Schedule Generator

We will begin momentarily …

What is the Schedule Generator?

The Schedule Generator is an engine that creates optimized schedules.

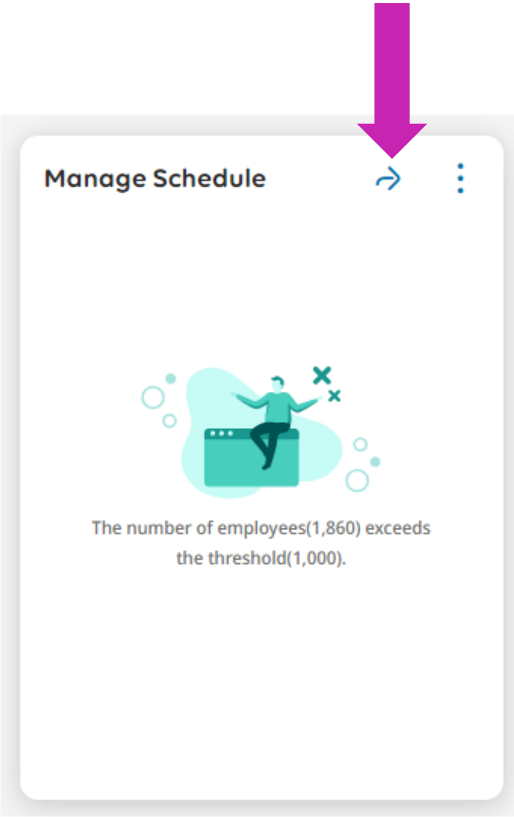
What factors can be considered?

- Employees
- Jobs
- Workload and coverage
- Employee preferences
- Shift templates or shift profiles
- Schedule rules
- Employee availability

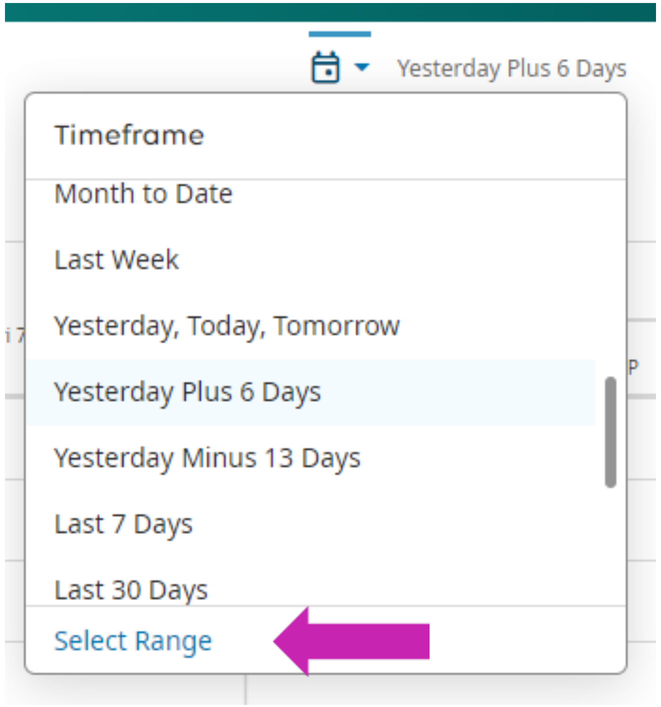
How to Generate Schedules

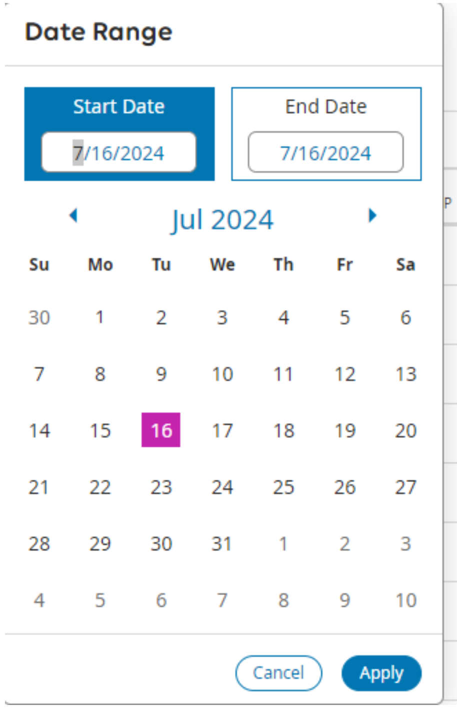
1. Navigate to the Schedule Planner from the Home Page
2. Select the Time Period that you wish to Generate Schedule.

1



2

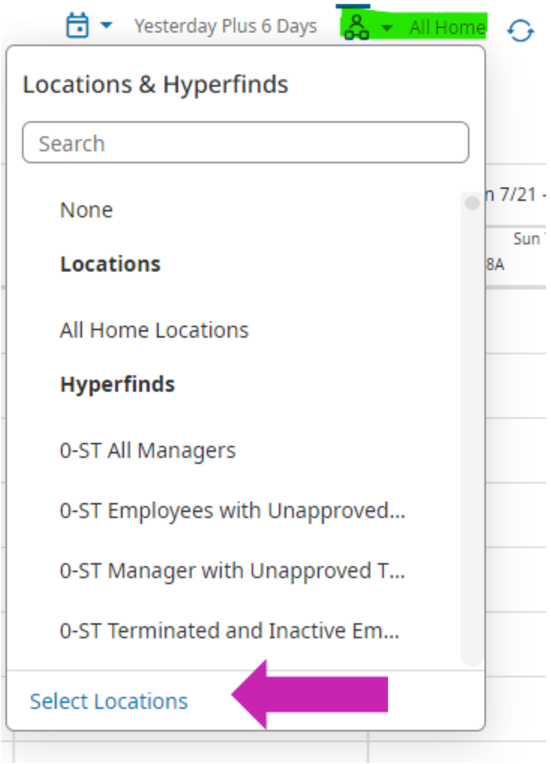




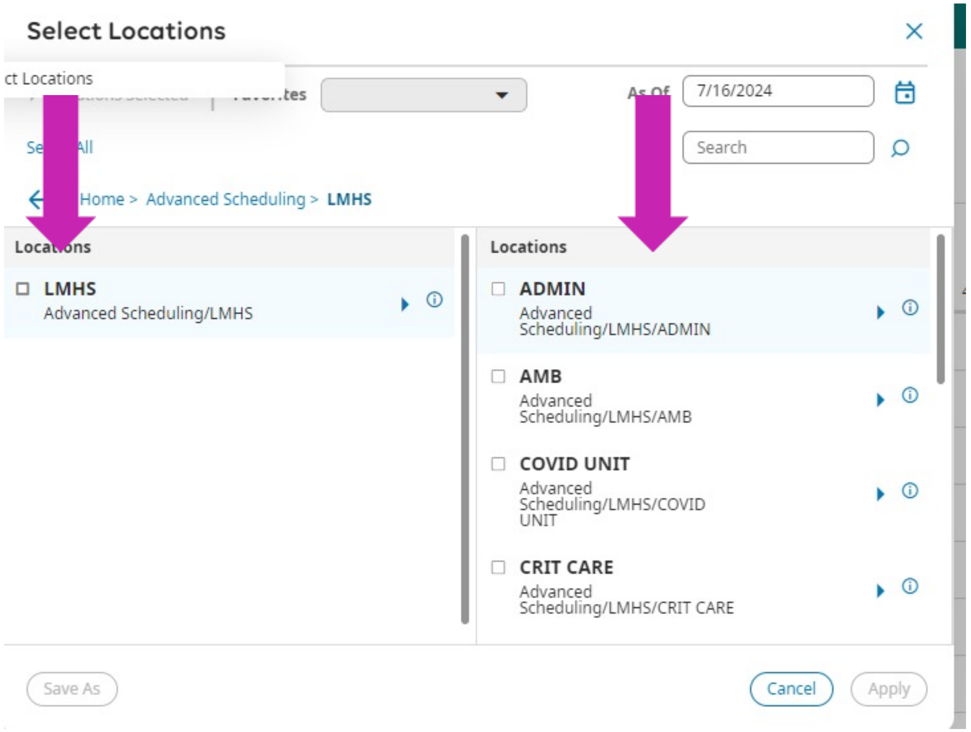
How to Generate Schedules

1. Navigate to the Unit/Department that you wish to generate shifts for under Locations & Hyperfinds. Choose Select Locations
2. In the Select Locations pop out select Advanced Scheduling > LMHS > Desired Location

1



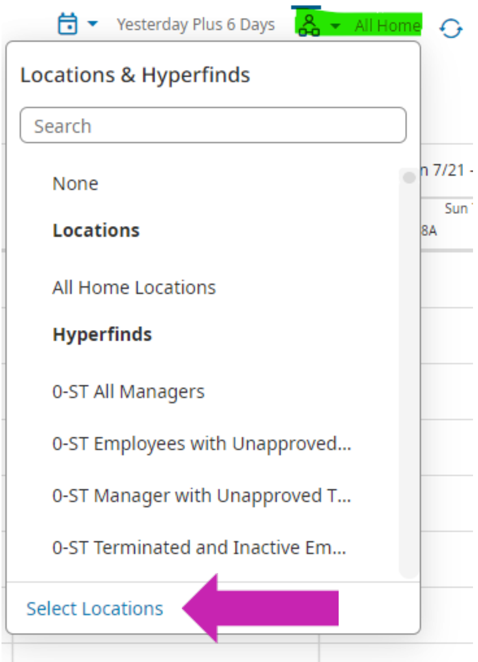
2



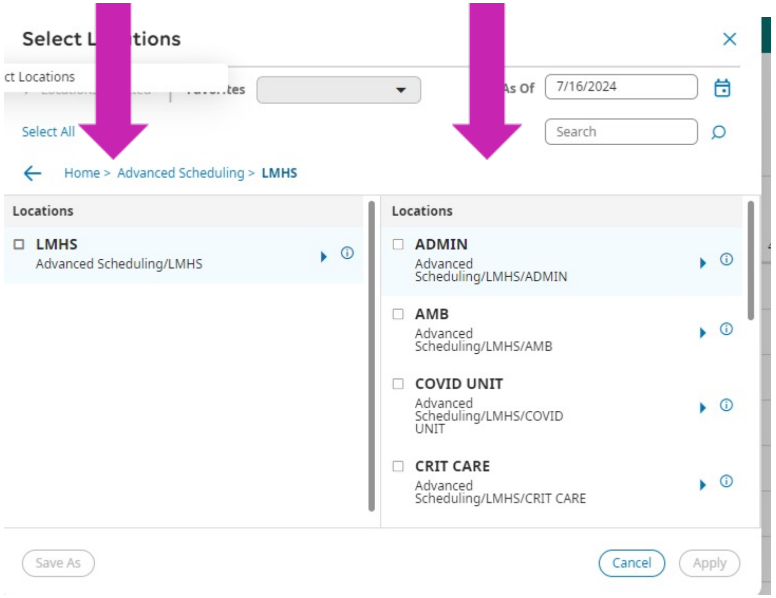
How to Generate Schedules – On Call Shifts

1. Navigate to the Unit/Department that you wish to generate shifts for under Locations & Hyperfinds. Choose Select Locations.
2. In the Select Locations pop out select Advanced Scheduling > LMHS > Desired Location.
3. If the Unit/Department requires associates to schedule On Call shifts, make sure to select both the main unit and the On Call option. See OB example below.

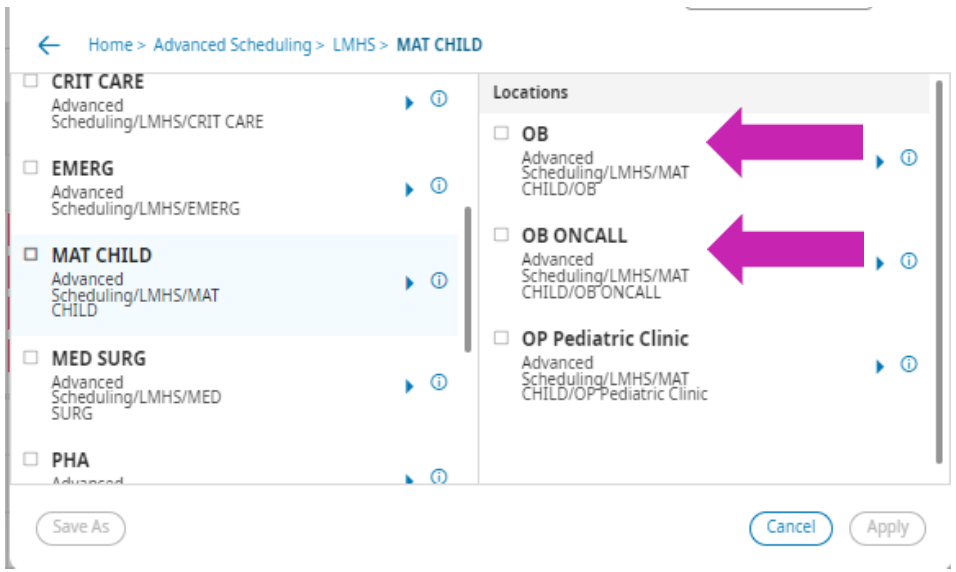
1



2



3

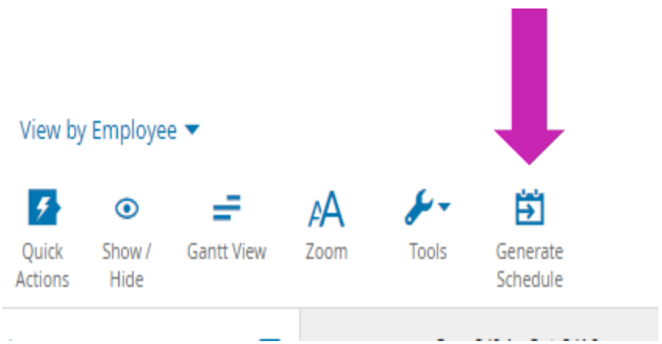


UKG

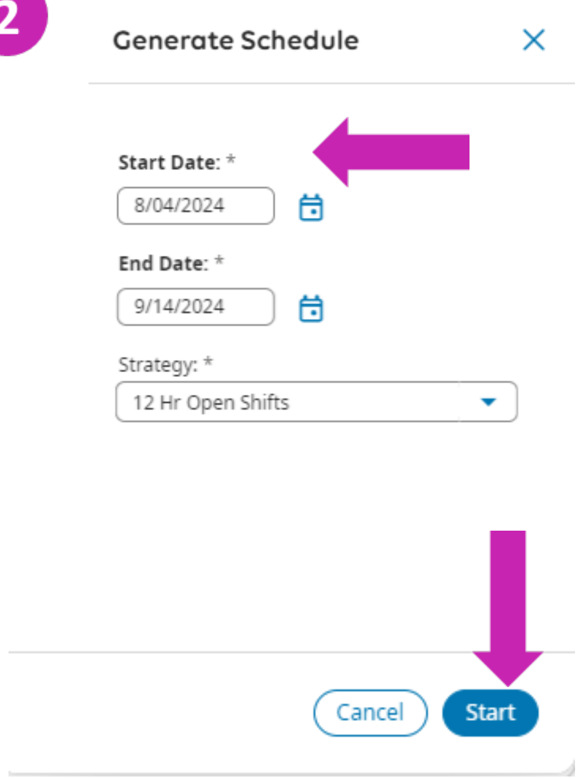
How to Generate Schedules

1. Once you have navigated to correct Location and have selected the appropriate timeframe, select the Generate Schedule button at the top.
2. In the pop out on the side make sure the appropriate Start and End Dates and Strategy are selected and select the “start” button at the bottom.
3. The Open Shifts should calculate and show in red at the top of the schedule.

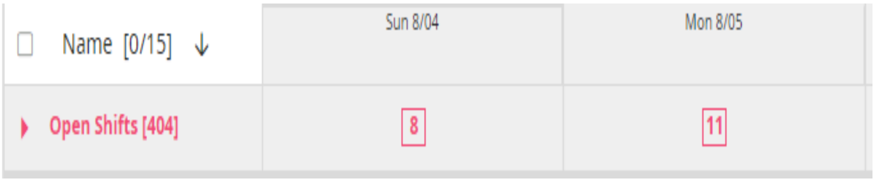
1



2



3

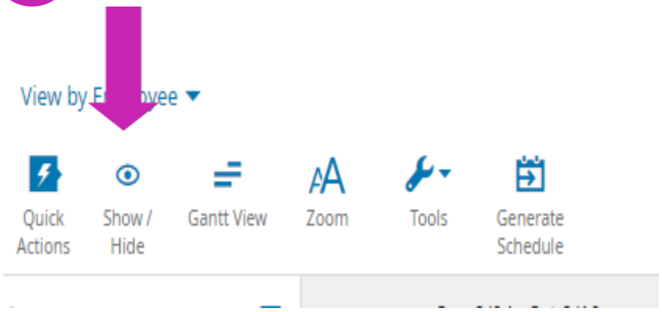


* If unable to see Open Shifts, please see next slide*

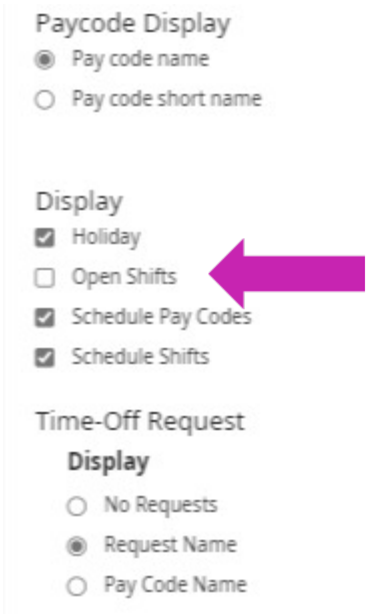
View Open Shifts

1. If you have generated schedules, but do not see the Open Shifts in red at the top, select the Show/Hide icon at the top.
2. In the Display section of the pop-out, make sure that Open Shifts has been selected.
3. Select Apply. Open Shifts should now show at the top of the Schedule Planner.

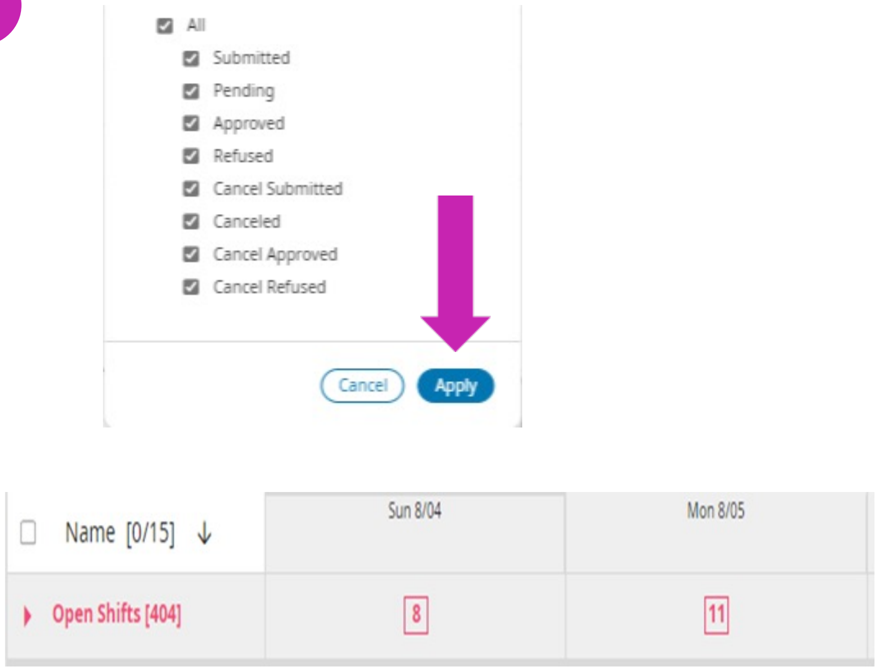
1



2



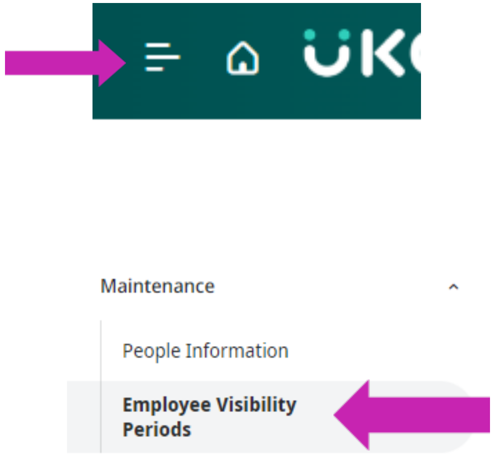
3



How to open Employee Request Periods

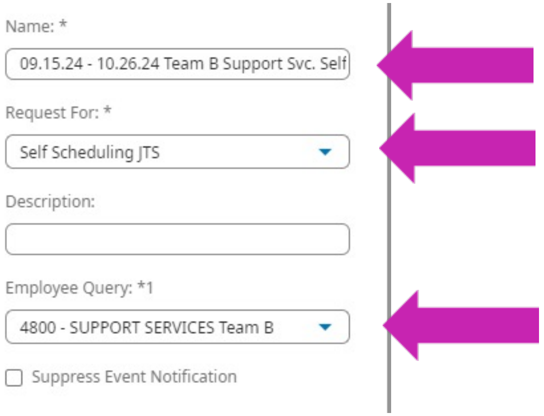
1. From the drop-down menu in the top left corner, go to the Maintenance section and select Employee Visibility Periods.
2. Select the Add Period option.
3. Enter a name for the request period, select correct option in “Request for” drop down, and choose the employee group in the “Employee Query” drop down.
4. Select the Submission dates based on which schedule group you are updating, enter in the dates for the request period, and select “Apply.” Repeat for other schedule groups, as necessary.

1

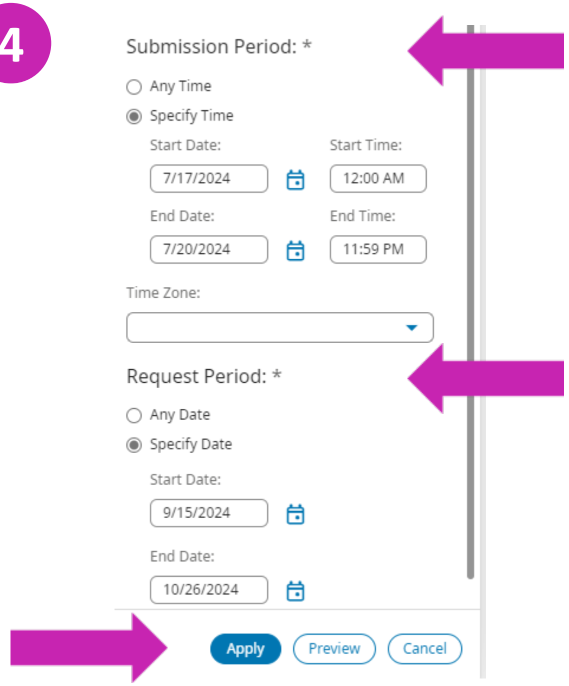


2

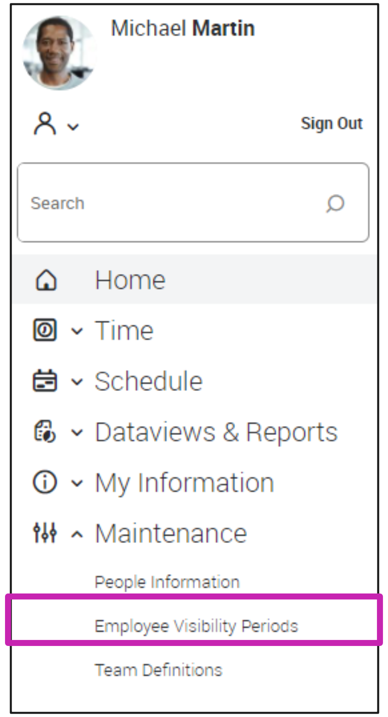
3

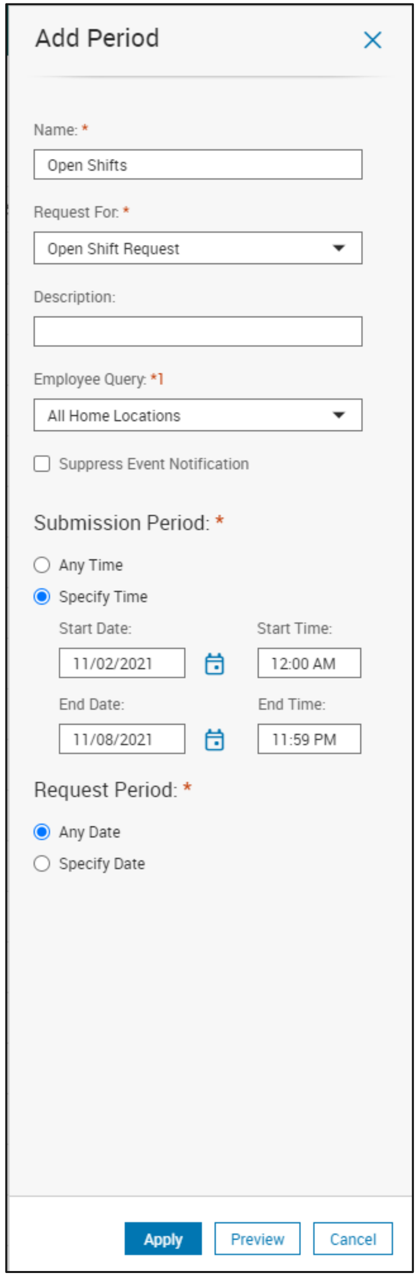


4



Defining or Editing Visibility Periods





Employee Self Service Requests

For an employee to make a request there must be an open Employee Visibility Period for the request type.

Employee Visibility Periods have two sets of dates:

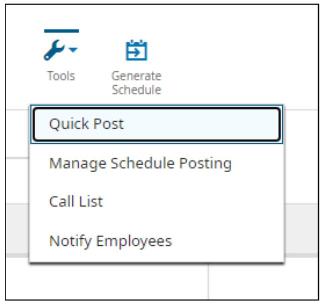
- Submission period — dates when employees can make the request
- Request period — dates that employees can request

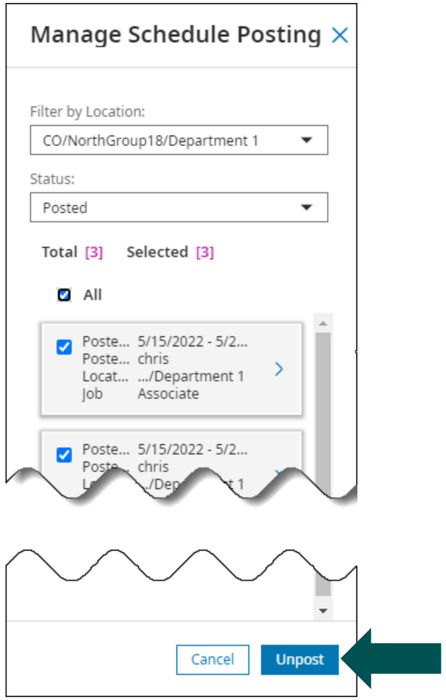
The periods can be:

- A recurring period
- A rolling period
- Available any time
- Specific date and time

Post and Unpost a Schedule

- Posting a schedule is often necessary to make it visible to employees and to enable certain employee self-service features.
- If a schedule is posted inadvertently, it is easy to return it to Unposted status.

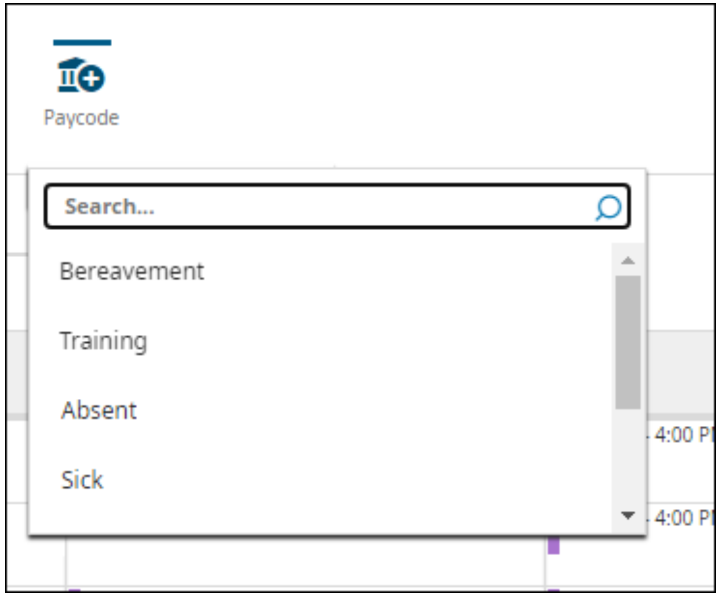




UKG

Add Paycodes

Paycodes are used to identify the type of hours that employees work. If an employee's hours differ from regular hours (such as training or absence), you will apply a paycode to those hours.



Employee Visibility Periods

Sun	Mon	Tues	Wed	Thurs	Fri	Sat
27	28	29	30	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	31

Submission Period

May I … ?

Request Period

Time off

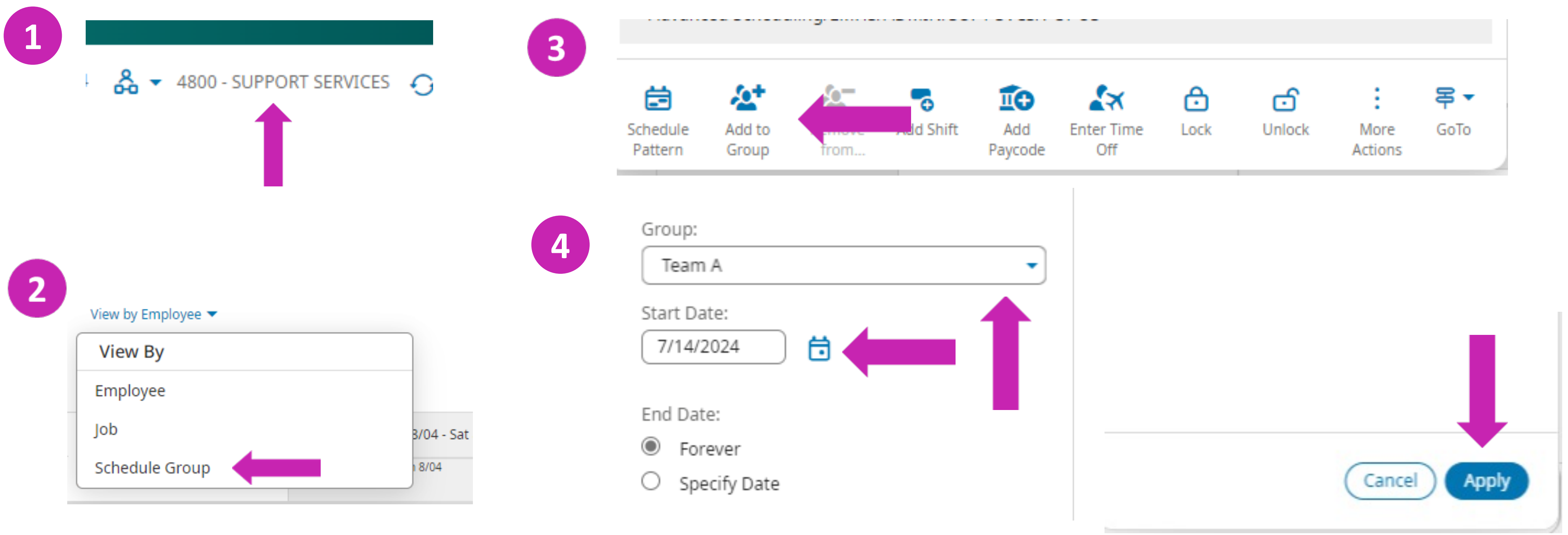
UKG

Assigning Teams

We will begin momentarily …

How to assign an associate to a team

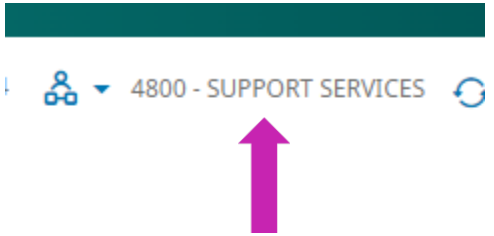
1. In the Advanced Schedule Planner, navigate to the desired Location.
2. At the top of the page, select the downward carrot next to “ View by Employee” and choose “ Schedule Group.” This will sort the employees into their assigned Teams.
3. To assign an associate to a Team, select the associate and right click. Select “Add to Group.”
4. Select the correct team in the drop down menu and update the Start Date to the desired date. Select “Apply.”



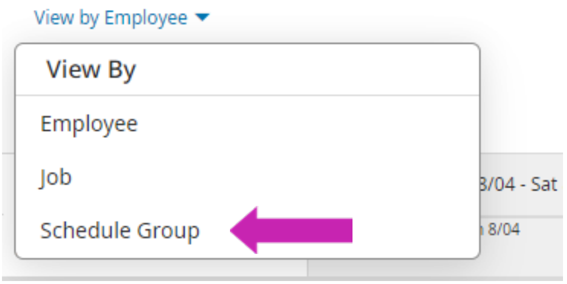
How to remove an associate from a team

1. In the Advanced Schedule Planner, navigate to the desired Location.
2. At the top of the page, select the downward carrot next to “ View by Employee” and choose “ Schedule Group.” This will sort the employees into their assigned Teams.
3. To assign an associate to a Team, select the associate and right click. Select “Remove from Group.”
4. Select the correct team in the drop-down menu and update the Start Date to the desired date. Select “Apply.”

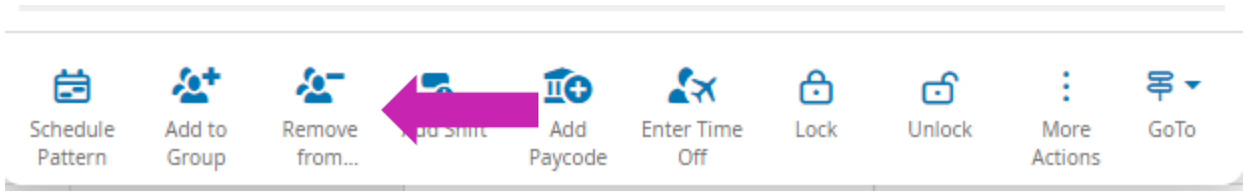
1



2



3



4

UKG

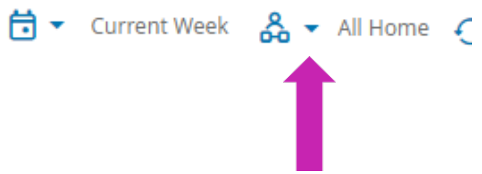
Entering Schedule Patterns

We will begin momentarily ...

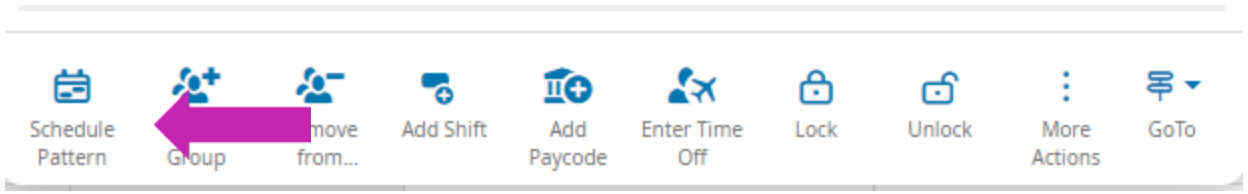
Entering a Schedule Pattern

1. In the Advanced Schedule Planner, navigate to the desired Location.
2. Select the employee and right click. (Able to select multiple associates)
3. Enter the Start Date and define the scheduling pattern. Ex.) 3 Weeks
4. Enter in the desired Schedule pattern. Select Apply. Make sure to Save in the top right corner!

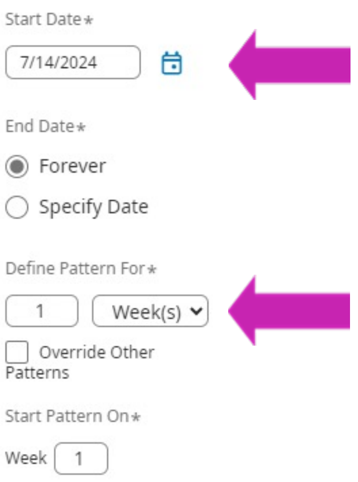
1



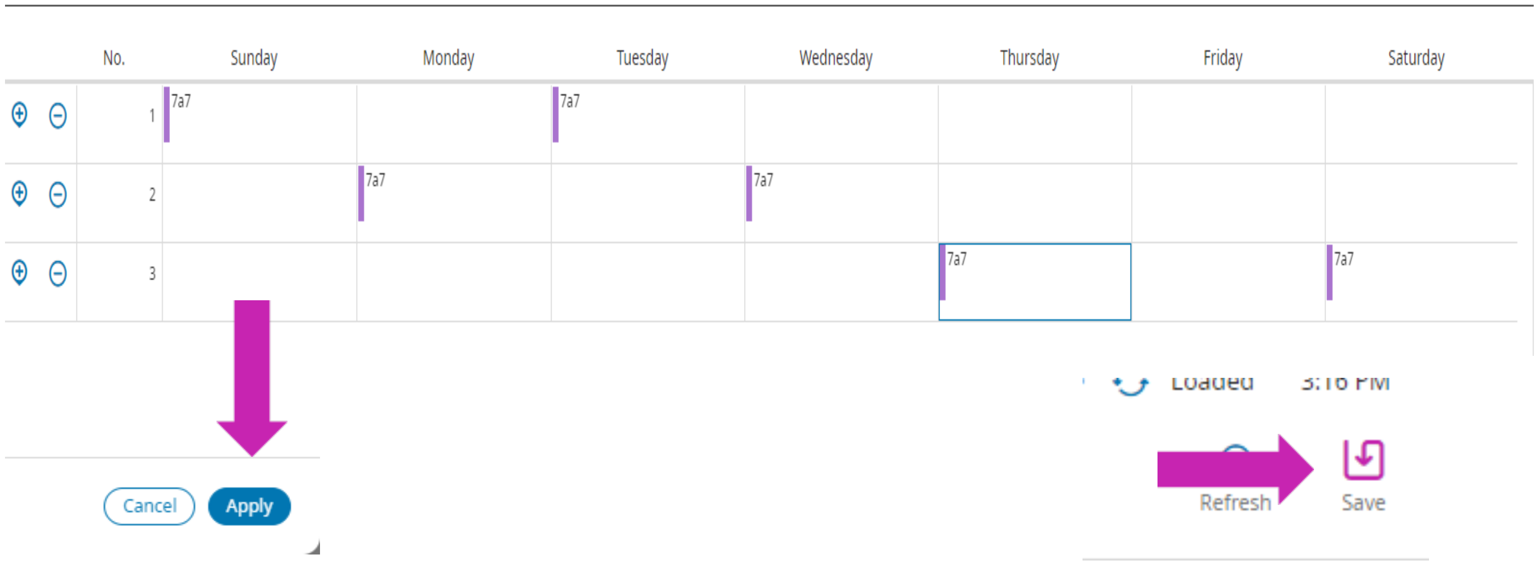
2



3



4



UKG

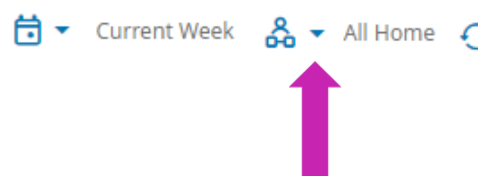
Adding a Shift

We will begin momentarily …

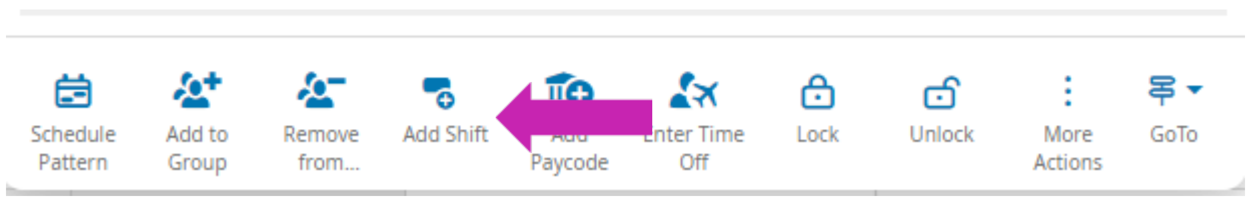
Adding a Shift

1. In the Advanced Schedule Planner, navigate to the desired Location.
2. Select the employee and right click. Select Add Shift.
3. Enter the start/end time and start/date.
4. Add Comment if desired. Select Apply and then Save.

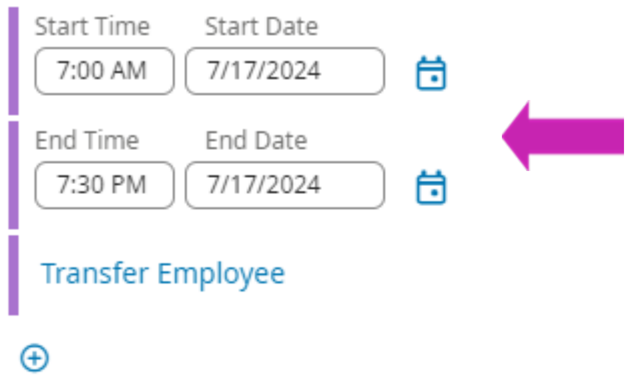
1



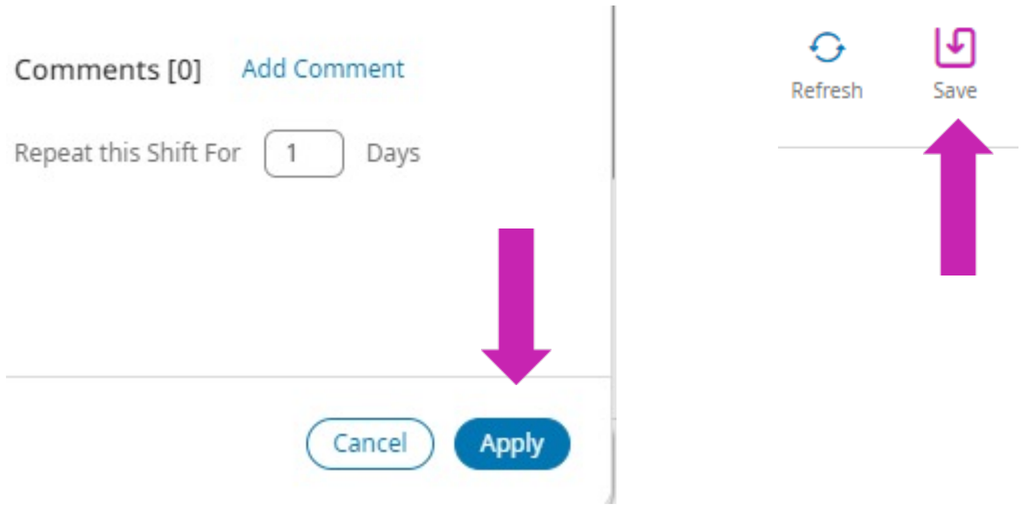
2



3



4

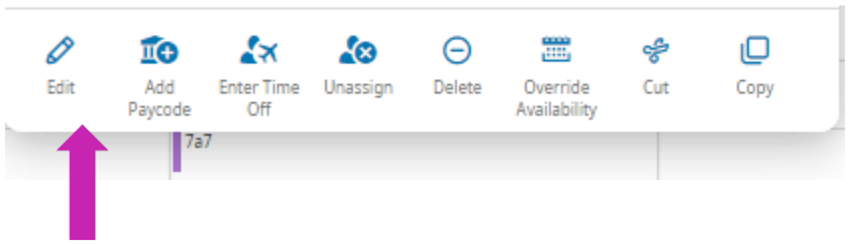


UKG

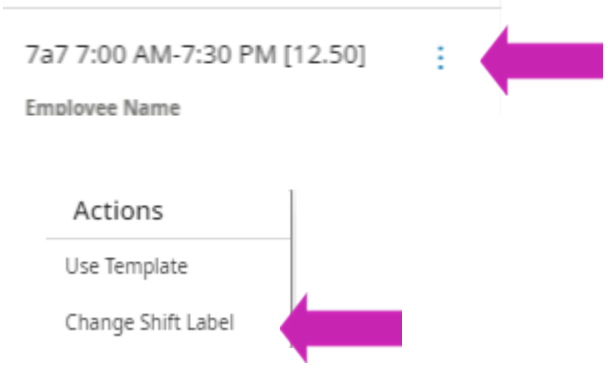
Adding/Changing a Shift Label

1. Select the desired shift, right click, and select edit.
2. Click on the 3 dots located at the top right of the pop-out. Select Change Shift Label
3. Enter desired shift label. Select Apply.
4. Make sure to Save!

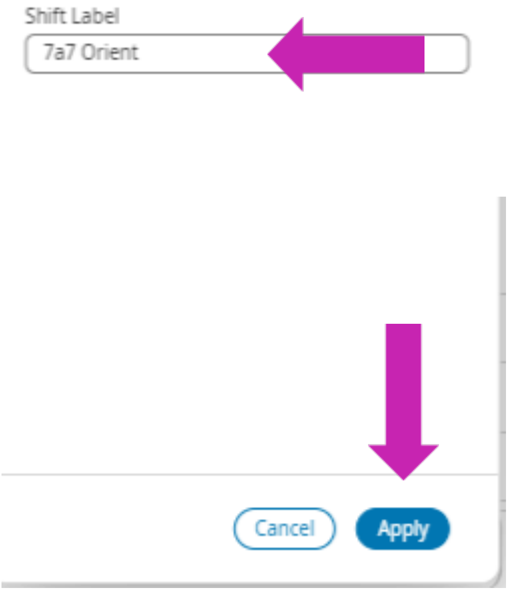
1



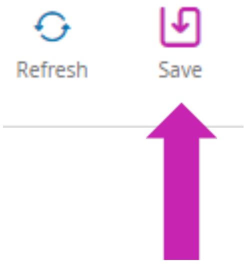
2



3



4

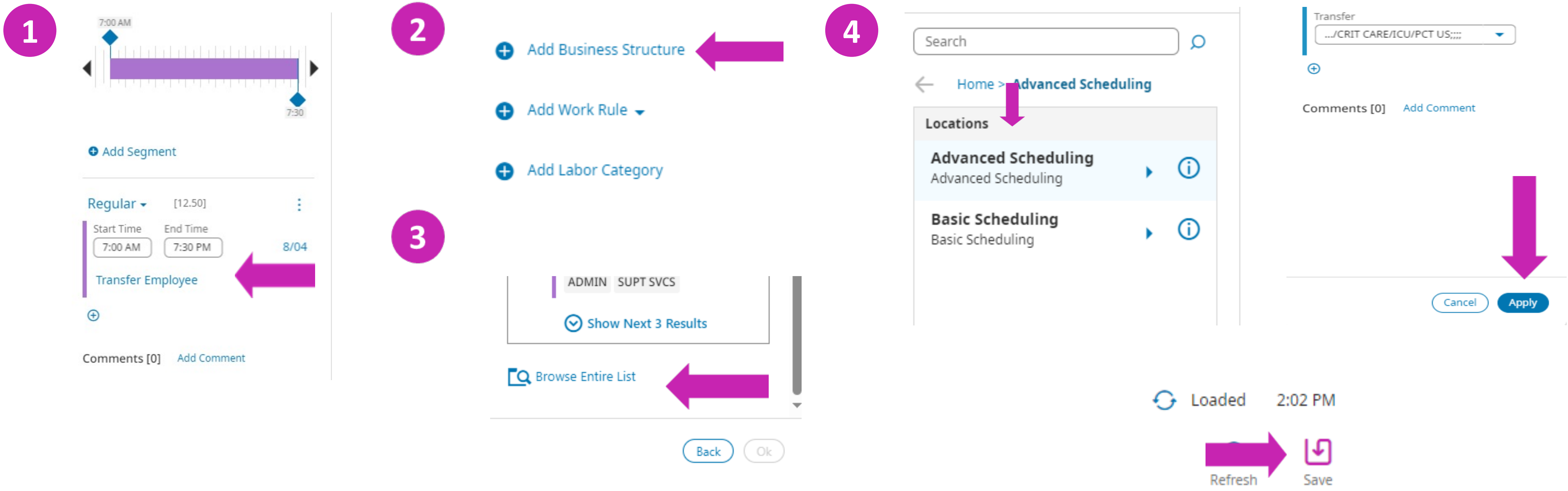


Transferring Hours

We will begin momentarily …

Transferring Hours

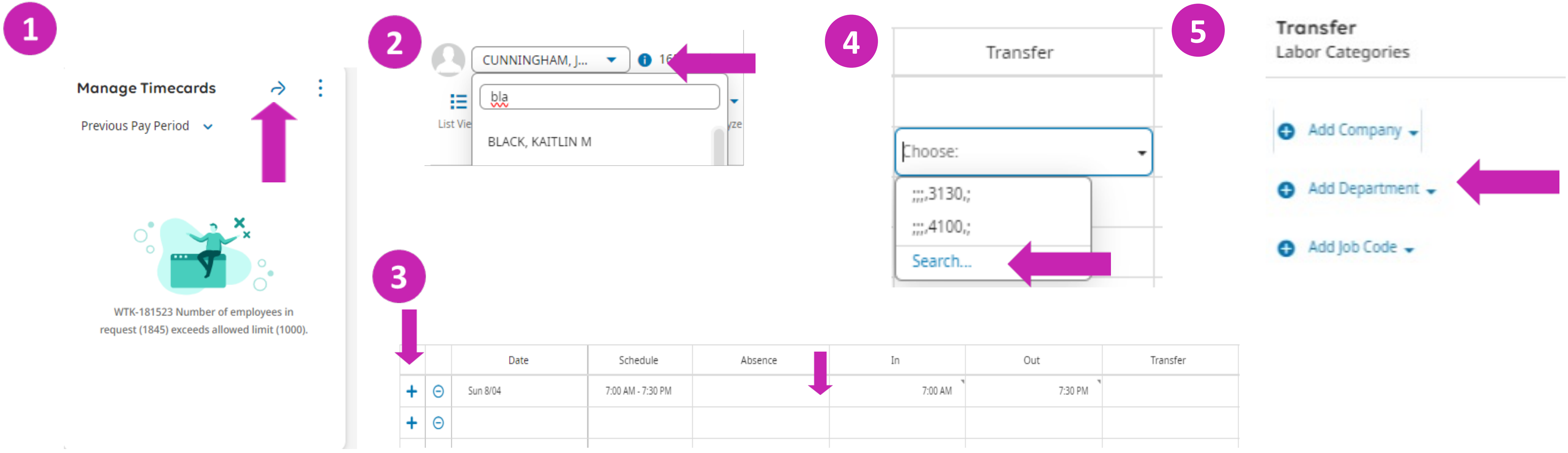
1. If an associate picks up hours on a different unit from the home unit, enter the shift and select “Transfer Employee”
2. Select “Add Business Structure”.
3. Scroll to the bottom and select “Browse Entire List”
4. Using the Advanced Scheduling option, navigate and select the desired department and job. Select Apply and Save



UKG

Transferring Hours from the Timecard

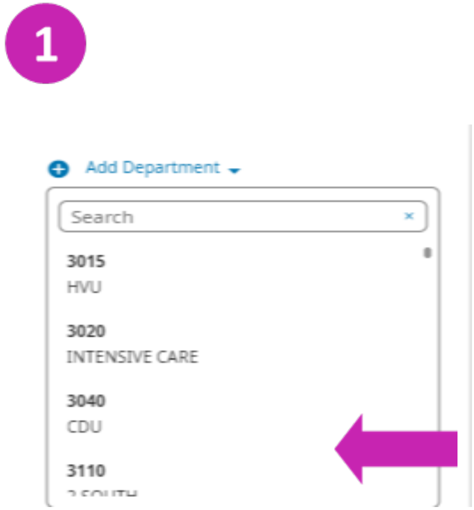
1. Navigate to the employee timecard using the Manage Timecards tile on the home page.
2. Select the desired employee in the drop-down menu.
3. On the selected date, press the (+) button. In the new line, enter in the time employee was moved to new location.
4. In the transfer column, select "Search" in the drop-down menu.
5. Select Add Department.

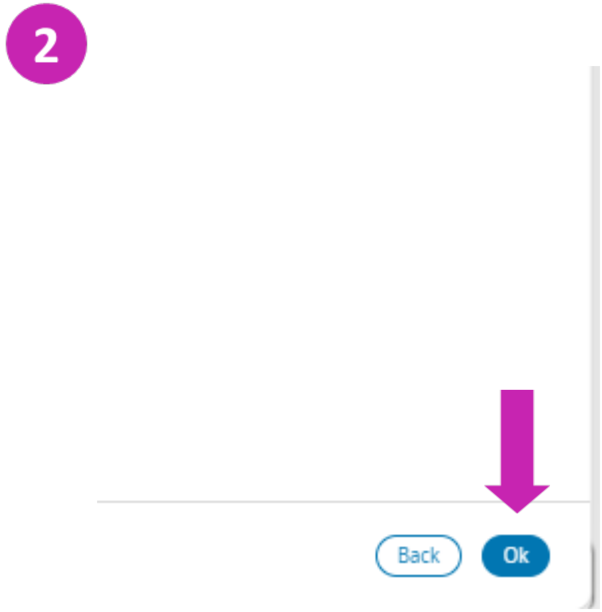


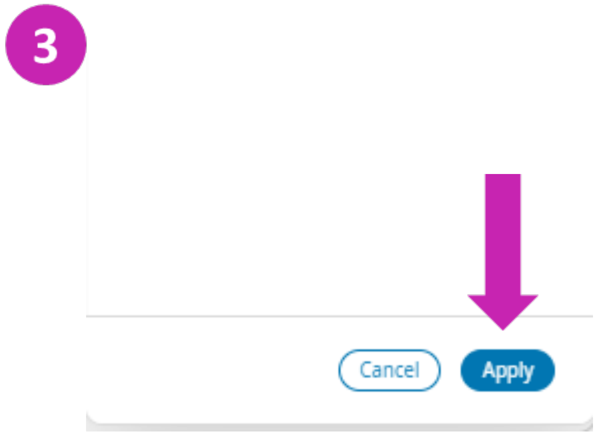
UKG

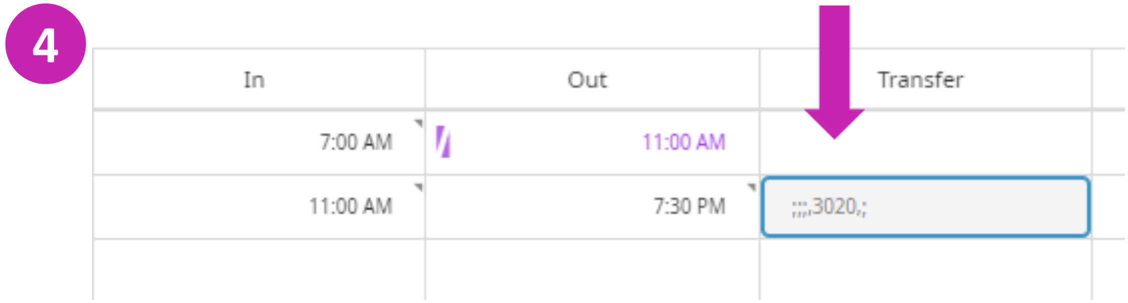
Transferring Hours from the Timecard pt. 2

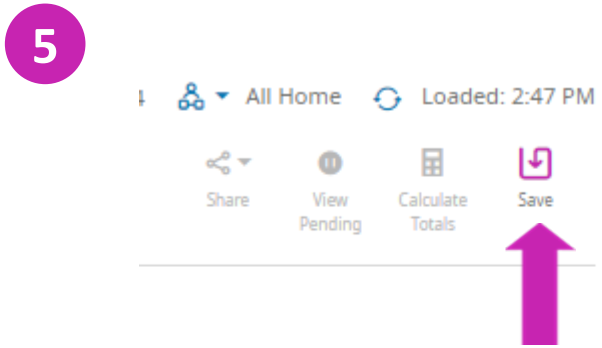
1. From the drop-down menu in Add Department. Select the desired department.
2. Select “OK”
3. Select “Apply”
4. The hours should show that they were allocated to the selected department.
5. Make sure to hit “Save” at the top.











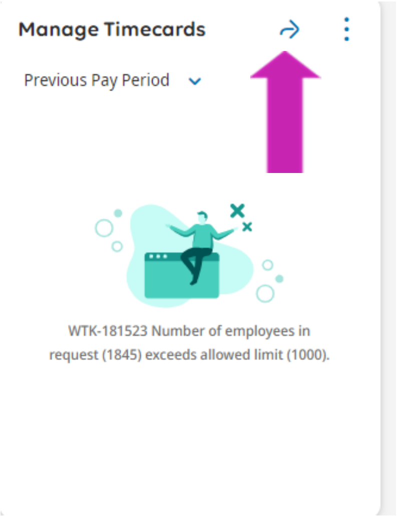
Adding Pay Codes from Timecard

We will begin momentarily …

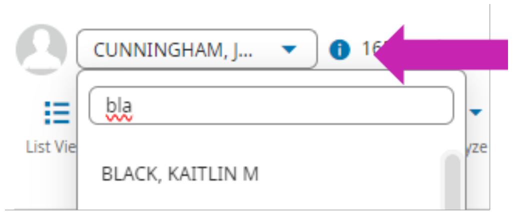
Adding Pay Codes from the Timecard

1. Navigate to the employee timecard using the Manage Timecards tile on the home page.
2. Select the desired employee in the drop-down menu.
3. On the selected date, press the (+) button. In the new line, select the appropriate pay code from the drop-down menu in the Pay Code column. Ex: UPTM, U-Absent, Absent, oncall, etc.
4. In the new line, select the appropriate pay code from the drop-down menu in the Pay Code column. Ex: UPTM, U-Absent, Absent, oncall, etc.
5. Enter the amount in the Amount column. Make sure to Save!

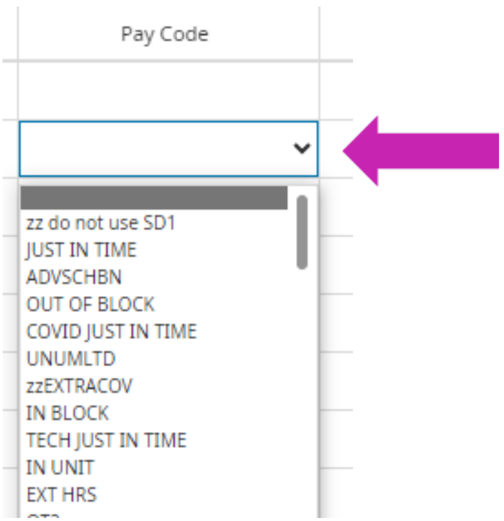
1



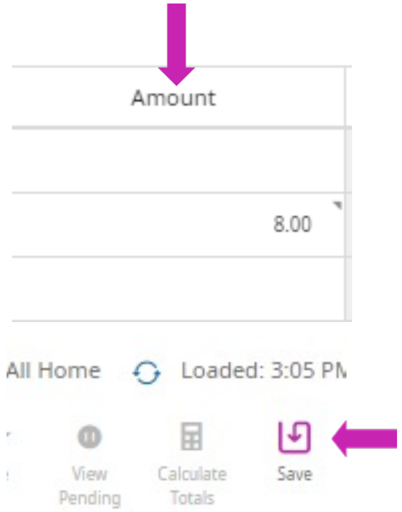
2



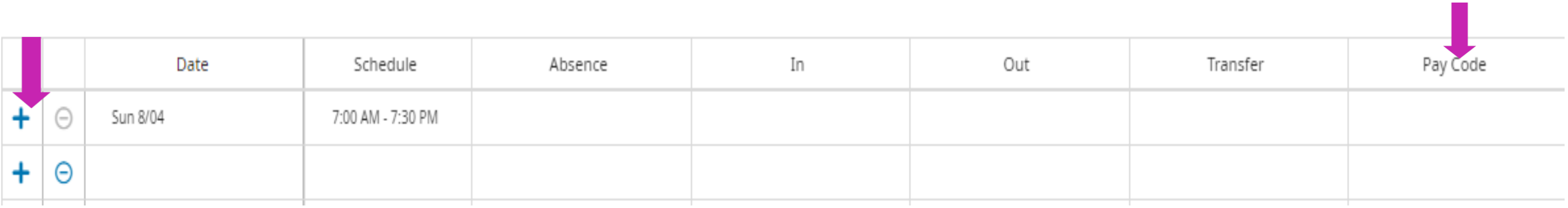
4



5



3



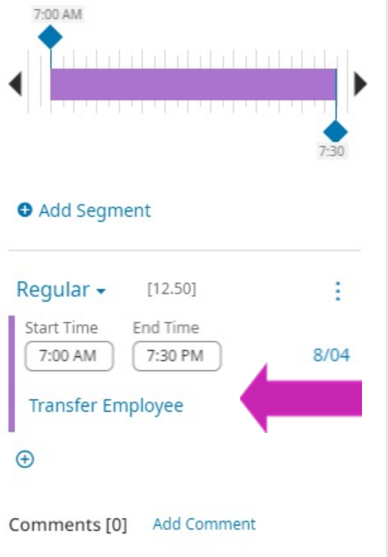
Changing/Adding a Work Rule

We will begin momentarily …

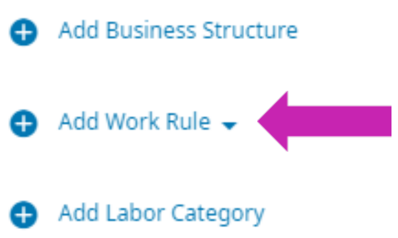
Changing/Adding a Work Rule

1. If an associate picks up hours on a different unit from the home unit, enter the shift and select "Transfer Employee"
2. Select "Add Work Rule".
3. Select desired work rule from drop-down list
4. Select Apply. Make sure to Save

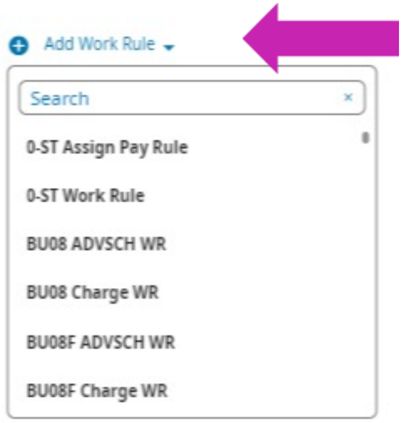
1



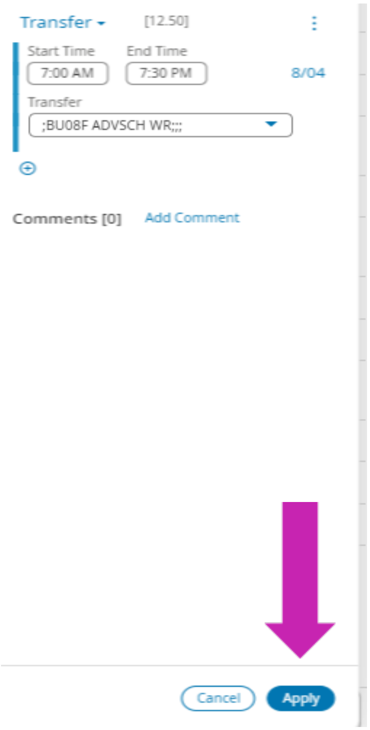
2



3



4



Requests for Schedule Changes

Managers can also receive requests for schedule changes from employees using Employee Self Service. Requests could include:

- Unscheduled time off
- Temporary changes their availability
- Shift swaps with another employee

Requests submitted via Employee Self Service are processed from the home page in the Control Center and updated within the schedule automatically.

Manage Shift Swap Requests

- After the schedule is posted, you can open a visibility period that allows employees to swap shifts.
- This can help the organization meet its business needs and enhance staff satisfaction by allowing employees more control over their schedules.
- Guided recommendations can help employees find the most eligible candidates to trade shifts.
- Shift swaps can be configured for auto-approval or require manager review and approval.