		Off	1600-0000	1600-0000	1600-0000	1600-0000	1600-0000	Off
3		Off	Off	0000-0800	0000-0800	0000-0800	0000-0800	0000-0800
4		Off	Off	1600-0000	1600-0000	1600-0000	1600-0000	Off

11. Click the  button

12. Return to the “Summary” tab

Summary				Allocation						
Employee	Max	Alloc	Base	Mon	Tue	Wed	Thu	Fri	Sat	Sun
Adams, Alison	168.0	152.0	1	0600-1400	0600-1400	0600-1400	0800-1600	0800-1600	Off	Off
NI/Security Guard		184.0		0000-0800	0000-0800	0000-0800	0000-0800	0000-0800	0000-0800	0000-0800
D/Security Guard		136.0					0600-1400	0600-1400		
D2/Security Guard		208.0		0800-1600	0800-1600	0800-1600			0800-1600	0800-1600
AFT/Security Guard		152.0		1600-0000	1600-0000	1600-0000	1600-0000	1600-0000	1600-0000	1600-0000

Rotation 1 of 4

Buttons: Assign, Un-Assign, Print, Save

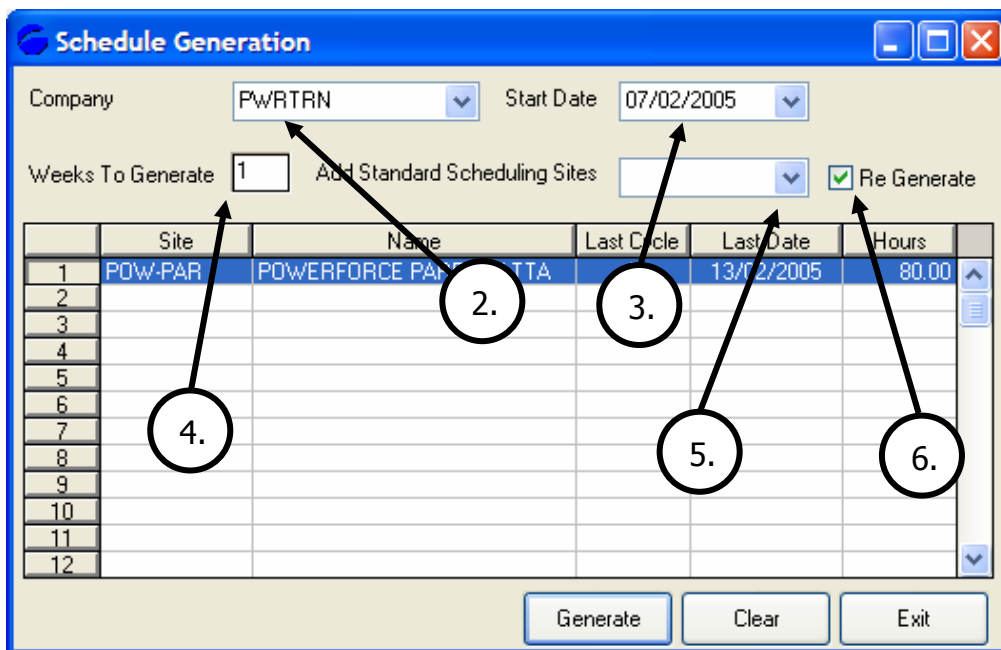
- A. For week 1 the first shift in the pattern has been assigned to the employee
- B. 152 hours have been allocated to the employee
 - 1) 38 hours for each rotation
 - Day 1
 - Day 2
 - Afternoons
 - Nights

13. Repeat steps 6 through 12 until all rotations have been assigned.

Generate Schedule

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

1. From the “Navigator” open “Scheduling / Generate Schedule”



2. Select the company

Scheduler Comments

Outcome: *Explain how to add a new comment.*
 Explain how to delete a comment.

Why Use

Creating standard comment increases consistency and makes comments much faster to enter.

Overview

Rebuilding the scheduling comments table

Scheduling comments Maintenance


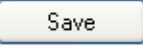


Using Scheduler Comments

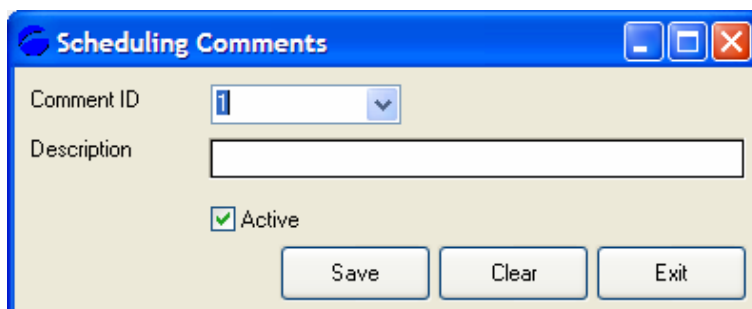
Available in these Windows

Procedure

Schedule Comments Maintenance:

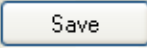
Regular usage comments are stored in a PowerForce table. This window allows you to create edit and delete these comments.

1. Open “Time Scheduling / Scheduling Comments” from the “System Codes” menu.
2. The “Comment Id” is automatically created
 - A. If you wish to edit another comment open the list box and select the desired entry
3. Click  the description field and enter you new comment
4. Check “Active” to make the comment available or un-check to make the comment un-available
5. Click  to save the comment
6. Comments may be deleted by opening the comment and click  the  button in the toolbar.




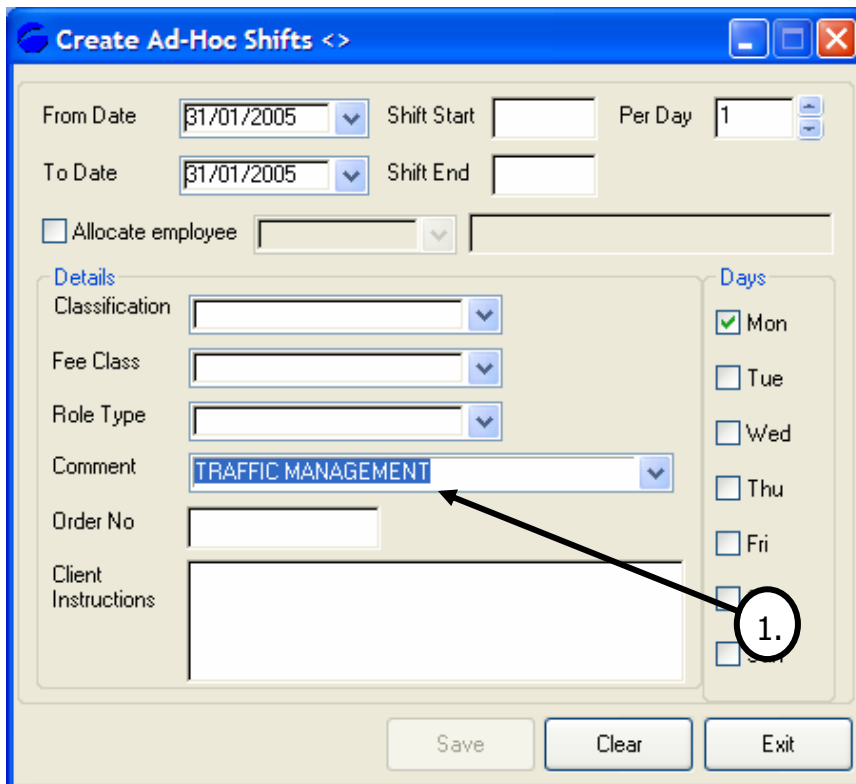
Note: Comments may only be deleted in this window.

Using Scheduler Comments

1. Select from the list box
or
2. Type your own and click 

Available in these Windows

1. “Scheduling / Time Scheduling Workbench / Ad-Hoc Schedule Button  / Create Ad-Hoc Shifts” window in the “Navigator”



Create Ad-Hoc Shifts <>

From Date: 31/01/2005 Shift Start: Per Day: 1

To Date: 31/01/2005 Shift End:

Allocate employee

Details

Classification: Fee Class: Role Type: Comment: TRAFFIC MANAGEMENT

Order No: Client Instructions:

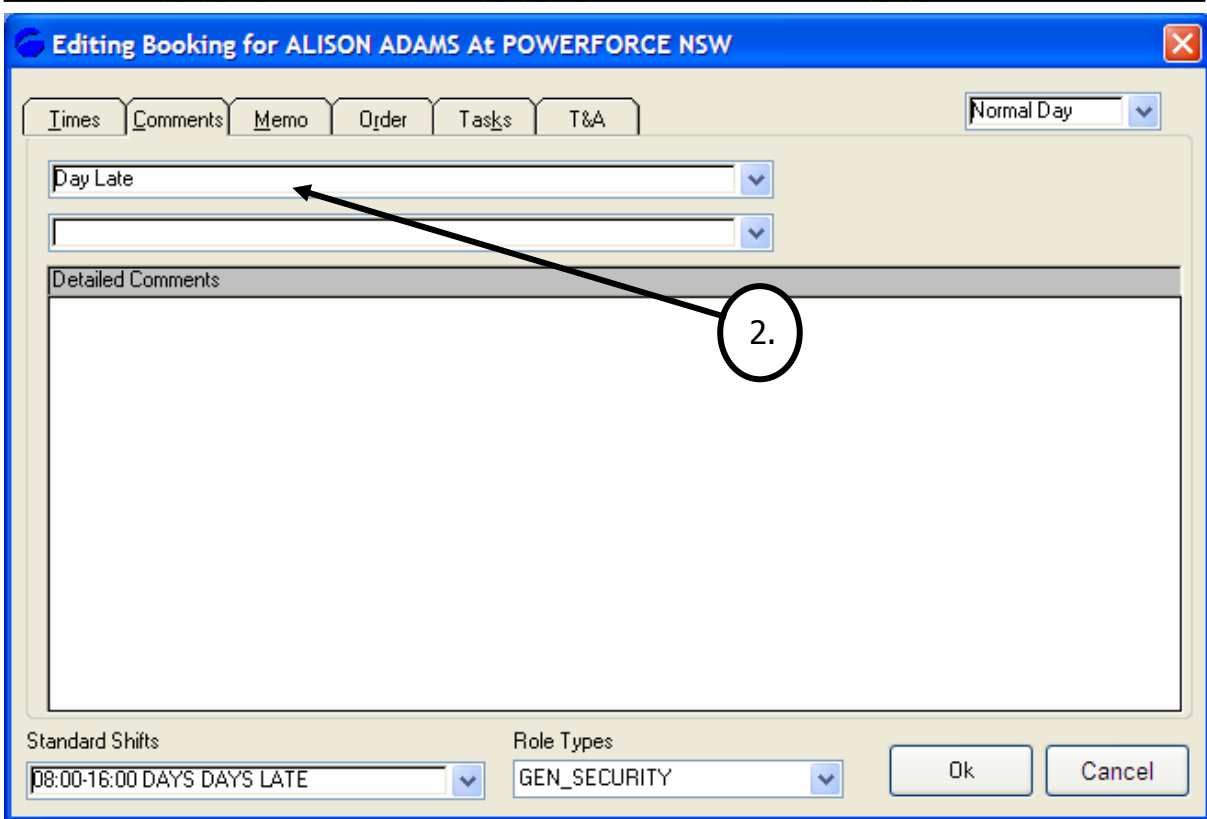
Days

Mon Tue Wed Thu Fri Sat

1.

Save Clear Exit

2. “Scheduling / Time Scheduling Workbench / Booking Window / Comments Tab” in the “Navigator”



How to Create an Adhoc Shift

Outcome: *Demonstrate how to create a shift that is not part of the normal cycle.*

Why Use

Use this procedure when you want to create a shift that will only be used once or that you do not want generated every cycle.

Procedure

1. Open "Scheduling / Time Scheduling Workbench" from the "Navigator"

Scheduling Workbench <Site Location>

View: W/End 06/02/2005, Period 7 Days, Rotation Start 1, End 1

Employee: ADAMS QUINCE, Book 77.00, Over/Standard 77.00

FEB 2005	Mon 31	Tue 01	Wed 02	Thu 03	Fri 04	Sat 05	Sun 06
ADAMS QUINCE-PWR-003	09:00-17:00	07:00-15:00		09:00-17:00	09:00-17:00		
BROWN ALISON-PWR-010						15:00-23:00	15:00-23:00
LITHGOW JOHN-PWR-012	00:00-12:00		08:30-17:30 16:00-00:00				
PWR-002							

Resources/Hours: 2/20.00 | 1/8.00 | 2/17.00 | 1/8.00 | 1/8.00 | 1/8.00 | 1/8.00

2. Select a site and click the site tab to refresh the screen
3. Click the “Adhoc” button

Create Ad-Hoc Shifts <POWERFORCE PARRAMATTA>

From Date: 02/02/2005, Shift Start: 16:00, Per Day: 1

To Date: 02/02/2005, Shift End: 00:00

Allocate employee: FWR-002, ANTHONY JOHN ADAMS

Details


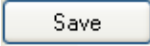
Classification: 10, Fee Class: , Role Type: GEN_SECURITY, Comment: GENERAL SECURITY, Order No: B-10235, Client Instructions:

Days

Mon, Tue, Wed, Thu, Fri, Sat, Sun

Save | Clear | Exit

4. Enter the dates for the shifts
5. Enter the start and end times
6. Enter the number of shifts required for each day

7. If you want to allocate this shift to an employee
 - A. Check “Allocate Employee”
 - B. Select the employee from the list
8. Check the boxes for the days these shifts will be required
9. Select the classification if required for payment of the shift
10. Select the role type of the shift if required
11. Enter comments if required
 - A. These can be viewed in the booking window
 - B. Sort on this field in the “Scheduling” report
12. Enter the order number if required
 - A. This will print on the invoice
 - B. The client can be set to “Split” invoices on order number
13. The client instructions can be entered if required
 - A. The client can be set to print this on the invoice
14. Click  the  button

The shift must be assigned to an employee before it can be edited through the booking window.
