

Schedule Generator

© 2023 UKG Inc. All rights reserved.

We will begin momentarily ...

What is the Schedule Generator?

The Schedule Generator is an engine that creates optimized schedules.

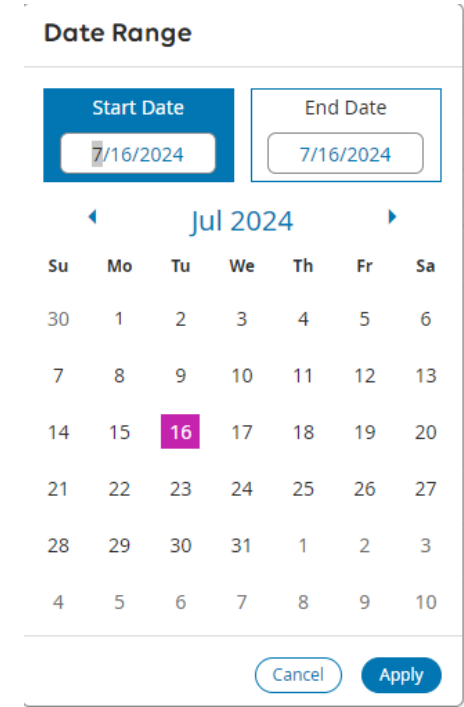
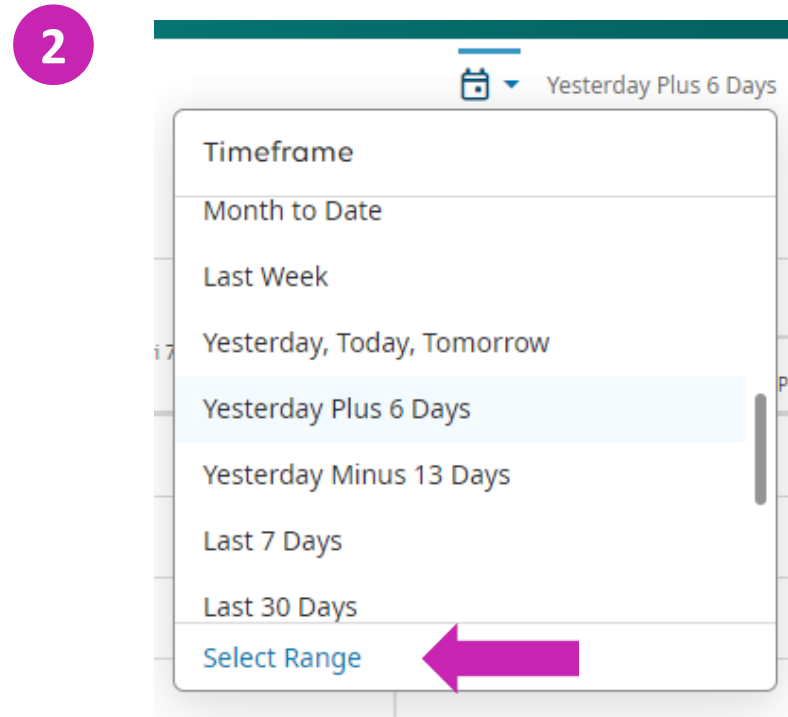
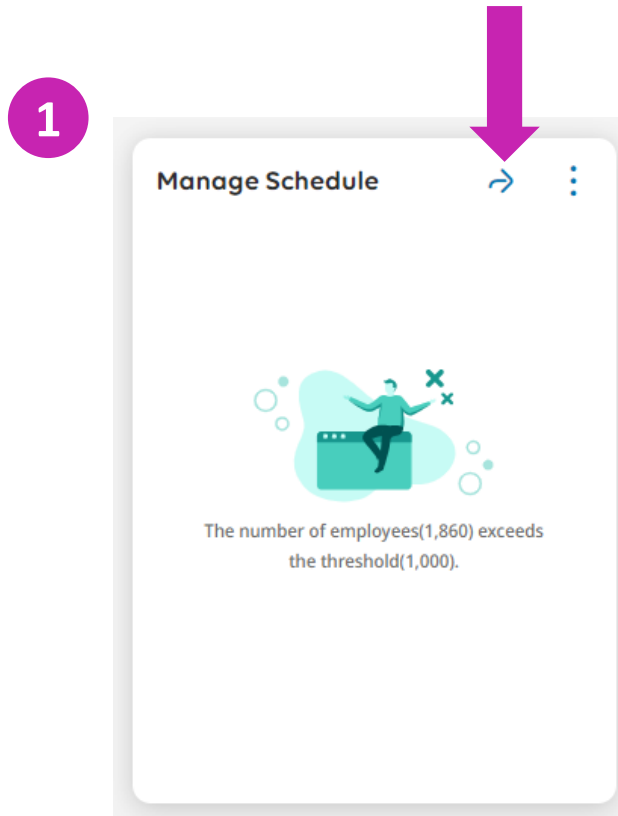
What factors can be considered?

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



How to Generate Schedules

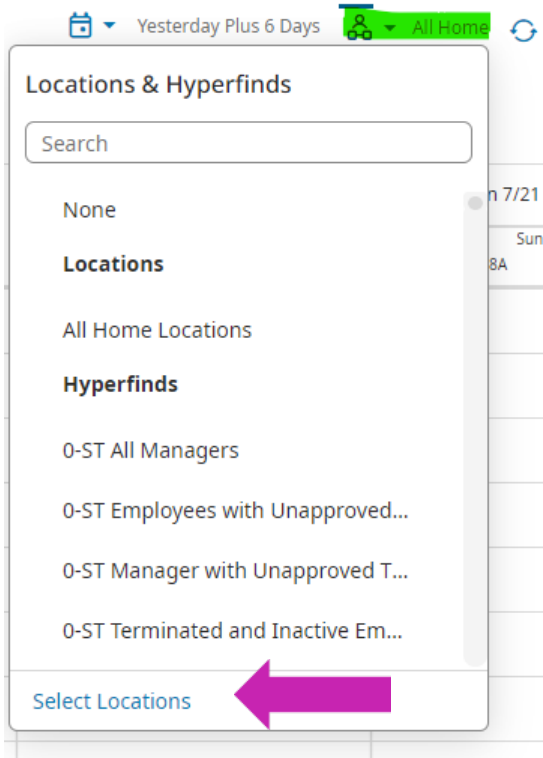
1. Navigate to the Schedule Planner from the Home Page
2. Select the Time Period that you wish to Generate Schedule.



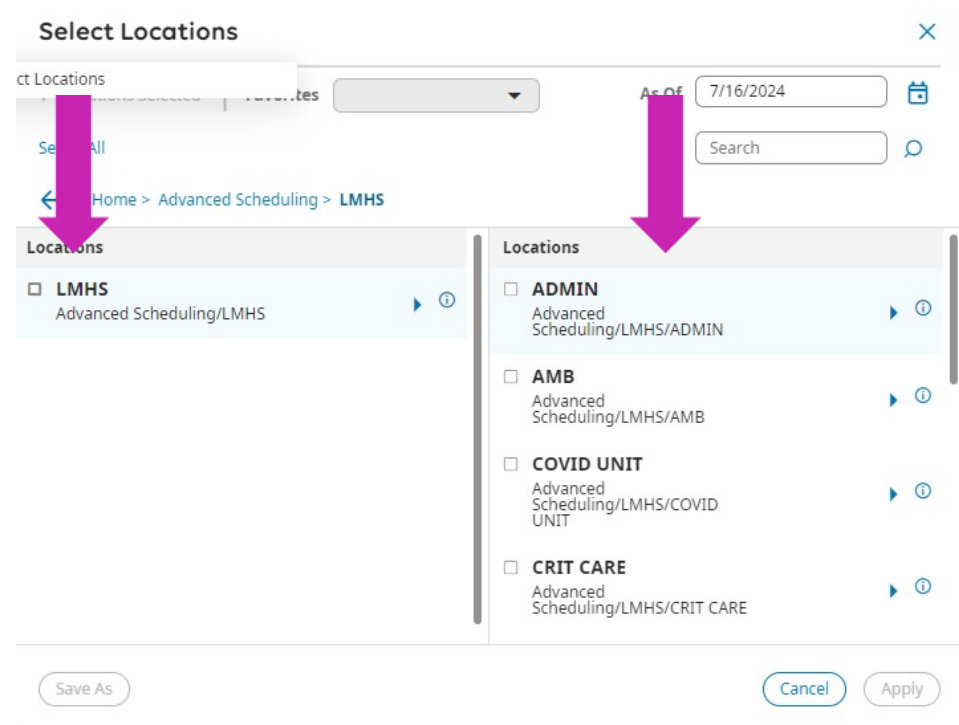
How to Generate Schedules

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



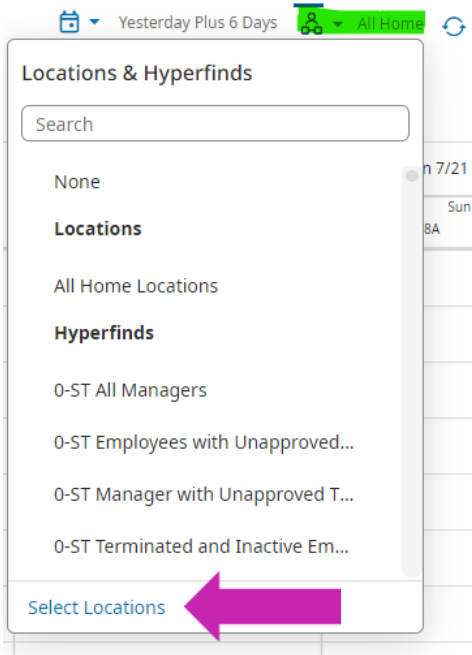
2



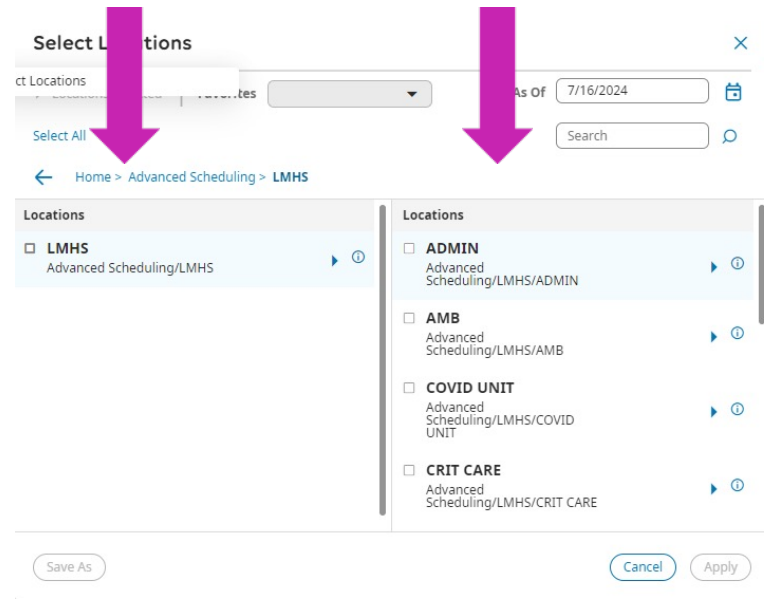
How to Generate Schedules – On Call Shifts

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.

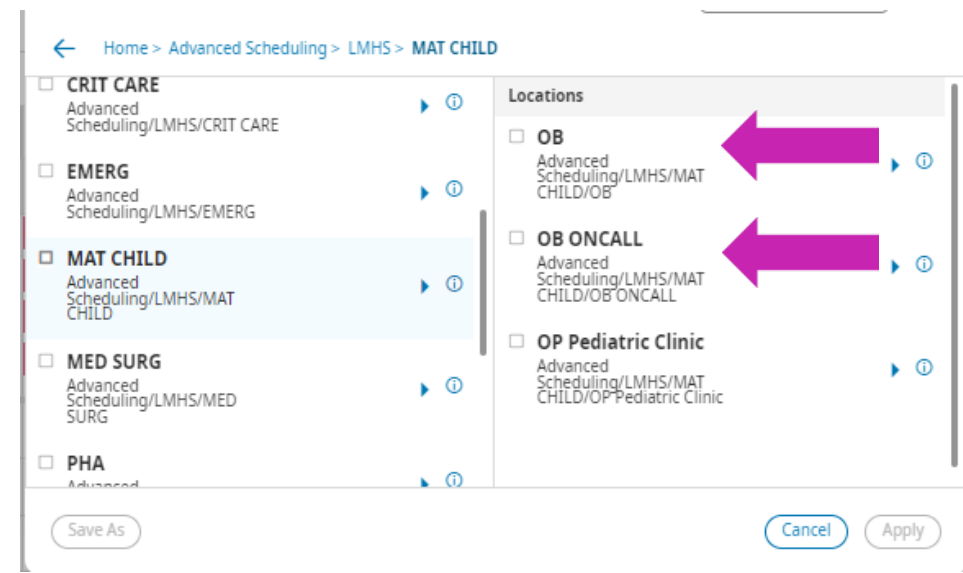
1



2



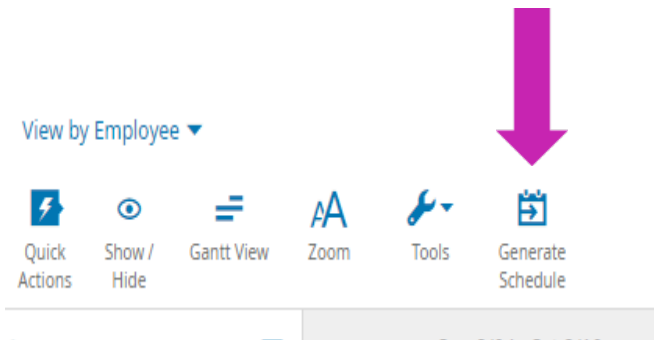
3



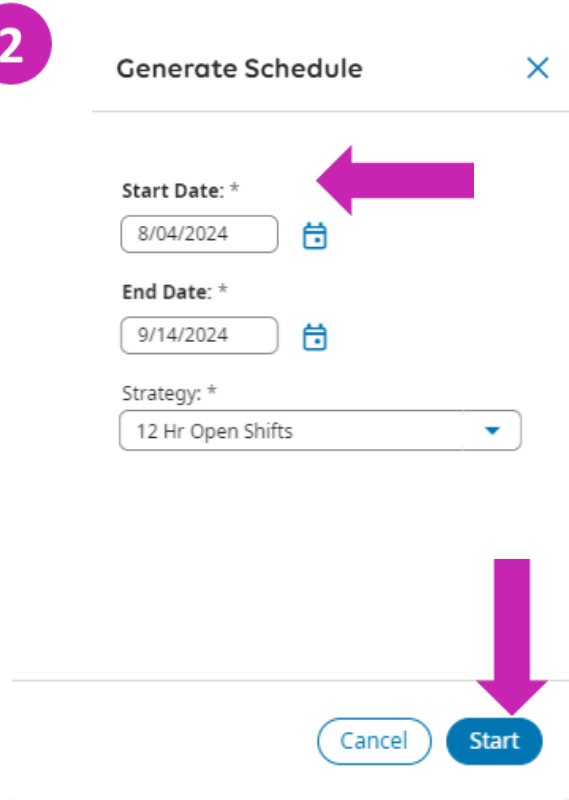
How to Generate Schedules

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

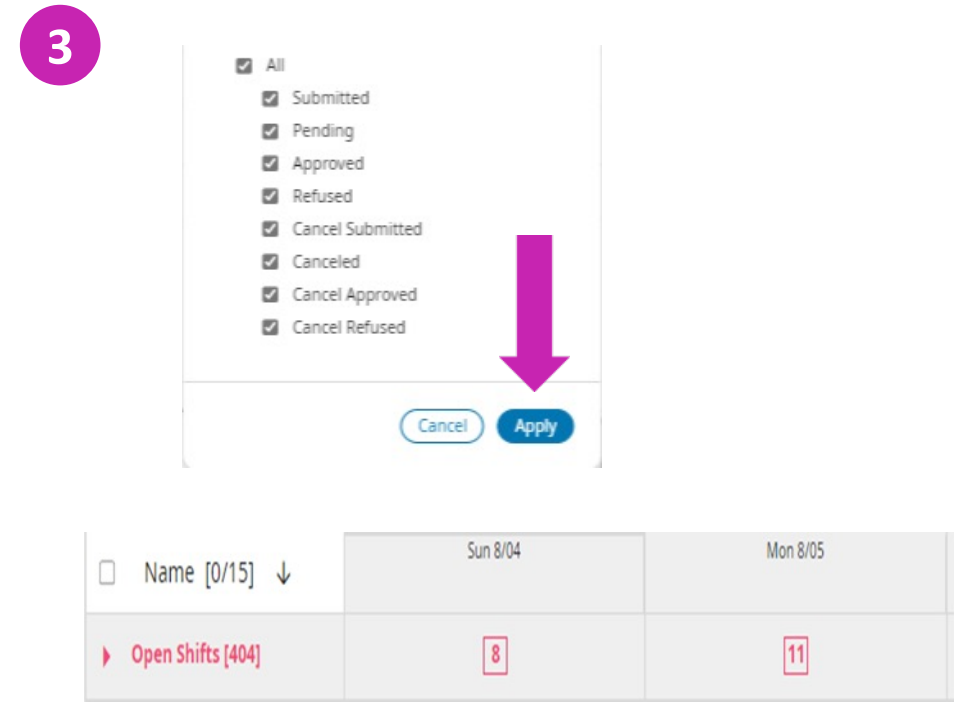
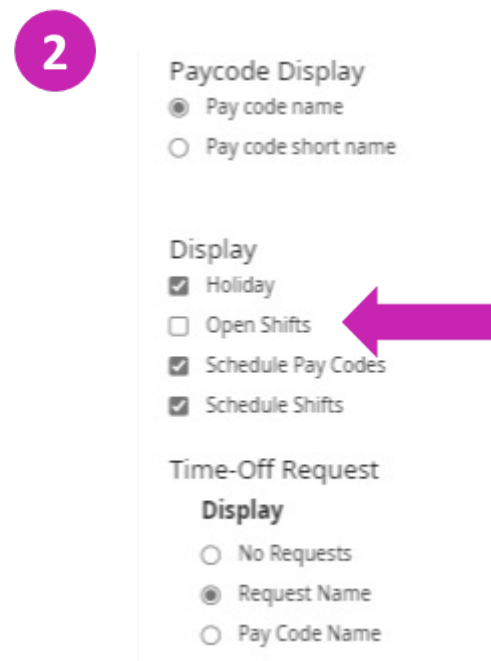
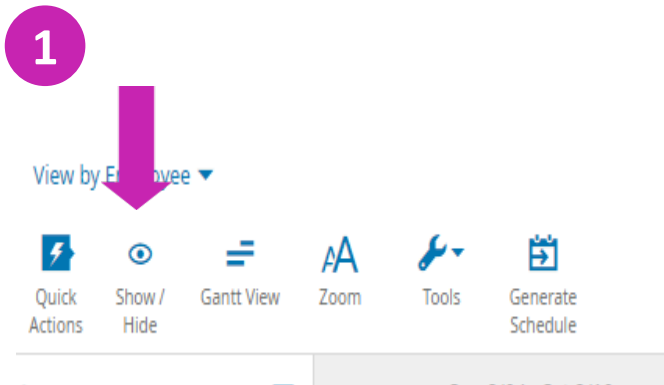
A screenshot of a schedule grid. The columns are labeled 'Sun 8/04' and 'Mon 8/05'. The rows are labeled 'Name [0/15] ↓' and 'Open Shifts [404]'. The 'Open Shifts' row shows a red '8' under 'Sun 8/04' and a red '11' under 'Mon 8/05'.

	Sun 8/04	Mon 8/05
Name [0/15] ↓		
Open Shifts [404]	8	11

* 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.

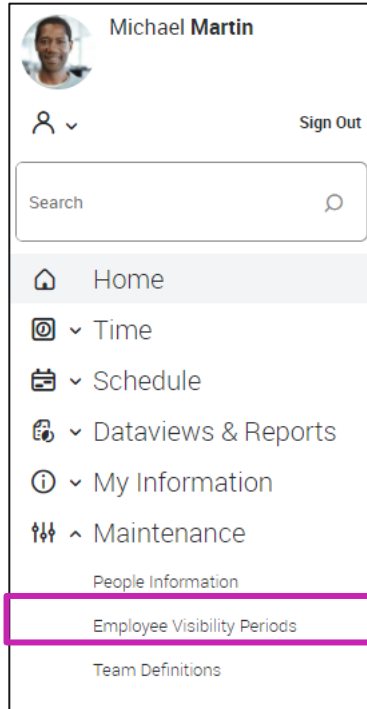


How to open Employee Request Periods

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.

The image shows a four-step process for opening Employee Request Periods in the UKG system. Step 1: A pink arrow points to the hamburger menu icon in the top left corner of the UKG interface. Step 2: A pink arrow points to the 'Add Period' button (a plus sign) in the top navigation bar. Step 3: A pink arrow points to the 'Name' field, which contains '09.15.24 - 10.26.24 Team B Support Svc. Self'. Other fields include 'Request For' (Self Scheduling JTS), 'Employee Query' (4800 - SUPPORT SERVICES Team B), and a 'Suppress Event Notification' checkbox. Step 4: A pink arrow points to the 'Submission Period' section, which includes radio buttons for 'Any Time' and 'Specify Time' (selected). It shows 'Start Date' (7/17/2024) and 'End Date' (7/20/2024) with calendar icons, and 'Start Time' (12:00 AM) and 'End Time' (11:59 PM). Below this is a 'Time Zone' dropdown. The 'Request Period' section has radio buttons for 'Any Date' and 'Specify Date' (selected), with 'Start Date' (9/15/2024) and 'End Date' (10/26/2024) with calendar icons. At the bottom, a pink arrow points to the 'Apply' button.

Defining or Editing Visibility Periods



Michael Martin

Sign Out

Search

- Home
- Time
- Schedule
- Dataviews & Reports
- My Information
- Maintenance
- People Information
- Employee Visibility Periods**
- Team Definitions

Add Period

Name: *
Open Shifts

Request For: *
Open Shift Request

Description:

Employee Query: *1
All Home Locations

Suppress Event Notification

Submission Period: *

Any Time

Specify Time

Start Date: 11/02/2021 Start Time: 12:00 AM

End Date: 11/08/2021 End Time: 11:59 PM

Request Period: *

Any Date

Specify Date

Apply Preview Cancel

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:

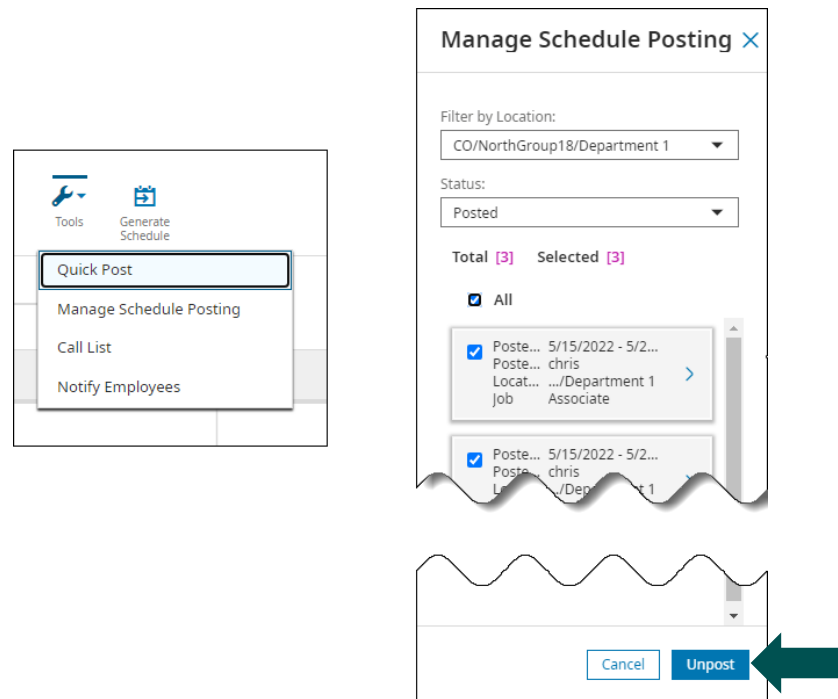
- Submission period — dates when employees can make the request
- Request period — dates that employees can request

The periods can be:

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

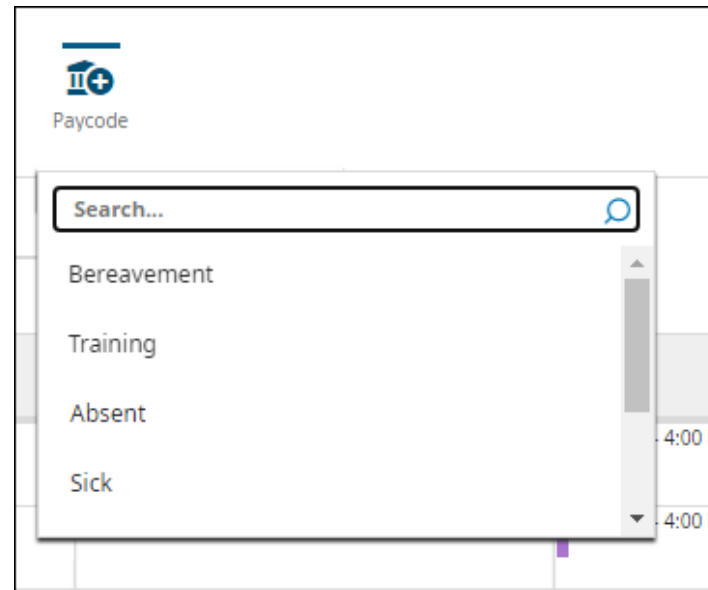
Post and Unpost a Schedule

- 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.

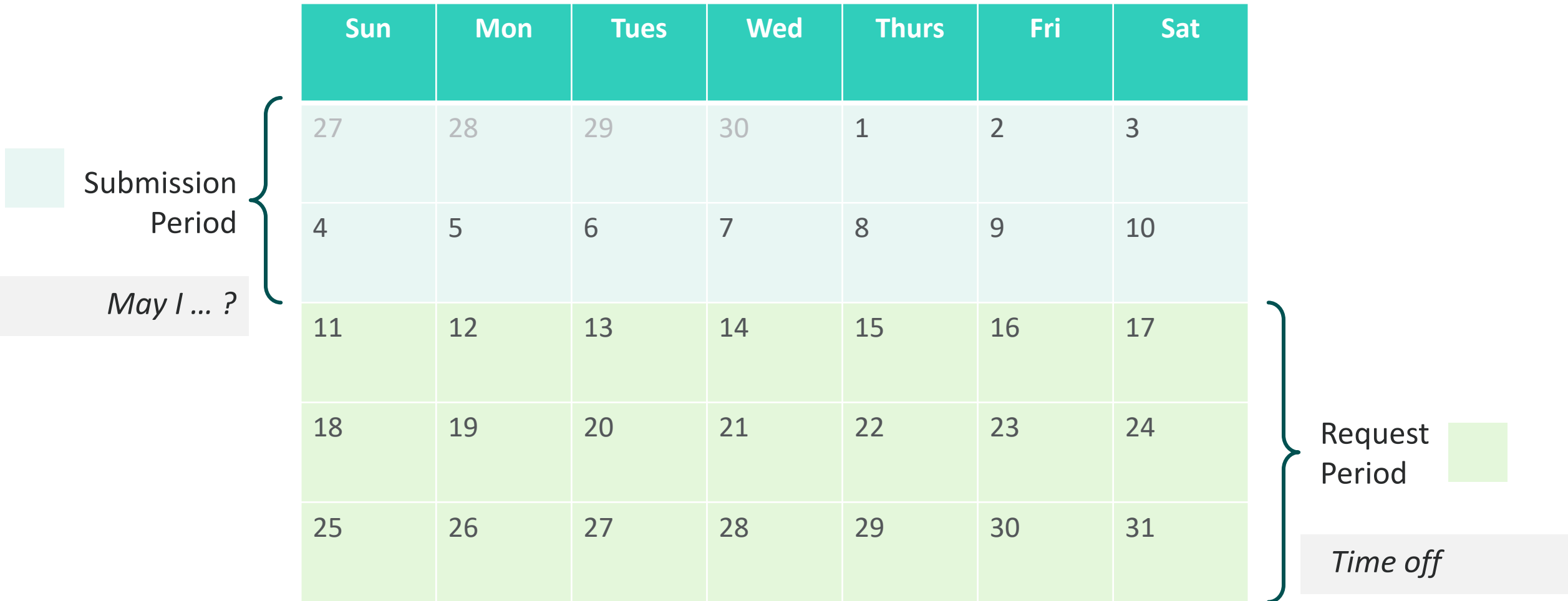


Add Paycodes

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



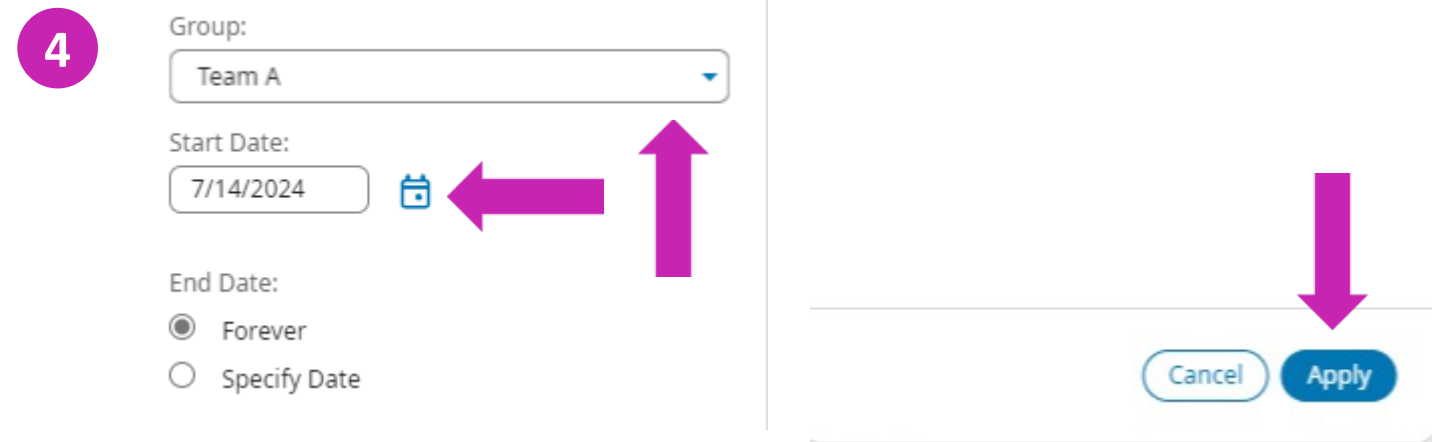
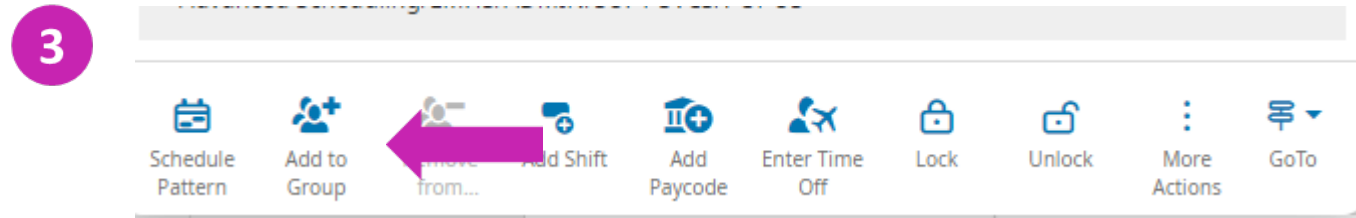
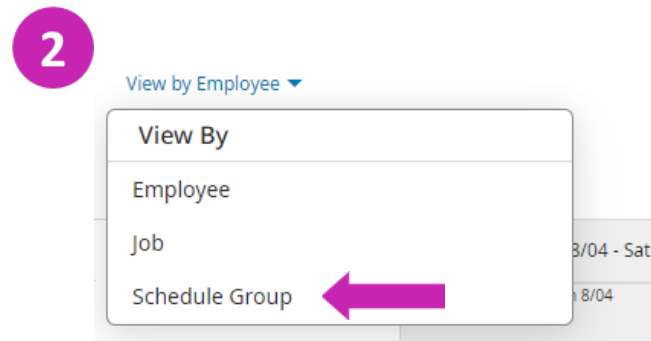
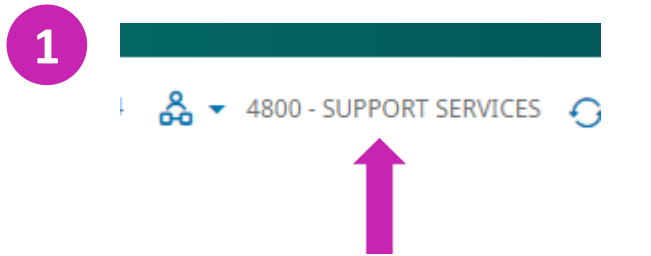
Assigning Teams

© 2023 UKG Inc. All rights reserved.

We will begin momentarily ...

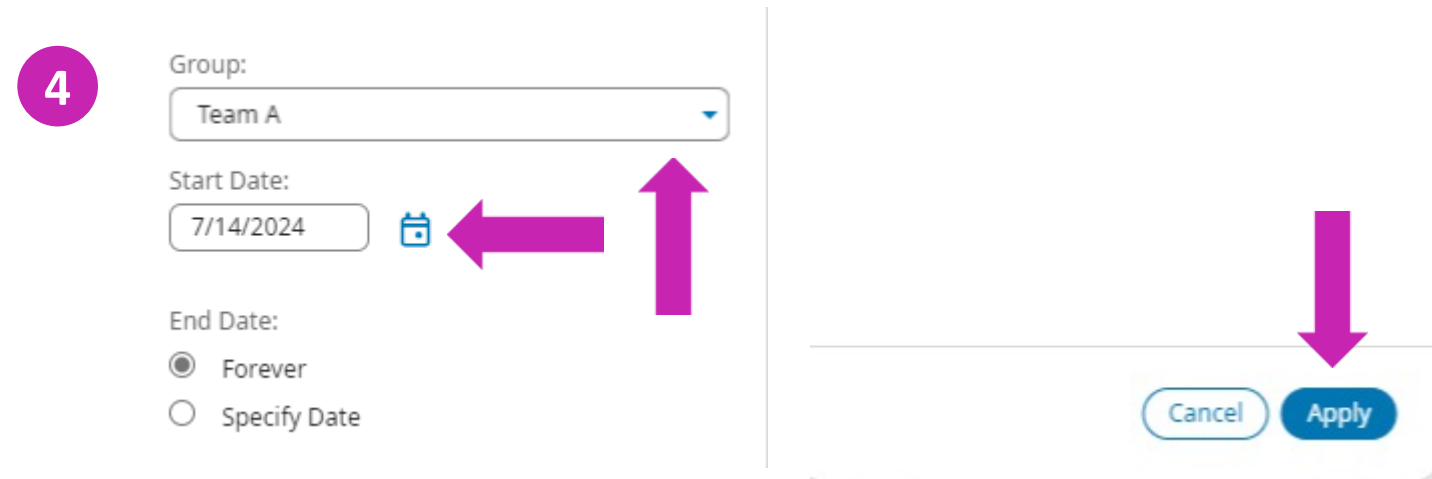
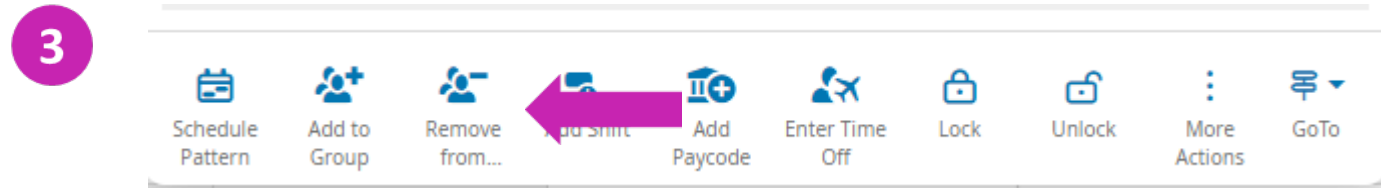
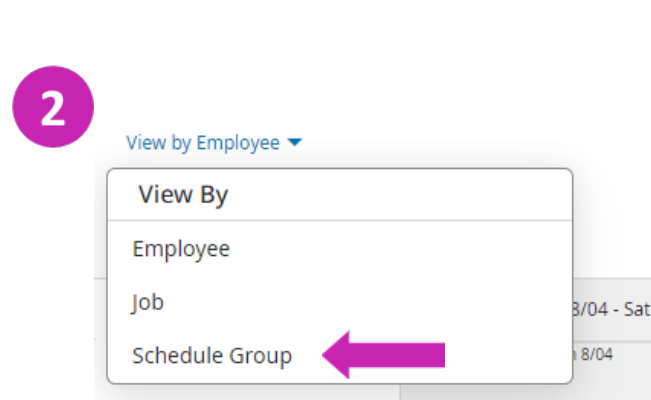
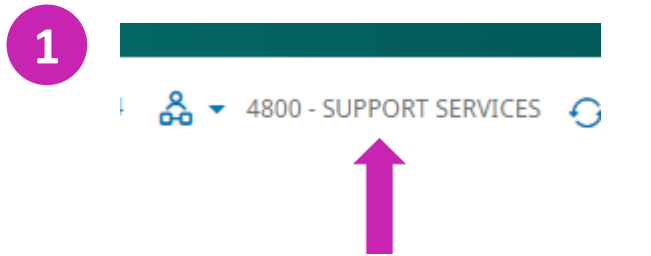
How to assign an associate to a team

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.”



Entering Schedule Patterns

© 2023 UKG Inc. All rights reserved.

We will begin momentarily ...

Entering a Schedule Pattern

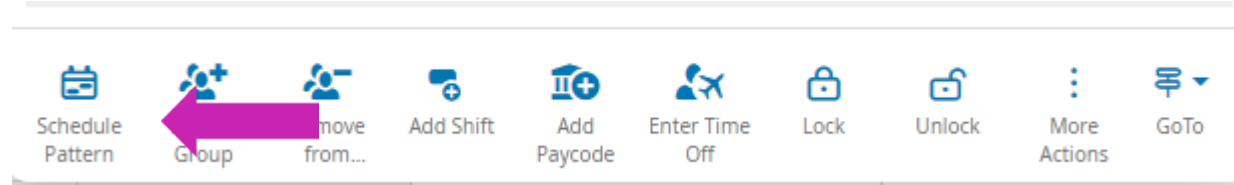
1. In the Advanced Schedule Planner, navigate to the desired Location.
2. Select the employee and right click. (Able to select multiple associates)
3. Enter the Start Date and define the scheduling pattern. Ex.) 3 Weeks
4. Enter in the desired Schedule pattern. Select Apply. Make sure to Save in the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

1

Current Week All Home



2



3

Start Date*

7/14/2024



End Date*

Forever

Specify Date

Define Pattern For*

1

Week(s)



Override Other Patterns

Start Pattern On*

Week 1

4

No.	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
1	7a7		7a7				
2		7a7		7a7			
3					7a7		7a7

Cancel Apply

Refresh Save

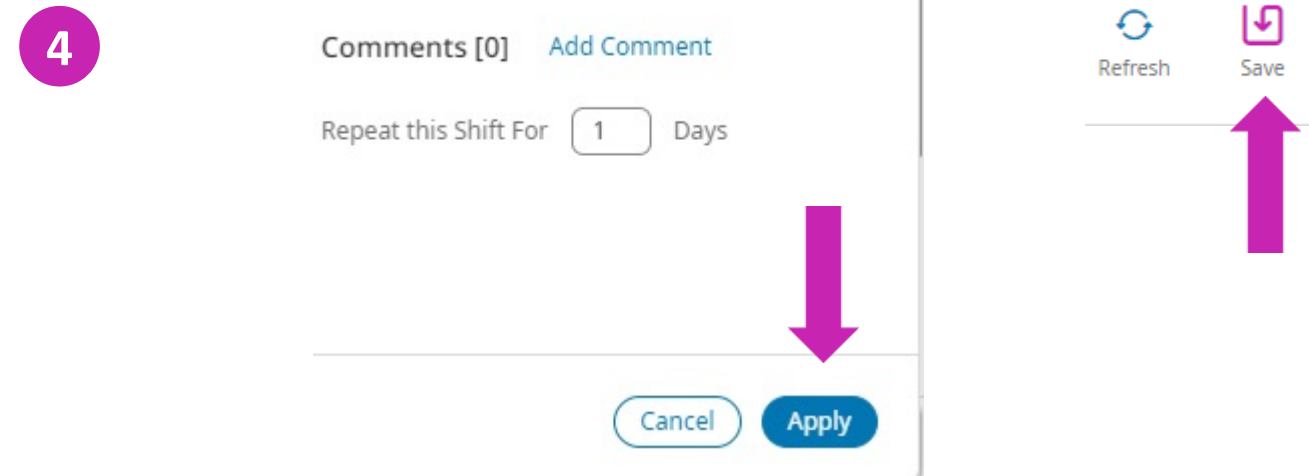
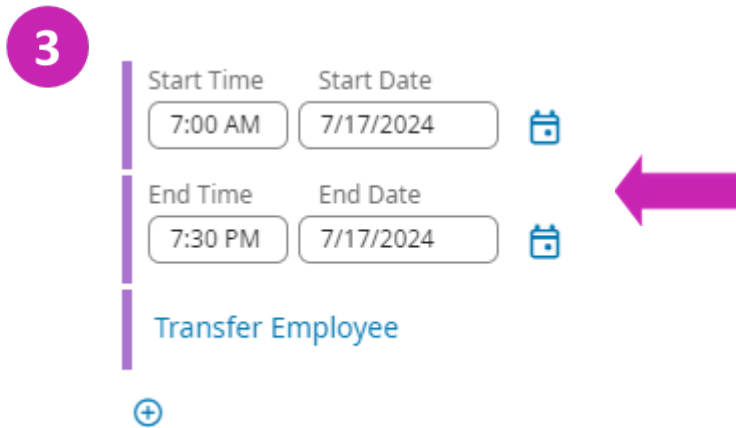
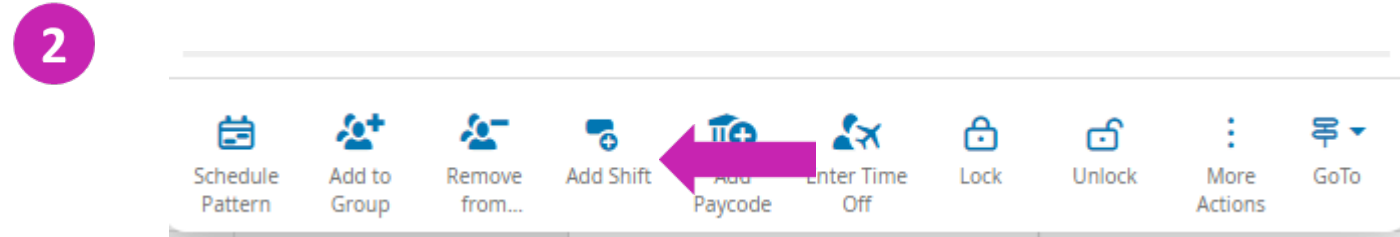
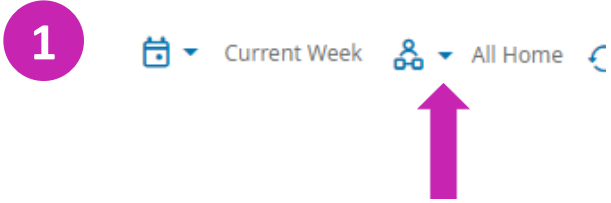
Adding a Shift

© 2023 UKG Inc. All rights reserved.

We will begin momentarily ...

Adding a Shift

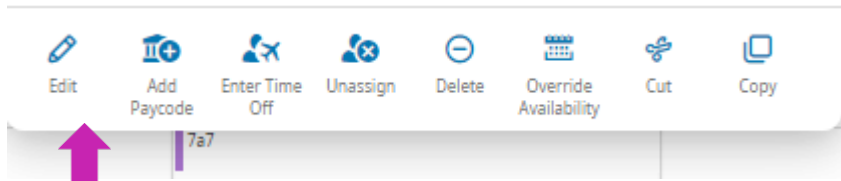
1. In the Advanced Schedule Planner, navigate to the desired Location.
2. Select the employee and right click. Select Add Shift.
3. Enter the start/end time and start/date.
4. Add Comment if desired. Select Apply and then Save.



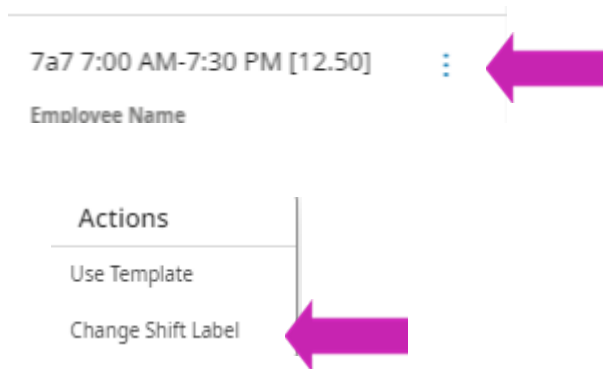
Adding/Changing a Shift Label

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!

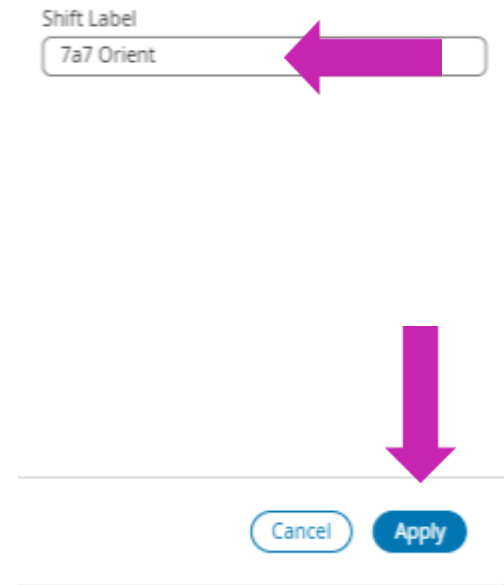
1



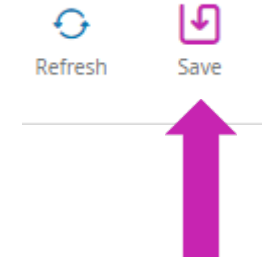
2



3



4



Transferring Hours

© 2023 UKG Inc. All rights reserved.

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

1 7:00 AM 7:30
Add Segment
Regular [12.50]
Start Time End Time
7:00 AM 7:30 PM 8/04
Transfer Employee
Comments [0] Add Comment

2 + Add Business Structure
+ Add Work Rule
+ Add Labor Category

3 ADMIN SUPT SVCS
Show Next 3 Results
Browse Entire List
Back Ok

4 Search
Home > Advanced Scheduling
Locations
Advanced Scheduling
Basic Scheduling
Transfer
.../CRIT CARE/ICU/PCT US;...
Comments [0] Add Comment
Cancel Apply
Loaded 2:02 PM
Refresh Save

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.

1 Manage Timecards

Previous Pay Period ▾

WTK-181523 Number of employees in request (1845) exceeds allowed limit (1000).

2 CUNNINGHAM, J... 16

bla

BLACK, KAITLIN M

3

	Date	Schedule	Absence	In	Out	Transfer
+ ⊖	Sun 8/04	7:00 AM - 7:30 PM		7:00 AM	7:30 PM	
+ ⊖						

4 Transfer

Choose: ▾

...3130;

...4100;

Search...

5 Transfer Labor Categories

+ Add Company ▾

+ Add Department ▾

+ Add Job Code ▾

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.

1

2

3

4

5

In	Out	Transfer
7:00 AM	11:00 AM	
11:00 AM	7:30 PM	...3020;

Adding Pay Codes from Timecard

© 2023 UKG Inc. All rights reserved.

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!

The screenshot illustrates the process of adding pay codes to a timecard. It shows the 'Manage Timecards' section with a 'Previous Pay Period' dropdown. A message indicates that the number of employees in a request (1845) exceeds the allowed limit (1000). The interface includes a search bar for employees, a list of employees (e.g., CUNNINGHAM, J... and BLACK, KAITLIN M), and a table for adding timecard entries. The table has columns for Date, Schedule, Absence, In, Out, Transfer, and Pay Code. A dropdown menu for pay codes is shown, listing various codes like 'zz do not use SD1', 'JUST IN TIME', 'ADV SCHBN', 'OUT OF BLOCK', 'COVID JUST IN TIME', 'UNUMLTD', 'zzEXTRACOV', 'IN BLOCK', 'TECH JUST IN TIME', 'IN UNIT', and 'EXT HRS'. The 'Amount' column is highlighted with a value of 8.00. A 'Save' button is visible at the bottom right.

	Date	Schedule	Absence	In	Out	Transfer	Pay Code
+ -	Sun 8/04	7:00 AM - 7:30 PM					
+ -							

Changing/Adding a Work Rule

© 2023 UKG Inc. All rights reserved.

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

7:00 AM 7:30 8/04

+ Add Segment

Regular [12.50]

Start Time End Time

7:00 AM 7:30 PM

Transfer Employee

Comments [0] Add Comment

2

- + Add Business Structure
- + Add Work Rule ←
- + Add Labor Category

3

+ Add Work Rule ↓

Search

- 0-ST Assign Pay Rule
- 0-ST Work Rule
- BU08 ADVSCH WR
- BU08 Charge WR
- BU08F ADVSCH WR
- BU08F Charge WR

4

Transfer [12.50] 8/04

Start Time End Time

7:00 AM 7:30 PM

Transfer

:BU08F ADVSCH WR::

Comments [0] Add Comment

Cancel Apply

Loaded 2:02 PM

Refresh Save ←

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.

<input type="checkbox"/>	<u>Apple, Sara</u>	7:00 AM - 4:00 PM	
<input type="checkbox"/>	<u>Benson, Olivia</u>	2:00 PM - 8:00 PM	
<input type="checkbox"/>	<u>Chu, Paul</u>		2:00 PM - 8:00 PM
<input type="checkbox"/>	<u>Devos, Julio</u>	11:00 AM - 6:00 PM	7:00 AM - 4:00 PM

