VISUAL SCHEDULING QUICK GUIDE

With Visual Scheduling, you define your ongoing needs for each position. It can help find the best-fit candidate by filtering based on your criteria. Using Visual Scheduling with ESS Mobile, employees can interact with their schedules which can include picking up open shifts or trading shifts.
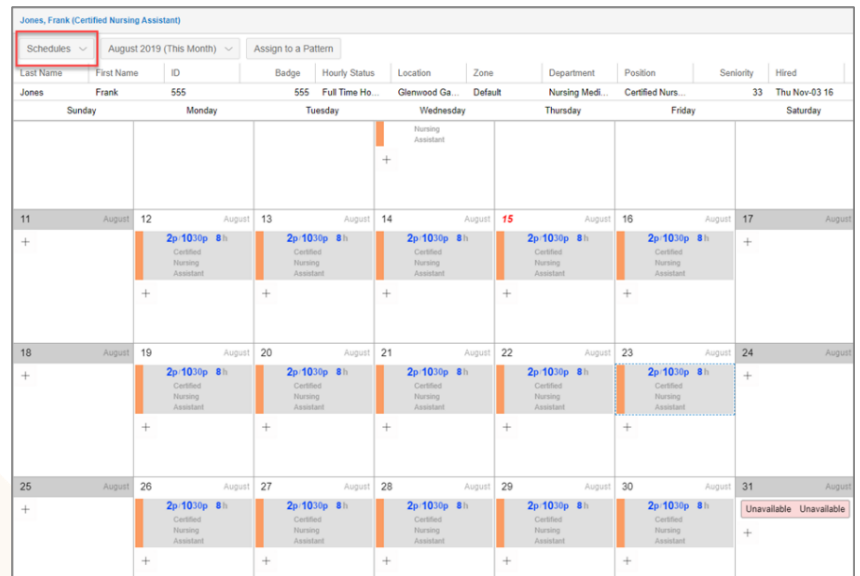
SCHEDULE PATTERNS

The first and very important step to accurate employee schedules is using Schedule Patterns. A Schedule Pattern automatically repeats a predefined schedule to an employee. An example of a schedule pattern would be **2nd Shift Nursing 3:00pm – 11:00pm Mon-Fri.**

To learn more about Schedule Patterns please review the **Schedule Pattern** training video in our Training Center.
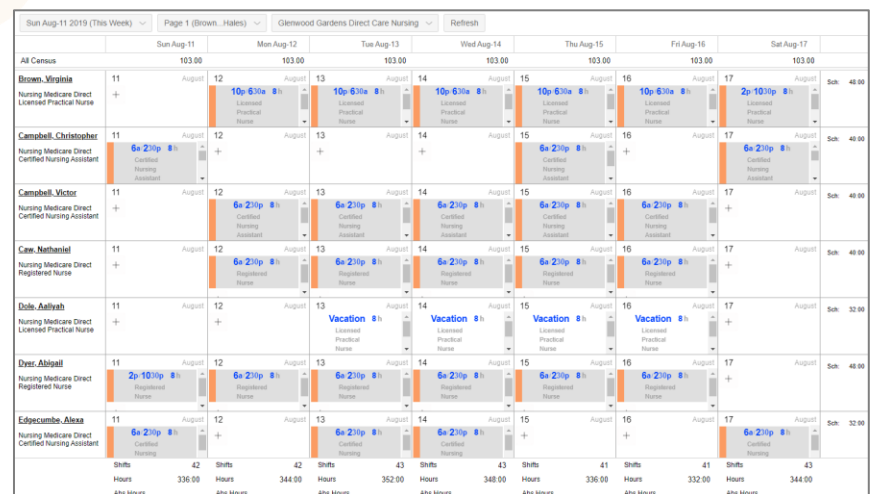
ROSTER SCHEDULING AND EDITING

Schedules can be edited for unique situations such as days off or when schedule changes are needed. Roster scheduling gives you the ability to make quick schedule changes to a single or group of employees. To learn more about editing an employee schedule please review the **Standard Schedules** training video in our Training Center

Single Employee Schedules can be edited by locating the employee and choosing their Schedule page.


To edit a group of employees, choose **"This Week"** in the menu under the **Schedule** group. This will list all employees you have access to make quick schedule changes.

1.800.841.3824
advancedtime.com

Grand Rapids Office - 4475 Wilson Ave. SW, Suite 8, Grandville, MI 49418
Detroit Office - 45570 Maben Road, Suite 400, Canton, MI 48187

VISUAL SCHEDULING TEMPLATES

Now that you have employees scheduled you can see their schedules by position in Visual Scheduling. To access Visual Scheduling. Go to **Visual Scheduling** in your menu under the **Scheduling** Group
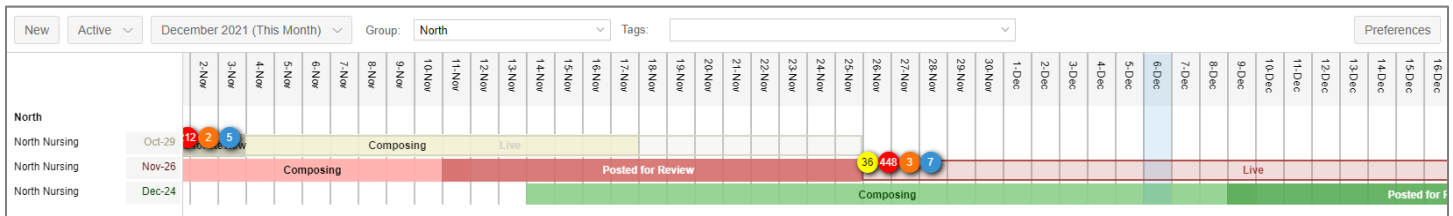
You will be shown the group(s) templates you have access to. If you have access to more than one location, you can select by clicking on the **Group** drop-down at the top of your screen.

The example above shows 3 different schedules templates for North Nursing Staff. Each template has 3 stages.

- **Composing** – Employees will not see the schedule in this template while in this stage.
- **Posted For Review** – Employees are notified schedules are posted for this template and can interact with them.
- **Live** – The schedules are posted and being worked. Employees can still interact with them.

To access a schedule template, click anywhere on the bar-graph of the schedule you want to access or click on the name and choose **Select Template**
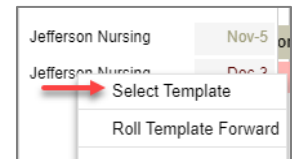
ROLL TEMPLATE FORWARD

When you are ready to compose a new schedule, click on the name of the latest template you have and choose **Roll Template Forward.** This will create a new template and bring in all employee schedules.

INACTIVATE A TEMPLATE

When a template is no longer live you can tag it as inactive. This will keep your template list nice and short. To inactivate, click on the name of template that is expired and choose **Tag as Inactive**.

1.800.841.3824
advancedtime.com

Grand Rapids Office - 4475 Wilson Ave. SW, Suite 8, Grandville, MI 49418
Detroit Office - 45570 Maben Road, Suite 400, Canton, MI 48187

advanced time

VISUAL SCHEDULING SCREEN OVERVIEW

Visual Scheduling screen displays the employees listed by position and shift. This will give a clear view of coverage.

December	December	December	December
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

Friday	Saturday	Sunday	Monday	Tuesday	Wednesday	Thursday

3 December — RNs
7a/7p 11:30 | 1 | 1
calarco, annelynn

7p/7a 11:30 | 1 | 1
asemota, joy

LPNs
7a/7p 11:30 | 7 | 9
stampley, dwana
hawthorne, arnetta
miller, warren
shorts, karicia
stampley, erika
williams, nina
grier, andrea
staples, aundreia
williams, angela

7p/7a 11:30 | 3 | 6
ray, danielle
shoulders, jeremy
norment, angela
bell, jameka
pringle, yolanda
clark, georgette

CENAs
7a/7p 11:30 | 8 | 6

4 December — RNs

LPNs
7a/7p 11:30 | 7 | 8
staples, aundreia
stampley, dwana
canty, gemirria
miller, warren
russell-pace, yvonne
shorts, karicia
williams, angela
cain, shanika

7p/7a 11:30 | 8 | 9
bell, jameka
mitchell, leslie
nealis, simaya
pringle, yolanda
shorts, saphonia
tait, benita
turner, elaine
norment, angela
bynum, tanisha

CENAs
7a/7p 11:30 | 8 | 10
bausley, tamika
bell, taikiyyah
fielder, dunita
johnson, marketa
kaigler, latoya

5 December — RNs

LPNs
7a/7p 11:30 | 6 | 9
staples, aundreia
canty, gemirria
miller, warren
russell-pace, yvonne
shorts, karicia
williams, angela
stampley, erika
fennell, fredean
cain, shanika

7p/7a 11:30 | 7 | 9
bell, jameka
mitchell, leslie
nealis, simaya
pringle, yolanda
shorts, saphonia
tait, benita
turner, elaine
abdullah, latasha
bynum, tanisha

CENAs
7a/7p 11:30 | 7 | 8
bausley, tamika
bell, taikiyyah
fielder, dunita
kaigler, latoya

6 December — RNs
7a/7p 11:30 | 1 | 1
calarco, annelynn

7p/7a 11:30 | 1 | 1
asemota, joy

LPNs
7a/7p 11:30 | 7 | 7
fennell, fredean
gant, juanita
hawthorne, arnetta
russell-pace, yvonne
stampley, erika
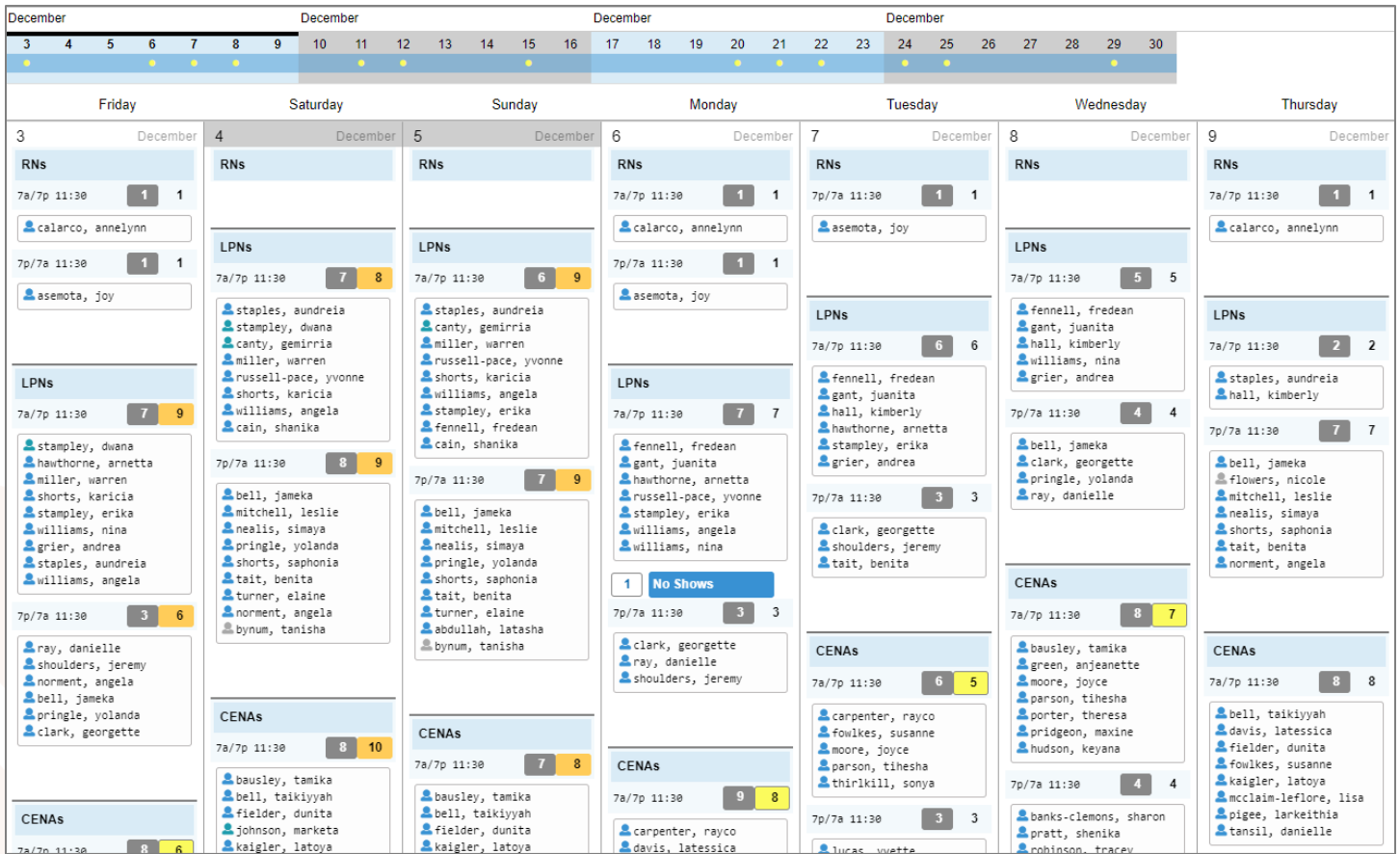williams, angela
williams, nina

| 1 | No Shows

7p/7a 11:30 | 3 | 3
clark, georgette
ray, danielle
shoulders, jeremy

CENAs
7a/7p 11:30 | 9 | 8
carpenter, rayco
davis, latessica

7 December — RNs
7p/7a 11:30 | 1 | 1
asemota, joy

LPNs
7a/7p 11:30 | 6 | 6
fennell, fredean
gant, juanita
hall, kimberly
hawthorne, arnetta
stampley, erika
grier, andrea

7p/7a 11:30 | 3 | 3
clark, georgette
shoulders, jeremy
tait, benita

CENAs
7a/7p 11:30 | 6 | 5
carpenter, rayco
fowlkes, susanne
moore, joyce
parson, tihesha
thirlkill, sonya

7p/7a 11:30 | 3 | 3
lucas, yvette

8 December — RNs

LPNs
7a/7p 11:30 | 5 | 5
fennell, fredean
gant, juanita
hall, kimberly
williams, nina
grier, andrea

7p/7a 11:30 | 4 | 4
bell, jameka
clark, georgette
pringle, yolanda
ray, danielle

CENAs
7a/7p 11:30 | 8 | 7
bausley, tamika
green, anjeanette
moore, joyce
parson, tihesha
porter, theresa
pridgeon, maxine
hudson, keyana

7p/7a 11:30 | 4 | 4
banks-clemons, sharon
pratt, shenika
robinson, tracey

9 December — RNs
7a/7p 11:30 | 1 | 1
calarco, annelynn

LPNs
7a/7p 11:30 | 2 | 2
staples, aundreia
hall, kimberly

7p/7a 11:30 | 7 | 7
bell, jameka
flowers, nicole
mitchell, leslie
nealis, simaya
shorts, saphonia
tait, benita
norment, angela

CENAs
7a/7p 11:30 | 8 | 8
bell, taikiyyah
davis, latessica
fielder, dunita
fowlkes, susanne
kaigler, latoya
mcclaim-leflore, lisa
pigee, larkeithia
tansil, danielle

By default, this shows a weekly view. To choose a different week, click on the week on the top of the screen you would like to display. The week being displayed will bold. The example above is showing 4 different weeks to select.

If employees assigned to shift are not showing, go to View at the top right side of the screen and select **Show Assignments.**

POSITION DETAILS

LPNs → **Position**
7a/7p 11:30 | 6 | 9 → **Shift / Number Employees Needed / Number of Employees Assigned**
| 4 | Orange color indicates over scheduled
| 2 | Yellow indicates understaffed.
staples, aundreia
canty, gemirria
miller, warren
russell-pace, yvonne
shorts, karicia
williams, angela
stampley, erika
fennell, fredean
cain, shanika
→ **List of Employees Assigned**

Image	Description
2 No Shows	Displays when employee(s) haven't shown up for a shift. This also shows in the Dashboard as an absents.
1 Pickup Requests	When an employee request to pick-up an open shift. This will also list on the To-Do-List ✓ 9,
PARTIAL PICK UP manning, david 10p/2:30a **PARTIAL PICK UP** edgecumbe, alexa 2a/10:30a	When an employee request to pick-up a portion of an open shift. This will also list on the To-Do-List ✓ 9,
1 Drop Requests	Displays when and employee request to drop an assigned schedule. This will also list on the To-Do-List ✓ 9,

1.800.841.3824
advancedtime.com

Grand Rapids Office - 4475 Wilson Ave. SW, Suite 8, Grandville, MI 49418
Detroit Office - 45570 Maben Road, Suite 400, Canton, MI 48187

ADDING OR EDITING SHIFTS IN VISUAL SCHEDULING

You can add or change an existing shift. Most common edit to an existing shift is changing the number of employees needed.
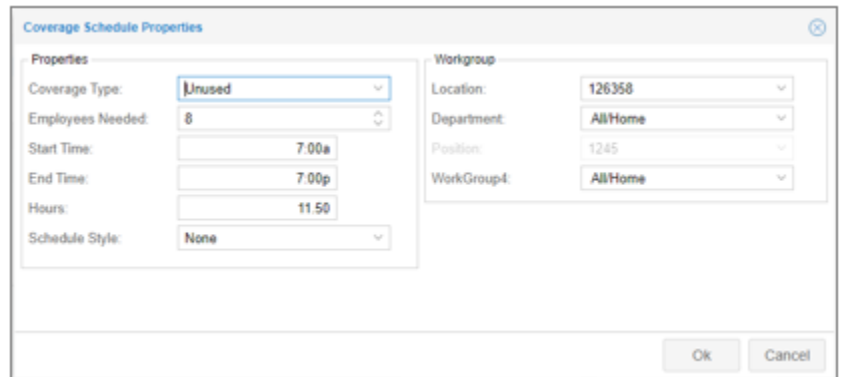
TO EDIT SHIFT:

1. Click on an existing shift and choose **Change Schedule Properties.**
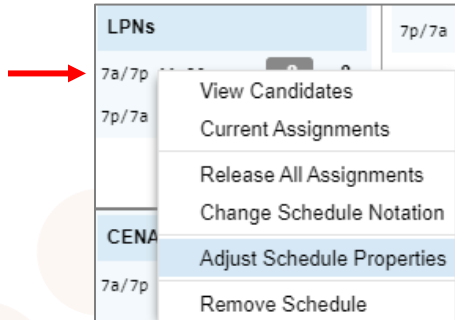
2. Here you can adjust the Start/End time and the Employees Needed. If you increase the number of employees needed over the current amount schedule, it will create an open shift for employees to pick up.
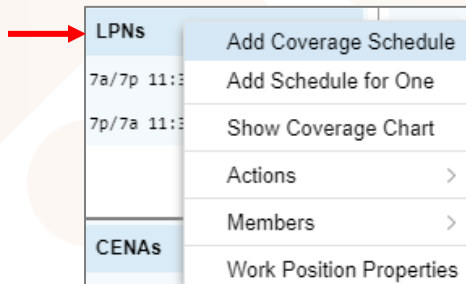
   WARNING: Changing the Start/End times will change the schedules of any employees assigned to this shift

TO ADD A SHIFT:

1. Click on the Position you would like to add a shift for and choose **Add Coverage Schedule**

2. The same shift properties screen will display. Fill in the Employees Needed and Start/End times.

FIND THE RIGHT CANDIDATE

A user can find an employee to fill an open position in Visual Scheduling.

TO FIND A CANDIDATE:

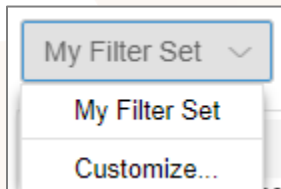1. Click on the shift you would like to fill a position and choose **View Candidates.**
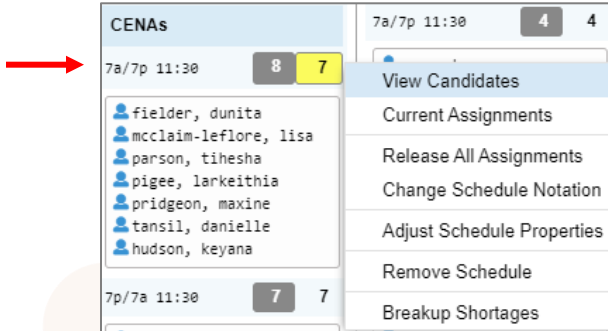
2. This will show a list of employees that can work that position and are not scheduled to work on the day selected.

3. Select the employee(s) you want to assign to the shift and choose **SAVE** at the bottom of the list. This will schedule the employee for the position and that shift.
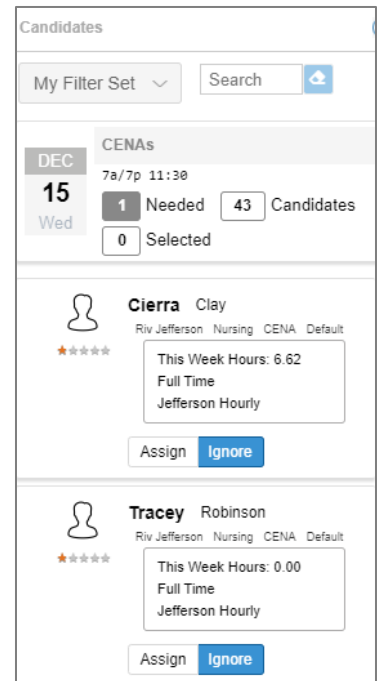
FILTER YOUR CANDIDATES:

You can filter the list of candidates based on a lot of different criteria.

1. If you need to filter the candidate list, select My Filter Set above the list of candidates and choose **Customize.**

2. The Current filter setup will display at the bottom of the screen.

    a. Each Filter has the following options
        i. **Delete** – Remove the filter
        ii. **Enable** – If enabled list will be filtered based on the criteria. If not enabled the information can be just displayed
        iii. **Show** - If checked it will show the information for this filter.
        iv. **Sort** – It will sort your Candidate list based on this filter.

3. If you want to Add a new Filter, click the button **Add Filter**. A list of filters will display for you to choose.

REMOVING AN EMPLOYEE FROM A SHIFT

If you have too many employees schedule on a shift you can remove an employee.

TO REMOVE AN EMPLOYEE:

1. Click on the shift you need to remove an employee from and choose Current Assignments.
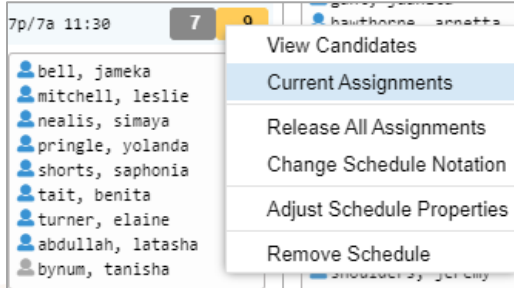
2. This will show a list of employees assigned to that shift.
3. Choose **Release** on any employee you would like to remove and then click **SAVE** at the bottom of the list.
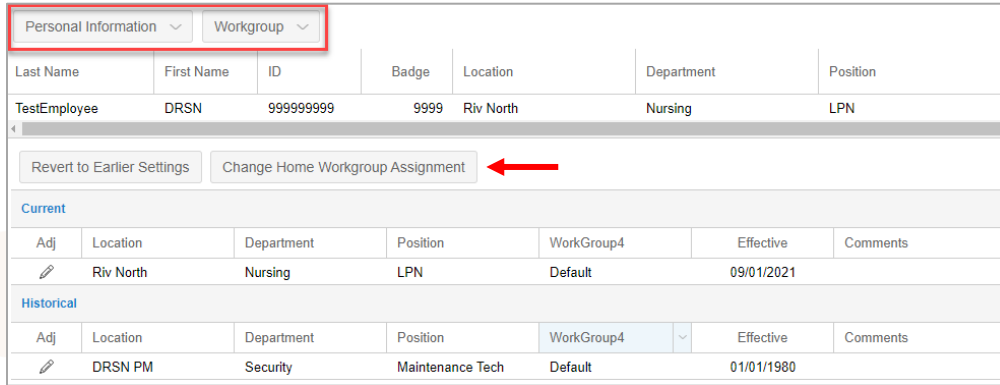
![advanced time logo]
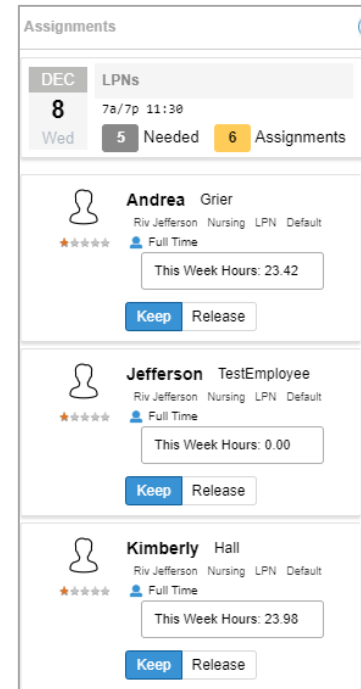
ASSIGNING A WORK AREA TO EMPLOYEES

Sometimes it's necessary to not only schedule a position but also an area for the employee to work. Most common assignments are floors, wings, or zones (or sometimes a combination).

ASSIGNING A HOME AREA

If the employee works in the same area on a regular basis, you can assign them a home area.

1. Go to the employees record → Personal Information page → Workgroup tab
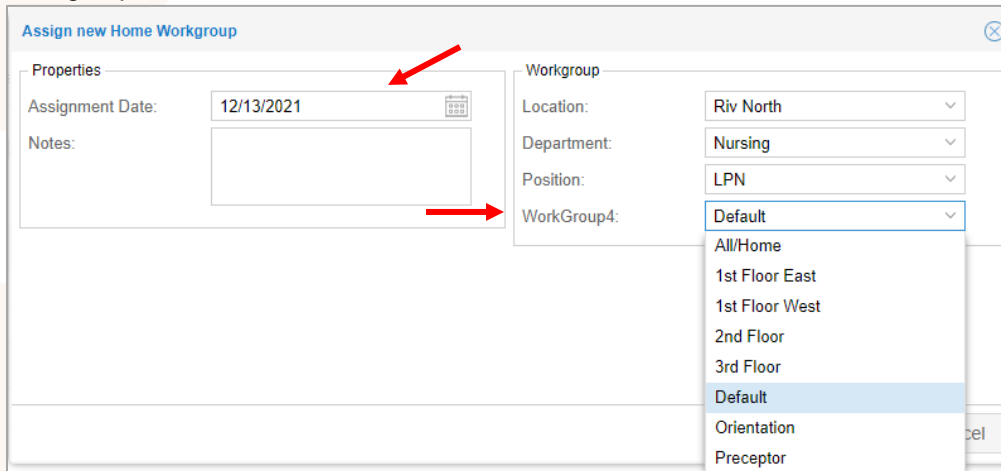
2. Click on the Change **Home Workgroup Assignment** button
3. Enter the date the employee starts working on the floor and the correct floor/wing by clicking on the selections in Workgroup4

WARNING: Only change Workgroup4, do not change any other Workgroup levels.
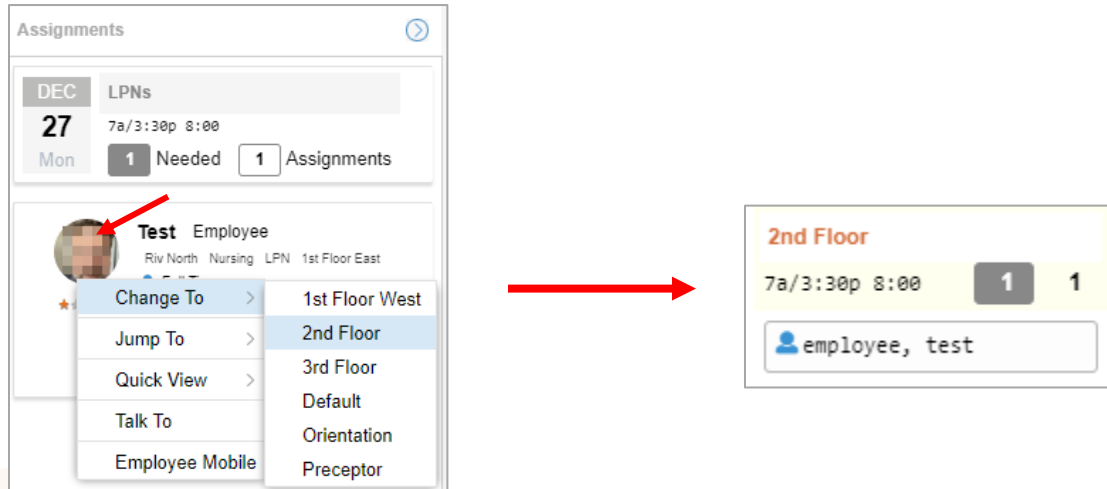
CHANGING EMPLOYEES WORK AREA

Employees schedules change on a regular basis, Visual Scheduling makes it easy to quickly change an employee's work area for a shift.

1. In Visual Scheduling choose an employee by clicking on their name and select **Assignment Details**. This will show a list of employees on the right side working that position and area.

1.800.841.3824
advancedtime.com

Grand Rapids Office - 4475 Wilson Ave. SW, Suite 8, Grandville, MI 49418
Detroit Office - 45570 Maben Road, Suite 400, Canton, MI 48187

2. Click on the employee image → select **Change To** → and choose a new area for that shift.
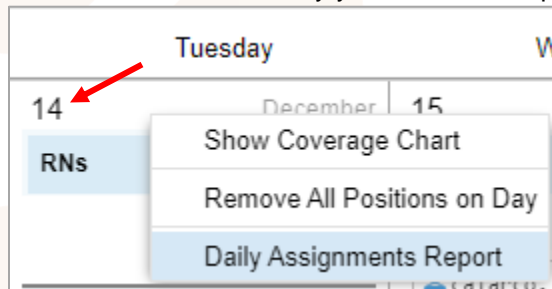

DAILY ASSIGNEMENT REPORT- POSTING

It's important to post a daily assignment report. This report shows all areas, positions and shift scheduled to work on a day.
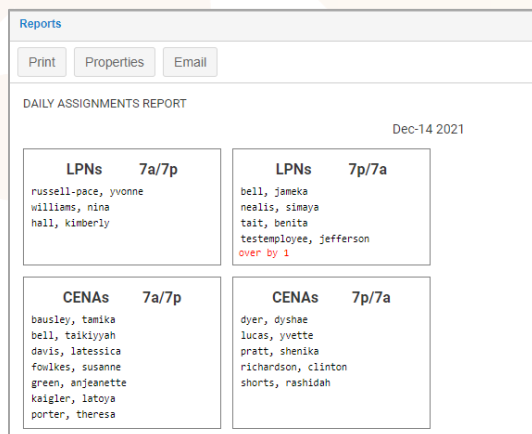
TO VIEW / PRINT

1. Click on the date of the day you would like to print the daily report and choose **Daily Assignment Report**.

2. A view of the report will display giving you the option to Print or Email.

VIEW

PRINT

1.800.841.3824
advancedtime.com

Grand Rapids Office - 4475 Wilson Ave. SW, Suite 8, Grandville, MI 49418
Detroit Office - 45570 Maben Road, Suite 400, Canton, MI 48187