



Creating Scheduling Assignments

Staffing and Scheduling

2021.2



CONFIDENTIAL MATERIAL

The information contained in this document, and in any related attachments or documents, may contain confidential and/or privileged material and is intended only for current licensed clients of symplr products. Any reproduction, review, retransmission, dissemination, or other use of, or taking of any action in reliance upon, this information by persons or entities other than by the intended recipient is prohibited.

If you are an unintended recipient of this document, or are in possession of this document by mistake, please destroy this document in its entirety or contact us at (866) 373-9725.

Contents

Change Log	5
Scheduling Assignments	6
Scheduling Assignments Common Configuration Screens	6
Assignment Source	8
Assignment Codes	8
Selection Style Qualification Rules	10
Staffing Configuration - Priority Dates	10
Staffing Configuration - Priority Days	11
Default Selection Style	12
Employee Record Configuration	12
Combination of Shifts Assignment	13
Steps to Create a Combination of Shifts Assignment	13
Maximum Work Stretch Assignment	18
Steps to Create a Maximum Work Stretch Assignment	18
Minimum Staffing and Employee Schedule Validation	21
About Minimum Staffing Rules	22
About Employee Schedule Validation	23
Setting Up Minimum Staffing Rules	23
Set the Activity Code Indicators	23
Set the Pay Code Indicators	25
Configure the Assignment Codes	26
Minimum Days Off	28
Minimum Scheduled Hours	28
Minimum Shift Equity	32
Minimum Weekends	34
Create a Selection Style	39
Update the Staffing Configuration	40
Working with Employee Schedule Validations	40
Schedule Screen	40
Employee Current Schedule and Self Schedule Screens	44
Employee Monthly View Screen	44
Schedule Overlap Assignment	45
Steps to Create a Schedule Overlap Assignment	45
Scheduled Hours Assignment	47
Steps for Creating a Scheduled Hours Assignment	48
Shift Equity Assignment	53
Steps for Creating a Shift Equity Assignment	53
Holiday Staffing Assignments	55
Adjusting the Staffing Plan/Core Staffing Plan for Holidays	57
Every Other Holiday Assignment	59

Every Other Major/Minor Holiday Assignment	68
Every Other Same Holiday	76
X out of Y Holiday Assignment	81
Holiday Rotations Assignment Configuration	88
Holidays Not Tracked Assignment	95
Maximum Holidays Assignment Configuration	98
No Holidays Worked	103
Additional Needs-Based Scheduling Set Up	109
Staffing Configuration - Priority Dates	117
Weekend Staffing Assignments	126
Every Other Weekend Assignment	127
X out of Y Weekends	132
No Weekends Worked	136
Weekends Not Tracked	139
Additional Needs-Based Scheduling Set Up	142
Add Need-Based Schedule Authorization to Activity Codes	145

Change Log

2021.2 - released November 2021

Topic	Description
Document	Branding updates; no content changes

Scheduling Assignments

Staffing and Scheduling uses assignment screens to determine which scheduling rules apply to each employee. The Standard assignments of Combination of Shifts, Maximum Work Stretch, Schedule Overlap, Scheduled Hours, Shift Equity, Holiday Staffing and Weekend Staffing are discussed in this document.

- To qualify for an assignment, employees must meet each of the criteria set up in the Criteria section on the Assignment screen.
- Each employee is only assigned to one of the assignments.
- The ALL assignments for the Standard classification are included with the core system. There are no qualification requirements for the ALL assignments, so employees who do not qualify for any other assignment are automatically assigned to that assignment.
- There can be multiple assignment codes for each Assignment Type, such as one holiday or one weekend, but an employee can only be assigned to one assignment code. If an employee qualifies for more than one assignment, the order the qualification criteria appear on the Assignment Determination list determines the employee's assignment. For example, if job class is the highest priority qualification, when an employee qualifies for one assignment based on Job Class qualification and another assignment based on Employee Class qualification, the assignment code with the Job Class qualification would be the one assigned to the employee. For more information, see **Configuration > Assignments > Assignment Source > Assignment Determination**.

This chapter describes the screen configuration needed for all assignment types, then outlines step by step instructions for setting up specific assignments.

Note

The assignments are only validated if they are included in the selection style assigned to the process. For example, when running a needs-based schedule pass, only those assignment rules selected for the selection style for needs-based scheduling passes are included.

Scheduling Assignments Common Configuration Screens

The following summarizes the screen configuration required for creating assignments. Depending on the assignment types being used, not all screens need to be set up.

Note

All these screens are found on the Assignments card, unless otherwise noted.

Step-by-step instructions for setting up each assignment type are available in this chapter.

<p>Assignment Source (on the next page)</p>	<p>This screen displays the rules used by the system for processing. The standard assignment source records are already set up in the system.</p> <p>Standard assignment source options for the scheduling application are Holiday, Weekend, Maximum Work Stretch, Scheduled Hours, Schedule Overlap, Shift Equity, and Combination of Shifts.</p> <p>The Assignment Determination button opens a screen to select the qualification criteria that is available when setting up an Assignment Code record.</p>
<p>Assignment Codes (on the next page)</p>	<p>This screen is used to define the values used for a specific assignment and to identify the qualifying employees for that assignment. For example, there could be one Maximum Work Stretch assignment code for RN's in Department 3270 and another Maximum Work Stretch assignment code for LPN's.</p>
<p>Selection Style Qualification Rules (on page 10)</p>	<p>This screen is found on Configuration > Scheduling. The rules for each assignment are only validated if they are selected for validation in the Selection Styles screen. For example, the Maximum Work Stretch assignment rule is only validated when running the core schedule pass if it is included in the Selection Style used for validating core schedules.</p>
<p>Staffing Configuration</p> <ul style="list-style-type: none"> • Staffing Configuration - Priority Dates (on page 117) • Staffing Configuration - Priority Days (on page 11) 	<p>This screen is found on Configuration > Scheduling.</p> <ul style="list-style-type: none"> • The Priority Dates screen is used to indicate dates that should be populated first in the scheduling process. This makes it more likely that eligible employees are scheduled for a holiday assignment and are not disqualified because of other scheduling rules, such as approved /overtime hours, maximum work stretch, or shift equity rules. • The Priority Days screen is used to indicate the days of the week that should be populated first during the scheduling process. This is used to ensure that employees that should be scheduled are not ineligible because of other scheduling rules
<p>Default Selection Style (on page 12)</p>	<p>This screen is found on Preferences > My Preferences. The default selection styles for Create Schedule, Manual Edit Validation and Scheduling Assistant Call In are set up here. These selection styles use the assignment code records to determine whether employees are qualified to be scheduled, based on the assignment requirements. For example, if the selection style for scheduling includes the Scheduled Hours assignment, the system validates the employee assignment screen to see if daily/pay period approved or overtime hours rules would be violated if the employee was scheduled.</p>

Employee Record Configuration (on page 12)	<p>Employee assignments can be viewed on the TCS screen under the Assignments card.</p> <p>In Employee > General > Indicators, there is a field to select whether an employee is on the A or B schedule for the Every Other Holiday schedule rule.</p> <p>On the Parameters tab, there are fields to indicate the date when an employee is eligible to begin the weekend rules and the date to begin the holiday rules. If an employee is immediately eligible to participate in these rules, the fields can be left blank.</p>
------------------------------------------------------------	----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

Assignment Source

The Assignment Source screen displays all the Assignment Source options currently set up in the system. There are many standard Assignment Sources included in the system. Most of the fields of the Standard records are not editable. However, standard records can be replicated and the values modified.

The Assignment Source records establish specific information about a type of assignment, including the criteria options for selecting qualified employees, such as organization, job class, or daily hours, and the calculation information. This assignment source is then selected when creating an Assignment Code and that code inherits all the values of the Assignment Source. Multiple assignment codes can use the same assignment source.

The Assignment Determination section is where the fields are selected that can be used as criteria for assigning employees. For example, if an assignment can be based on the employee's job class, the Job Class field must be selected in the Assignment Determination screen (see step 4 below).

To edit the Assignment Determination in the Assignment Source screen, complete the following steps:

1. From **Configuration > Assignments**, select the **Assignment Source** icon.
2. Click on the Assignment Determination button in the left pane. This opens a screen to select which fields are available in the Assignment Code screen when setting up the selection criteria.
3. Add all criteria that might be used for the assignments. For example, if some assignments are determined by Employee Class and some are determined by Organization Unit, include both these options in the Assigned Criteria Items list.
4. To add criteria options, drag the option to the Assigned Criteria Items column.
5. When all options are selected, click **Save**.

The items selected in this screen are now available when configuring the Assignment Code screen.

Assignment Codes

The Assignment Codes screen displays all the assignment codes in the system. These codes are used to define values for processing assignment rules and to determine which employees are included in this assignment.

Multiple codes can be entered for each type of assignment. Also, be sure to update the indicators and parameters for the ALL assignment.

To add a new assignment, complete the following steps. To update an existing assignment, open the record and then begin with step 7 below:

1. From **Configuration > Assignment**, click on the **Assignment Code** icon.
2. Select the **Add** button from the left pane.
3. From the Assignment Source Classification drop-down menu, select whether the source code is a Standard, Customer, User Defined or Replicated code. The standard codes are already set up in the system.
4. Select the **Assignment Source Code** to determine which rule this assignment is used for.
5. In the Code field, enter an alphanumeric value to identify this assignment.
6. In the Description field, enter a label to describe this assignment.
7. Click **Save**.
8. Select the **Indicators** tab. Select the indicator option values from the drop-down listing to set the rules for this particular assignment.
9. Select the **Parameter** tab (if applicable). Enter the parameter option values to set the rules for this particular assignment.
10. Save these values.
11. Select the **Criteria** button in the left pane to open a screen to select the qualification criteria for this assignment code.
 - The field options that are displayed on this screen are selected on the Assignment Source configuration screen.
 - Employees must meet each criterion set up on this screen to qualify for this assignment code.
 - If an employee qualifies for more than one assignment code, the order the qualification criteria appear on the Assignment Determination listing in the Assignment Source screen determines the hierarchy of the assignment criteria. For example: There is an assignment code for employees in department 3270 and an assignment code for RN job class. If an employee belongs to department 3270 and belongs to the RN job class, whichever qualification is higher on this list would be the employee assignment. If Job Class is listed higher, the employee would get the RN assignment. If Department is higher on this listing, the employee would get the department 3270 assignment.
 - For each assignment source, the system provides a default assignment code of ALL, which does not have any qualification criteria. Therefore, if employees do not qualify for any other assignment code within an assignment source, they automatically qualify for the ALL assignment.

Selection Style Qualification Rules

The Selection Styles screen defines the rules used in the following scheduling features: automatic schedule creation, validation of manually entered schedule assignments, and Schedule Assistant call in wizard.

When creating assignments, be sure that the selection style includes the configured rules. For example, after setting up Holiday or Weekend assignments, be sure these rules are included in the Selected Rules column on the Qualification page. Otherwise, these rules are not being checked. It is recommended the selection styles that include these rules are entered as the Default Selection Styles, to ensure the correct style is being used.

Employees are validated on the assignment rule awarded to them, based on the qualification criteria. So the same rule selected in this screen may have different values for different employees. For example, the Holiday rule can be selected for validation. Employees who qualify for the Every Other Same Holiday assignment are validated based on the indicator and parameter values of that assignment and employees who qualify for the X out of Y holiday assignment are validated on the Indicator and Parameter values of that assignment.

To select assignment rules to be included in a selection style, complete the following steps:

1. From **Configuration > Scheduling**, open an existing selection style or create a new one.
2. Click on the **Qualification** button to open a screen displaying the rules used for each pass of the selected process (auto scheduling, edit validation, scheduling assistant call in).
3. Highlight the rule in the Available Rules column and drag to the Selected Rules column.
4. To remove a rule, drag the entry back into the Available Rules section.
5. Rules may be moved around within the Selected Rules column according to the order they should display. Highlight the Rule and drag it above or below another entry. The red arrows indicate where the Rule will display.
6. Click the **Save** button before exiting.

Note

For more information on setting up Selection Styles, see the online help documentation for **Configuration > Scheduling > Selection Styles**.

Staffing Configuration - Priority Dates

In the Staffing Configuration screen, the Priority Dates button opens a screen to indicate dates that have highest scheduling priority, such as holiday time frames. When running the scheduling process, the priority dates that occur within the scheduling period are scheduled before the rest of the days. Using this feature prevents employees who are eligible to work a holiday from being disqualified because of other scheduling rules, such as overtime or approved hours.

If Priority Days are also set up for this Staffing Configuration record, the system will schedule the days within the Priority Dates time frame in the sort order specified by the Priority Days table.

For example:

- The Priority Days are set as Saturday, Sunday, and Friday. The rest of the days populate in chronological order (Monday, Tuesday, Wednesday, Thursday)
- The Priority Dates for the Thanksgiving Holiday are set up as Thursday through Sunday of the last week of November (November 27-30, 2018)

When the scheduling period that includes the dates of November 23-30 is run, the scheduling process will first schedule Saturday, November 29, then Sunday, November 30, then Friday, November 28, then Thursday, November 27. The system will then populate the rest of the scheduling period in the normal sequence.

Adding a Priority Dates record:

1. From **Configuration > Scheduling**, select the **Staffing Configuration** screen.
2. Search for and open a record. Click on the **Priority Dates** button in the left pane.
3. Enter the Start Date for the first day of the date range to be scheduled first.
4. Enter the End Date for the last day of the date range to be scheduled first.
5. Enter a Description to describe this priority date's record.
6. Click **Save**.
7. Repeat steps 1-4 for all the priority dates to be configured.
8. In the Priority field, set the priority number of which holiday record should be populated first. This is used when more than one holiday falls within a scheduling period, such as Christmas and New Year's.
9. Click **Save**.

Note

The priority dates need to be updated each year, before the scheduling process is run for the date range.

Staffing Configuration - Priority Days

The Priority Days button opens a screen to indicate the order that the days of the week should be scheduled. For example, weekend days can be set up to schedule before week days. When using needs-based weekend staffing, scheduling weekend days first makes it more likely that employees will be scheduled their eligible weekends. Otherwise, an employee might reach their weekly approved hours or overtime hours limit before the weekend is populated.

When the scheduling process is run, all instances of the highest priority day of the week (as displayed in the Assigned Days section) within the scheduling period are scheduled first, in chronological order. Then the second highest priority day of the week is scheduled for all those days of the week, in chronological order. Any days of the week not selected are scheduled chronologically.

As an example, the system starts with the days selected in the Assigned Days column and populates all the Sundays in the scheduling period, then all the Saturdays, and then all the Fridays. The system then moves to the Available Days column and populates the Mondays, the Tuesdays, the Wednesdays, and finally the Thursdays.

Default Selection Style

The Default Selection Style page allows the user to set the default selection styles when creating an automatic schedule, when manually adding a schedule, when using the scheduling assistant wizard, and/or for when approving a schedule bid.

These Selection Styles indicate the rules that must be validated to determine if an employee is qualified to work the schedule.

When creating assignments, be sure that the selection style includes the configured rules. For example, after setting up Holiday or Weekend assignments, be sure these rules are included in the Selected Rules column on the Qualification page. Otherwise, these rules are not being checked. It is recommended the selection styles that include these rules are entered as the Default Selection Styles, to ensure the correct style is being used.

Values entered in these fields are automatically defaulted into the corresponding fields in the application. These fields can be changed when running the processes.

Note

The selection style options that are displayed in the Field Look Up Values must be previously set up on the Selection Styles Configuration screen. The options that display for each field correspond to the options set up for the matching Type. For example, the styles that are displayed for the Create Schedule field were configured with the Type of Auto Schedule.

Employee Record Configuration

Some indicators and parameters for assignments are set up at the employee level on the Employee Record.

- If employees are on every other holiday rotations, the indicator to determine if the employee is on the A or the B rotation is set on the indicator screen.
- If employees have a waiting period before they are included in the holiday or weekend rotations, the effective dates are set up in the employee record.
- The assignment table the employee belongs to is listed on the Assignments card in the employee record.

Viewing Employee Assignments

An employee's assignments can be viewed on the employee record on **TCS > Assignments**. Employee assignments are updated when the scheduling process is run or a schedule is added to the schedule screen.

Note

The Assignments option must be selected in **Preferences > My Preferences > Time Card** for the Assignments card to display in the TCS screen.

Employee Indicators Tab

If an employee is scheduled for the Every Other Holiday rule, the employee needs to be assigned to either the A or B holiday schedule.

The default for this field is **A**, so only the employees assigned to the **B** holiday schedule need to have their records updated.

Employee Parameters Tab

If an employee has a waiting period before he or she is eligible to participate in the Holiday or Weekend assignment rules, an eligibility date can be entered in the employee record.

1. From the Employee section, use the **Employee Search** feature to locate the employee records to configure.
2. Open **Employee General > Parameters > Schedule Process**.
3. Schedule Standard Date 1 indicates the date when the employee is eligible to start the weekend rules. If the employee does not have a waiting period, this field can be left blank.
4. Schedule Standard Date 2 indicates the date when the employee is eligible to start the holiday rules. If the employee does not have a waiting period, this field can be left blank.

Combination of Shifts Assignment

The Combination of Shifts assignment is used to limit the number of shifts of a certain length that the employee can be scheduled to work during each week. For example, the rule can be set up so that employees in the assignment can work up to two 12-hour shifts and one 8-hour shift one week, and three 8-hour shifts and one 12-hour shift the alternate week.

Steps to Create a Combination of Shifts Assignment

The following summarizes the steps needed to configure the Combination of Shifts assignment rule. These steps are described in more detail below.

Step 1: Create a new Range Table

- A. Set up the Range Tables General tab
- B. Set up the Range Tables Decimal Ranges

Step 2: Create a new Assignment Code

- A. Set up the Assignment Code, General tab
- B. Set up the Assignment Code, Indicators tab
- C. Set up the Assignment Code, Parameters tab
- D. Assign the Assignment Code, Range Table Categories
- E. Select the Qualification Criteria

Step 3: Verify qualifying Activity Codes are set up**Step 4:** Add the Combination of Shifts validation to the Selection Styles**Step 1A: Set up the Range Tables General Tab**

Prior to setting up the assignment code, range tables must be set up for the combination of shifts rules. These range tables indicate the length of the shifts and the number of shifts of that particular length to be included.

These ranges will be selected when setting up the Assignment Codes parameters screen to identify the number of shifts of each length to assign to a particular week in the rotation.

1. Open **Configuration > Assignments > Range Table**.
2. Click on the **Add** button to add a new record.
In the Assignment Source Classification field, enter **Standard**.
3. In the Assignment Source Code field, select **Cmb Shifts** from the Field Look Up Values in the right pane.
4. In the Range Table Definition Code field, choose **Rotation Weeks**.
5. Enter a Code that will identify this range table record.
6. Enter a Description that describes this range table record.
7. Click **Save**.

Step 1B: Set up Range Tables Decimal Ranges

1. Click on the **Decimal Range** button to configure the shift length ranges and the number of shifts of that length allowed. Select the **Add** button.
2. Enter a Description that will identify this range of values.
3. In the Low Shift Length field, enter the shortest length of shift to be included in this validation. As an example, the open record is configured for shifts that are between 8.1 hours and 12.0 hours in length. The companion parameter shows that 3 shifts within that length can be worked.
4. In the High Shift Length field, enter the longest length shift to be included in this validation.
5. Click on the **Parameters** tab.

6. In the Cmb Shifts Assignment Code Schedule Standard Integer 1 field, enter the maximum number of shifts of the indicated length range that are allowed by this assignment (as set up on the General tab). As an example, an employee can be scheduled 2 shifts that are between 11-12 hours in length and 2 shifts that are between 7-8 hours in length.
7. Click **Save**.

Step 2A: Set up the Assignment Codes General Tab

1. From **Configuration > Assignments**, select the **Assignment Code** screen.
2. Click on the **Add** button to add a new Assignment Code.
3. Enter the date this Assignment Code will be effective.
4. Select the **Standard** option from the Assignment Source Classification field.
5. In the Assignment Source Code field, select **Cmb Shifts** from the Field Look Up Values.
6. Enter a Code and Description to identify this combination shifts assignment record.
7. Click **Save**.

Step 2B: Set up the Assignment Codes Indicators Tab

1. With the record open, select the **Indicators** tab.
2. Set Cmb Shifts Assignment Code Indicator Schedule Standard 1 to **Y** to activate the combination of shifts rule for this assignment. For assignments that should not use the combination shifts rule, set this indicator to **N**.
3. In the Cmb Shifts Assignment Code Indicator Schedule Standard 2 field, indicate the number of weeks in the combination shifts rotation.

Note

This value does not have to be the same as the number of weeks in a scheduling period. For example, if the scheduling period is 4 weeks in length, but the combination shifts rotation is for every other week, the number 2 can be entered in this field.

4. In the Cmb Shifts Assignment Code Indicator Schedule Standard 3 field, indicate whether non-productive activity codes should also be included in the validation of shift lengths.
5. Click **Save**.

Step 2C: Set up the Assignment Codes Parameters Tab

1. With the assignment code open, click on the **Parameters** tab.
2. In the Cmb Shifts Assignment Code Parameter Schedule Standard Date 1 field, enter the date when the rotation of weeks is to begin.

Note

A leading practice is to set the Combination of Shifts Period Start Date to a Sunday, or to the same day as the start of a Pay Period. This allows for consistency in defining a 'week' as either a calendar week or a pay week.

3. Click **Save**.

Step 2D: Select the Range Table Category for Each Week

The Range Table Categories tab opens a screen where the number and lengths of qualifying shifts are attached to each week in a rotation. There are six weeks available on this screen, however, just set up the number of weeks that are included in the rotation. For example, if the value of Cmb Shifts Assignment Code Indicator Schedule Standard 2 is set to **4**, only set up Weeks 1-4 in this screen.

1. Select the **Range Table Categories** tab.
2. In the Week 1 field, select the range table that should be assigned for the first week of a rotation from the Field Look Up Values in the right pane.
3. In the Week 2 field, select the range table that should be assigned for the second week of a rotation. Continue filling in the shift combination for all the applicable weeks of the rotation.

Note

The options that are available in the right pane have been previously set up on the Range Table screen in a record where the Assignment Source Code is set to **Cmb Shifts**.

Step 2E: Select the Qualification Criteria

1. Click on the **Criteria** section button in the left pane to open a screen to indicate which employees should be given this assignment.
2. Click on the **Add** button in the left pane.
3. Enter the Effective Date, Code, and criteria options that identify employees who should be given this assignment.

The field options that are displayed on this screen are selected on **Configuration > Assignment > Assignment Source**. If additional fields are required, they must be added through that screen first.

4. Click on **Save**.
5. To add additional groups of employees to this assignment, click on the **Add** button again and complete another criteria screen. The groups set up for this assignment are displayed.

Step 3: Verify Qualifying Activity Codes are Set Up

For the system to automatically schedule activity codes during the scheduling process, they must be set up for auto scheduling. Also, there must be activity codes of the qualifying length. For example, if the combination of shifts rule is set up to schedule 3 shifts of 6-8 hours and 2 shifts of 10-12 hours, be sure there are activity codes of these lengths set up to be automatically scheduled for both the day and night shifts.

Note

If a profile is set up with ANY activity codes selected on the Activities screen, the system only uses those activity codes during the automatic scheduling process. Be sure there are activity codes of the sufficient length in hours for all coverage periods.

1. From **Configuration > Scheduling**, open the **Activity Code** screen.
2. Search for the activities to be updated.
3. Click on the **Indicators** tab, and open the **Schedule Process** card.
4. Set Activity Code Indicator Schedule Standard 3 to **Yes** to allow it to be automatically scheduled.
5. Click **Save**.

Note

Multiple activity codes can be updated at the same time by using the Replace feature.

Step 4: Add the Combination of Shifts Rule to the Selection Styles

The Combination of Shifts rule must be selected as one of the validations in the selection style for this rule to work.

1. From **Configuration > Scheduling**, select the **Selection Styles** page.
2. Open the selection style being used with the scheduling process.
3. Open each need-based scheduling pass.
4. If the Combination of Shifts rule is not selected, highlight the rule in the Available Rules column, hold down the left mouse button and drag it to the Selected Rules column.
5. Repeat steps 3-4 for each pass that uses the need-based scheduling rules.
6. Click **Save**.

Maximum Work Stretch Assignment

The Maximum Work Stretch assignment determines the maximum number of days in a row that an employee should be scheduled, or the maximum number of hours scheduled on consecutive days. This prevents an employee from being scheduled several days in a row when other scheduling rules, such as overtime or approved hours, are not violated. For example, if an employee is scheduled the final 5 days of one scheduling period and the first 5 days of another scheduling period, the employee may still be within the rules for approved hours and overtime. But they are being scheduled for 10 days in a row.

If validations for both Hours and Days are selected, the employee will be scheduled up to the maximum number of hours on consecutive days or maximum number of days in a row, whichever comes first. For example, if the Days value is set to **5** and the Hours value is set to **40**, the system will only schedule an employee for up to 5 days in a row or up to 40 hours in a row, whichever comes first.

Steps to Create a Maximum Work Stretch Assignment

The following summarizes the steps to create a Maximum Work Stretch assignment. The steps are described in more detail below.

Step 1: Create a new Assignment Code

- A. Set up the Assignment Code General tab
- B. Set up the Assignment Codes Indicator tab
- C. Set up the Assignment Codes Parameters tab
- D. Select the Qualification Criteria

Step 2: Add the Maximum Work Stretch validation to the Selection Styles

Step 1A: Set up the Assignment Code General Tab

1. Go to **Configuration > Assignments > Assignment Code**.
2. Click on **Add** to enter a new record.
3. Enter the date this Assignment Code will be effective.
4. Select the **Standard** option from the Assignment Source Classification field.
5. In the Assignment Source Code field, select **MaxWrk** from the field look up values.
6. Enter a Code and Description to identify this assignment record.
7. Click **Save**.

Step 1B: Set up the Assignment Codes Indicator Tab

1. Select the **Indicators** tab.
2. To validate the Maximum Work Stretch on the number of Days in a row, set MaxWrk Assignment Indicator Schedule Standard 1 to **Y**. Be sure to configure the companion parameter, MaxWrk Assignment Parameter Schedule Standard Integer 1.
3. To validate the Maximum Work Stretch on the number of Hours in a row, set MaxWrk Assignment Indicator Schedule Standard 2 to **Y**. Be sure to configure the companion parameter, MaxWrk Assignment Parameter Schedule Standard Hour 1.
4. Click **Save**.

Step 1C: Set up the Assignment Codes Parameter Tab

1. Click on the **Parameters** tab.
2. When MaxWrk Assignment Indicator Schedule Standard 2 is set to **Y**, enter the maximum number of hours an employee can work in a row in the MaxWork Assignment Parameter Schedule Standard Hour 1 field.
3. When MaxWrk Assignment Indicator Schedule Standard 1 is set to **Y**, enter the maximum number of hours an employee can work in consecutive days in the MaxWork Assignment Parameter Schedule Standard Integer 1 field.
4. Click **Save**.

Step 1D: Select the Qualification Criteria

1. Click on the **Criteria** section button in the left pane to open a screen to indicate which employees should be given this assignment.
2. Click on **Add** button in the left pane.
3. In the following screen, enter the Effective Date, Code, and criteria options that identify employees who should be given this assignment.

The field options that are displayed on this screen are selected on **Configuration > Assignment > Assignment Source**. If additional fields are required, they must be added through that screen first.

4. Employees must meet each criterion set up on this screen to qualify for this assignment code.
5. Click on **Save**.
6. To add additional groups of employees to this assignment, click on the **Add** button again and complete the previous screen. The groups given to this assignment are displayed.
7. Click **Save**.

Step 2: Add the Maximum Work Stretch validation to the Selection Styles

The Maximum Work Stretch rule must be selected as one of the validations in the selection style for this rule to work.

1. From **Configuration > Scheduling**, select the **Selection Styles** page.
2. Open the selection style being used with the automatic scheduling process and/or manual process.
3. Open a scheduling pass.
4. Point the cursor to the Maximum Work Stretch rule in the Available Rules column and drag the rule to the Selected Rules column.
5. Repeat steps 3-4 for each pass to be validated.
6. Click **Save**.
7. This selection style can be set up as the default for scheduling through **Preferences > My Preferences > Default Selection Styles**.

This selection style can be set up as the default for self-scheduling on **Configuration > Scheduling > Staffing Configuration**.

Maximum Work Stretch Indicators and Parameters

The following indicator and parameter settings are available for setting up the Maximum Work Stretch rule.

MaxWrk Assignment Indicator Schedule Standard 1 determines whether the system validates if an employee is being scheduled more than X days in a row.

Valid Options:

N	The system does not check to verify the employee is not scheduled more than X consecutive days.
Y	The system does check to verify that the employee is not scheduled more than X consecutive days.

When this indicator is set to **Y (Yes)**, the number of consecutive days value (X) must be set up on MaxWrk Assignment Indicator Schedule Standard Integer 1.

The Maximum Work Stretch validation must also be assigned to the Selection Style used for automatic and manual scheduling.

This indicator can be found in **Configuration > Assignments > Assignment Codes > MaxWrk Assignment Source > Indicators**.

MaxWrk Assignment Indicator Schedule Standard 2 determines whether the system validates if an employee is being scheduled more than X hours on consecutive days.

Valid Options:

N	The system does not check to verify the employee is not scheduled more than X hours in consecutive days.
Y	The system does check to verify that the employee is not scheduled more than X hours in consecutive days.

When this indicator is set to **Y**, the number of hours in consecutive days value (X) must be set up on MaxWrk Assignment Indicator Schedule Standard Hour 1

The Maximum Work Stretch validation must also be assigned to the Selection Style used for automatic and manual scheduling.

This indicator can be found in **Configuration > Assignments > Assignment Codes > MaxWrk Assignment Source > Indicators**.

MaxWork Assignment Code Parameter Schedule Standard Hour 1 determines the maximum number of hours on consecutive days that an employee is allowed to be scheduled. For example, if this value is set to 40, the employee can only be scheduled up to 40 hours in consecutive days.

This value must be set up when MaxWork Assignment Indicator Schedule Standard 2 is set to **Y**.

Valid Values:

Any numeric value

MaxWork Assignment Code Parameter Schedule Standard Integer 1 determines the maximum number of consecutive days that an employee is allowed to be scheduled. For example, if this value is set to **5**, the employee can only be scheduled up to 5 days in a row.

This value must be set up when MaxWork Assignment Indicator Schedule Standard 1 is set to **Y**.

Valid Values:

Any integer

Minimum Staffing and Employee Schedule Validation

Just as there are situations when certain kinds of employee schedules are limited to a maximum number, there may also be situations when a minimum number of certain schedules are required. To accommodate these situations, Staffing and Scheduling includes minimum staffing rules.

There are four minimum staffing rules available.

- Minimum Days Off
- Minimum Scheduled Hours
- Minimum Shift Equity
- Minimum Weekends

If a minimum staffing rule is created, employee schedule validation occurs. This validation determines whether an employee violates the rule. Violations are visible on various screens within the system, such as the schedule screen and the employee Monthly View screen.

This guide provides information about the different types of minimum staffing rules, employee schedule validation, setting up the rules, and working with rule violations.

About Minimum Staffing Rules

This section provides more information about each of the minimum staffing rules.

Minimum Days Off

This rule informs managers, schedulers, and employees when employees have not been given the minimum number of days off within a specified time period. You set the required minimum number of days off and the length of the time period. You can also set whether the days off must be consecutive.

Example

Employees must be given four days off within every two-week time period.

Minimum Scheduled Hours

This rule informs managers, schedulers, and employees when employees have not been given enough scheduled time to achieve their approved hours less an allowed variance. This rule can be created to monitor daily, weekly/biweekly, or schedule period approved hours.

Example

An employee's approved hours are 40 hours per week. The rule is violated until the accumulated schedule hours pass the 40-hour minimum.

Minimum Shift Equity

This rule informs managers, schedulers, and employees when employees have not been given enough schedules distributed among day, evening, and night shifts. You set which activities count toward which shift and how many of each the employees must work.

Example

Employees must work two evening and two night shifts per schedule period.

Minimum Weekends

This rule informs managers, schedulers, and employees when employees have not been given enough weekend schedules to achieve their required minimum number. You can define what you consider a weekend and what makes a weekend shift. You can set how many schedules are required and how many weekends are required in a schedule period.

Example

Employees must work four weekend shifts per schedule period.

About Employee Schedule Validation

The rules define the parameters of what you consider to be minimum staffing. Employee schedule validation is the process that determines whether employees are complying with or violating the rules. When employees and schedulers add and edit schedules, the validation occurs.

The employee schedule validation process uses a certain Selection Style to analyze the details of a schedule, compare the schedule to other schedules in the schedule period, and determine whether the minimum staffing rule has been met.

If a rule is violated, a message informs the employee or scheduler of the violation and corrections can be made. The messages appear on the employee self schedule screen and on the schedule screen.

Setting Up Minimum Staffing Rules

Set the Activity Code Indicators

Using the following table as a guide, configure the appropriate activity codes for the minimum staffing rules you are setting up.

Minimum Staffing Rule	Activity Code Indicator	Definition	Options	Notes
Minimum Days Off	Schedule Standard 11	Worked Activity Code determination for Minimum Days Off	Y, N	Select Y for activity codes considered worked and N for codes not considered worked.
Minimum Scheduled Hours	Schedule Standard 5	Determines which Activity Codes accumulate toward approved hours	Y, N	Select Y for activity codes that accumulate toward approved hours.
Minimum Shift Equity	Schedule Standard 1	Determines whether Activity Code is productive or non-productive	P, N	Select P for productive and N for non-productive activity codes.

Minimum Staffing Rule	Activity Code Indicator	Definition	Options	Notes
	Schedule Standard 2	Determines which shift Activity Code is applied to for Shift Equity	D, E, N, O	D = Day code E = Evening code N = Night code O = Activity code has no effect on Shift Equity
Minimum Weekends	Schedule Standard 10	Qualifying Activity Code determination for Minimum Weekend	A, D, E, N, X	A = Code qualifies, any shift D = Code qualifies, Day shift E = Code qualifies, Evening shift N = Code qualifies, Night shift X = Codes does not qualify

To set the activity code indicators, complete the following steps:

1. Select **Configuration > Scheduling > Activity Code**.
2. Search for and open the appropriate activity codes.
The appropriate activity codes are those that you want to specifically qualify or disqualify for minimum staffing rules.
3. Click the **Indicators** tab and open the **Schedule Process** card.
4. Using the previous table, select the desired options in the appropriate activity code fields for the minimum staffing rules you are setting up.
5. Click **Save**.
6. If you opened more than one activity code in step 2, click the arrow under Activity Navigator to move to the next activity code and repeat steps 3 - 5.

Set the Pay Code Indicators

Using the following table as a guide, configure the appropriate pay codes for the minimum staffing rules you are setting up.

Minimum Staffing Rule	Pay Code Indicator	Definition	Options	Notes
Minimum Days Off	Schedule Standard 9	Worked Pay Code determination for Minimum Days Off	Y, N	Select Y for pay codes considered worked and N for codes not considered worked.
Minimum Scheduled Hours	Schedule Standard 3	Determines which Pay Codes accumulate toward approved hours	Y, N	Select Y for pay codes that accumulate toward approved hours.
Minimum Shift Equity	Schedule Standard 5	Determines whether Pay Code is productive or non-productive	P, N	Select P for productive and N for non-productive pay codes.
	Schedule Standard 1	Determines which shift Pay Code is applied to for Shift Equity	D, E, N, O	D = Day code E = Evening code N = Night code O = Pay code has no effect on Shift Equity
Minimum Weekends	Schedule Standard 8	Qualifying Pay Code determination for Minimum Weekend	A, D, E, N, X	A = Code qualifies, any shift D = Code qualifies, Day shift E = Code qualifies, Evening shift N = Code qualifies, Night shift X = Codes does not qualify

To set the pay code indicators, complete the following steps:

1. Select **Configuration > Time and Attendance > Pay Code**.
2. Search for and open the appropriate pay codes.

The appropriate pay codes are those that you want to specifically qualify or disqualify for minimum staffing rules.

3. Click the **Indicators** tab and open the **Schedule Process** card.
4. Using the previous table, select the desired options in the appropriate pay code fields for the minimum staffing rules you are setting up.

5. Click **Save**.
6. If you opened more than one pay code in step 2, click the arrow under Pay Code Navigator to move to the next pay code and repeat steps 3 - 5.

Configure the Assignment Codes

There are four minimum staffing rules that you can configure, which consist of the following assignment codes.

- Minimum Days Off
- Minimum Scheduled Hours
- Minimum Shift Equity
- Minimum Weekends

In addition, you can apply a standard minimum staffing rule to all organization units that use Staffing and Scheduling or modify a rule for specific organization units by replicating a standard assignment code. Replicating an assignment code creates a copy of an existing one, which you modify.

Tip

As with all assignment codes, there is an ALL rule that applies to everyone, which can be enabled at the organization level you choose, such as facility or department. However, if a rule is modified specifically for an organization unit, the ALL rule no longer applies to that organization unit.

Configure the ALL Rule for All Organization Units

To configure an assignment code, complete the following steps. Then move to the section of this guide specific to the assignment code you want to configure.

1. Click **Configuration > Assignments > Assignment Code**.
2. Click in the Assignment Source Code field and then complete either of the following:
 - To view a list of all the minimum schedule assignment codes, type **min**.
 - To view a specific assignment code, scroll through the Field Look Up Values and click the desired code.
3. Click **Search** and then open the desired assignment code.
4. Move to the section of this guide specific to the assignment code you are configuring.

Create a Replicated Rule for Specific Organization Units

To create a replicated assignment code, complete the following steps. Then move to the section of this guide specific to the assignment code you want to configure.

1. Click **Configuration > Assignments > Assignment Code**.
2. Click in the Assignment Source Code field and then complete either of the following:
 - To view a list of all the minimum schedule assignment codes, type **min**.
 - To view a specific assignment code, scroll through the Field Look Up Values and click the desired code.
3. Click **Search** and then open the desired assignment code.
4. Under Actions, click **Replicate**.
5. Enter the desired Effective Date, Code, and Description to identify this replicated assignment code.
6. Click **Save**.
7. Under Assignment Code Sections, click Criteria and then under Assignment Code Actions, click **Add**.

This screen allows you determine which group of employees will be affected by this rule, such as an organization unit or a job class.

8. Enter information into the required fields and any other fields necessary to define the group of employees:

Example

Effective Date: 01/01/2010

Code: 1001

Description: 1001 Employees

Department: 1001

Facility: 1

9. Click **Save** and then under Assignment Code Sections, click **General**.
10. Move to the section of this guide specific to the assignment code you are configuring.

Minimum Days Off

After opening the ALL or replicated Minimum Days Off assignment code, complete the following steps.

- Using the following table, enter the appropriate information on the Indicators and Parameters tabs.

Tip

If you are not using a parameter, leave the field blank.

- Click **Save**.

Indicator or Parameter	Description	Options	Notes
I: Schedule Standard 1	Minimum Days Off processing determination	Y, N	Select Y to enable the Minimum Days Off rule.
P: Schedule Standard Integer 1	Minimum Days Off Period Length (in weeks)	Any numeric value	The number of weeks used to determine whether rule is violated, such as minimum 4 days off every 2 weeks.
P: Schedule Standard Integer 2	Minimum Days Off	Any numeric value	The minimum number of days off required in the period (set with the previous parameter), such as minimum 4 days off every 2 weeks.
P: Schedule Standard Integer 3	Minimum Consecutive Days Off	Any numeric value	Use if there is a required number of days off in a row, such as an employee must have 2 days off in a row.

Minimum Scheduled Hours

After opening the ALL or replicated Minimum Scheduled Hours assignment code, complete the following steps.

- Using the following table, enter the appropriate information on the Indicators and Parameters tabs.

Tip

Using the appropriate indicators, you can enable more than one method of minimum staffing rule processing.

Tip

If you are not using a parameter, leave the field blank.

2. Click **Save**.**Note**

For more information about which indicators and parameters to set, see the Minimum Scheduled Hours Explanation section that follows this table.

Indicator or Parameter	Description	Options	Notes
I: Schedule Standard 1	Minimum Approved Hours: Weekly/Bi-Weekly processing determination	Y, N	Select Y to enable the rule using approved hours during a weekly/biweekly period.
I: Schedule Standard 2	Minimum Approved Hours: Daily processing determination	Y, N	Select Y to enable the rule using the daily hours from employees' labor distributions.
I: Schedule Standard 3	Determines Minimum Approved Hours period day of week	1 - 7	If your pay periods are monthly or semi-monthly, select 1 - 7 to define the day of the week that begins your approved hours period.
I: Schedule Standard 4	Minimum Approved Hours: Schedule Period processing determination	Y, N	Select Y to enable the rule using approved hours during the schedule period.
P: Schedule Standard Date 1	Minimum Approved Hours Period Date	Any calendar date	Select a date corresponding to the beginning of a schedule period.
P: Schedule Standard Hour 1	Weekly/Bi-Weekly Approved Hours	Any numeric value	A value used to determine whether approved hours (from home labor distribution) are evaluated weekly or biweekly.
P: Schedule Standard Hour 2	Schedule Period Approved Hours	Any numeric value	The minimum number of hours in a schedule period used to determine whether the rule is violated.
P: Schedule Standard Integer 1	Weekly/Bi-Weekly Minimum Approved Hours Allowed Variance (minutes)	Any numeric value	The weekly or biweekly variance (in minutes) that determines whether the rule is violated.

Indicator or Parameter	Description	Options	Notes
P: Schedule Standard Integer 2	Daily Minimum Approved Hours Allowed Variance (minutes)	Any numeric value	The daily variance (in minutes) that determines whether the rule is violated.
P: Schedule Standard Integer 3	Schedule Period Minimum Approved Hours Allowed Variance (minutes)	Any numeric value	The schedule period variance (in minutes) that determines whether the rule is violated.
P: Schedule Standard Integer 4	Approved Hours Period Length (in weeks)	Any numeric value	The length (in weeks) of your approved hour periods within a schedule period.

Minimum Scheduled Hours Explanation

Minimum Scheduled Hours rules can be created for daily, weekly/biweekly, or schedule period approved hours. The following provides additional information about setting up the rules. The indicators and parameters referenced are the same as those found in the previous table.

Daily

- Set indicator Schedule Standard 2 to enable the rule.
- If needed, set parameter Schedule Standard Integer 2 to allow a variance when determining rule violations.

Example

Employees have 8 daily approved hours. Without a variance, total scheduled time on a day must be 8 or more hours or the rule is violated. However, you set the variance to 30 (minutes). With the variance, as long as an employee has 7.5 or more hours of scheduled time, the rule is not violated.

Weekly/Biweekly

- Set indicator Schedule Standard 1 to enable the rule.
- Set parameter Schedule Standard Hour 1 to determine whether the rule should evaluate approved hours weekly or biweekly when determining rule violations.

Example

On their labor distribution records, your employees have 80 Approved Hours. To make the rule evaluate approved hours on a biweekly basis, set parameter Schedule Standard Hour 1 to a lower number, such as 70.

To make the rule evaluate approved hours on a weekly basis, set the parameter to higher number, such as 90. In this case, since the Approved Hours (80) are less than the parameter value (90), the system will divide the Approved Hours by 2 to determine the weekly approved hours. $80/2 = 40$ hours per week of required scheduled hours.

- If needed, set parameter Schedule Standard Integer 1 to allow a variance when determining rule violations.

Example

Employees have 80 approved hours with biweekly evaluation. Without a variance, they must have 80 or more hours of scheduled time or the rule is violated. However, you set the variance to 120 (minutes). With the variance, as long as an employee has 78 or more hours of scheduled time, the rule is not violated.

Example

Employees have 80 approved hours with weekly evaluation. Without a variance, they must have 40 or more hours of scheduled time per week or the rule is violated. However, you set the variance to 90 (minutes). With the variance, as long as an employee has 38.5 or more hours of scheduled time, the rule is not violated.

- Set parameter Schedule Standard Date 1 to the date of a schedule period start date.
- If your pay periods are monthly or semi-monthly, set indicator Schedule Standard 3.

Note

For more information about setting parameter Schedule Standard Date 1 and indicator Schedule Standard 3, see the Period Determination document or contact symplr Customer Support by creating a case on Client Connections.

Schedule Period

- Set indicator Schedule Standard 4 to enable the rule.
- Set parameter Schedule Standard Integer 4 to define the length (in weeks) of your approved hour periods within a schedule period. This is used to break up a schedule period into smaller periods for easier use; however, the hours from the smaller periods still accumulate toward the schedule period total hours.

Example

Your schedule periods are six weeks. You set this parameter to 2 (weeks) so that the schedule period is broken into three shorter periods.

- Set the parameter Schedule Standard Hour 2 to the number of minimum approved hours for a schedule period.
- If needed, set parameter Schedule Standard Integer 3 to allow a variance when determining rule violations.

Example

Employees have 240 approved hours in a schedule period of six weeks. Without a variance, total scheduled time in a pay period must be 240 or more hours or the rule is violated. However, you set the variance to 180 (minutes). With the variance, as long as an employee has 237 or more hours of scheduled time, the rule is not violated.

Minimum Shift Equity

After opening the ALL or replicated Minimum Shift Equity assignment code, complete the following steps.

1. Using the following table, enter the appropriate information on the Indicators and Parameters tabs.

Tip

Using the appropriate indicators, you can enable more than one method of minimum staffing rule processing.

Tip

If you are not using a parameter, leave the field blank.

2. Click **Save**.

Indicator or Parameter	Description	Options	Notes
I: Schedule Standard 1	Minimum Shift Equity: Number of Schedules processing determination	Y, N	Select Y to enable the rule using a number of schedules, such as two schedules in a schedule period must be as night shifts. Works with parameters Schedule Standard Integer 1 - 3.

Indicator or Parameter	Description	Options	Notes
I: Schedule Standard 2	Minimum Shift Equity: Percentage of Hours processing determination	Y, N	Select Y to enable the rule using a percentage of hours, such as 20% of hours need to be as night shifts. Works with parameters Schedule Standard Percent 1 - 3.
I: Schedule Standard 3	Primary shift determination	D (day), E (evening), N (night)	Select the option for the shift that is considered primary. Works with parameters Schedule Standard Integer 4 & 5 or Schedule Standard Percent 4 & 5.
P: Schedule Standard Integer 1	Minimum Number Of Day Schedules per Schedule Period	Any numeric value	Works with indicator Schedule Standard 1.
P: Schedule Standard Integer 2	Minimum Number Of Evening Schedules per Schedule Period	Any numeric value	Works with indicator Schedule Standard 1.
P: Schedule Standard Integer 3	Minimum Number Of Night Schedules per Schedule Period	Any numeric value	Works with indicator Schedule Standard 1.
P: Schedule Standard Integer 4	Minimum Number Of Primary Shift Schedules per Schedule Period	Any numeric value	Works with indicator Schedule Standard 3.
P: Schedule Standard Integer 5	Minimum Number Of Off-Shift Schedules per Schedule Period	Any numeric value	The minimum number of non-primary shift schedules per schedule period. Works with indicator Schedule Standard 3.
P: Schedule Standard Percent 1	Minimum Percentage of Day Schedule Hours per Schedule Period	Any numeric value 1 - 100	Works with indicator Schedule Standard 2.

Indicator or Parameter	Description	Options	Notes
P: Schedule Standard Percent 2	Minimum Percentage of Evening Schedule Hours per Schedule Period	Any numeric value 1 - 100	Works with indicator Schedule Standard 2.
P: Schedule Standard Percent 3	Minimum Percentage of Night Schedule Hours per Schedule Period	Any numeric value 1 - 100	Works with indicator Schedule Standard 2.
P: Schedule Standard Percent 4	Minimum Percentage of Primary Schedule Hours per Schedule Period	Any numeric value 1 - 100	Works with indicator Schedule Standard 3.
P: Schedule Standard Percent 5	Minimum Percentage of Off-Shift Schedule Hours per Schedule Period	Any numeric value 1 - 100	The minimum percentage of non-primary schedule hours per schedule period. Works with indicator Schedule Standard 3.

Minimum Weekends

After opening the ALL or replicated Minimum Weekends assignment code, complete the following steps.

- Using the following table, enter the appropriate information on the Indicators and Parameters tabs.

Tip

Using the appropriate indicators, you can enable more than one method of minimum staffing rule processing.

Tip

If you are not using a parameter, leave the field blank.

- Click **Save**.

Indicator or Parameter	Description	Options	Notes
I: Schedule Standard 1	Minimum Weekend: Minimum Schedules processing determination	Y, N	Select Y to enable the rule using a minimum number of weekend schedules in a schedule period. Works with parameter Schedule Standard Integer 2.
I: Schedule Standard 2	Minimum Weekend: Minimum Weekends processing determination	Y, N	Select Y to enable the rule using a minimum number of weekends. Works with indicator Schedule Standard 3.
I: Schedule Standard 3	Qualifying Weekend determination	B, C, L, N	These values define a qualifying weekend and determine whether an employee meets the minimum number of weekends. See the Qualifying Weekend Determination subsection that follows this table.
P: Schedule Standard Alpha 1	Weekend Schedule Determination	H, L, P, S or any combination (such as, HS or PS)	These values determine which schedules are considered weekend schedules. See the Weekend Schedule Determination subsection that follows this table.
P: Schedule Standard DOW 1	Weekend Start Day of Week	Any day of the week	Select the day that your weekend begins.
P: Schedule Standard DOW 2	Weekend End Day of Week	Any day of the week	Select the day that your weekend ends.
P: Schedule Standard Hour 1	Minimum Hours Overlap	Any numeric value	The minimum number of hours a schedule has to overlap a weekend day for it to count toward the rule.
P: Schedule Standard Hour 2	Minimum Schedule Length	Any numeric value	The minimum length that a schedule needs to be for it to count toward the rule.

Indicator or Parameter	Description	Options	Notes
P: Schedule Standard Integer 1	Minimum Weekends in Schedule Period	Any numeric value	The minimum number of weekends in a schedule period that need to have schedules to satisfy the rule.
P: Schedule Standard Integer 2	Minimum Weekend Schedules in Schedule Period	Any numeric value	The minimum number of weekend schedules needed in a schedule period to satisfy the rule. Works with indicator Schedule Standard 1.
P: Schedule Standard Integer 3	Minimum Weekends Shifts in a Weekend Period	Any numeric value	The minimum number of weekend shifts needed in a weekend to satisfy the rule. Works with indicator Schedule Standard 3.
P: Schedule Standard Time 1	Weekend Start Time	Any time of day, in 24-hour format	The time that your weekend begins.
P: Schedule Standard Time 2	Weekend End Time	Any time of day, in 24-hour format	The time that your weekend ends.
P: Schedule Standard Percent 1	Minimum Percentage Overlap	Any numeric value 1 - 100	The percentage that a schedule has to overlap a weekend day for it to count toward the rule.

Qualifying Weekend Determination

This section helps you understand the indicator Schedule Standard 3, "Qualifying Weekend Determination." This indicator determines whether an employee's weekend schedules qualify to satisfy the rule.

The options for this indicator are: B, C, L, and N. This indicator works with parameters Schedule Standard Integer 1 and Schedule Standard Integer 3.

Indicator Option	Definition	See Example #
B	Qualifying Weekends are defined by the Consecutive Same Shifts method	1
C	Qualifying Weekends are defined by the Consecutive Days method	2

Indicator Option	Definition	See Example #
L	Qualifying Weekends are defined by the Same Shift method	3
N	Qualifying Weekends are defined by the Number of Qualifying Weekend Schedules method	4

Example

Weekend = 00:00 Saturday to 23:59 Sunday

Parameter Schedule Standard Integer 1, "Minimum Weekends in Schedule Period" = 2

Parameter Schedule Standard Integer 3, "Minimum Weekend Shifts in a Weekend Period" = 2

Activity Codes used in examples: 0700-8 (07:00 for 8 hours, DAY) and 1500-8 (15:00 for 8 hours, EVE)

Schedule Period = 4 weeks (four sets of Saturdays and Sundays are used in the tables)

Qualifying schedules are in **bold**.

Examples

1. Consecutive Same Shifts method - consecutive days and same shifts (Day, Eve, Night) for the weekend

Saturday1	Sunday1	Sat2	Sun2	Sat3	Sun3	Sat4	Sun4	Qualified?
0700-8	0700-8			0700-8	0700-8			Yes
1500-8		0700-8	0700-8		1500-8	0700-8	0700-8	Yes
0700-8	1500-8			0700-8	0700-8	1500-8	1500-8	Yes
0700-8	0700-8	0700-8		0700-8		0700-8	1500-8	No

2. Consecutive Days method - consecutive days and any shifts for the weekend

Saturday1	Sunday1	Sat2	Sun2	Sat3	Sun3	Sat4	Sun4	Qualified?
0700-8	0700-8			0700-8	1500-8			Yes
1500-8		0700-8	1500-8		0700-8	1500-8	0700-8	Yes
	1500-8	0700-8		0700-8	0700-8	1500-8		No

3. Same Shift method - any days and same shifts for the weekend

Saturday1	Sunday1	Sat2	Sun2	Sat3	Sun3	Sat4	Sun4	Qualified?
0700-8	0700-8			0700-8	0700-8			Yes

Saturday1	Sunday1	Sat2	Sun2	Sat3	Sun3	Sat4	Sun4	Qualified?
0700-8		0700-8	0700-8	1500-8	1500-8		0700-8	Yes
	0700-8	0700-8	1500-8	0700-8	0700-8	0700-8		No

4. Number of Qualifying Weekend Schedules method - any days and any shifts for the weekend

Saturday1	Sunday1	Sat2	Sun2	Sat3	Sun3	Sat4	Sun4	Qualified?
0700-8	1500-8			0700-8	0700-8			Yes
	1500-8	1500-8	0700-8	0700-8		0700-8	0700-8	Yes
	0700-8	1500-8		1500-8	0700-8		1500-8	No

Weekend Schedule Determination

This section helps you understand the parameter Schedule Standard Alpha 1, "Weekend Schedule Determination." This parameter defines exactly what you consider a weekend schedule to be.

The options for this parameter are: H, L, P, S, and any combination of these. To combine determination methods, enter the letter combination in the Schedule Standard Alpha 1 field without spaces or punctuation, such as HS or PS.

Parameter Option	Definition	Works With	See Example #
H	Minimum Hours Overlap	P: Schedule Standard Hour 1 and day & time parameters	1
L	Minimum Schedule Length	P: Schedule Standard Hour 2 and day & time parameters	2
P	Minimum Percentage Overlap	P: Schedule Percentage Overlap and day & time parameters	3
S	Starts Within	P: Schedule Standard DOW 1 & 2 and Schedule Standard Time 1 & 2	4

Example:

1. H = 4, weekend starts at 23:00 on Friday

Schedule = 19:00 for 8 hours	Overlaps by 4 hours	Qualifies
Schedule = 19:00 for 6 hours	Overlaps by 2 hours	Does not qualify

2. L = 8, schedule is on the weekend

Schedule = 08:00 for 8 hours	Qualifies
------------------------------	-----------

Schedule = 08:00 for 6 hours	Does not qualify
------------------------------	------------------

3. P = 50 (50%), weekend starts at 23:00 on Friday

Schedule = 19:00 for 8 hours	Overlaps by 50%	Qualifies
Schedule = 19:00 for 6 hours	Overlaps by 33%	Does not qualify

4. S, weekend starts at 23:00 on Friday and ends at 23:00 on Sunday

Schedule = 23:00 on Friday for 8 hours	Qualifies
Schedule = 19:00 on Friday for 8 hours	Does not qualify
Schedule = 23:00 on Sunday for 8 hours	Does not qualify
Schedule = 19:00 on Sunday for 8 hours	Qualifies

Create a Selection Style

Selection styles define the rules used in many scheduling features, including minimum staffing. Create a Schedule Period Validation selection style for your minimum staffing rules by completing the following steps:

1. Click **Configuration > Scheduling > Selection Styles**.
2. Under Actions, click **Add**.
3. Enter a Code and Description to identify the selection style.
4. In the Type field, select Schedule Period Validation and click **Save**.
5. Under Selection Style Sections, click **Qualification**.
6. Based on the types of minimum staffing rules you are creating, drag the appropriate selections from Available Rules to the Selected Rules area.
7. Click **Save**.

Example

If you are creating Minimum Days Off and Minimum Weekend staffing rules, drag both selections to the Selected Rules area.

Update the Staffing Configuration

After you have created a Schedule Period Validation selection style, add it to the appropriate Staffing Configurations by completing the following steps:

1. Click **Configuration > Scheduling > Staffing Configuration**.
2. Search for and open the appropriate staffing configurations.
The appropriate staffing configurations are for the organization units that you want to add the selection style to.
3. Click in the Schedule Period Validation Selection Style field and then select the appropriate selection style from the Field Look Up Values list.
4. Click **Save**.
5. If you opened more than one staffing configuration in step 2, click the arrow under Staffing Configuration Navigator to move to the next staffing configuration and repeat steps 3 and 4.

Working with Employee Schedule Validations

The employee schedule validation process runs in the background checking for rule violations. The process does not run continuously, however. It runs in approximately one-minute intervals.

When the system determines that a minimum staffing rule is being violated, a message appears to inform you. This section of the guide provides information about where to view the messages and how to force an instant employee schedule validation.

Employee schedule validation violations appear on the following screens:

- Schedule screen
- Employee's Current Schedule screen
- Employee's Self Schedule screen
- Employee's Monthly View screen

Schedule Screen

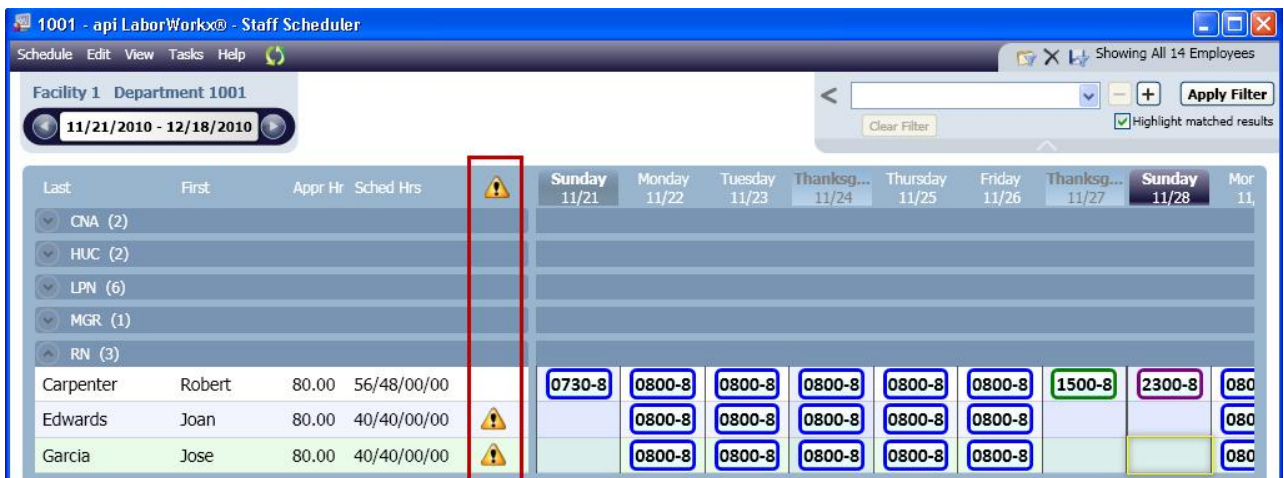
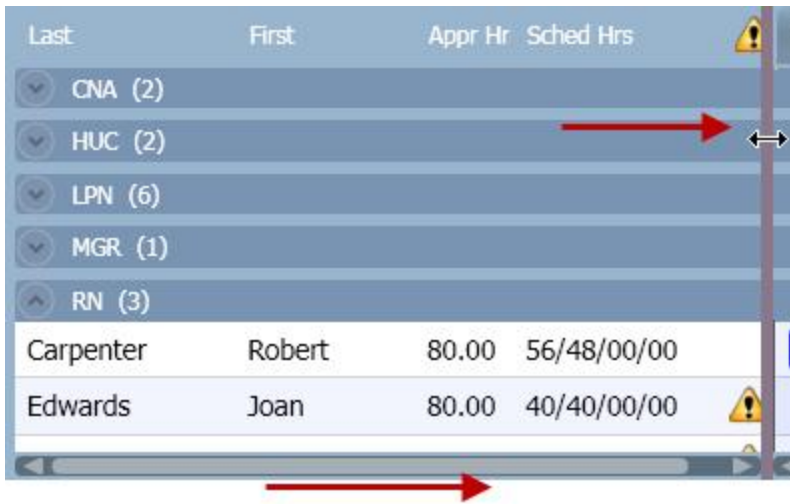
On the schedule screen, violations appear as an exclamation point icon  in the Exceptions column.

Tip

If you do not see the Exceptions column, complete the following steps.

1. Right-click in the employee name area and select **Show/Hide Details**.
The Employee Details Display Configuration dialog appears.
2. Scroll until you see Exceptions in the Field Name column, select **Display In List** and click **Close**.

3. If needed to view the column, use the horizontal scroll or drag the divider.



View All Violations (Exceptions)

- Click the **Employee Schedule Exceptions** tab.
- The total number of exceptions appears in parentheses.
- A list appears with the details of the exceptions, such as employee information and the type of violation.

- The following image informs you that these employees are violating the Minimum Shift Equity rule by not having the required number of day, evening, and night schedules.

Type	Employee	Schedule Period	Stage	Description	Begin Date	End Date
	Jose Garcia	11/21/2010 - 12/18/2010	Open Schedule	Minimum number of Day schedules not met for Schedule Period (Be	11/21/2010	12/18/2010
	Jose Garcia	11/21/2010 - 12/18/2010	Open Schedule	Minimum number of Night schedules not met for Schedule Period (B	11/21/2010	12/18/2010
	Jose Garcia	11/21/2010 - 12/18/2010	Open Schedule	Minimum number of Evening schedules not met for Schedule Period	11/21/2010	12/18/2010
	Joan Edwards	11/21/2010 - 12/18/2010	Open Schedule	Minimum number of Evening schedules not met for Schedule Period	11/21/2010	12/18/2010
	Joan Edwards	11/21/2010 - 12/18/2010	Open Schedule	Minimum number of Night schedules not met for Schedule Period (B	11/21/2010	12/18/2010
	Joan Edwards	11/21/2010 - 12/18/2010	Open Schedule	Minimum number of Day schedules not met for Schedule Period (Be	11/21/2010	12/18/2010

View an Employee's Violations (Exceptions)

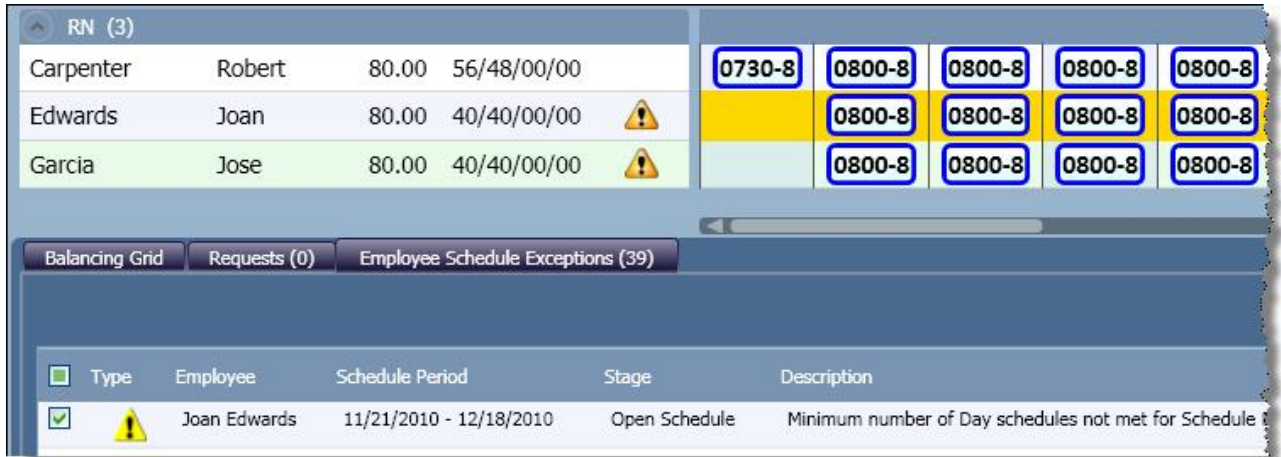
- Click in the appropriate employee's row.
- The employee's violations appear on the **Employee Schedule Exceptions** tab.
- The employee's name appears in the filter field. View all employee exceptions by clicking **X** in the filter field.

Employee	Violations
Carpenter Robert	0730-8, 0800-8, 0800-8, 0800-8, 0800-8, 0800-8, 1500-8, 2300-8, 0800-8
Edwards Joan	0800-8, 0800-8, 0800-8, 0800-8, 0800-8, 0800-8
Garcia Jose	0800-8, 0800-8, 0800-8, 0800-8, 0800-8

Type	Employee	Schedule Period	Stage	Description	Begin Date	End Date
	Joan Edwards	11/21/2010 - 12/18/2010	Open Schedule	Minimum number of Evening schedules not met for Schedule Period	11/21/2010	12/18/2010
	Joan Edwards	11/21/2010 - 12/18/2010	Open Schedule	Minimum number of Day schedules not met for Schedule Period (Be	11/21/2010	12/18/2010

Highlight Affected Period

- To view the period that the violation affects, click a box on the Employee Schedule Exceptions tab.
- The affected period, such as a week or entire the schedule period, appears in yellow in the schedule grid.



Validate Employee Schedule


After making changes, such as adding, editing, and deleting schedules, the employee validation process determines if any minimum staffing rules are violated. However, instead of waiting for the next instance of the process to run, you can force the validation to occur immediately.

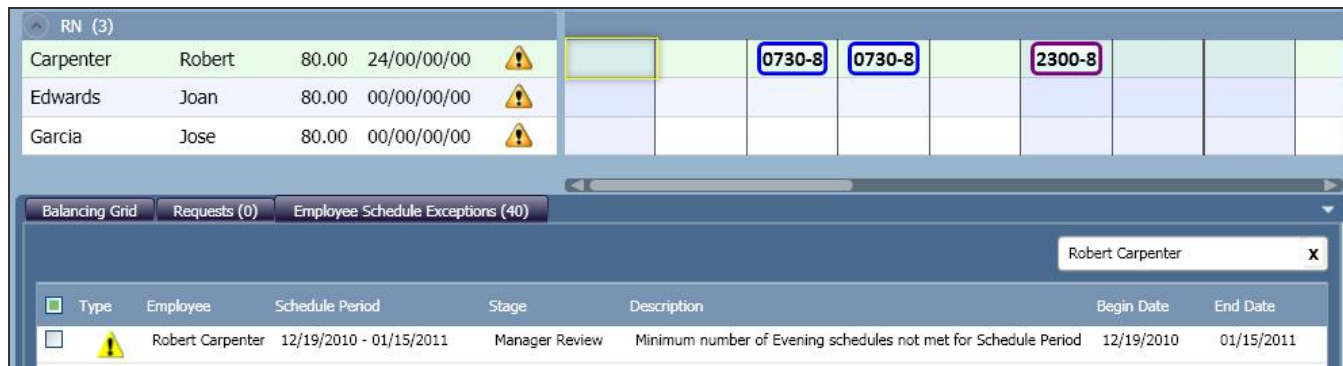
- Right-click on the row for the employee you are validating and click **Validate Employee Schedule**.
- If a violation occurs, the Exceptions column and the **Employee Schedule Exceptions** tab are updated.

Example of a New Violation (Exception)

At this time, Robert Carpenter is not violating the Minimum Shift Equity.



His only evening schedule is deleted. After the validation process completes, the exclamation point icon  appears, and Robert appears in the Employee Schedule Exceptions tab.



Employee Current Schedule and Self Schedule Screens

On the employee's Current Schedule and Self Schedule screens, minimum staffing rule violations appear above the schedule grid. Included in the message is the number of scheduled and required schedules.

Validate Me Now

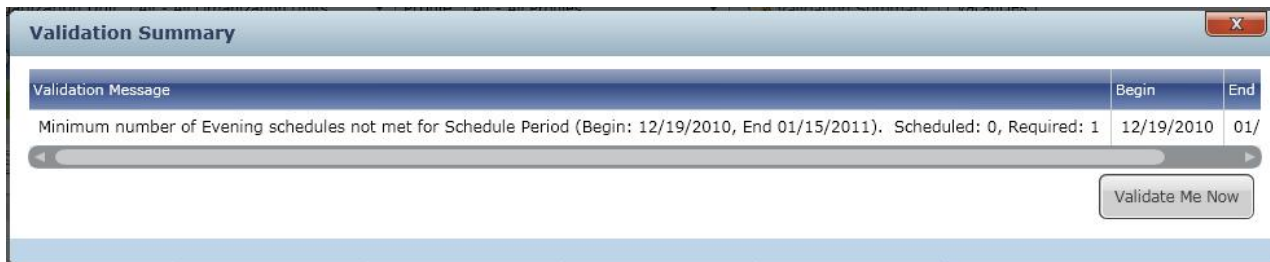
After making changes on the self schedule screen, the employee validation process determines if any minimum staffing rules are violated. However, instead of waiting for the next instance of the process to run, you can force the validation to occur immediately.

- Under Self Scheduling Actions, click **Validate Me Now**.
- If a violation occurs, the appropriate message appears above the schedule grid.

Employee Monthly View Screen

On the employee's Monthly View screen, minimum staffing rule violations appear in the Validation Summary dialog.

- Click the **Validation Summary** button.
- Included in the message is the number of scheduled and required schedules.



Validate Me Now

After making changes on the Monthly View screen, the employee validation process determines if any minimum staffing rules are violated. However, instead of waiting for the next instance of the process to run, you can force the validation to occur immediately.

- Click the **Validation Summary** button and in the dialog that appears, click **Validate Me Now**.
- If a violation occurs, the appropriate message appears in the Validation Summary dialog.

Schedule Overlap Assignment

The Schedule Overlap assignment determines the minimum number of minutes that must elapse between the end time of one employee schedule or class and the beginning time of another employee schedule or class. This is to allow adequate “rest” time between scheduled activities.

The number of minutes required can be different for Core and for Need-based schedules, and between classes and work schedules. This is to allow the creation of back-to-back core schedules for an employee.

Steps to Create a Schedule Overlap Assignment

The following summarizes the steps to create a Schedule Overlap assignment. The steps are described in more detail below.

Step 1: Create a new Assignment Code

- A. Set up the Assignment Code General tab
- B. Set up the Assignment Codes Parameters tab
- C. Select the Qualification Criteria

Step 2: Add the Schedule Overlap validation to the Selection Styles

Step 1A: Set up the Assignment Code General Screen

1. Go to **Configuration > Assignments > Assignment Code**.
2. Click on the **Add** button in the left pane to enter a new record.
3. Enter the date this Assignment Code will be effective.
4. Select the **Standard** option from the Assignment Source Classification field.
5. In the Assignment Source Code field, select **SchedOverlap** from the field look up values.
6. Enter a Code and Description to identify this assignment record.
7. Click **Save**.

Step 1B: Set up the Assignment Codes Parameters tab

To set up the Assignment Code parameters, complete the following steps. If the record is already open, skip to step 3

1. Go to **Configuration > Assignments > Assignment Code**.
2. Search for the record to be set up by entering **SchedOverlap** in the Assignment Source Code field.
3. Click on the **Add** button in the left pane to enter a new record.
4. Select the **Parameters** tab.
5. In the Schedule Standard Integer 1 field, enter the minimum number of minutes that must elapse between a productive schedule and a productive schedule (when scheduled during a core schedule pass).
6. In the Schedule Standard Integer 2 field, enter the minimum number of minutes that must elapse between an education class and a productive schedule (when scheduled during a core schedule pass).
7. In the Schedule Standard Integer 3 field, enter the minimum number of minutes that must elapse between an education class and a productive schedule (when scheduled during a need-based schedule pass).
8. In the Schedule Standard Integer 4 field, enter the minimum number of minutes that must elapse between a productive schedule and a productive schedule (when scheduled during a need-based schedule pass).
9. In the Schedule Standard Integer 5 field, enter the minimum number of minutes that must elapse between a non-productive schedule and a non-productive schedule (when scheduled during a core schedule pass).
10. In the Schedule Standard Integer 6 field, enter the minimum number of minutes that must elapse between a non-productive schedule and a non-productive schedule (when scheduled during a core schedule pass).
11. In the Schedule Standard Integer 7 field, enter the minimum number of minutes that must elapse between a productive schedule and a non-productive schedule (when scheduled during a need-based schedule pass).
12. In the Schedule Standard Integer 8 field, enter the minimum number of minutes that must elapse between a non-productive schedule and a non-productive schedule (when scheduled during a need-based schedule pass).
13. In the Schedule Standard Integer 9 field, enter the minimum number of minutes that must elapse between a non-productive schedule and an education class (when scheduled during a core schedule pass).
14. In the Schedule Standard Integer 10 field, enter the minimum number of minutes that must elapse between a non-productive schedule and an education class (when scheduled during a need-based schedule pass).

Step 1C: Select the Qualification Criteria

1. Click on the **Criteria** section button in the left pane to open a screen to indicate the employees who should be given this assignment.
2. Click on the **Add** button in the left pane.
3. Enter the Effective Date, a Code and a Description to identify this qualification record.
4. Enter the criteria options to identify employees who should be given this assignment.

The criteria options that are available on this screen are selected on **Assignment Source > Assignment Determination** for SchedOverlap. Additional selection criteria can be added to that record, and then will be available on the Criteria screen.

5. Click on **Save**.
6. To add additional groups of employees to this assignment, click on the **Add** button again and enter the qualification criteria. The groups awarded to this assignment are displayed on cards in the right pane.

Step 2: Add the Schedule Overlap Validation to the Selection Styles

The Schedule Overlap rule must be selected as one of the validations in the selection style for this rule to work.

1. From **Configuration > Scheduling**, select the **Selection Styles** page.
2. Open the selection style being used with the automatic scheduling process and/or manual process.
3. Open a scheduling pass.
4. Point the cursor to the Schedule Overlap rule in the Available Rules column. Hold down the left mouse button and drag the rule to the Selected Rules column.
5. Repeat steps 3-4 for each pass to be validated.
6. Click **Save**.

Scheduled Hours Assignment

The Scheduled Hours assignment is used to indicate whether the system will validate an employee's daily or weekly overtime hours and/or daily or bi-weekly approved hours when an employee is assigned an activity code that accumulates towards these values.

This rule also determines if employees can be scheduled above their approved hours value and/or their overtime hours value. For example, if staff numbers are low, this feature can be used to schedule employees a certain number of extra hours.

This rule also determines the cutoff of when the pay period approved hours value is split into equal values for each week. For example, if an employee has approved bi-weekly hours value of 60, a setting indicates whether the employee can only be scheduled up to 30 hours in each week, or whether the employee can be scheduled 40 hours one week and 20 hours the next.

This rule also determines the cutoff of when the overtime hours value is treated as a weekly value, rather than a bi-weekly value.

Steps for Creating a Scheduled Hours Assignment

The following summarizes the steps to create a Scheduled Hours assignment. The steps are described in more detail below.

Step 1: Create a new Assignment Code

- A. Set up the Assignment Code General tab
- B. Set up the Assignment Code Indicators tab
- C. Set up the Assignment Code Parameters tab
- D. Select the Qualification Criteria

Step 2: Add the Approved Hours/Overtime Hours validation to the Selection Styles

Step 3: Set up Activity Codes to accumulate toward weekly overtime and approved hours

Step 4: Set up Pay Codes to accumulate toward weekly overtime and approved hours

Step 1A: Set up the Assignment Code General tab

1. Go to **Configuration > Assignments > Assignment Code**.
2. Click on **Add** to enter a new record.
3. Enter the date this Assignment Code will be effective.
4. Select the **Standard** option from the Assignment Source Classification field.
5. In the Assignment Source Code field, select **SchedHours** from the field look up values.
6. Enter a Code and Description to identify this assignment record.
7. Click **Save**.

Step 1B: Set up the Assignment Codes Indicator tab

1. Click on the **Indicators** tab.
2. Under Schedule Standard 1, enter **Y** to validate the scheduled hours by the employees' Approved Hours value.
3. Under Schedule Standard 2, enter **Y** to validate the scheduled hours by the employees' Daily Hours value.
4. Under Schedule Standard 3, enter **Y** to validate the overtime hours by the employees' Weekly/Pay Period Overtime value.
5. Under Schedule Standard 4, enter **Y** to validate the overtime hours by the employees' Daily Overtime Hours value.

6. Under Schedule Standard 5, enter the number corresponding to the day of the week where the Overtime/Approved Hours validation is started.
7. Under Scheduled Standard 6, enter **Y** to validate the scheduled hours by the Scheduled Hours Approved Hours value.

When this indicator is set to **Y**, it works in conjunction with the following parameters (found on the Parameters tab).

- **Schedule Process > Schedule Standard Hour 3** (schedule period approved hours)
- **Schedule Process > Schedule Standard Integer 5** (determines the number of weeks in the schedule period)
- **Schedule Process > Schedule Standard Integer 6** (determines if there is a variance allowed)

Step 1C: Set up the Assignment Codes Parameters tab

1. Select the **Parameters** tab.
2. The Schedule Standard Hour 1 field is used to determine if the employee's Approved Hours should be validated for the entire bi-weekly time frame or if each week should be independently evaluated. Enter the cutoff value which indicates the point where approved hours are split equally between the two weeks. For example, if this value is set to 65, when the employee's approved hours value is LESS THAN 65, the employee's approved hours value is multiplied by .5 and the employee can be scheduled up to 32.5 hours for each week. If the employee approved hours are GREATER THAN OR EQUAL TO 65, the hours can be distributed across the pay period.

Note

The Approved Hours value in the employee record is always a pay period value.

3. The Schedule Standard Hours 2 field is used to determine if the employee's Overtime Hours value is a weekly value or a bi-weekly value. If the hours in the employee record are GREATER THAN OR EQUAL TO this cutoff value, the employee hours are considered to be a bi-weekly value. When the hours in the employee record are LESS THAN this value, they are considered to be a weekly value. For example, if the cutoff is set to 45, and the overtime hours in an employee record is 40, this value is considered to be 40 hours in one week. If the cutoff value was set to 39, the 40 hours would be considered to be a bi-weekly overtime value, and the employee would only be scheduled for 40 hours per pay period.
4. The Schedule Standard Hours 3 field is used to set the number of approved hours in the schedule period that an employee can be scheduled for.

This parameter works in conjunction with:

- Schedule Process indicator Schedule Standard 6 (when set to **Y**)
- Schedule Standard Integer 5 (determines the number of weeks in the schedule period; see below for information)

- Schedule Standard Integer 6 (determines if there is a variance; see below for information)
5. In the Schedule Standard Integer 1 field, enter the number of minutes above the employees' Weekly or Bi-Weekly Approved Hours value that the employee is able to be scheduled.

Note

When using the Weekly Approved Hours check, this is the number of minutes each week that the employee can be scheduled above the approved hours value.

6. In the Schedule Standard Integer 2 field, enter the number of minutes per day an employee is authorized to work beyond his/her Daily Approved Hours value.
7. In the Schedule Standard Integer 3 field, enter the number of minutes above the employee's Weekly/Bi-Weekly Overtime Hours value that he/she is able to be scheduled.
8. In the Schedule Standard Integer 4 field, enter the number of minutes per day an employee is authorized to work beyond his/her Daily Overtime Hours value.
9. In the Schedule Standard Integer 5 field, enter the number of weeks in the schedule period.
To help determine this parameter's value, look to the organization unit's Staffing Configuration to find out the number of weeks in the schedule period.

This parameter works in conjunction with:

- Schedule Process indicator Schedule Standard 6 (when set to **Y**)
 - Schedule Standard Hour 3 (determines the number of approved hours in the schedule period; see above for information)
 - Schedule Standard Integer 6 (determines if there is a variance; see below for information)
10. In the Schedule Standard Integer 6 field, enter the number of minutes above the schedule period's approved hours that an employee can be scheduled for. This can be left blank or set to **0** if no variance is allowed.

This parameter works in conjunction with:

- Schedule Process indicator Schedule Standard 6 (when set to **Y**)
- Schedule Standard Hour 3 (determines the number of approved hours in the schedule period; see above for information)
- Schedule Standard Integer 5 (determines the number of weeks in the schedule period; see above for information)

Step 1D: Select the Qualification Criteria

1. Click on the **Criteria** section button in the left pane to open a screen to indicate the employees who should be given this assignment.
2. Click on the **Add** button in the left pane.
3. Enter an Effective Date, a Code and Description to identify this qualification record.

4. Enter the criteria options to identify employees who should be given this assignment.
The criteria options that are available on this screen are selected on **Assignment Source > Assignment Determination** for SchedHours. Additional selection criteria can be added to that record, and then will be available on the Criteria screen.
5. Click on **Save**.
6. To add additional groups of employees to this assignment, click on the **Add** button again and enter the qualification criteria. The groups awarded to this assignment are displayed on cards in the right pane.

Step 2: Add the Scheduled Hours validation to the Selection Styles

The Overtime Hours and/or Approved Hours rules must be selected as one of the validations in the selection style for these rules to work.

1. From **Configuration > Scheduling**, select the **Selection Styles** page.
2. Open the selection style being used with the automatic scheduling process and/or manual process.
3. Open a scheduling pass.
4. To validate the daily and/or pay period approved hours, point the cursor to the Approved Hours rule in the Available Rules column. Hold down the left mouse button and drag the rule to the Selected Rules column.
5. To validate the daily and/or pay period overtime hours, point the cursor to the Overtime Hours rule in the Available Rules column. Hold down the left mouse button and drag the rule to the Selected Rules column.
6. Repeat steps 3-4 for each pass to be validated. Save the record.

Step 3: Set up activity codes to accumulate toward weekly overtime and approved hours

1. From **Configuration > Scheduling** open the **Activity Code** screen.
2. Open the activity code record to be configured.
3. Click on the **Indicators** tab, then open the **Schedule Process** card.
4. Activity Code Indicator Schedule Standard 4 determines whether the hours assigned to an employee with this activity code should accumulate towards an employee's Overtime values. Set this value to **Y** if the activity code SHOULD accumulate towards overtime.

Note

The default setting for this indicator is set to **N**, unless it has been updated in the Indicators screen.

5. Activity Code Indicator Schedule Standard 5 determines whether the hours assigned to an employee with this activity code should accumulate towards an employee's Approved Hours values. Set this value to **Y** if the activity code SHOULD accumulate towards overtime.

Note

The default setting for this indicator is set to **Y**, unless it has been updated in the Indicators screen.

Step 4: Set up pay codes to accumulate toward weekly overtime and approved hours

1. From **Configuration > Time and Attendance** open the **Pay Code** screen.
2. Open the pay code record to be configured.
3. Click on the **Indicators** tab, then open the **Schedule Process** card.
4. Pay Code Indicator Schedule Standard 3 determines whether the hours assigned to an employee with this pay code should accumulate towards an employee's Approved Hours values. Set this value to **Y** if the pay code SHOULD accumulate towards overtime.

Note

The default setting for this indicator is set to **N**, unless it has been updated in the Indicators screen.

5. Pay Code Indicator Schedule Standard 4 determines whether the hours assigned to an employee with this pay code should accumulate towards an employee's Overtime Hours values. Set this value to **Y** if the activity code SHOULD accumulate towards overtime.

Note

The default setting for this indicator is set to **N**, unless it has been updated in the Indicators screen.

Employee Record Validation

The SchedHours assignment assigned to an employee is based on the employee's Home Labor distribution. The variance settings allowed are taken from this assignment. The values that are used during the Approved Hours and Overtime Hours rules validations are based on the labor distribution record of the position being validated, which may be either a Primary Home, Alternate Home, or Alternate position, found in **Employee > Labor Distribution**.

- Daily Overtime is validated from the Daily Overtime Hours field.
- Weekly/Bi-Weekly Overtime is validated from the Weekly Overtime Hours field
- Daily Approved hours is validated from the Daily Hours field.
- Bi-Weekly approved hours is validated from the Approved Hours field.

Shift Equity Assignment

The Employee Shift Equity Assignment is used when employees are required to work a certain number of activities on the day shift, the evening shift and/or the night shift. Activity codes and pay codes are set up so that the system knows which shift they count toward.

Steps for Creating a Shift Equity Assignment

The following summarizes the steps to create a Shift Equity assignment. The steps are described in more detail below.

Step 1: Create a new Assignment Code

- A. Set up the Assignment Code General tab
- B. Set up the Assignment Code Indicator tab
- C. Set up the Assignment Codes Parameters tab
- D. Select the Qualification Criteria

Step 2: Set up Activity Codes to indicate assigned shifts

Step 3: Set up Pay Codes to indicate assigned shifts

Step 4: Add the Shift Equity validation to the Selection Style

1A: Set up the Assignment Code General tab

1. Go to **Configuration > Assignments > Assignment Code**.
2. Click on **Add** button in the left pane to enter a new record.
3. Enter the date this Assignment Code will be effective.
4. Select the **Standard** option from the Assignment Source Classification field.
5. In the Assignment Source Code field, select **Shift Equity** from the Field Look Up Values.
6. Enter a Code and Description to identify this shift equity assignment record.
7. Click **Save**.

1B: Set up the Assignment Code Indicator tab

1. With the assignment record open, select the **Indicators** tab.
2. Shift Equity Assignment Code Indicator Schedule Standard 1 indicates whether this assignment uses the Shift Equity rule.
 - When this indicator is set to **Y**, Shift Equity rules are validated when processing schedules for employees in this assignment.
 - When this indicator is set to **N**, Shift Equity rules are not validated when processing schedules for employees in this assignment.
3. Click **Save**.

1C: Set up the Assignment Codes Parameters tab

1. From the open record, select the **Parameters** tab.
2. In the Shift Equity Assignment Code Parameter Schedule Standard Integer 1 field, enter the number of Day shift activity codes that can be assigned within a pay period to employees in this assignment.
3. In the Shift Equity Assignment Code Parameter Schedule Standard Integer 2 field, enter the number of Evening shift activity codes that are coded as Evening shifts that can be assigned within a pay period to employees in this assignment.
4. In the Shift Equity Assignment Code Parameter Schedule Standard Integer 3 field, enter the number of Night shift activity codes that can be assigned within a pay period to employees in this assignment.
5. Click **Save**.

As an example, employees are able to be assigned four day shift schedules, three evening shift schedules and three night shift schedules within a pay period. Activity Code Indicator Schedule Standard 2 determines which shift the activity code belongs to.

1D: Select the qualification criteria on the Assignment Codes Criteria screen

1. Click on the **Criteria** section button in the left pane to open a screen to indicate the employees who should be given this assignment.
2. Click on the **Add** button in the left pane.
3. Enter an Effective Date, a Code and Description to identify this qualification record.
4. Enter the criteria options that identify employees who should be given this assignment.

The criteria options that are available on this screen are selected on **Assignment Source > Assignment Determination** for Shift Equity. Additional selection criteria can be added to that record, and then will be available on the Criteria screen.

5. Click on **Save**.
6. To add additional groups of employees to this assignment, click on the **Add** button again and enter the qualification criteria. The groups awarded to this assignment are displayed on cards in the right pane.

Step 2: Set up Activity Codes to indicate assigned shifts

When using the Shift Equity rule, the activity codes must be configured to indicate which of the three shifts the activity counts toward. Each activity code can only count toward one shift.

Note

Any activity code that is set to **O** is not counted when assigning shifts. Any number of these activity codes can be assigned to the employee. Therefore, when using the shift equity rule you may want to limit the activity codes that can be assigned to specific profile codes via the **Activity Codes** section button on the Profiles screen (**Configuration > Labor Distribution > Profiles > Activity Codes**).

1. In **Configuration > Scheduling > Activity Code**, open the activity code record to configure.
2. Click on the **Indicators** tab.
3. Activity Code Indicator Schedule Standard 2 determines whether the activity code is for days, evenings, or nights, or whether it does not count toward shift equity. Select the appropriate code from the list in the left pane.
4. Click **Save**.

Step 3: Set up Pay Codes to indicate assigned shifts

When using the Shift Equity rule, the pay codes must be configured to indicate which of the three shifts the activity counts toward. Each pay code can only count toward one shift.

Note

Any pay code that is set to **O** is not counted when assigning shifts. Any number of these pay codes can be assigned to the employee.

1. In **Configuration > Time and Attendance > Pay Code**, open the pay code record to configure.
2. Click on the **Indicators** tab.
3. Pay Code Indicator Schedule Standard 1 determines whether the pay code counts towards the day shift, evening shift, night shift, or whether it does not count toward shift equity. Select the appropriate code from the list in the left pane.
4. Click **Save**.

Step 4: Add the Shift Equity validation to the Selection Style

The Shift Equity rule must be selected as one of the validations in the selection style for these rules to work.

1. From **Configuration > Scheduling**, select the **Selection Styles** page.
2. Open the selection style being used with the automatic scheduling process or manual process.
3. Open a scheduling pass.
4. Point the cursor to the Shift Equity rule in the Available Rules column. Hold down the left mouse button and drag the rule to the Selected Rules column.
5. Save the record.

Holiday Staffing Assignments

Holiday staffing assignments can be used to automate the process of assigning employees to work holidays. This ensures that the holidays are being fairly distributed. Holiday assignments are given to employees based on their Home Labor Distribution.

If core schedules are not populated on holidays, "need-based" scheduling is used. If the organization does not normally use need-based scheduling (for example, if all employee schedules are core schedules), additional set up may be required to populate the activity codes and employee preferences for these dates. For more information, see [Additional Needs-Based Scheduling Set Up \(on page 109\)](#).

When the system validates the Holiday Rule during scheduling, it determines whether employees are "eligible" to work, which means they are not disqualified based on the holiday assignment settings. For example, with the Every Other Same holiday rule, if an employee worked the same holiday in the previous year, they are not eligible to work that same holiday in the current year--they are disqualified from working. Eligible employees can be scheduled if there is a scheduling opening available for them, and if they meet other scheduling rules, such as overtime or position permissions.

The number of staff required to work a holiday may be more or less than normal staffing, depending on the department. For example, Emergency Room staffing requirements may be higher than normal, but Medical/Surgical staffing requirements may be lower than normal, if routine appointments are not scheduled. Other department staffing requirements may remain unchanged.

- If the staffing needs should NOT be adjusted, but all eligible staff should be scheduled, this can be accomplished by setting the Staffing Level value in the Holiday Passes of the Selection Styles to a value higher than 100% (for example, 150%).
- If the staffing needs should be adjusted on a holiday, these can be changed on the Staffing Plan or Core Staffing Plan. For more information, see [Adjusting the Staffing Plan/Core Staffing Plan for Holidays \(on the next page\)](#).

Note

Changing the Staffing Plan value will change the needs as viewed in the Schedule Needs grid and on reports.

Below is a listing of holiday rules that can be automated. For each rule, there is also the option of incorporating major holiday/minor holiday rotations, for example, X out of Y Major/X out of Y Minor Holidays.

Note

When setting up the ALL assignment for holidays, do not add any selection criteria. This is the assignment that is given to any employees who do not qualify for any other Holiday assignment.

Every Other Holiday Assignment	Employees in this assignment are eligible to work every other holiday. They are assigned to either the A or B holiday schedule.
Every Other Major/Every Other Minor Holiday	Employees in this assignment are eligible to work alternating Major holiday and alternating Minor holiday. Each holiday is specified as major or minor, so there are two rotations of holidays occurring simultaneously. Employees are assigned to work either the A or B holiday schedule.

Every Other Same Holiday Assignment	Employees in this assignment work a specific holiday one year, then the following year they do not work this same holiday. The system checks back to the previous year for the holiday with the same Holiday Category, to determine employee eligibility.
X out of Y Holidays Assignment	Employees in this assignment are eligible to work X out of Y holidays, for example 1 out of 3 holidays, or 2 out of 4 holidays.
Holiday Rotations Assignment	In this assignment, specific holidays are worked by the employees belonging to the assignment. For example, a Holiday 1 rotation assignment works New Year's Day and July 4; Holiday 2 rotation assignment works Memorial Day and Thanksgiving and Holiday 3 rotation assignment works Labor Day and Christmas. Each year the holidays worked in the rotations can be reset to a different rotation.
Maximum Holidays Assignment	The employees in this assignment are eligible to work X holidays in Y years; for example, 3 holidays in 1 year or 5 holidays in 2 years.
No Worked Holidays Assignment	Employees in this assignment do not work any holidays, for example, those that work in departments that are closed on holidays.
Holidays Not Tracked	Employees in this assignment do not have special rules for holidays. Holidays are scheduled like any other day. <div style="border: 1px solid blue; border-radius: 10px; padding: 10px;"> <p>Note</p> <p>This assignment only needs to be set up if there are employees with other holiday assignments being scheduled together, and so the Holiday validation is activated in the Selection Style.</p> </div>

Note

The assignment configuration in this documentation is used for the staffing of holidays only and does not determine any Holiday pay rules.

Adjusting the Staffing Plan/Core Staffing Plan for Holidays

The Staffing Plan or Core Staffing Plan can be adjusted to change the staffing requirements on Holiday dates. This method can be used in departments where the staffing requirements are higher or lower than usual on holidays.

To adjust the staffing needs in the Staffing Plan, complete the following steps:

1. From **Actions > Scheduling**, open the **Staffing Plan** screen.

This screen can also be opened from **Actions > Scheduling > Schedule**. Click on the **Open Staffing Plan** button in the left pane.

2. Enter the Organization Unit of the schedule to be modified.
3. Enter the Start Date and the End Date of the schedule to be modified.
4. If a Default staffing template was selected, those values are automatically loaded.
5. If no default was selected, or to change the Staffing Template loaded, click on the **Apply Staffing Template** button and enter the required information to select a template.
6. The grid is displayed showing the profile and coverage period, and the staffing needs set for each day.
7. To change any of the required staffing level values for any days, highlight the cells and type in the new staffing values in whole and decimal numbers.

Note

This is the number of staff needed, not an FTE (full time equivalent) value. If the coverage period is for 12 hours, this value means the number of staff required to work a 12-hour shift.

8. To change any of the required profile codes for the entire selected date range, click on the down arrow to the right of the profile field and select a new profile.
9. To add new profile/coverage period combinations to the plan, complete the following steps:
 - a. Click on the bottom line of the staffing plan, next to the asterisk.
 - b. Select a profile from the drop-down menu to the right of the field.
 - c. Select a coverage period from the drop-down menu to the right of the field.
 - d. Enter the staffing needs for each day of the entire scheduling period displayed.
10. To delete an entire line in the staffing plan, complete the following steps:
 - a. Click on the gray cell to the left of the line. The entire line is highlighted.
 - b. Press `Delete` on the keyboard.

A message appears verifying the deletion should continue. Select **Yes**.
11. When modifications to all fields have been completed, click **Save**.
12. These new values are automatically loaded to the Needs grid.

Note

To cancel the transaction, click on **Hide Open Staffing Plan**.

To adjust the staffing needs in the Core Staffing Plan, complete the following steps:

1. From **Actions > Scheduling**, select **Core Staffing Plan**.
2. Enter the Organization Unit information.
3. Enter the Start Date and End Date of the scheduling date range.
4. If a Default core staffing template was selected, those values are automatically loaded.

5. If no default was selected, or to change the Core Staffing Template loaded, click on the **Apply Core Staffing Template** button in the left pane to open the information to select a template.
6. To change any of the required staffing level values for any days, highlight the cells and type in the new staffing values in whole and decimal numbers.

Note

This is the number of staff needed, not an FTE (full time equivalent) value. If the coverage period is for 12 hours, this value means the number of staff required to work a 12-hour shift.

7. To add new profile/activity code combinations to the plan, complete the following steps:
 - a. Click on the bottom line of the plan next to the asterisk.
 - b. Select a profile from the drop-down menu to the right of the field.
 - c. Select an activity code from the drop-down menu to the right of the field.
 - d. Enter the staffing needs for each day of the entire scheduling period displayed.
8. To delete an entire line in the staffing plan, complete the following steps:
 - a. Click on the gray cell to the left of the line. The entire line is highlighted.
 - b. Press `Delete` on the keyboard.

A message appears verifying the deletion should continue. Select **Yes**.
9. When modifications to all fields have been completed, click **Save**.

Note

To reload the original staffing values after the updates have been saved, click on the **Apply Staffing Template** button in the left pane. Enter the start and end dates of the date range to be restored and the staffing template code to be loaded.

Every Other Holiday Assignment

The Every Other Holiday assignment is used when employees should be scheduled to work on alternate holidays.

The first holiday worked is determined by the date entered in Every Other Holiday Parameter Schedule Standard Date 1. This is found on **Configuration > Assignment > Assignment Source** on the **Parameters** tab.

The holiday closest to this date is assigned to Schedule A and is eligible to be worked by Schedule A employees. The next holiday would be eligible for Schedule B employees, the following holiday would be eligible for Schedule A, etc.

Employees are assigned to either the Schedule A or the Schedule B assignment in **Employee > General > Indicators > Schedule Process**.

Each assignment needs to track which holiday rotations are Schedule A and which are Schedule B based on the Holiday Parameter Schedule Standard Date 1, so they can assign their employees accordingly. If one assignment has more or less holidays than another department, their A and B holidays would be different. In other words, A and B rotations are not directly linked any holiday itself, but whether the holiday is eligible or ineligible based on the alternating status starting with the holiday nearest to Every Other Holiday Parameter Schedule Standard Date 1. If a new holiday is added in between the existing ones, that one is incorporated into the alternate rotation.

For example: If Every Other Holiday Parameter Schedule Standard Date 1 is set to 12/30/08, the following holiday rotation occurs:

New Year's Day	Schedule A
Memorial Day	Schedule B

If a new holiday is added between the existing holidays, this is the new Schedule A/B rotation:

New Year's Day	Schedule A
President's Day	Schedule B
Memorial Day	Schedule A

Note

If an employee does not work an eligible holiday, they are still not eligible to work the next holiday. In other words, the system does not assign "every other holiday" by whether the employee worked the previous holiday. An employee is eligible to work/not work alternating holidays, starting from the Every Other Holiday Reference Date.

Holidays	Eligible to Work
New Year's 2018	Schedule A
President's Day 2018	Schedule B
Memorial Day 2018	Schedule A
July 4 2018	Schedule B
Labor Day 2018	Schedule A
Thanksgiving 2018	Schedule B
Christmas 2018	Schedule A
New Year's 2019	Schedule B

Note

If there is an even number of holidays in a year, employees will be eligible to work the same holidays each year. Talk with your support representative for strategies to modify the assignment, if desired.

Steps to Create the Every Other Holiday Assignment

The following summarizes the steps needed to configure the Every Other Holiday assignment rule. Click on the links below to view the details of each step.

Step 1: Create Holiday records, if they do not already exist in the system

- A. Set up the Holiday General tab
- B. Set up the Holiday Indicators tab
- C. Set up the Holiday Parameters tab

Step 2: Create a new Assignment Code record

- A. Set up the Assignment Code General tab
- B. Set up the Assignment Code Indicators tab
- C. Set up the Assignment Code Parameters tab
- D. Set up the Assignment Code Criteria screen
- E. Set up the Assignment Code Holiday screen

Step 3: Set up the Every Other Holiday reference date

Step 4: Assign employees to the A or B rotation

Step 5: Enter the employee Holiday Shift Eligibility Date, if applicable

Step 6: Add the Holiday validation to the Selection Styles

Step 1A: Set up the Holiday General Tab**Note**

If holidays that can be used by this assignment are already created in the Holiday table, this step can be skipped. Be sure that the date/time parameters for the start and end of the holiday time frame are the same as required for this assignment.

To enter a new holiday record, complete the following steps.

1. From the **Configuration > Assignments**, select the **Holiday** icon.
2. Click on the **Add** button in the left pane to open a screen to add a new record.
3. Enter a Code and Description to identify this holiday code.
4. Enter the Actual Date of the holiday and the Observed Date when it is observed in the corporation.

5. Enter the Holiday Category Code.

This field is used with the Every Other Same Holiday assignment to match up the same holiday between years, since there may be more than one "Holiday" record for the same holiday and they may have different names.

6. Click **Save**.

The Indicator and Parameter tabs are now available.

Step 1B: Set up the Holiday Indicator Tab

1. Select the **Indicators** tab and open the Schedule Process card by clicking on the arrow.

2. Select the indicator option values from the drop-down listing to set the rules for this particular assignment.

- For this holiday rule, Holiday Indicator Schedule Standard 1 can be left with the default setting of **A**, since all holidays are tracked in one rotation.
- For this holiday rule Holiday Indicator Schedule Standard 2 can be left with the default setting of **Y**.

Note

All holidays selected for this rule must have this value set to **Y**.

3. Click **Save**.

Step 1C: Set up the Holiday Parameter Tab

1. Select the **Parameters** tab and open the **Schedule Process** card by clicking on the arrow.

2. Enter the parameter option values to set the start date/time and the end date/time for the holiday for this assignment.

- In the Holiday Parameter Schedule Standard Date 1 field, enter the starting date of the holiday. The holiday time frame begins on this date on the time defined by Holiday Parameter Schedule Standard Time 1.
- In the Holiday Parameter Schedule Standard Date 2 field, enter the ending date of the holiday. The holiday time frame ends on this date on the time defined by Holiday Parameter Schedule Standard Time 2.
- In the Holiday Parameter Schedule Standard Time 1 field, enter the time the holiday begins on the starting date, defined by Holiday Parameter Schedule Standard Date 1.
- In the Holiday Parameter Schedule Standard Time 2 field, enter the time the holiday ends on the ending date, defined by Holiday Parameter Schedule Standard Date 2.

3. Click **Save**.

Step 2A: Set up the Assignment Code General Tab

1. From **Configuration > Assignments**, select the **Assignment Code** screen.
2. Click on the **Add** button to add a new Assignment Code.
3. Enter the date this Assignment Code will be effective.
4. Select the **Standard** option from the Assignment Source Classification field.
5. In the Assignment Source Code field, select **Holiday** from the field look up values.
6. Enter a Code and Description to identify this holiday assignment record.
7. Click **Save**.

The Indicators and Parameters tabs are now available for set up.

Step 2B: Set up the Assignment Codes Indicators Tab

To set up the Assignment Codes Indicators tab, complete the following steps.

1. Click on the **Indicators** tab, then open the **Schedule Process** card.
2. Set Holiday Assignment Code Indicator Schedule Standard 1 to **Y** to process the selected holidays in this assignment using holiday rules.
3. Set Holiday Assignment Code Indicator Schedule Standard 2 to the proper option of how holiday shifts are determined.
 - If this indicator is set to **H** (hours in holiday), also configure the Holiday Assignment Code Parameter Schedule Standard Hour 1 to indicate the minimum hours that must be in the holiday time frame to consider a shift a holiday shift.
 - If this indicator is set to **P** (percentage of shift in holiday), also configure the Holiday Assignment Code Parameter Schedule Standard Percent 1 to indicate the minimum percentage of a shift that must be in the holiday time frame to consider it a holiday shift.
 - If this indicator is set to **S** (start time), the start time is set up on the Holiday record.
4. Set Holiday Assignment Code Indicator Schedule Standard 3 to **Y** to process the Every Other Holiday Rule.
5. Set Holiday Assignment Code Indicator Schedule Standard 4 to **N**.
6. Set Holiday Assignment Code Indicator Schedule Standard 5 to the proper option to determine if there is a maximum number of schedules that an employee is eligible to work during the holiday time frame.
 - If this indicator is set to **Y** (Yes), also configure Holiday Assignment Code Parameter Schedule Standard Integer 1 to indicate the maximum number of schedules that an employee can work.
 - If this indicator is set to **N** (No), there is no limit to the number of schedules an employee can work during the holiday time frame.
7. Set Holiday Assignment Code Indicator Schedule Standard 6 to **N**.
8. Set Holiday Assignment Code Indicator Schedule Standard 7 to **N**.

9. Set Holiday Assignment Code Indicator Schedule Standard 8 to **N**.
10. Set Holiday Assignment Code Schedule Standard 9 to the option to determine if productive core rotating schedules should be populated on holidays if the employee is eligible to work.
 - If this indicator is set to **Y** (Yes) employees are scheduled their core schedules if they are eligible to work
 - If this indicator is set to **N** (No) employees are not given their core schedules on any holiday. Employees can still be assigned a need-based schedule on holidays they are eligible to work.
11. Click on the **Parameters** tab to set up the companion parameters.

Step 2C: Set up the Assignment Codes Parameter Tab

To set up the Assignment Codes Parameter tab, complete the following steps.

1. Select the **Parameters** tab, then open the **Schedule Process** card.
2. Depending on the setting of Holiday Assignment Code Indicator Schedule Standard 2, set the companion parameter to indicate how holiday shifts are determined.
 - If this indicator is set to **H** (hours in holiday), also configure the Holiday Assignment Code Parameter Schedule Standard Hour 1 to indicate the minimum hours of an employee schedule that must be in the holiday time frame to consider it a holiday schedule.
 - If this indicator is set to **P** (percentage of shift in holiday), also configure the Holiday Assignment Code Parameter Schedule Standard Percent 1 to indicate the minimum percentage of an employee schedule that must be in the holiday time frame to consider it a holiday schedule.
 - If this indicator is set to **S** (start time), the start time of the employee schedule must be within the holiday time frame to consider it a holiday schedule. The start date/time and ending date/time of the holiday time frame is set up on **Configuration > Assignment > Holidays > Parameters**.
3. Holiday Assignment Code Parameter Schedule Standard Integer 1 determines the maximum number of schedules that can be assigned to employees during a single holiday date range. If using this rule, enter a positive integer in this field.
4. Holiday Assignment Code Parameter Schedule Standard Integers 2 - 5 are not used with this assignment and can be left blank.
5. Click **Save**.

Step 2D: Set up the Assignment Codes Criteria Section

The Criteria section is where the employees that should receive this assignment are identified. The criteria options that are available were previously selected on **Assignment Source > Assignment Determination**.

To configure the criteria requirements, complete the following steps.

1. With the Assignment Code record open, click on the **Criteria section** button in the left pane.
2. Click on **Add** to add a new record.
3. Enter an Effective Date, a Code and Description to identify this Criteria record.
4. In the additional fields, enter the criteria options that identify employees who should be given this assignment.

Additional criteria options can be added (by authorized users) through the **Assignment Source > Assignment Determination** button.

5. Click **Save**.
6. To add additional groups of employees to this assignment, click on the Add button again and complete steps 3 - 5.

The groups given to this assignment are displayed.

7. Click on **Save**.

Note

Employees must meet ALL the requirements within one of the Criteria records to qualify for the assignment.

- For example, employees must have a Home labor distribution in facility 4, department 3270 and have a job class of 201(LPN). In the second record, employees must have a Home labor distribution in facility 4, department 3270 and have a job class of 101(RN).
- If employees do not qualify for any other assignment, they will automatically qualify for the All assignment, which does not have any qualification criteria. There is a default All assignment for every Assignment Source.

Step 2E: Set up the Assignment Codes Holiday Section Screen

The holidays that are included in this assignment are selected on the Holiday section screen.

To set up this screen, complete the following steps.

1. With the **Assignment Codes** screen open, click on the **Holiday** section button in the left pane.
2. Click on the **Add** button to open the Holiday Search screen. Enter search criteria to find holidays to include in this assignment.
3. A listing of the holidays that have been previously set up on the Holiday screen is displayed. Check the box to the left of each holiday to be included in this assignment.

There may be more than one record for the same holiday. Be sure to choose the correct one.

4. When all holidays for this assignment have been checked, click on the **Assign Selected** button in the left pane.

Step 3: Set up the Every Other Holiday Reference Dates

1. Go to **Configuration > Assignments > Assignment Source**.
2. From the Advanced search criteria, enter **Holiday Assignment** in the Category field.
3. Search for and select the Holiday record to be set up and open the **Parameters** tab.
 - Enter the starting date for the every other holiday rule in the field for Holiday Assignment Code Parameter Schedule Standard Date 1. The system will start the A rotation with the holiday that is closest to this date. Every other holiday from this date is considered to be eligible for the A rotation group to work. The non-eligible, alternate weekends are considered to be B rotation weeks.
 - If major and minor holidays are being rotated separately, enter the starting date for the every minor holiday rule in the field for Holiday Assignment Code Parameter Schedule Standard Date 2. The system will start the A rotation with the holiday that is closest to this date. Every other holiday from this date is considered to be eligible for the A rotation group to work. The non-eligible, alternate weekends are considered to be B rotation weeks.
4. Click **Save**.

Step 4: Assign employees to the A or B rotation

Employees are assigned to either the A or the B rotation by an indicator setting in their employee record. This is so half the employees are eligible to work a specific holiday while the other half are off. Then, on the following holiday, the other half of the employees are eligible to work.

Note

By default, this indicator is set to A. Only employees who should be assigned to the B rotation need to be updated.

1. From the Employee section, use the **Employee Search** feature to locate the employee records to configure.
2. Open the employee record to **General > Indicators > Schedule Process**.
3. Set the Employee Indicator Schedule Standard 1 value to indicate whether the employee belongs to the A or B holiday rotation.
4. Click **Save**.

The alternating major holiday and minor holiday rotations defined by Holiday Assignment Code Parameter Schedule Standard Date 1 and Holiday Assignment Code Parameter Schedule Standard Date 2 are considered Schedule A holidays. All holidays not eligible to be worked in Schedule A are considered to be eligible in Schedule B.

Each department needs to track which holidays are Schedule A and which are Schedule B, based on these dates, so they can assign their employees accordingly. If one department has more or less holidays than another department, their A and B holidays would be different. In other words, A and B rotations are not directly linked any holiday itself, but whether the holiday is eligible or ineligible based on the alternating status starting with the Schedule Standard Dates.

With the Every Other Major/Every Other Minor Holiday Rule, the major and minor holidays are tracked on separate rotations.

Note

This setting is NOT the same as the A or B indicator setting on Holiday Indicator Schedule Standard 1. That setting is used to indicate which holidays are major holidays and which ones are minor holidays.

Step 5: Enter the Employee Holiday Shift Eligibility Date

If an employee has a waiting period before he or she is eligible to participate in the Holiday assignment rules, an eligibility date can be entered in the employee record.

Note

If the employee does not have a waiting period, this field can be left blank.

1. From the Employee section, use the **Employee Search** feature to locate the employee records to configure.
2. Open **Employee General > Parameters > Schedule Process**.
3. In the Employee Parameter Schedule Standard Date 2 field, enter the date when the employee is eligible to start the holiday rules.
4. Click **Save**.

Step 6: Add the Holiday Validation to the Selection Style

The Holiday rule must be selected as a validation in each pass of the selection style.

1. From **Configuration > Scheduling**, select the **Selection Styles** page.
2. Open the selection style being used with the automatic scheduling process and/or manual process.
3. Open a scheduling pass.
4. Point the cursor to the Holiday rule in the Available Rules column and drag the rule to the Selected Rules column.
5. Repeat steps 3-4 for each pass to be validated.
6. Click **Save**.

Every Other Major/Minor Holiday Assignment

The Every Other Major/Every Other Minor Holiday Rule works much the same as the Every Other Holiday Rule. The difference is that there are two separate sets of holiday rotations occurring simultaneously; major holidays and minor holidays. Each holiday is set to be either a Major or a Minor holiday in the Holiday screen.

The “minor” rotation can also be used to fairly schedule unpaid holidays or days that are harder to schedule, such as Mother’s Day, Easter, or Super Bowl Sunday.

The first Schedule A major holiday rotation is defined by Holiday Assignment Code Parameter Schedule Standard Date 1.

The first Schedule A alternating minor holiday rotation is defined by Holiday Assignment Code Parameter Schedule Standard Date 2.

All holidays not eligible to be worked in Schedule A are considered to be Schedule B holidays. Each assignment needs to track which holidays are Schedule A and which are Schedule B so they can assign their employees accordingly.

If one department has more or less holidays than another department, their A and B holidays would be different. In other words, A and B rotations are not directly linked any holiday itself, but are based on the alternating Schedule A/Schedule B status starting with the Schedule Standard Dates.

An example of Major and Minor holiday rotations is shown below:

Major Holidays	Minor Holidays
New Year’s	President’s Day
Thanksgiving	Memorial Day
Christmas	July 4
	Labor Day

Eligible to work Major Holidays		Eligible to work Minor Holidays	
New Year’s 2017	Schedule A	President’s Day 2017	Schedule A
Thanksgiving 2017	Schedule B	Memorial Day 2017	Schedule B
Christmas 2017	Schedule A	July 4 2017	Schedule A
		Labor Day 2017	Schedule B
New Year’s 2018	Schedule B	President’s Day 2018	Schedule A
Thanksgiving 2018	Schedule A	Memorial Day 2018	Schedule B

Eligible to work Major Holidays		Eligible to work Minor Holidays	
Christmas 2018	Schedule B	July 4 2018	Schedule A
		Labor Day 2018	Schedule B

Steps to Create an Every Other Major/Minor Holiday Rotation

The following summarizes the steps needed to configure the Every Other Major/Every Other Minor Holiday rule. The steps are described in more detail below:

Step 1: Set up the Major and Minor holidays in the Holiday screen

- A. Set up the Holiday General Tab
- B. Set up the Holiday Indicators Tab
- C. Set up the Holiday Parameters Tab

Step 2: Create a new Assignment Code record

- A. Set up the Assignment Code General Tab
- B. Set up the Assignment Code Indicators Tab
- C. Set up the Assignment Code Parameters Tab
- D. Set up the Assignment Code Criteria Screen
- E. Set up the Assignment Code Holiday Screen

Step 3: Set up the Every Other Holiday reference dates

Step 4: Assign employees to the A or B rotation

Step 5: Enter the employee Holiday Shift Eligibility Date, if applicable

Step 6: Add the holiday validation to the Selection Styles

Step 1A: Set up the Holiday General Tab

Note

If holidays that can be used by this assignment are already created in the Holiday table, this step can be skipped. Be sure that the date/time parameters for the start and end of the holiday time frame are the same as required for this assignment.

To enter a new holiday record, complete the following steps:

1. From **Configuration > Assignments**, select the **Holiday** icon.
2. Click on the **Add** button in the left pane to open a screen to add a new record.
3. Enter a Code and Description to identify this holiday code.

4. Enter the Actual Date of the holiday and the Observed Date when it is observed in the corporation.
5. Enter the Holiday Category Code. This field is used with the Every Other Same Holiday assignment to match up the same holiday between years, since there may be more than one "Holiday" record for the same holiday and they may have different names.
6. Click **Save**.

The Indicator and Parameter tabs are now available.

Step 1B: Set up the Holiday Indicators Tab

1. Select the **Indicators** tab and open the **Schedule Process** card by clicking on the arrow.
2. Select the indicator options from the drop-down listing to set the rules for this assignment.
 - For the Every Other Major/Minor Holiday rule, each holiday must be assigned to either the Major Holiday rotation (A) or the Minor Holiday rotation (B) using Holiday Indicator Schedule Standard 1. There does not need to be the same number of holidays in the two rotations.
 - For the Every Other Major/Minor Holiday rule Holiday Indicator Schedule Standard 2 can be left with the default setting of **Y**.

Note

All holidays selected for this rule must have this value set to **Y**.

3. Click **Save**.

Step 1C: Set up the Holiday Parameter Tab

1. Select the **Parameters** tab and open the **Schedule Process** card by clicking on the arrow.
2. Enter the parameter option values to set the start date/time and the end date/time for the holiday for this assignment.
 - In the Holiday Parameter Schedule Standard Date 1 field, enter the starting date of the holiday. The holiday time frame begins on this date on the time defined by Holiday Parameter Schedule Standard Time 1.
 - In the Holiday Parameter Schedule Standard Date 2 field, enter the ending date of the holiday. The holiday time frame ends on this date on the time defined by Holiday Parameter Schedule Standard Time 2.
 - In the Holiday Parameter Schedule Standard Time 1 enter the time the holiday begins on the starting date, defined by Holiday Parameter Schedule Standard Date 1.
 - In the Holiday Parameter Schedule Standard Time 2 enter the time the holiday ends on the ending date, defined by Holiday Parameter Schedule Standard Date 2.
3. Click **Save**.

Step 2A: Set up the Assignment Code General Tab

1. From **Configuration > Assignments**, select the **Assignment Code** screen.
2. Click on the **Add** button to add a new Assignment Code.
3. Enter the date this Assignment Code will be effective.
4. Select the **Standard** option from the Assignment Source Classification field.
5. In the Assignment Source Code field, select **Holiday** from the field look up values.
6. Enter a Code and Description to identify this holiday assignment record.
7. Click **Save**.

The Indicators and Parameters tabs are now available for set up.

Step 2B: Set up the Assignment Codes Indicators Tab

To set up the Assignment Codes Indicators tab, complete the following steps:

1. Click on the **Indicators** tab, then open the **Schedule Process** card.
2. Set Holiday Assignment Code Indicator Schedule Standard 1 to **Y** to process the selected holidays in this assignment using holiday rules.
3. Set Holiday Assignment Code Indicator Schedule Standard 2 to the proper option of how holiday shifts are determined.
 - If this indicator is set to **H** (hours in holiday), also configure the Holiday Assignment Code Parameter Schedule Standard Hour 1 to indicate the minimum hours that must be in the holiday time frame to consider a shift a holiday shift.
 - If this indicator is set to **P** (percentage of shift in holiday), also configure the Holiday Assignment Code Parameter Schedule Standard Percent 1 to indicate the minimum percentage of a shift that must be in the holiday time frame to consider it a holiday shift.
 - If this indicator is set to **S** (start time), the start time is set up on the Holiday record.
4. Set Holiday Assignment Code Indicator Schedule Standard 3 to **Y** to process the Every Other Holiday Rule.
5. Set Holiday Assignment Code Indicator Schedule Standard 4 to **N**.
6. Set Holiday Assignment Code Indicator Schedule Standard 5 to the proper option to determine if there is a maximum number of schedules that an employee is eligible to work during the holiday time frame.
 - If this indicator is set to **Y** (Yes), also configure Holiday Assignment Code Parameter Schedule Standard Integer 1 to indicate the maximum number of schedules that an employee can work.
 - If this indicator is set to **N** (No), there is no limit to the number of schedules an employee can work during the holiday time frame.
7. Set Holiday Assignment Code Indicator Schedule Standard 6 to **N**.
8. Set Holiday Assignment Code Indicator Schedule Standard 7 to **N**.

9. Set Holiday Assignment Code Indicator Schedule Standard 8 to **N**.
10. Set Holiday Assignment Code Schedule Standard 9 to the option to determine if productive core rotating schedules should be populated on holidays if the employee is eligible to work.
 - If this indicator is set to **Y** (Yes) employees are scheduled their core schedules if they are eligible to work
 - If this indicator is set to **N** (No) employees are not given their core schedules on any holiday. Employees can still be assigned a need-based schedule on holidays they are eligible to work.
11. Click on the **Parameters** tab to set up the companion parameters.

Step 2C: Set up the Assignment Code Parameter Tab

To set up the Assignment Codes Parameter tab, complete the following steps:

1. Select the **Parameters** tab, then open the **Schedule Process** card.
2. Depending on the setting of Holiday Assignment Code Indicator Schedule Standard 2, set the companion parameter to indicate how holiday shifts are determined.
 - If this indicator is set to **H** (hours in holiday), also configure the Holiday Assignment Code Parameter Schedule Standard Hour 1 to indicate the minimum hours of an employee schedule that must be in the holiday time frame to consider it a holiday schedule.
 - If this indicator is set to **P** (percentage of shift in holiday), also configure the Holiday Assignment Code Parameter Schedule Standard Percent 1 to indicate the minimum percentage of an employee schedule that must be in the holiday time frame to consider it a holiday schedule.
 - If this indicator is set to **S** (start time), the start time of the employee schedule must be within the holiday time frame to consider it a holiday schedule. The start date/time and ending date/time of the holiday time frame is set up on **Configuration > Assignment > Holidays > Parameters**.
3. Holiday Assignment Code Parameter Schedule Standard Integer 1 determines the maximum number of schedules that can be assigned to employees during a single holiday date range. If using this rule, enter a positive integer in this field.
4. Holiday Assignment Code Parameter Schedule Standard Integers 2 - 5 are not used with this assignment and can be left blank.
5. Click **Save**.

Step 2D: Set up the Assignment Codes Criteria Section

The Criteria section is where the employees that should receive this assignment are identified. The criteria options that are available were previously selected on **Assignment Source > Assignment Determination**.

To configure the criteria requirements, complete the following steps:

1. With the Assignment Code record open, click on the **Criteria** section button in the left pane.
2. Click on **Add** to add a new record.
3. Enter an Effective Date, a Code and Description to identify this Criteria record.
4. In the additional fields, enter the criteria options that identify employees who should be given this assignment.

Additional criteria options can be added (by authorized users) through **Assignment Source > Assignment Determination** button.

5. Click **Save**.
6. To add additional groups of employees to this assignment, click on the **Add** button again and complete steps 3 - 5. The groups given to this assignment are displayed.
7. Click **Save**.

Note

Employees must meet ALL the requirements within one of the Criteria records in order to qualify for the assignment.

- For example, employees must have a Home labor distribution in facility 4, department 3270 and have a job class of 201(LPN). In the second record, employees must have a Home labor distribution in facility 4, department 3270 and have a job class of 101(RN).
- If employees do not qualify for any other assignment, they will automatically qualify for the All assignment, which does not have any qualification criteria. There is a default All assignment for every Assignment Source.

Step 2E: Set up the Assignment Codes Holiday Section Screen

The holidays that are included in this assignment are selected on the Holiday section screen.

To set up this screen, complete the following steps:

1. With the Assignment Codes screen open, click on the **Holiday** section button in the left pane.
2. Click on the **Add** button to open the Holiday Search screen. Enter search criteria to find holidays to include in this assignment.
3. A listing of the holidays that have been previously set up on the Holiday screen is displayed. Check the box to the left of each holiday to be included in this assignment.

There may be more than one record for the same holiday. Be sure to choose the correct one.

4. When all holidays for this assignment have been checked, click on the **Assign Selected** button in the left pane.

Step 3: Set up the Every Other Holiday Reference Dates

1. Go to **Configuration > Assignments > Assignment Source**.
2. From the Advanced search criteria, enter **Holiday Assignment** in the Category field.
3. Search for and select the Holiday record to be set up and open the **Parameters** tab.
 - Enter the starting date for the every other holiday rule in the field for Holiday Assignment Code Parameter Schedule Standard Date 1. The system will start the A rotation with the holiday that is closest to this date. Every other holiday from this date is considered to be eligible for the A rotation group to work. The non-eligible, alternate weekends are considered to be B rotation weeks.
 - If major and minor holidays are being rotated separately, enter the starting date for the every minor holiday rule in the field for Holiday Assignment Code Parameter Schedule Standard Date 2. The system will start the A rotation with the holiday that is closest to this date. Every other holiday from this date is considered to be eligible for the A rotation group to work. The non-eligible, alternate weekends are considered to be B rotation weeks.
4. Click **Save**.

Step 4: Assign employees to the A or B rotation

Employees are assigned to either the A or the B rotation by an indicator setting in their employee record. This is so half the employees are eligible to work a specific holiday while the other half are off. Then, on the following holiday, the other half of the employees are eligible to work.

Note

By default, this indicator is set to **A**. Only employees who should be assigned to the B rotation need to be updated.

1. From the Employee section, use the Employee Search feature to locate the employee records to configure.
2. Open the employee record to **General > Indicators > Schedule Process**.
3. Set the Employee Indicator Schedule Standard 1 value to indicate whether the employee belongs to the A or B holiday rotation.
4. Click **Save**.

The alternating major holiday and minor holiday rotations defined by Holiday Assignment Code Parameter Schedule Standard Date 1 and Holiday Assignment Code Parameter Schedule Standard Date 2 are considered Schedule A holidays. All holidays not eligible to be worked in Schedule A are considered to be eligible in Schedule B.

Each department needs to track which holidays are Schedule A and which are Schedule B, based on these dates, so they can assign their employees accordingly. If one department has more or less holidays than another department, their A and B holidays would be different. In other words, A and B rotations are not directly linked any holiday itself, but whether the holiday is eligible or ineligible based on the alternating status starting with the Schedule Standard Dates.

With the Every Other Major/Every Other Minor Holiday Rule, the major and minor holidays are tracked on separate rotations.

Note

This setting is NOT the same as the A or B indicator setting on Holiday Indicator Schedule Standard 1. That setting is used to indicate which holidays are major holidays and which ones are minor holidays.

Step 5: Enter the Employee Holiday Shift Eligibility Date

If an employee has a waiting period before he or she is eligible to participate in the Holiday assignment rules, an eligibility date can be entered in the employee record.

Note

If the employee does not have a waiting period, this field can be left blank.

1. From the Employee section, use the Employee Search feature to locate the employee records to configure.
2. Open **Employee General > Parameters > Schedule Process**.
3. In the Employee Parameter Schedule Standard Date 2 field, enter the date when the employee is eligible to start the holiday rules.
4. Click **Save**.

Step 6: Add the Holiday Validation to the Selection Style

The Holiday rule must be selected as a validation in each pass of the selection style.

1. From **Configuration > Scheduling**, select the **Selection Styles** page.
2. Open the selection style being used with the automatic scheduling process and/or manual process.
3. Open a scheduling pass.
4. Point the cursor to the Holiday rule in the Available Rules column and drag the rule to the Selected Rules column.
5. Repeat steps 3-4 for each pass to be validated.
6. Click the **Save**.

Every Other Same Holiday

The employees in the Every Other Same Holiday assignment work a specific holiday one year, then the following year they do not work this same holiday. The system checks back to the previous year for the holiday with the same Holiday Category Code, to determine employee eligibility.

- If employees worked a holiday with a matching Holiday Category Code the previous year, they are NOT eligible to work the holiday with the same Holiday Category Code in the current year.
- If employees did NOT work a holiday with a matching Holiday Category Code the previous year, they are eligible to work the holiday with the same Holiday Category Code in the current year

Steps to Create the Every Other Same Holiday Assignment

The following summarizes the steps needed to configure the Every Other Same Holiday assignment rule. Click on the links below to view the details of each step.

Step 1: Create Holiday records, if they do not already exist in the system

- A. Set up the Holiday General tab
- B. Set up the Holiday Indicators tab
- C. Set up the Holiday Parameters tab

Step 2: Create a new Assignment Code record

- A. Set up the Assignment Code General tab
- B. Set up the Assignment Code Indicators tab
- C. Set up the Assignment Code Parameters tab
- D. Set up the Assignment Code Criteria screen
- E. Set up the Assignment Code Holiday screen

Step 3: Enter the Employee Holiday Shift Eligibility Date, if applicable.

Step 4: Add the Holiday validation to the Selection Styles

Step 1A: Set up the Holiday General Tab

Note

If holidays that can be used by this assignment are already created in the Holiday table, this step can be skipped. Be sure that the date/time parameters for the start and end of the holiday time frame are the same as required for this assignment.

To enter a new holiday record, complete the following steps.

1. From **Configuration > Assignments**, select the **Holiday** icon.
2. Click on the **Add** button in the left pane to open a screen to add a new record.
3. Enter a Code and Description to identify this holiday code.

4. Enter the Actual Date of the holiday and the Observed Date when it is observed in the corporation.
5. Enter the **Holiday Category Code**.

This field is used with the Every Other Same Holiday assignment to match up the same holiday between years, since there may be more than one "Holiday" record for the same holiday and they may have different names.

6. Click **Save**.

The Indicator and Parameter tabs are now available.

Step 1B: Set up the Holiday Indicator Tab

1. Select the **Indicators** tab and open the **Schedule Process** card by clicking on the arrow.
2. Select the indicator option values from the drop-down listing to set the rules for this particular assignment.
 - For this holiday rule, Holiday Indicator Schedule Standard 1 can be left with the default setting of **A**, since all holidays are tracked in one rotation.
 - For this holiday rule Holiday Indicator Schedule Standard 2 can be left with the default setting of **Y**.

Note

All holidays selected for this rule must have this value set to **Y**.

3. Click **Save**.

Step 1C: Set up the Holiday Parameter Tab

1. Select the **Parameters** tab and open the **Schedule Process** card by clicking on the arrow.
2. Enter the parameter option values to set the start date/time and the end date/time for the holiday for this assignment.
 - In the Holiday Parameter Schedule Standard Date 1 field, enter the starting date of the holiday. The holiday time frame begins on this date on the time defined by Holiday Parameter Schedule Standard Time 1.
 - In the Holiday Parameter Schedule Standard Date 2 field, enter the ending date of the holiday. The holiday time frame ends on this date on the time defined by Holiday Parameter Schedule Standard Time 2.
 - In the Holiday Parameter Schedule Standard Time 1 field, enter the time the holiday begins on the starting date, defined by Holiday Parameter Schedule Standard Date 1.
 - In the Holiday Parameter Schedule Standard Time 2 field, enter the time the holiday ends on the ending date, defined by Holiday Parameter Schedule Standard Date 2.
3. Click **Save**.

Step 2A: Set up the Assignment Code General Tab

1. From **Configuration > Assignments**, select the **Assignment Code** screen.
2. Click on the **Add** button to add a new Assignment Code.
3. Enter the date this Assignment Code will be effective.
4. Select the **Standard** option from the Assignment Source Classification field.
5. In the Assignment Source Code field, select **Holiday** from the field look up values.
6. Enter a Code and Description to identify this holiday assignment record.
7. Click **Save**.

The Indicators and Parameters tabs are now available for set up.

Step 2B: Set up the Assignment Code Indicators Tab

To set up the Assignment Codes Indicators tab, complete the following steps:

1. From **Configuration > Assignment**, Assignment Code screen, search for and open the record to be set up.
2. Click on the **Indicators** tab, then open the **Schedule Process** card.
3. Set Holiday Assignment Code Indicator Schedule Standard 1 to **Y** to process this assignment using holiday rules.
4. Set Holiday Assignment Code Indicator Schedule Standard 2 to the proper option of how holiday shifts are determined.
 - If this indicator is set to **H** (hours in holiday), also configure the Holiday Assignment Code Parameter Schedule Standard Hour 1 to indicate the minimum hours that must be in the holiday time frame to consider a shift a holiday shift.
 - If this indicator is set to **P** (percentage of shift in holiday), also configure the Holiday Assignment Code Parameter Schedule Standard Percent 1 to indicate the minimum percentage of a shift that must be in the holiday time frame to consider it a holiday shift.
 - If this indicator is set to **S** (start time), the start time is set up on the Holiday record.
5. Set Holiday Assignment Code Indicator Schedule Standard 3 to **N**.
6. Set Holiday Assignment Code Indicator Schedule Standard 4 to **N**.
7. Set Holiday Assignment Code Indicator Schedule Standard 5 to the proper option to determine if there is a maximum number of schedules that an employee is eligible to work during the holiday time frame.
 - If this indicator is set to **Y** (Yes), also configure Assignment Code Parameter Schedule Standard Integer 1 to indicate the maximum number of schedules that an employee can work.
 - If this indicator is set to **N** (No), there is no limit to the number of schedules an employee can work during the holiday time frame.
8. Click **Save**.

9. Click on the **Parameters** tab to configure the companion parameters.
10. Set Holiday Assignment Code Indicator Schedule Standard 6 to **Y**, to activate the Every Other Same Holiday rule.
11. Set Holiday Assignment Code Indicator Schedule Standard 7 to **N**.
12. Set Holiday Assignment Code Indicator Schedule Standard 8 to **N**.
13. Set Holiday Assignment Code Schedule Standard 9 to the proper option to determine if productive core rotating schedules should be populated on holidays if the employee is eligible to work.
 - If this indicator is set to **Y** (Yes) employees are scheduled their core schedules if they are eligible to work
 - If this indicator is set to **N** (No) employees are not given their core schedules on any holiday.

Note

Employees can still be assigned a need-based schedule on holidays they are eligible to work.

14. Click on the **Parameters** tab to set up the companion parameters.

Step 2C: Set up the Assignment Codes Parameter Tab

To set up the Assignment Codes Parameter tab, complete the following steps:

1. Select the **Parameters** tab, then open the **Schedule Process** card.
2. Depending on the setting of Holiday Assignment Code Indicator Schedule Standard 2, set the companion parameter to indicate how holiday shifts are determined.
 - If this indicator is set to **H** (hours in holiday), also configure the Holiday Assignment Code Parameter Schedule Standard Hour 1 to indicate the minimum hours of an employee schedule that must be in the holiday time frame to consider it a holiday schedule.
 - If this indicator is set to **P** (percentage of shift in holiday), also configure the Holiday Assignment Code Parameter Schedule Standard Percent 1 to indicate the minimum percentage of an employee schedule that must be in the holiday time frame to consider it a holiday schedule.
 - If this indicator is set to **S** (start time), the start time of the employee schedule must be within the holiday time frame to consider it a holiday schedule. The start date/time and ending date/time of the holiday time frame is set up on **Configuration > Assignment > Holidays > Parameters**.
3. Holiday Assignment Code Parameter Schedule Standard Integer 1 determines the maximum number of schedules that can be assigned to employees during a single holiday date range. If using this rule, enter a positive integer in this field.

Holiday Assignment Code Parameter Schedule Standard Integers 2 - 5 are not used with this

assignment and can be left blank.

4. Click **Save**.

Step 2D: Set up the Assignment Codes Criteria Section

The Criteria section is where the employees that should receive this assignment are identified. The criteria options that are available were previously selected on **Assignment Source > Assignment Determination** section screen.

To configure the criteria requirements, complete the following steps:

1. With the Assignment Code record open, click on the **Criteria** section button in the left pane.
2. Click on **Add** to add a new record.
3. Enter an Effective Date, a Code and Description to identify this Criteria record.
4. In the additional fields, enter the criteria options that identify employees who should be given this assignment.

Additional criteria options can be added (by authorized users) through **Assignment Source > Assignment Determination** button.

5. Click **Save**.
6. To add additional groups of employees to this assignment, click on the **Add** button again and complete steps 3 - 5. The groups given to this assignment are displayed.
7. Click **Save**.

Note

Employees must meet ALL the requirements within one of the Criteria records to qualify for the assignment.

- For example, employees must have a Home labor distribution in facility 4, department 3270 and have a job class of 201(LPN). In the second record, employees must have a Home labor distribution in facility 4, department 3270 and have a job class of 101(RN).
- If employees do not qualify for any other assignment, they will automatically qualify for the All assignment, which does not have any qualification criteria. There is a default All assignment for every Assignment Source.

Step 2E: Set up the Assignment Codes Holiday Section Screen

The holidays that are included in this assignment are selected on the Holiday section screen.

To set up this screen, complete the following steps:

1. With the Assignment Codes screen open, click on the **Holiday** section button in the left pane.
2. Click on the **Add** button to open the Holiday Search screen. Enter search criteria to find holidays to include in this assignment.

3. A listing of the holidays that have been previously set up on the Holiday screen is displayed. Check the box to the left of each holiday to be included in this assignment.

Note

There may be more than one record for the same holiday. Be sure to choose the correct one.

4. When all holidays for this assignment have been checked, click on the **Assign Selected** button in the left pane.

Step 3: Enter the Employee Holiday Shift Eligibility Date

If an employee has a waiting period before he or she is eligible to participate in the Holiday assignment rules, an eligibility date can be entered in the employee record.

Note

If the employee does not have a waiting period, this field can be left blank.

1. From the Employee section, use the Employee Search feature to locate the employee records to configure.
2. Open **Employee General > Parameters > Schedule Process**.
3. In the Employee Parameter Schedule Standard Date 2 field, enter the date when the employee is eligible to start the holiday rules.
4. Click **Save**.

Step 4: Add the Holiday Validation to the Selection Style

The Holiday rule must be selected as a validation in each pass of the selection style:

1. From **Configuration > Scheduling**, select the **Selection Styles** page.
2. Open the selection style being used with the automatic scheduling process and/or manual process.
3. Open a scheduling pass.
4. Point the cursor to the Holiday rule in the Available Rules column and drag the rule to the Selected Rules column.
5. Repeat steps 3-4 for each pass to be validated.
6. Click **Save**.

X out of Y Holiday Assignment

The employees in the X out of Y Holiday assignment are eligible to work a certain number of holidays within a range of holidays, for example 1 out of 3 holidays, or 3 out of 7 holidays. The values of X and Y are set up in the parameters screen of this holiday assignment.

This assignment can span more than a single year. For example, this assignment can be set up for 7 out of 12 holidays, even if there are only 6 holidays in a year.

Note

With this holiday assignment, employees could be scheduled for more than one holiday in a row.

Steps to Create an X out of Y Holiday Assignment

The following summarizes the steps to create an X out of Y Holiday assignment. The steps are described in more detail below.

Step 1: Create Holiday records, if they are not already set up

- A. Set up the Holiday General tab
- B. Set up the Holiday Indicators tab
- C. Set up the Holiday Parameters tab

Step 2: Create a new Assignment Code

- A. Set up the Assignment Code General tab
- B. Set up the Assignment Code Indicators tab
- C. Set up the Assignment Code Parameters tab
- D. Set up the Assignment Code Criteria screen
- E. Set up the Assignment Code Holiday screen

Step 3: Enter the employee Holiday Shift Eligibility Date, if applicable

Step 4: Add the Holiday Validation to the Selection Styles

Step 1A: Set up the Holiday General Tab**Note**

If holidays that can be used by this assignment are already created in the Holiday table, this step can be skipped. Be sure that the date/time parameters for the start and end of the holiday time frame are the same as required for this assignment.

To enter a new holiday record, complete the following steps:

1. From **Configuration > Assignments**, select the **Holiday** icon.
2. Click on the **Add** button in the left pane to open a screen to add a new record.
3. Enter a Code and Description to identify this holiday code.
4. Enter the Actual Date of the holiday and the Observed Date when it is observed in the corporation.

5. Enter the Holiday Category Code.

This field is used with the Every Other Same Holiday assignment to match up the same holiday between years, since there may be more than one "Holiday" record for the same holiday and they may have different names.

6. Click **Save**.

The Indicator and Parameter tabs are now available.

Step 1B: Set up the Holiday Indicator Tab

1. Select the **Indicators** tab and open the **Schedule Process** card by clicking on the arrow.

2. Select the indicator option values from the drop-down listing to set the rules for this particular assignment.

- For this holiday rule, Holiday Indicator Schedule Standard 1 can be left with the default setting of **A**, since all holidays are tracked in one rotation.
- For this holiday rule Holiday Indicator Schedule Standard 2 can be left with the default setting of **Y**.

Note

All holidays selected for this rule must have this value set to **Y**.

3. Click **Save**.

Step 1C: Set up the Holiday Parameter Tab

1. Select the **Parameters** tab and open the **Schedule Process** card by clicking on the arrow.

2. Enter the parameter option values to set the start date/time and the end date/time for the holiday for this assignment.

- In the Holiday Parameter Schedule Standard Date 1 field, enter the starting date of the holiday. The holiday time frame begins on this date on the time defined by Holiday Parameter Schedule Standard Time 1.
- In the Holiday Parameter Schedule Standard Date 2 field, enter the ending date of the holiday. The holiday time frame ends on this date on the time defined by Holiday Parameter Schedule Standard Time 2.
- In the Holiday Parameter Schedule Standard Time 1 field, enter the time the holiday begins on the starting date, defined by Holiday Parameter Schedule Standard Date 1.
- In the Holiday Parameter Schedule Standard Time 2 field, enter the time the holiday ends on the ending date, defined by Holiday Parameter Schedule Standard Date 2.

3. Click **Save**.

Step 2A: Set up the Assignment Code General Tab

1. From **Configuration > Assignments**, select the **Assignment Code** screen.
2. Click on the **Add** button to add a new Assignment Code.
3. Enter the date this Assignment Code will be effective.
4. Select the **Standard** option from the Assignment Source Classification field.
5. In the Assignment Source Code field, select **Holiday** from the field look up values.
6. Enter a Code and Description to identify this holiday assignment record.
7. Click **Save**.

The Indicators and Parameters tabs are now available for set up.

Step 2B: Set up the Assignment Codes Indicators Tab

To set up the Assignment Codes Indicators tab, complete the following steps:

1. From **Configuration > Assignment > Assignment Code**, search for and open the record to be set up.
2. Click on the **Indicators** tab, then open the **Schedule Process** card.
3. Set Holiday Assignment Code Indicator Schedule Standard 1 to **Y** to process this assignment using holiday rules.
4. Set Holiday Assignment Code Indicator Schedule Standard 2 to the proper option of how holiday shifts are determined.
 - If this indicator is set to **H** (hours in holiday), also configure the Holiday Assignment Code Parameter Schedule Standard Hour 1 to indicate the minimum hours that must be in the holiday time frame to consider a shift a holiday shift.
 - If this indicator is set to **P** (percentage of shift in holiday), also configure the Holiday Assignment Code Parameter Schedule Standard Percent 1 to indicate the minimum percentage of a shift that must be in the holiday time frame to consider it a holiday shift.
 - If this indicator is set to **S** (start time), the start time is set up on the Holiday record.
5. Set Holiday Assignment Code Indicator Schedule Standard 3 to **N**.
6. Set Holiday Assignment Code Indicator Schedule Standard 4 to **Y** to activate the X out of Y Holiday Rule.
7. Set Holiday Assignment Code Indicator Schedule Standard 5 to the proper option to determine if there is a maximum number of schedules that an employee is eligible to work during the holiday time frame.
 - If this indicator is set to **Y** (Yes), also configure Assignment Code Parameter Schedule Standard Integer 1 to indicate the maximum number of schedules that an employee can work.
 - If this indicator is set to **N** (No), there is no limit to the number of schedules an employee can work during the holiday time frame.

8. Set Holiday Assignment Code Indicator Schedule Standard 6 to **N**.
9. Set Holiday Assignment Code Indicator Schedule Standard 7 to **N**.
10. Set Holiday Assignment Code Indicator Schedule Standard 8 to **N**.
11. Set Holiday Assignment Code Schedule Standard 9 to the proper option to determine if productive core rotating schedules should be populated on holidays if the employee is eligible to work.
 - If this indicator is set to **Y** (Yes) employees are scheduled their core schedules if they are eligible to work
 - If this indicator is set to **N** (No) employees are not given their core schedules on any holiday.

Note

Employees can still be assigned a need-based schedule on holidays they are eligible to work.

12. Click **Save**.
13. Click on the **Parameters** tab to set up the companion parameters.

Step 2C: Set up the Assignment Codes Parameter Tab

To set up the Assignment Codes Parameter tab for the X out of Y Holidays Rule, complete the following steps:

1. Select the **Parameters** tab, then open the **Schedule Process** card.
2. Depending on the setting of Holiday Assignment Code Indicator Schedule Standard 2, set the companion parameter to indicate how holiday shifts are determined.
 - If this indicator is set to **H** (hours in holiday), also configure the Holiday Assignment Code Parameter Schedule Standard Hour 1 to indicate the minimum hours of an employee schedule that must be in the holiday time frame to consider it a holiday schedule.
 - If this is set to **P** (percentage of shift in holiday), also configure the Holiday Assignment Code Parameter Schedule Standard Percent 1 to indicate the minimum percentage of an employee schedule that must be in the holiday time frame to consider it a holiday schedule.
 - If this indicator is set to **S** (start time), the start time of the employee schedule must be within the holiday time frame to consider it a holiday schedule. The start date/time and ending date/time of the holiday time frame is set up on **Configuration > Assignment > Holidays > Parameters**.
3. Holiday Assignment Code Parameter Schedule Standard Integer 1 determines the maximum number of schedules that can be assigned to employees during a single holiday date range. If using this rule, enter a positive integer in this field.
4. Holiday Assignment Code Parameter Schedule Standard Integers 2 - 3 are not used with this assignment and can be left blank.

5. In the Holiday Assignment Code Parameter Schedule Standard Integer 4 field, enter the number of holidays being tracked in each rotation. This would be the Y value in the X out of Y equation. For example, if this assignment is for 4 out of 7 holidays, the **7** would be entered in this field.
6. In the Holiday Assignment Code Parameter Schedule Standard Integer 5 field, enter the number of holidays that should be worked in each rotation. This would be the X value in the X out of Y equation. For example, if this assignment is for 4 out of 7 holidays, the **4** would be entered in this field.
7. Click **Save**.

Step 2D: Set up the Assignment Codes Criteria Section

The Criteria section is where the employees that should receive this assignment are identified. The criteria options that are available were previously selected on **Assignment Source > Assignment Determination**.

To configure the criteria requirements, complete the following steps:

1. With the Assignment Code record open, click on the **Criteria** section button in the left pane.
2. Click on **Add** to add a new record.
3. Enter an Effective Date, a Code and Description to identify this Criteria record.
4. In the additional fields, enter the criteria options that identify employees who should be given this assignment.

Additional criteria options can be added (by authorized users) through the **Assignment Source > Assignment Determination** button.

5. Click **Save**.
6. To add additional groups of employees to this assignment, click on the **Add** button again and complete steps 3 - 5. The groups given to this assignment are displayed.
7. Click **Save**.

Note

Employees must meet ALL the requirements within one of the Criteria records to qualify for the assignment.

- For example, employees must have a Home labor distribution in facility 4, department 3270 and have a job class of 201(LPN). In the second record, employees must have a Home labor distribution in facility 4, department 3270 and have a job class of 101(RN).
- If employees do not qualify for any other assignment, they will automatically qualify for the All assignment, which does not have any qualification criteria. There is a default All assignment for every Assignment Source.

Step 2E: Set up the Assignment Codes Holiday Section Screen

The holidays that are included in this assignment are selected on the Holiday section screen.

To set up this screen, complete the following steps:

1. With the Assignment Codes screen open, click on the **Holiday** section button in the left pane.
2. Click on the **Add** button to open the Holiday Search screen. Enter search criteria to find holidays to include in this assignment.
3. A listing of the holidays that have been previously set up on the Holiday screen is displayed. Check the box to the left of each holiday to be included in this assignment.
There may be more than one record for the same holiday. Be sure to choose the correct one.
4. When all holidays for this assignment have been checked, click on the **Assign Selected** button in the left pane.

Step 3: Enter the Employee Holiday Shift Eligibility Date

If an employee has a waiting period before he or she is eligible to participate in the Holiday assignment rules, an eligibility date can be entered in the employee record.

Note

If the employee does not have a waiting period, this field can be left blank.

1. From the Employee section, use the Employee Search feature to locate the employee records to configure.
2. Open **Employee General > Parameters > Schedule Process**.
3. In the Employee Parameter Schedule Standard Date 2 field, enter the date when the employee is eligible to start the holiday rules.
4. Click **Save**.

Step 4: Add the Holiday Validation to the Selection Styles

The Holiday rule must be selected as a validation in each pass of the selection style.

1. From **Configuration > Scheduling**, select the **Selection Styles** page.
2. Open the selection style being used with the automatic scheduling process and/or manual process.
3. Open a scheduling pass.
4. Point the cursor to the Holiday rule in the Available Rules column and drag the rule to the Selected Rules column.
5. Repeat steps 3-4 for each pass to be validated.
6. Click **Save**.

Holiday Rotations Assignment Configuration

In the Holiday Rotations assignment, specific holidays are eligible to be worked by certain employees. For example, Holiday 1 rotation employees can work New Year’s Day and Labor Day, Holiday 2 rotation employees can work Memorial Day and Christmas, and Holiday 3 rotation employees can work July 4 and Thanksgiving. Each year, the eligible holidays to work for each assignment can be changed.

To set up a Holiday Rotations assignment, a separate assignment needs to be set up for each holiday rotation. For example, if there are three separate holiday rotations for an organization unit, then three separate assignments would need to set up (as an example, these are called Holiday Rotation 1, Holiday Rotation 2 and Holiday Rotation 3). For each assignment, select a holiday record for EACH holiday, making sure to select the correct holiday that is either set up as Working or Not Working for that assignment rotation.

The recommended way to indicate which employees belong to each rotation is to use assignment codes. These are established on the Assignment Codes screen. The following is an example of suggested configuration for setting up a holiday for three separate rotations.

- Select an assignment criterion to indicate each holiday rotation, for example Grade, Seniority Hours, Pay Group and create codes for each of the holiday rotations, such as Holiday 1, Holiday 2, or Holiday 3.
- Set up two holiday records for each holiday--one set to work the holiday and one set to not work the holiday.
- Create a holiday assignment for each rotation using the assignment codes as the selection criterion. Select a holiday option for each holiday, whether to work or not work the holiday.
- Add the appropriate selection criteria code to each employee record. For example, if the Grade code is being used to differentiate between employees in different rotations, this code needs to be added to the employee record.

Note

Employees should remain in the same holiday rotation assignment. The holidays set to work for each rotation should change each year. Employees are eligible to work on those holidays set to **Y** in their specific rotation. The system does not compare previous years’ holidays worked or holiday rotations worked by other assignments. See the example of a three-year rotation.

Holidays for 2007	Holiday Rotation 1 Schedule Standard 2 setting	Holiday Rotation 2 Schedule Standard 2 setting	Holiday Rotation 3 Schedule Standard 2 setting	Holidays for 2008	Holiday Rotation 1 Schedule Standard 2 setting	Holiday Rotation 2 Schedule Standard 2 setting	Holiday Rotation 3 Schedule Standard 2 setting	Holidays for 2009	Holiday Rotation 1 Schedule Standard 2 setting	Holiday Rotation 2 Schedule Standard 2 setting	Holiday Rotation 3 Schedule Standard 2 setting
New Years Day	Y	N	N	New Years Day	N	N	Y	New Years Day	N	Y	N
Memorial Day	N	Y	N	Memorial Day	Y	N	N	Memorial Day	N	N	Y
July 4	N	N	Y	July 4	N	Y	N	July 4	Y	N	N
Labor Day	Y	N	N	Labor Day	N	N	Y	Labor Day	N	Y	N
Thanksgiving	N	N	Y	Thanksgiving	N	Y	N	Thanksgiving	Y	N	N
Christmas Day	N	Y	N	Christmas Day	Y	N	N	Christmas Day	N	N	Y

Steps to Create the Holiday Rotation Assignment

The following summarizes the steps to create a Holiday Rotation assignment. These steps are described in more detail below.

Step 1: Set up the Assignment Source with a Criteria option to identify employees in the assignment

Step 2: Create criteria codes to identify employees for each rotation

Step 3: Create two Holiday records for each holiday, one set to work, one set to not work

- A. Set up the Holiday General Tab
- B. Set up the Holiday Indicators Tab
- C. Set up the Holiday Parameters Tab

Step 4: Create new Assignment Code records for each rotation

- A. Set up the Assignment Code General Tab
- B. Set up the Assignment Code Indicators Tab
- C. Set up the Assignment Code Parameters Tab
- D. Set up the Assignment Code Criteria Screen
- E. Set up the Assignment Code Holidays Screen

Step 5: Add the appropriate assignment criteria to each employee record

Step 6: Enter the employee Holiday Shift Eligibility Date, if applicable.

Step 7: Add the holiday validation to the Selection Styles

Step 1: Set up the Assignment Source Criteria option

This step allows the user to select certain fields as criteria to specify which employees belong to a certain holiday rotation. As an example, the user can add the Grade criteria. Then the user can create separate grade records (rotation 1, rotation 2, rotation 3) and assign these grade records to the employee.

1. From **Configuration > Assignment**, open the **Assignment Source** screen.
2. From the search screen, enter **Holiday** in the Code field and click on the **Search** button.
3. Select the record with the appropriate Holiday description.
4. Click on the **Assignment Determination** button in the left pane.
5. From the Available Criteria Items listing, find a criteria combination that will uniquely identify this assignment.

Note

With Holiday Rotations it is best to use a Labor Distribution option that is not used in any other processing--for example, the Grade, Labor Group, or Seniority option.

6. Drag the criteria selection from the Available Criteria Items column on the left to the Assigned Criteria Items column on the right.
7. Drag the criteria selection up in the hierarchy on the Assigned Criteria Items field so that it supersedes other criteria.
8. Click **Save**.

Step 2: Create criteria codes to identify employees for each rotation

Create as many criteria records as there are rotations. For example, if there are three different groups in the holiday rotation, create three different records.

1. From **Configuration > Labor Distribution**, select the appropriate screen.
2. Click on the **Add** button in the left pane to add a new record.
3. In the Code field, enter a code that describes this holiday rotation.
4. Enter a Description to describe this record, such as Holiday 1 Rotation, Holiday 2 Rotation, and Holiday 3 Rotation.
5. Let the Active field default to **Yes**.
The organization unit is automatically filled in.
6. Click **Save**.
7. Repeat steps 2-6, one for each rotation (If there are three rotations, set up three criteria records; if there are four rotations, set up need four criteria records).

Step 3A: Set up the Holiday Codes General Screen

Note

Since holidays by default are set to **Y**, if there are holidays already set up in the Holiday table, they can be used by this assignment for the WORKED holiday. If holidays are not already set up, set up two records for each holiday—one set to WORK and one set to NOT WORK.

1. Open the Assignment Codes table from **Configuration > Assignment > Holiday**.
2. Click on the **Add** button to create a new record.
3. Enter a Code and Description that will identify this holiday--indicating that it is "Not Worked", if applicable.
4. Enter the Actual Date of the holiday and the Observed Date when it is observed in the corporation.
5. Enter the Holiday Category Code. This field is used with the Every Other Same holiday assignment because there may be more than one "Holiday" record for the same holiday.
6. Click **Save**.

Step 3B: Set up the Holiday Indicators Tab

1. Select the **Indicators** tab.
2. For this holiday rule, Holiday Indicator Schedule Standard 1 is not used, and the default setting can be left.
3. For this holiday rule, each holiday should have two records: One record should have Holiday Indicator Schedule Standard 2 set to **Y** and the matching holiday record should have this indicator set to **N**.
4. Click **Save**.

Note

When the Assignment is being created, the correct holiday (Y/N--worked or not worked) needs to be selected from the Holiday section screen.

Step 3C: Set up the Holiday Parameters Tab

1. Select the **Parameters** tab and open the **Schedule Process** card by clicking on the arrow.
2. Enter the parameter option values to set the start date/time and the end date/time for the holiday for this assignment.
3. Enter the parameter option values to set the start date/time and the end date/time for the holiday for this assignment.
 - In the Holiday Parameter Schedule Standard Date 1 field, enter the starting date of the holiday. The holiday time frame begins on this date on the time defined by Holiday Parameter Schedule Standard Time 1.
 - In the Holiday Parameter Schedule Standard Date 2 field, enter the ending date of the holiday. The holiday time frame ends on this date on the time defined by Holiday Parameter Schedule Standard Time 2.
 - In the Holiday Parameter Schedule Standard Time 1 field, enter the time the holiday begins on the starting date, defined by Holiday Parameter Schedule Standard Date 1.
 - In the Holiday Parameter Schedule Standard Time 2 field, enter the time the holiday ends on the ending date, defined by Holiday Parameter Schedule Standard Date 2.
4. Click **Save**.

Step 4A: Set up the Assignment Code General tab

1. From **Configuration > Assignment**, open the **Assignment Code** screen.
2. Click on the **Add** button in the left pane to open a screen to create a new record.
3. Enter the date this Assignment Code will be effective.
4. Select the **Standard** option from the Assignment Source Classification field.
5. In the Assignment Source Code field, select **Holiday** from the field look up values.

6. For each holiday rotation, create a separate Code with a unique name.
7. Enter a Description to identify this holiday assignment record.
8. Click **Save**.

Step 4B: Set up the Assignment Codes Indicators Tab

To set up the Assignment Codes Indicators tab, complete the following steps:

1. From **Configuration > Assignment > Assignment Code**, search for and open the record to be set up.
2. Click on the **Indicators** tab, then open the **Schedule Process** card.
3. Set Holiday Assignment Code Indicator Schedule Standard 1 to **Y** to process this assignment using holiday rules.
4. Set Holiday Assignment Code Indicator Schedule Standard 2 to the proper option of how holiday shifts are determined.
 - If this indicator is set to **H** (hours in holiday), also configure the Holiday Assignment Code Parameter Schedule Standard Hour 1 to indicate the minimum hours that must be in the holiday time frame to consider a shift a holiday shift.
 - If this indicator is set to **P** (percentage of shift in holiday), also configure the Holiday Assignment Code Parameter Schedule Standard Percent 1 to indicate the minimum percentage of a shift that must be in the holiday time frame to consider it a holiday shift.
 - If this indicator is set to **S** (start time), the start time is set up on the Holiday record.
5. Set Holiday Assignment Code Indicator Schedule Standard 3 to **N**.
6. Set Holiday Assignment Code Indicator Schedule Standard 4 to **N**.
7. Set Holiday Assignment Code Indicator Schedule Standard 5 to the proper option to determine if there is a maximum number of schedules that an employee is eligible to work during the holiday time frame.
 - If this indicator is set to **Y** (Yes), also configure Assignment Code Parameter Schedule Standard Integer 1 to indicate the maximum number of schedules that an employee can work.
 - If this indicator is set to **N** (No), there is no limit to the number of schedules an employee can work during the holiday time frame.
8. Set Holiday Assignment Code Indicator Schedule Standard 6 to **N**.
9. Set Holiday Assignment Code Indicator Schedule Standard 7 to **N**.
10. Set Holiday Assignment Code Indicator Schedule Standard 8 to **N**.

11. Set Holiday Assignment Code Schedule Standard 9 to the proper option to determine if productive core rotating schedules should be populated on holidays if the employee is eligible to work.
 - If this indicator is set to **Y** (Yes) employees are scheduled their core schedules if they are eligible to work
 - If this indicator is set to **N** (No) employees are not given their core schedules on any holiday. Note: Employees can still be assigned a need-based schedule on holidays they are eligible to work.
12. Click **Save**.
13. Click the **Parameters** tab to set up the companion parameters.

Step 4C: Set up the Assignment Code Parameters Tab

To set up the Assignment Codes Parameter tab, complete the following steps:

1. Select the **Parameters** tab, then open the **Schedule Process** card.
2. Depending on the setting of Holiday Assignment Code Indicator Schedule Standard 2, set the companion parameter to indicate how holiday shifts are determined.
 - If this indicator is set to **H** (hours in holiday), also configure the Holiday Assignment Code Parameter Schedule Standard Hour 1 to indicate the minimum hours of an employee schedule that must be in the holiday time frame to consider it a holiday schedule.
 - If this is set to **P** (percentage of shift in holiday), also configure the Holiday Assignment Code Parameter Schedule Standard Percent 1 to indicate the minimum percentage of an employee schedule that must be in the holiday time frame to consider it a holiday schedule.
 - If this indicator is set to **S** (start time), the start time of the employee schedule must be within the holiday time frame to consider it a holiday schedule. The start date/time and ending date/time of the holiday time frame is set up on **Configuration > Assignment > Holidays > Parameters**.
3. Holiday Assignment Code Parameter Schedule Standard Integer 1 determines the maximum number of schedules that can be assigned to employees during a single holiday date range. If using this rule, enter a positive integer in this field.
4. Holiday Assignment Code Parameter Schedule Standard Integers 2 - 5 are not used with this assignment and can be left blank.
5. Click **Save**.

Step 4D: Set up the Assignment Codes Criteria Section

1. Click on the **Criteria** button in the left pane.
2. Click on the **Add** button to add a new criteria record.
3. Enter an Effective Date, a Code and a Description that will identify this assignment rotation record.

4. Enter the additional required criteria information, such as the Grade Code used to differentiate between the holiday rotation records.

The field options that are displayed on this screen are selected on **Configuration > Assignment > Assignment Source**. If additional fields are required, they must be added through that screen first.

5. Click **Save**.

Step 4E: Select the Applicable Holidays on the Assignment Codes Holiday screen

The holidays that are included in this assignment are selected on the Holiday section screen.

To set up this screen, complete the following steps:

1. With the Assignment Codes screen open, click on the **Holiday** section button in the left pane.
2. Click on the **Add** button to open the Holiday Search screen. Enter search criteria to find holidays to include in this assignment.
3. A listing of the holidays that have been previously set up on the Holiday screen is displayed. Check the box to the left of each holiday to be included in this assignment.

There may be more than one record for the same holiday. Be sure to correctly select the holidays to **Work** or **Not Work**.

Note

You must select an option for each observed holiday, whether it is worked or not worked. Otherwise, the system will schedule any unselected holidays as a regular working day.

Step 5: Add the appropriate assignment criteria to each employee record

1. Open an employee master record and select the **Labor Distribution** screen.
2. Select the Home Labor Distribution record.
3. Enter the assignment criteria that will indicate which holiday rotation this employee belongs to. Select the correct rotation from the Field Look Up Values.

Step 6: Enter the Employee Holiday Shift Eligibility Date

If an employee has a waiting period before he or she is eligible to participate in the Holiday assignment rules, an eligibility date can be entered in the employee record.

Note

If the employee does not have a waiting period, this field can be left blank.

1. From the Employee section, use the Employee Search feature to locate the employee records to configure.
2. Open **Employee General > Parameters > Schedule Process**.
3. In the Employee Parameter Schedule Standard Date 2 field, enter the date when the employee is

eligible to start the holiday rules.

4. Click **Save**.

Step 7: Add the Holiday Validation to the Selection Style

The Holiday rule must be selected as a validation in each pass of the selection style.

1. From **Configuration > Scheduling**, select the **Selection Styles** page.
2. Open the selection style being used with the automatic scheduling process and/or manual process.
3. Open a scheduling pass.
4. Point the cursor to the Holiday rule in the Available Rules column and drag the rule to the Selected Rules column.
5. Repeat steps 3-4 for each pass to be validated.
6. Click **Save**.

Holidays Not Tracked Assignment

The Holidays Not Tracked assignment can be used when certain employees are given their normal work schedules during the holidays. This assignment must be created so that employees are not given another holiday assignment. The holiday rule in the Selection Style must still be activated to schedule properly for those employees who do have special Holiday rules.

Note

This assignment only needs to be set up if there are employees with other holiday assignments being scheduled together with employees who work normal schedules on holidays, and so the Holiday validation is activated in the Selection Style. If all employees in an organization unit work normal schedules on holidays, the Holiday validation does not need to be added to the Selection Style, and this assignment is not needed.

Steps to Create an Assignment Where Holidays Are Not Tracked

The following summarizes the steps to create an assignment where the Holidays are Not Tracked, and employees are scheduled on holidays the same as other days. These steps are described in more detail below.

Note

Holiday records are not used for this assignment. They only need to be set up if they are used with other holiday assignments.

Step 1: Create a new Assignment Code

- A. Set up the Assignment Code General tab
- B. The Assignment Code Indicators tab does not need to be set up. Default settings can be used.
- C. The Assignment Code Parameters tab does not need to be set up. Default settings can be used.

- D. Set up the Assignment Code Criteria screen
- E. Important: Do not select any holidays on the Assignment Codes Holiday screen.

Step 2: Enter the employee Holiday Shift Eligibility Date, if applicable

Step 3: The Holiday validation is not required in the Selection Style unless there are other holiday assignments being scheduled

Step1A: Set up the Assignment Code General Tab

1. Go to the Configuration > Assignments > Assignment Code.
2. Click on **Add** to enter a new record.
3. Enter the date this Assignment Code will be effective.
4. Select the **Standard** option from the Assignment Source Classification field.
5. In the Assignment Source Code field, select **Holiday** from the field look up values.
6. Enter a Code and Description to identify this holiday assignment record.
7. Click **Save**.

Step 1D: Set up the Assignment Codes Criteria Section

The Criteria section is where the employees that should receive this assignment are identified. The criteria options that are available were previously selected on **Assignment Source > Assignment Determination**.

To configure the criteria requirements, complete the following steps:

1. With the Assignment Code record open, click on the **Criteria** section button in the left pane.
2. Click on **Add** to add a new record.
3. Enter an Effective Date, a Code and Description to identify this Criteria record.
4. In the additional fields, enter the criteria options that identify employees who should be given this assignment.

Additional criteria options can be added (by authorized users) through the **Assignment Source > Assignment Determination** button.

5. Click **Save**.
6. To add additional groups of employees to this assignment, click on the **Add** button again and complete steps 3 - 5. The groups given to this assignment are displayed.
7. Click **Save**.

Note

Employees must meet ALL the requirements within one of the Criteria records to qualify for the assignment.

- For example, employees must have a Home labor distribution in facility 4, department 3270 and have a job class of 201(LPN). In the second record, employees must have a Home labor distribution in facility 4, department 3270 and have a job class of 101(RN).
- If employees do not qualify for any other assignment, they will automatically qualify for the All assignment, which does not have any qualification criteria. There is a default All assignment for every Assignment Source.

Step 2: Enter the Employee Holiday Shift Eligibility Date

If an employee has a waiting period before he or she is eligible to participate in the Holiday assignment rules, an eligibility date can be entered in the employee record.

Note

If the employee does not have a waiting period, this field can be left blank.

1. From the **Employee** section, use the Employee Search feature to locate the employee records to configure.
2. Open **Employee General > Parameters > Schedule Process**.
3. In the Employee Parameter Schedule Standard Date 2 field, enter the date when the employee is eligible to start the holiday rules.
4. Click **Save**.

Step 3: Holiday Validation is not Required in the Selection Style

The Holiday validation in the Selection Style is not required.

Since holidays are not tracked, the selection style used does not need to include the Holiday rule. However, if there are any employees in the same schedule who DO have holiday assignments, the Holiday rule must be selected.

Note

The Holiday rule must be selected as a validation in each pass of the selection style.

1. From **Configuration > Scheduling > Selection Styles**.
2. Open the selection style being used with the automatic scheduling process and/or manual process.
3. Open a scheduling pass.
4. Point the cursor to the **Holiday** rule in the Available Rules column and drag the rule to the Selected Rules column.
5. Repeat steps 3-4 for each pass to be validated.
6. Click **Save**.

Maximum Holidays Assignment Configuration

The employees in the Maximum Holidays assignment are eligible to work X holidays in Y years, for example 3 holidays in 2 years. The values of X and Y must be set up in the parameters screen of this holiday assignment.

Steps to Create a Maximum Holidays Assignment

The following summarizes the steps to create a Maximum Holidays assignment. These steps are described in more detail below.

Step 1: Create Holiday records, if they are not already set up

- A. Set up the Holiday General tab
- B. Set up the Holiday Indicators tab
- C. Set up the Holiday Parameters tab

Step 2: Create a new Assignment Code

- A. Set up the Assignment Code General tab
- B. Set up the Assignment Code Indicators tab
- C. Set up the Assignment Code Parameters tab
- D. Set up the Assignment Code Criteria screen
- E. Set up the Assignment Code Holiday screen

Step 3: Enter the employee Holiday Shift Eligibility Date, if applicable

Step 4: Add the Holiday validation to the Selection Styles

Step 1A: Set up the Holiday General Tab

Note

If holidays that can be used by this assignment are already created in the Holiday table, this step can be skipped. Be sure that the date/time parameters for the start and end of the holiday time frame are the same as required for this assignment.

To enter a new holiday record, complete the following steps.

1. Go to **Configuration > Assignments > Holiday** icon.
2. Click on the **Add** button in the left pane to open a screen to add a new record.
3. Enter a Code and Description to identify this holiday code.
4. Enter the Actual Date of the holiday and the Observed Date when it is observed in the corporation.
5. Enter the Holiday Category Code. This field is used with the Every Other Same Holiday assignment to match up the same holiday between years, since there may be more than one "Holiday" record for the same holiday and they may have different names.

6. Click **Save**.

The Indicator and Parameter tabs are now available.

Step 1B: Set up the Holiday Indicator Tab

1. Select the Indicators tab and open the Schedule Process card by clicking on the arrow.
2. Select the indicator option values from the drop-down listing to set the rules for this particular assignment.
 - For this holiday rule, Holiday Indicator Schedule Standard 1 can be left with the default setting of **A**, since all holidays are tracked in one rotation.
 - For this holiday rule Holiday Indicator Schedule Standard 2 can be left with the default setting of **Y**.

Note

All holidays selected for this rule must have this value set to **Y**.

3. Click **Save**.

Step 1C: Set up the Holiday Parameter Tab

1. Select the **Parameters** tab and open the **Schedule Process** card by clicking on the arrow.
2. Enter the parameter option values to set the start date/time and the end date/time for the holiday for this assignment.
 - In the Holiday Parameter Schedule Standard Date 1 field, enter the starting date of the holiday. The holiday time frame begins on this date on the time defined by Holiday Parameter Schedule Standard Time 1.
 - In the Holiday Parameter Schedule Standard Date 2 field, enter the ending date of the holiday. The holiday time frame ends on this date on the time defined by Holiday Parameter Schedule Standard Time 2.
 - In the Holiday Parameter Schedule Standard Time 1 field, enter the time the holiday begins on the starting date, defined by Holiday Parameter Schedule Standard Date 1.
 - In the Holiday Parameter Schedule Standard Time 2 field, enter the time the holiday ends on the ending date, defined by Holiday Parameter Schedule Standard Date 2.

3. Click **Save**.

Step 2A: Set up the Assignment Code General Tab

1. From **Configuration > Assignments**, select the **Assignment Code** screen.
2. Click on the **Add** button to add a new Assignment Code.
3. Enter the date this Assignment Code will be effective.
4. Select the **Standard** option from the Assignment Source Classification field.
5. In the Assignment Source Code field, select **Holiday** from the field look up values.

6. Enter a Code and Description to identify this holiday assignment record.
7. Click **Save**.

The Indicators and Parameters tabs are now available for set up.

Step 2B: Set up the Assignment Code Indicators Tab

To set up the Assignment Codes Indicators tab, complete the following steps.

1. From **Configuration > Assignment > Assignment Code**, search for and open the record to be set up.
2. Click on the Indicators tab, then open the **Schedule Process** card.
3. Set Holiday Assignment Code Indicator Schedule Standard 1 to **Y** to process this assignment using holiday rules.
4. Set Holiday Assignment Code Indicator Schedule Standard 2 to the proper option of how holiday shifts are determined.
 - If this indicator is set to **H** (hours in holiday), also configure the Holiday Assignment Code Parameter Schedule Standard Hour 1 to indicate the minimum hours that must be in the holiday time frame to consider a shift a holiday shift.
 - If this indicator is set to **P** (percentage of shift in holiday), also configure the Holiday Assignment Code Parameter Schedule Standard Percent 1 to indicate the minimum percentage of a shift that must be in the holiday time frame to consider it a holiday shift.
 - If this indicator is set to **S** (start time), the start time is set up on the Holiday record.
5. Set Holiday Assignment Code Indicator Schedule Standard 3 to **N**.
6. Set Holiday Assignment Code Indicator Schedule Standard 4 to **N**.
7. Set Holiday Assignment Code Indicator Schedule Standard 5 to the proper option to determine if there is a maximum number of schedules that an employee is eligible to work during the holiday time frame.
 - If this indicator is set to **Y** (Yes), also configure Assignment Code Parameter Schedule Standard Integer 1 to indicate the maximum number of schedules that an employee can work.
 - If this indicator is set to **N** (No), there is no limit to the number of schedules an employee can work during the holiday time frame.
8. Set Holiday Assignment Code Indicator Schedule Standard 6 to **N**.
9. Set Holiday Assignment Code Indicator Schedule Standard 7 to **Y** to process the Maximum Holidays in Calendar Years rule.
10. Set Holiday Assignment Code Indicator Schedule Standard 8 to **N**.

11. Set Holiday Assignment Code Schedule Standard 9 to the proper option to determine if productive core rotating schedules should be populated on holidays if the employee is eligible to work.
 - If this indicator is set to **Y** (Yes) employees are scheduled their core schedules if they are eligible to work
 - If this indicator is set to **N** (No) employees are not given their core schedules on any holiday.

Note

Employees can still be assigned a need-based schedule on holidays they are eligible to work.

12. Click **Save**.
13. Click on the **Parameters** tab to set up the companion parameters.

Step 2C: Set up the Assignment Codes Parameter Tab

To set up the Assignment Codes Parameter tab, complete the following steps.

1. Select the **Parameters** tab, then open the **Schedule Process** card.
2. Depending on the setting of Holiday Assignment Code Indicator Schedule Standard 2, set the companion parameter to indicate how holiday shifts are determined.
 - If this indicator is set to **H** (hours in holiday), also configure the Holiday Assignment Code Parameter Schedule Standard Hour 1 to indicate the minimum hours of an employee schedule that must be in the holiday time frame to consider it a holiday schedule.
 - If this is set to **P** (percentage of shift in holiday), also configure the Holiday Assignment Code Parameter Schedule Standard Percent 1 to indicate the minimum percentage of an employee schedule that must be in the holiday time frame to consider it a holiday schedule.
 - If this indicator is set to **S** (start time), the start time of the employee schedule must be within the holiday time frame to consider it a holiday schedule. The start date/time and ending date/time of the holiday time frame is set up on **Configuration > Assignment > Holidays > Parameters**.
3. Holiday Assignment Code Parameter Schedule Standard Integer 1 determines the maximum number of schedules that can be assigned to employees during a single holiday date range. If using this rule, enter a positive integer in this field.
4. Set Holiday Assignment Code Parameter Schedule Standard Integer 2 to indicate the number of years that are tracked in this rotation. For example, if this rotation is for 8 Holidays in 3 years, the **3** goes in this field.
5. Set Holiday Assignment Code Parameter Schedule Standard Integer 3 to indicate the number of holidays that are eligible in this rotation. For example, if this rotation is for 8 Holidays in 3 years, the **8** goes in this field.
6. Holiday Assignment Code Parameter Schedule Standard Integers 4 - 5 are not used with this

assignment and can be left blank.

7. Click **Save**.

Step 2D: Set up the Assignment Codes Criteria Section

The Criteria section is where the employees that should receive this assignment are identified. The criteria options that are available were previously selected on **Assignment Source > Assignment Determination**.

To configure the criteria requirements, complete the following steps.

1. With the Assignment Code record open, click on the **Criteria** section button in the left pane.
2. Click on **Add** to add a new record.
3. Enter an Effective Date, a Code and Description to identify this Criteria record.
4. In the additional fields, enter the criteria options that identify employees who should be given this assignment.

Additional criteria options can be added (by authorized users) through the Assignment Source screen > Assignment Determination button.

5. Click **Save**.
6. To add additional groups of employees to this assignment, click on the **Add** button again and complete steps 3 - 5. The groups given to this assignment are displayed.
7. Click **Save**.

Note

Employees must meet ALL the requirements within one of the Criteria records to qualify for the assignment.

- For example, employees must have a Home labor distribution in facility 4, department 3270 and have a job class of 201(LPN). In the second record, employees must have a Home labor distribution in facility 4, department 3270 and have a job class of 101(RN).
- If employees do not qualify for any other assignment, they will automatically qualify for the All assignment, which does not have any qualification criteria. There is a default All assignment for every Assignment Source.

Step 2E: Set up the Assignment Codes Holiday Section Screen

The holidays that are included in this assignment are selected on the Holiday section screen.

To set up this screen, complete the following steps.

1. With the Assignment Codes screen open, click on the **Holiday** section button in the left pane.
2. Click on the **Add** button to open the Holiday Search screen.
3. Enter search criteria to find holidays to include in this assignment.

4. A listing of the holidays that have been previously set up on the Holiday screen is displayed. Check the box to the left of each holiday to be included in this assignment.

There may be more than one record for the same holiday. Be sure to choose the correct one.

5. When all holidays for this assignment have been checked, click on the **Assign Selected** button in the left pane.

Step 3: Enter the Employee Holiday Shift Eligibility Date

If an employee has a waiting period before he or she is eligible to participate in the Holiday assignment rules, an eligibility date can be entered in the employee record.

Note

If the employee does not have a waiting period, this field can be left blank.

1. From the Employee section, use the Employee Search feature to locate the employee records to configure.
2. Open **Employee General > Parameters > Schedule Process**.
3. In the Employee Parameter Schedule Standard Date 2 field, enter the date when the employee is eligible to start the holiday rules.
4. Click **Save**.

Step 4: Add the Holiday Validation to the Selection Style

The Holiday rule must be selected as a validation in each pass of the selection style.

1. From **Configuration > Scheduling**, select the **Selection Styles** page.
2. Open the selection style being used with the automatic scheduling process and/or manual process.
3. Open a scheduling pass.
4. Point the cursor to the Holiday rule in the Available Rules column and drag the rule to the Selected Rules column.
5. Repeat steps 3-4 for each pass to be validated.
6. Click **Save**.

No Holidays Worked

Employees in the No Holidays Worked assignment do not work any holidays. This assignment might be used for departments that are closed on holidays, such as administration departments.

The following summarizes the steps to create a No Worked Holidays assignment. Click on the links below to view the details of each step.

Step 1: Create Holiday records, if they are not already set up

- A. Set up the Holiday General tab
- B. Set up the Holiday Indicators tab

C. Set up the Holiday Parameters tab

Step 2: Create a new Assignment Code record

A. Set up the Assignment Code General tab

B. Set up the Assignment Code Indicator tab

C. Set up the Assignment Codes Parameters tab

D. Set up the Assignment Code Criteria screen

E. Set up the Assignment Code Holiday screen

Step 3: Enter the Employee Holiday Shift Eligibility Date, if applicable.

Step 4: Add the Holiday validation to the Selection Styles

Step 1A: Set up the Holiday General Tab

Note

If holidays that can be used by this assignment are already created in the Holiday table, this step can be skipped. Be sure that the date/time parameters for the start and end of the holiday time frame are the same as required for this assignment.

To enter a new holiday record, complete the following steps.

1. From **Configuration > Assignments**, select the **Holiday** icon.
2. Click on the **Add** button in the left pane to open a screen to add a new record.
3. Enter a Code and Description to identify this holiday code.
4. Enter the Actual Date of the holiday and the Observed Date when it is observed in the corporation.
5. Enter the Holiday Category Code.

This field is used with the Every Other Same Holiday assignment to match up the same holiday between years, since there may be more than one "Holiday" record for the same holiday and they may have different names.

6. Click **Save**.

The Indicator and Parameter tabs are now available.

Step 1B: Set up the Holiday Indicator Tab

1. Select the Indicators tab and open the **Schedule Process** card by clicking on the arrow.
2. Select the indicator option values from the drop-down listing to set the rules for this particular assignment.
 - For this holiday rule, Holiday Indicator Schedule Standard 1 can be left with the default setting of **A**, since all holidays are tracked in one rotation.
 - For this holiday rule Holiday Indicator Schedule Standard 2 can be left with the default setting of **Y**.

Note

All holidays selected for this rule must have this value set to **Y**.

3. Click **Save**.

Step 1C: Set up the Holiday Parameter Tab

1. Select the **Parameters** tab and open the **Schedule Process** card by clicking on the arrow.
2. Enter the parameter option values to set the start date/time and the end date/time for the holiday for this assignment.
 - In the Holiday Parameter Schedule Standard Date 1 field, enter the starting date of the holiday. The holiday time frame begins on this date on the time defined by Holiday Parameter Schedule Standard Time 1.
 - In the Holiday Parameter Schedule Standard Date 2 field, enter the ending date of the holiday. The holiday time frame ends on this date on the time defined by Holiday Parameter Schedule Standard Time 2.
 - In the Holiday Parameter Schedule Standard Time 1 field, enter the time the holiday begins on the starting date, defined by Holiday Parameter Schedule Standard Date 1.
 - In the Holiday Parameter Schedule Standard Time 2 field, enter the time the holiday ends on the ending date, defined by Holiday Parameter Schedule Standard Date 2.
3. Click **Save**.

Step 2A: Set up the Assignment Code General Tab

1. From **Configuration > Assignments**, select the **Assignment Code** screen.
2. Click on the **Add** button to add a new Assignment Code.
3. Enter the date this Assignment Code will be effective.
4. Select the **Standard** option from the Assignment Source Classification field.
5. In the Assignment Source Code field, select **Holiday** from the field look up values.
6. Enter a Code and Description to identify this holiday assignment record.

7. Click **Save**.

The Indicators and Parameters tabs are now available for set up.

Step 2B: Set up the Assignment Code Indicator Tab

To set up the Assignment Codes Indicators tab, complete the following steps:

1. From **Configuration > Assignment > Assignment Code**, search for and open the record to be set up.
2. Click on the **Indicators** tab, then open the **Schedule Process** card.
3. Set Holiday Assignment Code Indicator Schedule Standard 1 to **N**. Then employees are not eligible to work the holidays that are selected in the holidays section.
4. Set Holiday Assignment Code Indicator Schedule Standard 2 to the proper option of how holiday shifts are determined.
 - If this indicator is set to **H** (hours in holiday), also configure the Holiday Assignment Code Parameter Schedule Standard Hour 1 to indicate the minimum hours that must be in the holiday time frame to consider a shift a holiday shift.
 - If this indicator is set to **P** (percentage of shift in holiday), also configure the Holiday Assignment Code Parameter Schedule Standard Percent 1 to indicate the minimum percentage of a shift that must be in the holiday time frame to consider it a holiday shift.
 - If this indicator is set to **S** (start time), the start time is set up on the Holiday record.
5. Set Holiday Assignment Code Indicator Schedule Standard 3 to **N**.
6. Set Holiday Assignment Code Indicator Schedule Standard 4 to **N**.
7. Set Holiday Assignment Code Indicator Schedule Standard 5 to **N**.
8. Set Holiday Assignment Code Indicator Schedule Standard 6 to **N**.
9. Set Holiday Assignment Code Indicator Schedule Standard 7 to **N**.
10. Set Holiday Assignment Code Indicator Schedule Standard 8 to **N**.
11. Set Holiday Assignment Code Indicator Schedule Standard 9 to **N**.
12. Click **Save**.
13. Click on the **Parameters** tab to set up the companion parameters.

Step 2C: Set up the Assignment Code Parameters Tab

To set up the Assignment Codes Parameter tab, complete the following steps.

1. Select the **Parameters** tab, then open the **Schedule Process** card.
2. Depending on the setting of Holiday Assignment Code Indicator Schedule Standard 2, set the companion parameter to indicate how holiday shifts are determined.
 - If this indicator is set to **H** (hours in holiday), also configure the Holiday Assignment Code Parameter Schedule Standard Hour 1 to indicate the minimum hours of an employee schedule that must be in the holiday time frame to consider it a holiday schedule.
 - If this is set to **P** (percentage of shift in holiday), also configure the Holiday Assignment Code Parameter Schedule Standard Percent 1 to indicate the minimum percentage of an employee schedule that must be in the holiday time frame to consider it a holiday schedule.
 - If this indicator is set to **S** (start time), the start time of the employee schedule must be within the holiday time frame to consider it a holiday schedule. The start date/time and ending date/time of the holiday time frame is set up on **Configuration > Assignment > Holidays > Parameters**.
3. Holiday Assignment Code Parameter Schedule Standard Integer 2 is not used in this assignment and can be left blank.
4. Set Holiday Assignment Code Parameter Schedule Standard Integer 3 is not used in this assignment and can be left blank.
5. Click **Save**.

Step 2D: Set up the Assignment Codes Criteria Section

The Criteria section is where the employees that should receive this assignment are identified. The criteria options that are available were previously selected on **Assignment Source > Assignment Determination**.

To configure the criteria requirements, complete the following steps.

1. With the Assignment Code record open, click on the **Criteria** section button in the left pane.
2. Click on **Add** to add a new record.
3. Enter an Effective Date, a Code and Description to identify this Criteria record.
4. In the additional fields, enter the criteria options that identify employees who should be given this assignment.

Additional criteria options can be added (by authorized users) through the **Assignment Source > Assignment Determination** button.
5. Click **Save**.
6. To add additional groups of employees to this assignment, click on the **Add** button again and complete steps 3 - 5.

The groups given to this assignment are displayed.

7. Click **Save**.

Note

Employees must meet ALL the requirements within one of the Criteria records to qualify for the assignment.

- For example, employees must have a Home labor distribution in facility 4, department 3270 and have a job class of 201(LPN). In the second record, employees must have a Home labor distribution in facility 4, department 3270 and have a job class of 101(RN).
- If employees do not qualify for any other assignment, they will automatically qualify for the All assignment, which does not have any qualification criteria. There is a default All assignment for every Assignment Source.

Step 2E: Set up the Assignment Codes Holiday Section Screen

The holidays that are included in this assignment are selected on the Holiday section screen.

To set up this screen, complete the following steps.

1. With the Assignment Codes screen open, click on the **Holiday** section button in the left pane.
2. Click on the **Add** button to open the Holiday Search screen.
3. Enter search criteria to find holidays to include in this assignment.
4. A listing of the holidays that have been previously set up on the Holiday screen is displayed. Check the box to the left of each holiday to be included in this assignment.

There may be more than one record for the same holiday. Be sure to choose the correct one.

5. When all holidays for this assignment have been checked, click on the **Assign Selected** button in the left pane.

Step 3: Enter the Employee Holiday Shift Eligibility Date

If an employee has a waiting period before he or she is eligible to participate in the Holiday assignment rules, an eligibility date can be entered in the employee record.

Note

If the employee does not have a waiting period, this field can be left blank.

1. From the Employee section, use the Employee Search feature to locate the employee records to configure.
2. Open **Employee General > Parameters > Schedule Process**.
3. In the Employee Parameter Schedule Standard Date 2 field, enter the date when the employee is eligible to start the holiday rules.
4. Click **Save**.

Step 4: Add the Holiday Validation to the Selection Styles

The Holiday rule must be selected as a validation in each pass of the selection style.

1. From **Configuration > Scheduling**, select the **Selection Styles** page.
2. Open the selection style being used with the automatic scheduling process and/or manual process.
3. Open a scheduling pass.
4. Point the cursor to the Holiday rule in the Available Rules column and drag the rule to the Selected Rules column.
5. Repeat steps 3-4 for each pass to be validated.
6. Click **Save**.

Additional Needs-Based Scheduling Set Up

The following additional set up may be required when using needs-based scheduling for populating holiday time frames, especially if the organization unit usually populates the schedule with Core schedules or by Self Scheduling.

Some or all of this set up may already be completed.

- Add a Needs-Based Holiday Pass to the Selection Styles
- Create a Staffing Template
- Create a Core Staffing Template (only if staffing needs are based on activity codes)
- Update Activity Codes to Allow Automatic Scheduling
- Add Profile Activity Code Selection
- Set Up Employee Schedule Preferences
- In the Staffing Configuration Screen, Set Up Priority Dates

Selection Styles

Selection styles can be modified to include need-based passes, and/or a new selection style can be created which includes need-based passes. Need-based passes are those where the Selection field is set to either Staffing Plan or Core Staffing Plan.

If core schedules are not populated during holidays, and there are no need-based passes set up, no employees will be populated on holidays.

To add a needs-based scheduling pass to an existing Auto Schedule selection style, complete the following steps:

1. From **Configuration > Scheduling > Selection Styles**, search for and open an existing selection style.
2. Click the **Passes** button in the left pane.

The existing passes will be displayed.

3. Click the **Add** button to open a screen to add passes.
4. In the **Selection** field, choose one of the following options:
 - Choose the **Staffing Plan** option to create a schedule pass which populates needs based on Coverage Period and Profile from the Staffing Plan grid on the schedule.
 - Choose the **Core Staffing Plan** option to create a schedule pass which populates needs based on Activity Code and Profile from the Core Staffing Plan.
5. Enter a Description identifying this pass.
6. In the Staffing Level field, enter the percentage of population for this pass--which in this pass is for holiday dates only because the Holiday Pass is set to **Yes**.

If all employees who are eligible to work a holiday should be scheduled, this is a way to force the system to over-schedule. For example, if the staffing requirement for a specific coverage period on the Staffing Plan is set to **10**, but there are 12 employees who are eligible to work a holiday, set this value to 120% or higher and all employees will be scheduled.
7. In the Holiday Pass field, set this value to **Yes** to populate only holidays within the scheduling range with needs-based schedules. Non-holiday dates in the schedule will not be populated.
8. Click **Save**.
9. Click on the **Qualification** button in the left pane to open the screen to select the rules to be validated with this pass.
10. Select the **Holiday** validation to enforce the holiday rules.
11. Select all other rules for determining which employees are eligible to work.
12. If additional fields are displayed with a selected rule, enter the values required.

Note

If the **Hide When Run** check box is selected, these fields are required, since the user will not be able to view or edit this field when running the Scheduling Assistant wizard. If this check box is not selected, default values are still recommended, since these fields are required when running the wizard. If default values are not set up, the user must complete the fields each time the wizard is run.

13. When all rules are selected, click **Save**.
14. Click on the **Sorting Rules** button in the left pane to rank the qualified employees.

15. Drag the rules to be used to rank employees from the Available Rules column to the Selected Rules column.

Note

The sorting of employees for assigning Holiday schedules may be different than for regular need-based schedules. For example, in holiday scheduling, you may want the highest seniority employees scheduled last instead of first, especially if all eligible employees will not be scheduled.

16. Enter the values of additional information required, such as sorting direction and increments used for calculating total points.
17. When all fields are completed, click **Save**.
18. To create additional passes, click on the **Passes** button and repeat steps 2-17.
 - a. When more than one pass is created for a selection style, the pass numbers default to the order they were created.
 - b. To reorder the Pass sequences, click on the number of a record under the Pass column and change it.
 - c. The numbering sequences of the other passes are updated.

For example, if there are four passes set up, and pass 3 is updated to number 2, passes 2, 3 and 4 are automatically updated to the proper number sequence. In the same manner, if one or more passes are deleted, the system automatically adjusts the numbering sequence of the remaining passes.

19. When all appropriate passes have been changed, click on the **Update Order** button to save the sequence.

Create a Staffing Template

The Staffing Template is a staffing grid indicating the baseline staffing levels needed for an organization unit. These staffing needs are set up for each combination of profile and coverage period.

Staffing templates are used to create the Staffing Plan, which indicates the staffing needs for a specific scheduling period. Auto Schedule Passes where the Selection is set to Staffing Plan use this information when running the scheduling process.

For more information on setting up a staffing template, see **Configuration > Scheduling > Staffing Template**.

To add a new Staffing Template record, complete the following steps:

1. Select the **Staffing Template** icon from **Configuration > Scheduling**.
2. Click on the **Add** button to open a screen to add a new record.
3. Enter a Code and Description to identify this Staffing Template.

4. Select the **Coverage Set Code** from the listing to indicate the coverage periods.

The staffing needs will be set up by coverage periods that exist within the selected coverage set. If the coverage set selected does not match the one set up for the organization unit on the Staffing Configuration screen, an error message is generated.

5. In the Active field, indicate if this Staffing Template is currently active and available to be assigned.
6. Enter the Number Of Weeks of this template.

This indicates the number of weeks of rotation before the same staffing needs pattern is repeated. In most cases, this staffing needs template is the same every week, and this value is set to one.

7. Indicate whether this template is to be the Default for this organization unit.

When this value is set to **Yes**, this template is automatically loaded when the **Open Staffing Plan** button is selected.

8. Enter the Organization Unit values indicating the labor distribution where this staffing template will be applied.
9. Click **Save**.

A grid is displayed to set up the staffing needs for this organization unit, for the number of weeks indicated.

10. In the Profile box, select a profile for this organization unit.
11. In the Coverage Period box, select one of the coverage periods from the selected coverage set.
12. For each day in the week, enter the number of staff needed for that profile/coverage period combination.

This is the number of staff needed during the coverage period, not an FTE value. A value of **1** for a 4-hour coverage period indicates needs for four hours of coverage. A value of **1** for a 12-hour coverage period indicates needs for twelve hours of coverage. A value of **.5** in an 8-hour night coverage period indicates that four hours of coverage are needed during that time frame.

13. Repeat steps 11-13 until each profile/coverage period combination for the organization unit is configured.
14. Click **Save**.

To delete one or more lines of the Staffing Template, complete the following steps:

1. Position the cursor in the box to the left of the record and click. The row is now highlighted.
 - To highlight multiple consecutive rows for deletion, after highlighting the first row to be deleted, hold down **Shift** on the keyboard and highlight the last row to be deleted. The first, last and all records in between are now highlighted.
 - To highlight multiple non-consecutive rows for deletion, after highlighting the first row to be deleted, hold down **Control** on the keyboard and click on the box to the left of each row to be deleted. All selected records are now highlighted.
2. When all rows are selected for deletion, press **Delete** on the keyboard.

3. A warning message is generating, verifying the rows are to be deleted. Click on **Yes**.

Note

Be sure to use the `Delete` key on the keyboard, not the Delete button in the left pane. Clicking on the button in the left pane will delete the entire template.

Create a Core Staffing Template

The Core Staffing Template is a staffing grid used for populating needs-based schedules in an organization unit. These staffing needs are set up for each combination of profile and activity code. This option can be used to set up staffing needs for organization units that use “staggered shifts” where coverage for specific time frames are needed.

For more information, see **Configuration > Scheduling > Core Staffing Template**.

To add a new Core Staffing Template record, complete the following steps:

1. Select the **Core Staffing Template** icon from **Configuration > Scheduling**.
2. Click on the **Add** button to open a screen to add a new record.
3. Enter a Code and Description to identify this core staffing template.
4. In the Active field, indicate if this template is currently active and available to be assigned.
5. Indicate whether this template is to be the Default for this organization unit.
When this value is set to **Yes**, this template is automatically loaded when the **Open Core Staffing Plan** button is selected.
6. Enter the Number Of Weeks of this template.
This indicates the number of weeks of rotation before the same staffing needs pattern is repeated.
In most cases, this staffing needs template is the same every week, and this value is set to one.
7. Enter the Organization Unit values indicating where this staffing template will be applied.
8. Click **Save**.
9. A grid is displayed to set up the staffing needs by activity code for this organization unit, for the number of weeks indicated.
10. In the Profile box, select a profile for this organization unit.
11. In the Activity box, select one of the activity codes from the drop-down menu.
12. For each day in the week, enter the number of staff needed for that profile/activity code combination.
13. Repeat steps 10-12 until each profile/activity code combination for the organization unit is configured.
14. Click **Save**.

To delete one or more lines of the Core Staffing Template, complete the following steps:

1. Position the cursor in the box to the left of the record and click. The row is now highlighted.
 - To highlight multiple consecutive rows for deletion, after highlighting the first row to be deleted, hold down `Shift` on the keyboard and highlight the last row to be deleted. The first, last and all records in between are now highlighted.
 - To highlight multiple non-consecutive rows for deletion, after highlighting the first row to be deleted, hold down `Control` on the keyboard and click on the box to the left of each row to be deleted. All selected records are now highlighted.
2. When all rows are selected for deletion, press `Delete` on the keyboard.
3. A warning message is generating, verifying the rows are to be deleted. Click on **Yes**.

Note

Be sure to use the `Delete` key on the keyboard, not the Delete button in the left pane. Clicking on the button in the left pane will delete the entire template.

Activity Codes

An Activity Code indicator setting determines whether an activity code can be used by the system when creating need-based schedules. Only codes with this value set to **Y** may be used by the system when creating a needs-based automatic schedule.

The indicator setting of multiple activity codes can be set to **Y** at the same time, by using the Replace feature, as outlined below.

To update the activity code indicators, complete the following steps:

1. From **Configuration > Scheduling**, open the **Activity Code** screen.
2. Enter search criteria to find the activity codes that should be activated for automatic scheduling.
3. Click on the check box to the left of each record that should be updated.
4. Click on the **Replace** button in the left pane to open a screen to update all selected records at the same time.
5. Select the **Indicators** tab and then open the **Schedule Process** category card.
6. Click on the check box to the left of Activity Code Indicator Schedule Standard 3 to enable the field.
7. Set this value to **Y** to authorize the selected activity codes to be available for use when the system creates automatic need-based schedules.
8. Click **Save**.

Add Profile Activity Code Selection

For each profile, specific activity codes can be authorized for automatic scheduling. The Activities button opens a screen to search for and select specific activity codes that are authorized for automatic scheduling for this profile. The activity codes available are assigned to the same organization unit as the open Profile record.

- When no activity codes are selected on this screen, all activity codes set up for the related organization unit are authorized for this profile.
- When any activity codes are entered on this screen, if creating automatic need-based schedules for the profile, the system validates the Auto Schedule box setting.
- When any activity codes in the Activities screen are set to **Yes**, only those activity codes are used when creating need-based automatic schedules.
- When all activity codes in the Activities screen are set to **No**, all activity codes set up for the related organization unit can be used when creating need-based automatic schedules.

Steps to Add Activity Codes to a Profile

To add one or more Activity Codes to a profile, complete the following steps:

1. From **Configuration > Labor Distribution**, open the **Profiles** screen.
2. Select the **Activities** button from the left pane.
3. Click on the **Add** button in the left pane to open the Activity Codes Search to filter search criteria when searching for an existing Activity Code.
4. After entering values in the selected fields, click on the **Search** button.

The results are listed below the search screen.

5. To select one or more record, click the selection box to the left of the record to alternately add or remove the check mark.

To select/de-select all records in a specific search result set, click on the box above the search results to add or remove all check marks.

6. After selecting activity codes, click on **Assign: Common Data** to add the same Auto Schedule values to all records or select **Assign: Individual Data** button to assign individual values to each record.

Note

Only activity codes assigned to the same organization unit as this profile in the Activity Codes configuration screen are included in the results set. For more information on the fields available when filtering the list, or when adding, editing or viewing a record, see **Configuration > Scheduling > Activity Codes**.

Employee Schedule Preferences

Schedule Preferences may need to be added to employee records to ensure they are assigned to the activity times they prefer to work. These preferences are validated during scheduling passes where the **Preferences** criteria option is selected.

When populating need-based schedules, the system uses activity codes where Activity Code Indicator Schedule Standard 3 is set to **Y**. The system then attempts to match qualified employees with these activity codes. Be sure that one or more employee preference records will match the activity codes set up. For example, if only 8-hour activity codes are allowed with automatic scheduling, and all the employee preference records say the employee prefers activities with a shift length of 12 hours, this will not create a scheduling match.

Note

When fields are left blank, the system allows any values in these fields. Therefore, when less information is entered in this screen, the employee is eligible to work more activity codes and is more likely to be added to the schedule.

Set up Employee Schedule Preferences

To set up employee schedule preferences, complete the following steps:

1. Search for and open the employee record of the employee to set up.
2. From the Employee Sections in the left pane, select the **Schedule Preferences** option.
3. Click on the **Add** button in the left pane to open the following set up screen.
4. Enter the Effective Date of when these preferences are effective.
5. Enter an Expiration Date if these preferences will expire on a certain date.

To leave these effective indefinitely, do not enter a value in this field.

6. If using Priority values, enter a number in this field.

Note

The system will only populate preferences in this record if this Priority value matches the Priority set up on the selection style.

7. Enter a Start Time for the preferred working time frame.

This setting is used with the Hour Value to indicate the preferred working time frame. For example, if the Start time is set to **700** and the Hour Value is set to **12.5**, the system can populate any activity code that starts on or after 0700 and ends on or before 19:30 (which is 12.5 hours after the start time).

8. In the Shift Length (Hours) field, enter the length of schedule the employee would like to work, for example, 8-hour or 12-hour.

This can be used in conjunction with the Start Time and Hour Value information.

9. In the Position Code field, enter the position code linked to profiles that the employee prefers to be assigned.
10. In the Activity Code field, enter the activity code the employee would like to be scheduled.
11. In the Sunday through Saturday fields, set each day of the week to **Yes** to indicate the types of schedules the employee prefers to work on the selected days of the week.

Different scheduling criteria can be set up for different days of the week. For example, the employee may want to work only 8-hour schedules on Saturday and Sunday but is willing to work any length shift the other days of the week.

12. Click **Save**.
13. To create additional preferences, click on the **Add** button in the left pane and complete steps 5-13 for each preference record.

Staffing Configuration - Priority Dates

In the Staffing Configuration screen, the Priority Dates button opens a screen to indicate dates that have highest scheduling priority (for example, holiday time frames). When running the scheduling process, the priority dates that occur within the scheduling period are scheduled before the rest of the days. Using this feature prevents employees who are eligible to work a holiday from being disqualified because of other scheduling rules, such as overtime or approved hours.

If Priority Days are also set up for this Staffing Configuration record, the system will schedule the days within the Priority Dates time frame in the sort order specified by the Priority Dates table.

For example:

- The Priority Days are set as Saturday, Sunday, and Friday. The rest of the days populate in chronological order (Monday, Tuesday, Wednesday, Thursday)
- The Priority Dates for the Thanksgiving Holiday are set up as Thursday through Sunday of the last week of November (November 27-30, 2018)

When the scheduling period that includes the dates of November 23-30 is run, the scheduling process will first schedule Saturday, November 29, then Sunday, November 30, then Friday, November 28, then Thursday, November 27. The system will then populate the rest of the scheduling period in the normal sequence.

Adding a Priority Dates record:

1. From **Configuration > Scheduling**, select the **Staffing Configuration** screen.
2. Search for and open a record.
3. Click on the **Priority Dates** button in the left pane.
4. Enter the Start Date for the first day of the date range to be scheduled first.
5. Enter the End Date for the last day of the date range to be scheduled first.
6. Enter a Description to describe this priority date's record.

7. Click **Save**.
8. Repeat steps 1-4 for all the priority dates to be configured.
9. In the Priority field, set the priority number of which holiday record should be populated first.
This is used when more than one holiday falls within a scheduling period, such as Christmas and New Year's.
10. Click **Save**.

Note
The priority dates need to be updated each year, before the scheduling process is run for the date range.

Holiday Assignment Code Indicators and Parameters

The following indicators are found in the assignment codes screen.

Holiday Assignment Code Indicator Schedule Standard 2

Holiday Assignment Code Indicator Schedule Standard 2 indicates the method of how an employee schedule is determined to be a holiday schedule.

Valid Indicator Options:

H	<p>Holiday schedules are determined by hours within the holiday date/time range.</p> <p>For example, if this field is set to 2, an employee's schedule must have at least two hours scheduled within the holiday date/time range to be considered a holiday schedule.</p> <div style="border: 1px solid blue; border-radius: 10px; padding: 5px; margin-top: 10px;"> <p>Note The number of hours for this indicator is set up on Holiday Assignment Code Parameter Schedule Standard Hour 1.</p> </div>
P	<p>Holiday schedules are determined by percentage of the shift within the holiday date/time range.</p> <p>The system compares the total length of the schedule with the amount of time that falls within the holiday time frame. For example: An employee works an 8-hour schedule, and 2 hours falls within the holiday time frame. If the percentage value were set to 50%, the schedule would not qualify as a holiday schedule because only 25% of the time falls within the holiday time frame.</p> <div style="border: 1px solid blue; border-radius: 10px; padding: 5px; margin-top: 10px;"> <p>Note The percentage for this indicator is set up on Holiday Assignment Code Parameter Schedule Standard Percent 1.</p> </div>
S	<p>Holiday schedules are determined by start time.</p> <p>If the start time of an employee's schedule falls within the time frame of the holiday (as defined by the starting and ending dates/times of the holiday) it is considered to be a holiday schedule.</p>

Note

The starting and ending dates/times of the holiday are set up on the Holiday screen, on the Parameters tab: Holiday Schedule Standard Date 1 and 2 and Holiday Schedule Standard Time 1 and 2.

Note

This indicator is found in **Configuration > Assignments > Assignment Code > Indicators > Schedule Process**.

Holiday Assignment Code Indicator Schedule Standard 3

Holiday Assignment Code Indicator Schedule Standard 3 indicates whether the Every Other Holiday rule should be activated with this assignment. When this rule is activated, employees are eligible to work alternating holidays.

- If core schedules are set to populate, (Holiday Assignment Code Indicator Schedule Standard 9 set to **Yes**), employees will be given their regular core schedule on alternating holidays.
- If need-based scheduling is used, the employee may or may not be scheduled, depending on the staffing needs.

Valid Indicator Options:

N	The Every Other Holiday rule is not processed with this assignment when scheduling.
Y	The Every Other Holiday rule is processed with this assignment when scheduling.

Note

This indicator is found in **Configuration > Assignments > Assignment Code > Indicators > Schedule Process**.

Holiday Assignment Code Indicator Schedule Standard 4

Holiday Assignment Code Indicator Schedule Standard 4 determines whether the X out of Y Holiday rule should be validated with this assignment. When this rule is activated, employees are eligible to work X out of Y holidays, for example, 2 out of 4 holidays, or 1 out of 3 holidays.

Valid Indicator Options:

N	The X out of Y Holiday rule is not processed with this assignment when scheduling.
Y	The X out of Y Holiday rule is processed with this assignment when scheduling.

When this value is set to **Y**, also configure the values of X on Holiday Assignment Code Parameter Schedule Standard Integer 5 and the value of Y on Holiday Assignment Code Parameter Schedule Standard Integer 4.

Note

This indicator is found in **Configuration > Assignments > Assignment Code > Indicators > Schedule Process**.

Holiday Assignment Code Indicator Schedule Standard 6

Holiday Assignment Code Indicator Schedule Standard 5 indicates if there is a maximum number of schedules that an employee is eligible to work during the holiday time frame.

Valid Indicator Options:

N	This rule is not processed for this assignment. There is no limit to the number of schedules an employee can work during the holiday time frame.
Y	This rule is processed for this assignment and there is a limit to the number of schedules an employee can work during the holiday time frame.

If this indicator is set to **Y** (Yes), also configure Assignment Code Parameter Schedule Standard Integer 1 to indicate the maximum number of schedules that an employee can work.

Note

This indicator is found in **Configuration > Assignments > Assignment Code > Indicators > Schedule Process**.

Holiday Assignment Code Indicator Schedule Standard 6

Holiday Assignment Code Indicator Schedule Standard 6 determines whether the Every Other Same Holiday rule should be activated for this assignment. When this rule is activated, employees who work a certain holiday one year are not eligible to work a holiday with the same Holiday Category the next year.

Valid Indicator Options:

N	The Every Other Same Holiday rule is not processed with this assignment when scheduling.
Y	The Every Other Same Holiday rule is processed with this assignment when scheduling.

Note

This indicator is found in **Configuration > Assignments > Assignment Code > Indicators > Schedule Process**.

Holiday Assignment Code Indicator Schedule Standard 7

Holiday Assignment Code Indicator Schedule Standard 7 determines whether the Maximum Holidays Worked in a Calendar Year Rule should be activated for this assignment. When this rule is activated, employees are eligible to work a certain number of holidays within a specified number of years, for example, 7 holidays in 2 years.

Valid Options:

N	The Every Other Same Holiday rule is not processed with this assignment when scheduling.
Y	The Every Other Same Holiday rule is processed with this assignment when scheduling.

When this indicator is set to **Y**, also configure Assignment Code Parameter Schedule Standard Integer 2 to indicate the number of years that are tracked (2 in this example) and Assignment Code Parameter Schedule Standard Integer 3 to indicate the number of holidays that must be worked within these number of years (7 in this example).

Note

This indicator can be found in **Configuration > Assignments > Assignment Codes > Indicators**.

Holiday Assignment Code Indicator Schedule Standard 8

Holiday Assignment Code Indicator Schedule Standard 8 determines whether this assignment uses the Holiday Rotations Rule.

In the Holiday Rotations assignment, specific holidays are eligible to be worked by certain employees. For example, Holiday 1 rotation employees can work New year's Day and July 4; Holiday 2 rotation employees can work Memorial Day and Thanksgiving and Holiday 3 rotation employees can work Labor Day and Christmas. Each year the eligible holidays to work for each assignment can be changed.

Valid Indicator Options:

N	This assignment does not use the Holiday Rotation processing.
Y	This assignment does use the Holiday Rotation processing.

Note

This indicator is found in **Configuration > Assignments > Assignment Code > Indicators > Schedule Process**.

Holiday Assignment Code Indicator Schedule Standard 9

Holiday Assignment Code Indicator Schedule Standard 3 determines whether employees productive core schedules should be populated as usual on holidays.

- If core schedules are set to populate, employees will be given their regular core schedule on holidays they are eligible to work, depending on the holiday rule selected.

- If core schedules are not set to populate, need-based scheduling is used. Employee may or may not be scheduled to work on their eligible holidays, depending on the staffing needs.

Valid Indicator Options:

N	Core productive schedules should not be populated on holidays. Core non-productive schedules are populated.
Y	Core productive schedules should be populated on holidays.

Note

This indicator is found in **Configuration > Assignments > Assignment Code > Indicators > Schedule Process**.

Holiday Assignment Code Parameter Schedule Standard Date 1

Holiday Assignment Code Parameter Schedule Standard Date 1 is used as the pivot date for the Schedule A Major holidays. The Major holiday set up in the holiday screen nearest this date is the first eligible major holiday to work. The next major holiday is Schedule B, and the system continues to alternate the holidays as being Schedule A or Schedule B. See the section on Every Other Holiday Assignment for a more detailed explanation.

Valid Values:

Any valid calendar date.

Note

This parameter is found in **Configuration > Assignments > Assignment Code > Parameters of the selected assignment**.

Holiday Assignment Code Parameter Schedule Standard Date 2

Holiday Assignment Code Parameter Schedule Standard Date 2 is used as the pivot date for the Schedule A Minor holidays. The Minor holiday set up in the holiday screen nearest this date is the first eligible minor holiday to work. The next minor holiday is ineligible, and the system continues to alternate the holidays as being eligible or ineligible to work. See the section on Every Other Major/Every Other Minor Holiday Rotation for a more detailed explanation.

Valid Values:

Any valid calendar date.

Note

This parameter is found in **Configuration > Assignments > Assignment Code > Holiday Assignment Source Code > Parameters** of the selected assignment.

Holiday Assignment Code Parameter Schedule Standard Hour 1

Holiday Assignment Code Parameter Schedule Standard Hour 1 indicates the minimum number of hours that must be included in a schedule in order for that schedule to be classified as a Holiday schedule.

For example, if this value is set to **2**, there must be two or more hours of an employee schedule that falls within the holiday time frame, as determined by the Start Date/Start Time and End Date/End Time settings.

This value is used if a Holiday schedule is determined by minimum hours, when Holiday Assignment Code Indicator Schedule Standard 2 is set to **H**.

Valid Values:

Any numeric value.

Holiday Assignment Code Parameter Schedule Standard Integer 1

Holiday Assignment Code Parameter Schedule Standard Integer 1 is used to indicate the maximum number of schedules that an employee can work within the holiday time frame. For example, if this value is set to **2**, employees can be scheduled a maximum of 2 schedules within the holiday time frame (as set up on the Holiday Parameters screen.)

This parameter setting is only used when Holiday Assignment Code Indicator Schedule Standard 5 is set to **Y**.

Valid values:

Any numeric value.

Note

This parameter can be found on **Configuration > Assignment > Assignment Codes** on the Parameters tab.

Holiday Assignment Code Parameter Schedule Standard Integer 2

Holiday Assignment Code Parameter Schedule Standard Integer 2 is used to indicate the number of years that are tracked in this rotation. For example, if this rotation is for 8 Holidays in 3 years, the **3** goes in this field.

Valid Values:

Any positive integer.

Holiday Assignment Code Parameter Schedule Standard Integer 2

Holiday Assignment Code Parameter Schedule Standard Integer 3 is used to indicate the maximum number holidays that can be worked in this rotation. For example, if this rotation is for 8 Holidays in 3 years, the **8** goes in this field.

Valid Values:

Any positive integer

Holiday Assignment Code Parameter Schedule Standard Integer 4

Holiday Assignment Code Parameter Schedule Standard Integer 4 is used to define the number of holidays being tracked in each rotation of this assignment. This would be the Y value in the X out of Y equation. For example, if this assignment is for 4 out of 7 holidays, the **7** would be entered in this field.

Valid Values:

Positive integers.

Holiday Assignment Code Parameter Schedule Standard Integer 5

Holiday Assignment Code Parameter Schedule Standard Integer 5 is used to define the number of holidays that an employee is required to work within the holiday cycle. This would be the X value in the X out of Y equation. For example, if this assignment is for 4 out of 7 holidays, the **4** would be entered in this field.

Valid Values:

Positive integers

Holiday Assignment Code Parameter Schedule Standard Percent 1

Holiday Assignment Code Parameter Schedule Standard Percent 1 indicates the minimum percentage of a schedule that must fall within a Holiday time frame in order for that schedule to be classified as a Holiday schedule.

For example, when this value is set to 50, then fifty percent or more of a schedule must fall within the Holiday time frame. In this example, if an employee works an 8-hour schedule, then 4 or more hours must occur within the Start Date/Start Time and End Date/End Time settings.

This value is used if a Holiday schedule is determined by minimum hours, when Holiday Assignment Code Indicator Schedule Standard 2 is set to **H**.

Valid Values:

Any numeric value

Holiday Indicator Schedule Standard 1

Holiday Indicator Schedule Standard 1 determines whether this holiday is considered to be a major or minor holiday. This is used with holiday rules which track some holidays differently than other holidays. For example, an organization unit might consider Major holidays to be Thanksgiving, Christmas and New Year's Day and minor holidays to be Memorial Day, Independence Day, and Labor Day. The rotations for major and minor holidays can be set up differently.

Note

If all holidays are included in the same rotation, all the holidays can be left with the default setting of **A**.

Valid Indicator Options:

A	This holiday is a major holiday.
B	This holiday is a minor holiday.

Note

This indicator is found in **Configuration > Assignments > Holiday > Indicator > Schedule Process**.

Holiday Indicator Schedule Standard 2

Holiday Indicator Schedule Standard 2 is used to indicate whether this holiday is to be populated as part of the Holiday Rotations Rule. This indicator is only used in the Holiday Rotations Rule, with holiday assignments where Holiday Assignment Code Indicator Schedule Standard 8 is set to **Y**.

With this assignment, there must be two records for each holiday--one with this indicator set to **Y** and one with this indicator set to **N**. One rotation will include the holiday with the indicator set to **Y** and the other rotations will include the holiday with the indicator set to **N**.

For more information on setting up this rule, see the section in this document on [Holiday Rotations Assignment Configuration \(on page 88\)](#).

Valid Indicator Options:

N	This holiday is not included in this holiday rotations assignment.
Y	This holiday is included in this holiday rotations assignment.

Note

This indicator is found in **Configuration > Assignments > Holiday > Indicator > Schedule Process**.

Holiday Parameter Schedule Standard Date 1

Holiday Parameter Schedule Standard Date 1 determines the starting date of the holiday. The holiday time frame begins on the date entered here, on the time defined by Holiday Parameter Schedule Standard Time 1.

Valid Values:

Any valid, properly formatted date.

Note

This parameter is found in **Configuration > Assignments > Holiday > Parameter > Schedule Process**.

Holiday Parameter Schedule Standard Date 2

Holiday Parameter Schedule Standard Date 2 determines the ending date of the holiday. The holiday time frame ends on the date entered here, on the time defined by Holiday Parameter Schedule Standard Time 2.

Valid Values:

Any valid date.

Note

This parameter is found in **Configuration > Assignments > Holiday > Parameter > Schedule Process**.

Holiday Parameter Schedule Standard Time 1

Holiday Parameter Schedule Standard Time 1 determines the starting time of the holiday. The holiday time frame begins on the time entered here, on the date defined by Holiday Parameter Schedule Standard Date 1.

Valid Values:

Any valid time, expressed in 24-hour format.

Note

This parameter is found in **Configuration > Assignments > Holiday > Parameter > Schedule Process**.

Holiday Parameter Schedule Standard Time 2

Holiday Parameter Schedule Standard Time 2 determines the starting time of the holiday. The holiday time frame begins on the time entered here, on the date defined by Holiday Parameter Schedule Standard Date 2.

Valid Values:

Any valid time, expressed in 24-hour format.

Note

This parameter is found in **Configuration > Assignments > Holiday > Parameter > Schedule Process**.

Weekend Staffing Assignments

The Weekend assignment is used to automatically schedule employees to work weekend shifts. This ensures that the weekend shifts are being fairly distributed. Weekend assignments are given to employees based on their Home Labor Distribution.

Automatic population of weekends for employees who do not have core schedules uses need-based scheduling passes. For more information on required configuration, see [No Holidays Worked \(on page 103\)](#).

Note

Weekend schedules are “need based” and employees are scheduled up to the established staffing levels. If all eligible employees should be assigned, the staffing level needs can be increased for that day.

The following is a listing of the weekend rules that can be automated:

Every Other Weekend	Employees in this assignment are eligible to work every other weekend.
X out of Y Weekends	Employees in this assignment are eligible to work X out of Y weekends, for example 1 out of 3 weekends, or 2 out of 4 weekends.
No Worked Weekends	Employees in this assignment do not work any weekends.
Weekends Not Tracked	Employees in this assignment do not have special staffing rules for weekend schedules.

Note

The assignment configuration in this documentation is used for the staffing of weekends only and does not determine any weekend pay differentials.

Viewing Employee Assignments

An employee's assignments can be viewed on the employee record on the TCS screen, on the Assignments card. Employee assignments are updated when the scheduling process is run or a schedule is added to the schedule screen.

Note

The Assignments option must be selected in **Preferences > My Preferences > Time Card Screen** in order for the Assignments card to display in the TCS screen.

Every Other Weekend Assignment

The Every Other Weekend assignment schedules employees to work on alternate weekends.

The pivot date for the weekend rotations is entered in Schedule Standard Date 2. The weekend on (or first weekend before) this date is eligible to be worked by the employees in the assignment. The next weekend would be ineligible. Alternate weekends are either eligible or ineligible, based on the rotation assigned to the employee.

A second assignment code must be created for employees to work the alternate weekends, and given a Schedule Standard Date 2 to begin on the weekend following the first assignment code. Employees are assigned to one of the two rotations.

Note

With this rotation, an employee can predict weeks and months in advance of a date as to whether it is their "weekend off". If an employee was not assigned to work on a weekend where they were eligible to work, they will not be assigned to work the following weekend because that is their ineligible weekend. To create a rotation that adjusts alternate weekends based on whether the employee was scheduled the previous weekend, use the X out of Y Weekend rotation rule configured for 1 out of 2 weekends.

Steps to Create an Every Other Weekend Assignment

The following summarizes the steps to create an Every Other Weekend assignment. The steps are described in more detail in the following pages.

Step 1: Create a new Assignment Code

- A. Set up the Assignment Code General tab
- B. Set up the Assignment Code Indicator tab
- C. Set up the Assignment Codes Parameters tab
- D. Set up the Assignment Code Qualification Criteria

Step 2: Add the Weekend Validation to the Selection Styles**Step 3:** Enter the employee Weekend Shift Eligibility Date, if applicable**Step 1A: Set up the Assignment Code General tab**

1. Go to **Configuration > Assignments > Assignment Code**.
2. Click on the **Add** button in the left pane to add a new Assignment Code.
3. Enter the date this Assignment Code will be effective.
4. In the Assignment Source Classification field, enter **Standard**.
5. In the Assignment Source Code field, enter **Weekend**.
6. Select the appropriate weekend rule from the Field Look Up Values.
7. In the Code field, enter an identification code for this weekend assignment.
8. In the Description field, enter a label to describe the code.
9. Click **Save**.

Step 1B: Set up the Assignment Code Indicator tab

1. With the record open, select the **Indicators** tab.
2. Set Weekend Assignment Code Indicator Schedule Standard 1 to **Y** to allow weekends to be processed using weekend rules.
3. Set Weekend Assignment Code Indicator Schedule Standard 2 to the proper option to indicate how weekend shifts are determined.
 - If this indicator is set to **H** (hours in weekend), also configure the Weekend Assignment Code Indicator Schedule Standard Hour 1 parameter to indicate the minimum hours that must be in the weekend time frame to consider a shift a weekend shift.
 - If this indicator is set to **P** (percentage of shift in weekend), also configure the Weekend Assignment Code Parameter Schedule Standard Percent 1 parameter to indicate the minimum percentage of a shift that must be in the weekend period to consider it a weekend shift.
 - If this indicator is set to **S** (start time), also configure parameters Weekend Assignment Code Parameter Schedule Standard DOW 1 & 2 and Weekend Assignment Code Parameter Schedule Standard Time 1 & 2 to determine the range of a weekend.
4. Set Weekend Assignment Code Indicator Schedule Standard 3 to **Y** to process the Every Other Weekend Rule.
5. Set Weekend Assignment Code Indicator Schedule Standard 4 to **N**.
6. If there are a maximum number of shifts that the employee can be assigned in a weekend, set the Weekend Assignment Code Indicator Schedule Standard 5 indicator value to **Y**.

Be sure to set up the companion parameter, Weekend Assignment Code Parameter Schedule Standard Integer 4.

Step 1C: Set up the Assignment Codes Parameters tab

1. With the assignment record open, select the **Parameters** tab.
2. Weekend Assignment Code Parameter Schedule Standard Date 1 is not used for this assignment, and the field can be left blank.
3. In the Weekend Assignment Code Parameter Schedule Standard Date 2, indicate the date that the every other weekend rotation is to start.
4. In Weekend Assignment Code Parameter Schedule Standard DOW 1, select the day of the week that the weekend time frame begins from the drop-down menu.
5. In Weekend Assignment Code Parameter Schedule Standard DOW 2, select the day of the week that the weekend time frame ends from the drop-down menu.

6. In the Weekend Assignment Code Schedule Standard Hour 1 field, enter the minimum number of hours an employee schedule must overlap a weekend time frame in order for the schedule to be counted as a weekend schedule.

This field needs to be set up if the weekend eligible shifts are tracked by hours in the weekend-- Weekend Assignment Code Indicator Schedule Standard 2 is set to **H**.

7. Weekend Assignment Code Parameter Standard Integers 1-3 are used with the X out of Y Weekend rule, and do not need to be set up for this assignment.

8. In the Weekend Assignment Code Parameter Standard Integer 4 field, enter the maximum number of schedules that an employee should be assigned during a single weekend time frame.

For example, if a **2** is entered here, an employee will only be assigned two schedules within an eligible weekend time frame.

9. In the Weekend Assignment Code Parameter Schedule Standard Time 1, enter the time on the Weekend Start Day that the weekend range begins.

10. In the Weekend Assignment Code Parameter Schedule Standard Time 2, enter the time on the Weekend End Day that the weekend range ends.

11. In the Weekend Assignment Code Parameter Schedule Standard Percent 1, enter the percentage of an employee schedule that must fall within the weekend time frame in order for it to be counted as weekend schedule.

This field needs to be set up if the weekend eligible shifts are tracked by hours in the weekend-- Weekend Assignment Code Indicator Schedule Standard 2 is set to **P**.

12. Click **Save**.

1D: Select the Assignment Codes Qualification Criteria

The Criteria section is where the employees that should receive this assignment are identified. The criteria options that are available were previously selected on **Assignment Source > Assignment Determination**.

To configure the criteria requirements, complete the following steps:

1. With the Assignment Code record open, click on the **Criteria** section button in the left pane.
2. Click on **Add** to add a new record.
3. Enter an Effective Date, a Code and Description to identify this Criteria record.
4. In the additional fields, enter the criteria options that identify employees who should be given this assignment.

If there are criteria options that are not displayed on this screen, additional options can be added (by authorized users) through the **Assignment Source > Assignment Determination** button.

5. Click **Save**.

6. To add additional groups of employees to this assignment, click on the Add button again and complete steps 3 - 5.

The groups given to this assignment are displayed.

7. Click on **Save**.

Note

Employees must meet ALL the requirements within one of the Criteria records to qualify for the assignment.

- For example, employees must have a Home labor distribution in facility 4, department 3270 and have a job class of 201(LPN). In the second record, employees must have a Home labor distribution in facility 4, department 3270 and have a job class of 101(RN).
- If employees do not qualify for any other assignment, they will automatically qualify for the All assignment, which does not have any qualification criteria. There is a default All assignment for every Assignment Source.

Step 2: Add the Weekend Validation to the Selection Styles

1. From **Configuration > Scheduling**, select the **Selection Styles** page.
2. Open the selection style being used with the automatic scheduling process.
3. Open a scheduling pass.
4. Point the cursor to the Weekend rule in the Available Rules column and drag the rule to the Selected Rules column.
5. Repeat steps 3-4 for each pass to be validated.
6. Click **Save**.

Step 3: Enter the employee Weekend Shift Eligibility Date

If an employee has a waiting period before he or she is eligible to participate in the Weekend assignment rotation, an eligibility date can be entered in the employee record. If an employee is currently eligible to participate in the weekend assignment rotation, this field can be left blank.

1. Search for an employee record using the Employee Search.
2. Open the employee record to **General > Parameters**.
3. In the Schedule Standard Date 1 field, enter a date when the employee is eligible to start the weekend assignment.

If the employee does not have a waiting period, this field can be left blank.

4. Click **Save**.

X out of Y Weekends

The employees assigned to the X out of Y Weekends assignment are available to work a maximum of weekends (X) within a series of weekends (Y), for example 1 out of 3 weekends or 3 out of 5 weekends. The values of X and Y must be set up in the parameters table of this weekend assignment.

The weekends are counted out in sets of Y weekends, starting from the date entered in the Weekend Parameter Schedule Standard Date 1 field. For example, if the value of Y is entered as 3, the system counts out sets of three weekends and will only schedule the employee one of the three weekends.

Steps to Create an X out of Y Weekend Assignment

The following summarizes the steps to create an X out of Y Weekend assignment. The steps are described in more detail below.

Step 1: Create a new Assignment Code

- A. Set up the Assignment Code, General tab
- B. Set up the Assignment Code, Indicator tab
- C. Set up the Assignment Code, Parameters tab
- D. Set up the Qualification Criteria

Step 2: Add the Weekend Validation to the Selection Styles

Step 3: Enter the Employee Weekend Shift Eligibility Date, if applicable

1A: Set up the Weekend Assignment Code General screen

1. From **Configuration > Assignments > Assignment Code**.
2. Click on the **Add** button in the left pane to add a new Assignment Code.
3. Enter a date this Assignment Code will be effective.
4. Select the **Standard** option from the Assignment Source Classification field.
5. In the Assignment Source Code field, select **Weekend** from the field look up values.
6. Enter a Code and Description to identify this weekend assignment record.
7. Click **Save**.

1B: Set up the Weekend Assignment Code Indicators

1. With the record open, select the **Indicators** tab.
2. Set Weekend Assignment Code Indicator Schedule Standard 1 to **Y** to allow weekends to be processed using weekend rules.

3. Set Weekend Assignment Code Indicator Schedule Standard 2 to the proper option to indicate how weekend shifts are determined.
 - If this indicator is set to **H** (hours in weekend), also configure the Weekend Assignment Code Indicator Schedule Standard Hour 1 parameter to indicate the minimum hours that must be in the weekend time frame to consider a shift a weekend shift.
 - If this indicator is set to **P** (percentage of shift in weekend), also configure the Weekend Assignment Code Parameter Schedule Standard Percent 1 parameter to indicate the minimum percentage of a shift that must be in the weekend period to consider it a weekend shift.
 - If this indicator is set to **S** (start time), also configure parameters Weekend Assignment Code Parameter Schedule Standard DOW 1 & 2 and Weekend Assignment Code Parameter Schedule Standard Time 1 & 2 to determine the range of a weekend.
4. Set Weekend Assignment Code Indicator Schedule Standard 3 to **N**.
5. Set Weekend Assignment Code Indicator Schedule Standard 4 to **Y**, to process the X out of Y Weekend Rule.
6. If there are a maximum number of shifts that the employee can be assigned in a weekend, set the Weekend Assignment Code Indicator Schedule Standard 5 indicator value to **Y**.
Be sure to set up the companion parameter, Weekend Assignment Code Parameter Schedule Standard Integer 4.

1C: Set up the Weekend Assignment Parameters

1. With the assignment record open, select the **Parameters** tab.
2. In the Weekend Assignment Code Parameter Schedule Standard Date 1 field, enter the date that this rotation should begin.
3. Weekend Assignment Code Parameter Schedule Standard Date 2 is not used in this assignment, and the field can be left blank.
4. In Weekend Assignment Code Parameter Schedule Standard DOW 1, select the day of the week that the weekend time frame begins from the menu.
5. In Weekend Assignment Code Parameter Schedule Standard DOW 2, select the day of the week that the weekend time frame ends from the menu.
6. In the Weekend Assignment Code Schedule Standard Hour 1 field, enter the minimum number of hours an employee schedule must overlap a weekend time frame for the schedule to be counted as a weekend schedule.
This field needs to be set up if the weekend eligible shifts are tracked by hours in the weekend-- Weekend Assignment Code Indicator Schedule Standard 2 is set to **H**.
7. In the Weekend Assignment Code Schedule Standard Integer 1 field, enter the number of weekends that are being tracked in this rotation.

For example, if the assignment is for 3 out of 5 weekends, enter the **5** in this field.

8. In the Weekend Assignment Code Schedule Standard Integer 2 field, enter the number of weekends that must be worked in this rotation.
For example, if the assignment is for 3 out of 5 weekends, enter the **3** in this field.
9. In the Weekend Assignment Code Schedule Standard Integer 3 field, enter the minimum number of schedules that an employee must work during a weekend for a weekend obligation to be filled.
For example, if 2 is entered in this field, an employee must work 2 schedules within a weekend time frame for it to count as a worked weekend.
10. In the Weekend Assignment Code Parameter Standard Integer 4 field, enter the maximum number of schedules that an employee should be assigned during a single weekend time frame.
For example, if a 2 is entered here, an employee will only be assigned two schedules within an eligible weekend time frame.
11. In Weekend Assignment Code Parameter Schedule Standard Time 1, enter the time on the Weekend Start Day that the weekend range begins.
12. In Weekend Assignment Code Parameter Schedule Standard Time 2, enter the time on the Weekend End Day that the weekend range ends.
13. In the Weekend Assignment Code Parameter Schedule Standard Percent 1, enter the percentage of an employee schedule that must fall within the weekend time frame for it to be counted as weekend schedule.
This field needs to be set up if the weekend eligible shifts are tracked by hours in the weekend-- Weekend Assignment Code Indicator Schedule Standard 2 is set to **P**.
14. Click **Save**.

1D: Select the Assignment Codes Qualification Criteria

The Criteria section is where the employees that should receive this assignment are identified. The criteria options that are available were previously selected on **Assignment Source > Assignment Determination**.

To configure the criteria requirements, complete the following steps.

1. With the Assignment Code record open, click on the **Criteria** section button in the left pane.
2. Click **Add** to add a new record.
3. Enter an Effective Date, a Code and Description to identify this Criteria record.
4. In the additional fields, enter the criteria options that identify employees who should be given this assignment.

If there are criteria options that are not displayed on this screen, additional options can be added (by authorized users) through the **Assignment Source > Assignment Determination** button.

5. Click **Save**.

6. To add additional groups of employees to this assignment, click on the Add button again and complete steps 3 - 5.

The groups given to this assignment are displayed.

7. Click on **Save**.

Note

Employees must meet ALL the requirements within one of the Criteria records to qualify for the assignment.

- For example, employees must have a Home labor distribution in facility 4, department 3270 and have a job class of 201(LPN). In the second record, employees must have a Home labor distribution in facility 4, department 3270 and have a job class of 101(RN).
- If employees do not qualify for any other assignment, they will automatically qualify for the All assignment, which does not have any qualification criteria. There is a default All assignment for every Assignment Source.

Step 2: Add the Weekend Validation to the Selection Styles

1. From **Configuration > Scheduling**, select the **Selection Styles** page.
2. Open the selection style being used with the automatic scheduling process.
3. Open a scheduling pass.
4. Point the cursor to the Weekend rule in the Available Rules column and drag the rule to the Selected Rules column.
5. Repeat steps 3-4 for each pass to be validated.
6. Click **Save**.

Step 3: Enter the Employee Weekend Shift Eligibility Date

If an employee has a waiting period before he or she is eligible to participate in the Weekend assignment rotation, an eligibility date can be entered in the employee record. If an employee is currently eligible to participate in the weekend assignment rotation, this field can be left blank.

1. Search for an employee record using the Employee Search.
2. Open the employee record to **General > Parameters**.
3. In the Schedule Standard Date 1 field, enter a date when the employee is eligible to start the weekend assignment.

If the employee does not have a waiting period, this field can be left blank.

4. Click **Save**.

No Weekends Worked

The employees in the No Weekends Worked assignment are not scheduled on work weekends. This assignment can be used for office staff or other departments that are not open during the weekends.

Steps to Create a No Weekends Worked Assignment

The following summarizes the steps to create a No Weekends Worked assignment. The steps are described in more detail in the following pages.

Step 1: Create a new Assignment Code

- A. Set up the Assignment Code General tab
- B. Set up the Assignment Code Indicator tab
- C. Set up the Assignment Codes Parameters tab
- D. Set up the Assignment Codes Qualification Criteria

Step 2: Add the Weekend Validation to the Selection Styles

Step 3: Enter the Employee Weekend Shift Eligibility Date, if applicable

Step 1A: Set up the Assignment Code General tab

1. From **Configuration > Assignments > Assignment Code**.
2. Click on the **Add** button in the left pane to add a new Assignment Code.
3. Enter a date this Assignment Code will be effective.
4. Select the **Standard** option from the Assignment Source Classification field.
5. In the Assignment Source Code field, select **Weekend** from the field look up values.
6. Enter a Code and Description to identify this weekend assignment record.
7. Click **Save**.

Step 1B: Set up the Assignment Code Indicator tab

1. With the assignment code open, select the **Indicators** tab.
2. Set Weekend Assignment Code Indicator Schedule Standard 1 to **N** to make this assignment ineligible for weekend processing.

All other weekend processing indicators are ignored when this indicator is set to **N**.

3. Click **Save**.

Step 1C: Set up the Assignment Codes Parameters tab

1. With the assignment record open, select the **Parameters** tab.
2. Weekend Assignment Code Parameter Schedule Standard Date 1 is not used for this assignment, and the field can be left blank.

3. In the Weekend Assignment Code Parameter Schedule Standard Date 2, is not used for this assignment, and the field can be left blank.
4. In Weekend Assignment Code Parameter Schedule Standard DOW 1, select the day of the week that the weekend time frame begins from the drop-down menu.
5. In Weekend Assignment Code Parameter Schedule Standard DOW 2, select the day of the week that the weekend time frame ends from the drop-down menu.
6. In the Weekend Assignment Code Schedule Standard Hour 1 field, enter the minimum number of hours an employee schedule must overlap a weekend time frame for the schedule to be counted as a weekend schedule.

This field needs to be set up if the weekend eligible shifts are tracked by hours in the weekend-- Weekend Assignment Code Indicator Schedule Standard 2 is set to **H**.

7. Weekend Assignment Code Parameter Standard Integers 1-3 are used with the X out of Y Weekend rule, and do not need to be set up for this assignment.
8. Weekend Assignment Code Parameter Standard Integer 4 is not used for this assignment, and the field can be left blank.
9. In the Weekend Assignment Code Parameter Schedule Standard Time 1, enter the time on the Weekend Start Day that the weekend range begins.
10. In the Weekend Assignment Code Parameter Schedule Standard Time 2, enter the time on the Weekend End Day that the weekend range ends.
11. In the Weekend Assignment Code Parameter Schedule Standard Percent 1, enter the percentage of an employee schedule that must fall within the weekend time frame for it to be counted as weekend schedule.

This field needs to be set up if the weekend eligible shifts are tracked by hours in the weekend-- Weekend Assignment Code Indicator Schedule Standard 2 and is set to **P**.

12. Click **Save**.

Step 1D: Select the Assignment Codes Qualification Criteria

The Criteria section is where the employees that should receive this assignment are identified. The criteria options that are available were previously selected on **Assignment Source > Assignment Determination**.

To configure the criteria requirements, complete the following steps:

1. With the Assignment Code record open, click on the **Criteria** section button in the left pane.
2. Click on **Add** to add a new record.
3. Enter an Effective Date, a Code and Description to identify this Criteria record.

4. In the additional fields, enter the criteria options that identify employees who should be given this assignment.

If there are criteria options that are not displayed on this screen, additional options can be added (by authorized users) through the **Assignment Source > Assignment Determination** button.

5. Click **Save**.
6. To add additional groups of employees to this assignment, click on the **Add** button again and complete steps 3 - 5.

The groups given to this assignment are displayed.

7. Click on **Save**.

Note

Employees must meet ALL the requirements within one of the Criteria records to qualify for the assignment.

- For example, employees must have a Home labor distribution in facility 4, department 3270 and have a job class of 201(LPN). In the second record, employees must have a Home labor distribution in facility 4, department 3270 and have a job class of 101(RN).
- If employees do not qualify for any other assignment, they will automatically qualify for the All assignment, which does not have any qualification criteria. There is a default All assignment for every Assignment Source.

Step 2: Add the Weekend Validation to the Selection Styles

1. From **Configuration > Scheduling**, select the **Selection Styles** page.
2. Open the selection style being used with the automatic scheduling process.
3. Open a scheduling pass.
4. Point the cursor to the Weekend rule in the Available Rules column and drag the rule to the Selected Rules column.
5. Repeat steps 3-4 for each pass to be validated.
6. Click **Save**.

Step 3: Enter the employee Weekend Shift Eligibility Date

If an employee has a waiting period before he or she is eligible to participate in the Weekend assignment rotation, an eligibility date can be entered in the employee record. If an employee is currently eligible to participate in the weekend assignment rotation, this field can be left blank.

1. Search for an employee record using the Employee Search.
2. Open the employee record to **General > Parameters**.

3. In the Schedule Standard Date 1 field, enter a date when the employee is eligible to start the weekend assignment.

If the employee does not have a waiting period, this field can be left blank.

4. Click **Save**.

Weekends Not Tracked

The Weekends Not Tracked assignment can be used when some employees in an organization unit are scheduled normally during weekends and some employees have special scheduling rules during weekends. Employees who are scheduled for weekends the same as any other day need to be given a separate assignment from employees who work a weekend rotation.

The weekend rule in the Selection Style must be activated to schedule properly for those employees who do have special weekend rules.

Steps to Create an Assignment Where Weekends Are Not Tracked

The following summarizes the steps to create an assignment where Weekends Are Not Tracked. Click on the link to access details on each of the steps below.

Step 1: Create a new Assignment Code

- A. Set up the Assignment Code General tab
- B. Set up the Assignment Code Indicator tab
- C. Set up the Assignment Codes Parameters tab
- D. Set up the Assignment Code Qualification Criteria

Step 2: Add the Weekend Validation to the Selection Styles

Step 3: Enter the Employee Weekend Shift Eligibility Date, if applicable

1A: Set up the Assignment Code General Screen

1. Go to **Configuration > Assignments > Assignment Code**.
2. Click on **Add** to enter a new record.
3. Select the **Standard** option from the Assignment Source Classification field.
4. In the Assignment Source Code field, select **Weekend** from the field look up values.
5. Enter a Code and Description to identify this weekend assignment record.
6. Click **Save**.

1B: Set Up the Assignment Code Indicators tab

1. From the Assignment Code record, select the **Indicators** tab.
2. Set Weekend Assignment Code Schedule Standard 1 to **Y** to process this assignment using weekend rules.

3. Leave the Schedule Standard 2 default.
4. Weekend Assignment Code Schedule Standard 3 should be set to **N**.
5. Weekend Assignment Code Schedule Standard 4 should be set to **N**.
6. Weekend Assignment Code Schedule Standard 5 should be set to **N**.
7. Click **Save**.

1C: Set up the Assignment Codes Parameters Tab

1. With the assignment record open, select the **Parameters** tab.
Weekend Assignment Code Parameter Schedule Standard Date 1 is not used for this assignment, and the field can be left blank.
2. In the Weekend Assignment Code Parameter Schedule Standard Date 2 is not used for this assignment, and the field can be left blank.
3. In Weekend Assignment Code Parameter Schedule Standard DOW 1, select the day of the week that the weekend time frame begins from the menu.
4. In Weekend Assignment Code Parameter Schedule Standard DOW 2, select the day of the week that the weekend time frame ends from the menu.
5. In the Weekend Assignment Code Schedule Standard Hour 1 field, enter the minimum number of hours an employee schedule must overlap a weekend time frame for the schedule to be counted as a weekend schedule.
This field needs to be set up if the weekend eligible shifts are tracked by hours in the weekend-- Weekend Assignment Code Indicator Schedule Standard 2 is set to **H**.
6. Weekend Assignment Code Parameter Standard Integers 1-3 are used with the X out of Y Weekend rule, and do not need to be set up for this assignment.
7. In the Weekend Assignment Code Parameter Standard Integer 4 field, enter the maximum number of schedules that an employee should be assigned during a single weekend time frame.
For example, if a 2 is entered here, an employee will only be assigned two schedules within an eligible weekend time frame.
8. In the Weekend Assignment Code Parameter Schedule Standard Time 1, enter the time on the Weekend Start Day that the weekend range begins.
9. In the Weekend Assignment Code Parameter Schedule Standard Time 2, enter the time on the Weekend End Day that the weekend range ends.
10. In the Weekend Assignment Code Parameter Schedule Standard Percent 1, enter the percentage of an employee schedule that must fall within the weekend time frame for it to be counted as weekend schedule.
This field needs to be set up if the weekend eligible shifts are tracked by hours in the weekend-- Weekend Assignment Code Indicator Schedule Standard 2 is set to **P**.
11. Click **Save**.

1D: Select the Assignment Codes Qualification Criteria

The Criteria section is where the employees that should receive this assignment are identified. The criteria options that are available were previously selected on **Assignment Source > Assignment Determination**.

To configure the criteria requirements, complete the following steps.

1. With the Assignment Code record open, click on the **Criteria** section button in the left pane.
2. Click on **Add** to add a new record.
3. Enter an Effective Date, a Code and Description to identify this Criteria record.
4. In the additional fields, enter the criteria options that identify employees who should be given this assignment.

If there are criteria options that are not displayed on this screen, additional options can be added (by authorized users) through the **Assignment Source > Assignment Determination** button.

5. Click **Save**.
6. To add additional groups of employees to this assignment, click on the Add button again and complete steps 3 - 5.

The groups given to this assignment are displayed.

7. Click **Save**.

Note

Employees must meet ALL the requirements within one of the Criteria records to qualify for the assignment.

- For example, employees must have a Home labor distribution in facility 4, department 3270 and have a job class of 201(LPN). In the second record, employees must have a Home labor distribution in facility 4, department 3270 and have a job class of 101(RN).
- If employees do not qualify for any other assignment, they will automatically qualify for the All assignment, which does not have any qualification criteria. There is a default All assignment for every Assignment Source.

Step 2: Add the Weekend Validation to the Selection Styles

Since weekends are not tracked, the selection style used does not need to include the Weekend rule. However, if there are any employees in the same schedule who DO have weekend assignments, the Weekend rule must be selected.

1. From **Configuration > Scheduling**, select the **Selection Styles** page.
2. Open the selection style being used with the automatic scheduling process.
3. Open a scheduling pass.

4. Point the cursor to the Weekend rule in the Available Rules column and drag the rule to the Selected Rules column.
5. Repeat steps 3-4 for each pass to be validated.
6. Click **Save**.

Step 3: Enter the Employee Weekend Shift Eligibility Date

If an employee has a waiting period before he or she is eligible to participate in the Weekend assignment rotation, an eligibility date can be entered in the employee record.

1. Search for an employee record using the Employee Search.
2. Open **General > Parameters**.
3. In the Schedule Standard Date 1 field, enter a date when the employee is eligible to start the weekend assignment.

If the employee does not have a waiting period, this field can be left blank.

4. Click **Save**.

Additional Needs-Based Scheduling Set Up

The following additional set up may be required when using needs-based scheduling for populating weekend time frames. Some or all of this set up may already be completed.

- Create a Staffing Template
- Create a Core Staffing Template (only if staffing needs are based on activity codes)
- Update Activity Codes to Allow Need Based Scheduling
- Add Profile Activity Code Selection
- Set up Priority Days
- Set Up Employee Schedule Preferences

Create a Staffing Template

The Staffing Template is a staffing grid indicating the baseline staffing levels needed for an organization unit. These staffing needs are set up for each combination of profile and coverage period.

Staffing templates are used to create the Staffing Plan, which indicates the staffing needs for a specific scheduling period. Auto Schedule Passes where the Selection is set to Staffing Plan use this information when running the scheduling process.

For more information on setting up a staffing template, see **Configuration > Scheduling > Staffing Template**.

To add a new Staffing Template record, complete the following steps:

1. Select the **Staffing Template** icon from **Configuration > Scheduling**.
2. Click on the **Add** button to open a screen to add a new record.

3. Enter a Code and Description to identify this Staffing Template.
4. Select the Coverage Set Code from the listing to indicate the coverage periods.

The staffing needs will be set up by coverage periods that exist within the selected coverage set.

Note

If the coverage set selected does not match the one set up for the organization unit on the Staffing Configuration screen, an error message is generated.

5. In the Active field, indicate if this Staffing Template is currently active and available to be assigned.
6. Enter the Number Of Weeks of this template.

This indicates the number of weeks of rotation before the same staffing needs pattern is repeated.

Note

In most cases, this staffing needs template is the same every week, and this value is set to one.

7. Indicate whether this template is to be the Default for this organization unit.
When this value is set to **Yes**, this template is automatically loaded when the **Open Staffing Plan** button is selected.
8. Enter the Organization Unit values indicating the labor distribution where this staffing template will be applied.
9. Click **Save**.
10. A grid is displayed to set up the staffing needs for this organization unit, for the number of weeks indicated.
11. In the Profile box, select a profile for this organization unit.
12. In the Coverage Period box, select one of the coverage periods from the selected coverage set.
13. For each day in the week, enter the number of staff needed for that profile/coverage period combination.
This is the number of staff needed during the coverage period, not an FTE value. A value of **1** for a 4-hour coverage period indicates needs for four hours of coverage. A value of **1** for a 12-hour coverage period indicates needs for twelve hours of coverage. A value of **.5** in an 8-hour night coverage period indicates that four hours of coverage are needed during that time frame.
14. Repeat steps 11-13 until each profile/coverage period combination for the organization unit is configured.
15. Click **Save**.

To delete one or more lines of the Staffing Template, complete the following steps.

1. Position the cursor in the box to the left of the record and click. The row is now highlighted.
 - To highlight multiple consecutive rows for deletion, after highlighting the first row to be deleted, hold down Shift on the keyboard and highlight the last row to be deleted. The first, last and all records in between are now highlighted.
 - To highlight multiple non-consecutive rows for deletion, after highlighting the first row to be deleted, hold down Control on the keyboard and click on the box to the left of each row to be deleted. All selected records are now highlighted.
2. When all rows are selected for deletion, press `Delete` on the keyboard.
3. A warning message is generating, verifying the rows are to be deleted. Click **Yes**.

Note

Be sure to use the `Delete` key on the keyboard, not the Delete button in the left pane. Clicking on the button in the left pane will delete the entire template.

Create a Core Staffing Template

The Core Staffing Template is a staffing grid used for populating needs-based schedules in an organization unit. These staffing needs are set up for each combination of profile and activity code. This option can be used to set up staffing needs for organization units that use “staggered shifts” where coverage for specific time frames are needed.

For more information, see **Configuration > Scheduling > Core Staffing Template**.

To add a new Core Staffing Template record, complete the following steps:

1. Select the **Core Staffing Template** icon from **Configuration > Scheduling**.
2. Click the **Add** button to open a screen to add a new record.
3. Enter a Code and Description to identify this core staffing template.
4. In the Active field, indicate if this template is currently active and available to be assigned.
5. Indicate whether this template is to be the Default for this organization unit.

When this value is set to **Yes**, this template is automatically loaded when the **Open Core Staffing Plan** button is selected.

6. Enter the Number Of Weeks of this template.

This indicates the number of weeks of rotation before the same staffing needs pattern is repeated.

Note

In most cases, this staffing needs template is the same every week, and this value is set to one.

7. Enter the Organization Unit values indicating where this staffing template will be applied.
8. Click **Save**.

9. A grid is displayed to set up the staffing needs by activity code for this organization unit, for the number of weeks indicated.
10. In the Profile box, select a profile for this organization unit.
11. In the Activity box, select one of the activity codes from the drop-down menu.
12. For each day in the week, enter the number of staff needed for that profile/activity code combination.
13. Repeat steps 10-12 until each profile/activity code combination for the organization unit is configured.
14. Click **Save**.

To delete one or more lines of the Core Staffing Template, complete the following steps.

1. Position the cursor in the box to the left of the record and click. The row is now highlighted.
 - To highlight multiple consecutive rows for deletion, after highlighting the first row to be deleted, hold down `Shift` on the keyboard and highlight the last row to be deleted. The first, last and all records in between are now highlighted.
 - To highlight multiple non-consecutive rows for deletion, after highlighting the first row to be deleted, hold down `Control` on the keyboard and click on the box to the left of each row to be deleted. All selected records are now highlighted.
2. When all rows are selected for deletion, press `Delete` on the keyboard.
3. A warning message is generating, verifying the rows are to be deleted. Click on **Yes**.

Note

Be sure to use the `Delete` key on the keyboard, not the Delete button in the left pane. Clicking on the button in the left pane will delete the entire template.

Add Need-Based Schedule Authorization to Activity Codes

An Activity Code indicator setting determines whether an activity code can be used by the system when creating need-based schedules. Only codes with this value set to **Y** may be used by the system when creating a needs-based automatic schedule.

The indicator setting of multiple activity codes can be set to **Y** at the same time, by using the Replace feature, as outlined below.

To update the activity code indicators, complete the following steps:

1. From **Configuration > Scheduling**, open the Activity Code screen.
2. Enter search criteria to find the activity codes that should be activated for automatic scheduling.
3. Click on the check box to the left of each record that should be updated.
4. Click the **Replace** button in the left pane to open a screen to update all selected records at the same time.
5. Select the **Indicators** tab and then open the **Schedule Process** category card.

6. Click the check box to the left of **Activity Code Indicator Schedule Standard 3** to enable the field.
7. Set this value to **Y** to authorize the selected activity codes to be available for use when the system creates automatic need-based schedules.
8. Click **Save**.

Add Profile Activity Code Selection

For each profile, specific activity codes can be authorized for automatic scheduling. The Activities button opens a screen to search for and select specific activity codes that are authorized for automatic scheduling for this profile. The activity codes available are assigned to the same organization unit as the open Profile record.

- When no activity codes are selected on this screen, all activity codes set up for the related organization unit are authorized for this profile.
- When any activity codes are entered on this screen, if creating automatic need-based schedules for the profile, the system validates the Auto Schedule box setting.
 - When any activity codes in the Activities screen are set to **Yes**, only those activity codes are used when creating need-based automatic schedules.
 - When all activity codes in the Activities screen are set to **No**, all activity codes set up for the related organization unit can be used when creating need-based automatic schedules.

Steps to Add Activity Codes to a Profile

To add one or more Activity Codes to a profile, complete the following steps:

1. From **Configuration > Labor Distribution**, open the **Profiles** screen.
2. Select the **Activities** button from the left pane.
3. Click on the **Add** button in the left pane to open the Activity Codes Search to filter search criteria when searching for an existing Activity Code.
4. After entering values in the selected fields, click on the **Search** button. The results are listed below the search screen.
5. To select one or more record, click the selection box to the left of the record to alternately add or remove the check mark.

To select/de-select all records in a specific search result set, click on the box above the search results to add or remove all check marks.

6. After selecting activity codes, click on Assign: Common Data to add the same Auto Schedule values to all records or select **Assign: Individual Data** button to assign individual values to each record.

Note

Only activity codes assigned to the same organization unit as this profile in the Activity Codes configuration screen are included in the results set. For more information on the fields available when filtering the list, or when adding, editing or viewing a record, see **Configuration > Scheduling > Activity Codes**.

Set Up Priority Days

The Priority Days button opens a screen to indicate the order that the days of the week should be scheduled. For example, weekend days can be set up to schedule before week days. When using needs-based weekend staffing, scheduling weekend days first makes it more likely that employees will be scheduled their eligible weekends. Otherwise, an employee might reach their weekly approved hours or overtime hours limit before the weekend is populated.

When the scheduling process is run, all instances of the highest priority day of the week (as displayed in the Assigned Days section) within the scheduling period are scheduled first, in chronological order. Then the second highest priority day of the week is scheduled for all those days of the week, in chronological order. Any days of the week not selected are scheduled chronologically.

As an example, the system starts with the days selected in the Assigned Days column and populates all the Sundays in the scheduling period, then all the Saturdays, and then all the Fridays. The system then moves to the Available Days column and populates the Mondays, the Tuesdays, the Wednesdays, and finally the Thursdays.

Setting Up Priority Days

To set the order the days of the week should be scheduled, complete the following steps:

1. From **Configuration > Scheduling**, select the **Staffing Configuration** screen.
2. Search for and select a record to be set up. Click on the **Priority Days** button in the left pane.
3. Highlight the first day of the week to be scheduled from the Available Days column and hold down the left mouse button.
4. Drag the name of the day to the Assigned Days column.
5. Continue to drag each day into the Assigned Days column.
6. To change the sort order of the days, highlight the day to be moved and drag the day up or down in the list sequence.

Red arrows indicate where the record will display in the sort priority.

7. To remove a day from the scheduling priority, drag it back to the Available Days column.
8. When the sort order of the days is completed, click on **Save**.

Employee Schedule Preferences

Schedule Preferences may need to be added to employee records to ensure they are assigned to the activity times they prefer to work. These preferences are validated during scheduling passes where the Preferences criteria option is selected.

When populating need-based schedules, the system uses activity codes where Activity Code Indicator Schedule Standard 3 is set to **Y**. The system then attempts to match qualified employees with these activity codes. Be sure that one or more employee preference records will match the activity codes set up. For example, if only 8-hour activity codes are allowed with automatic scheduling, and all the employee preference records say the employee prefers activities with a shift length of 12 hours, this will not create a scheduling match.

Note

When fields are left blank, the system allows any values in these fields. Therefore, when less information is entered in this screen, the employee is eligible to work more activity codes and is more likely to be added to the schedule.

Set up Employee Schedule Preferences

To set up employee schedule preferences, complete the following steps:

1. Search for and open the employee record of the employee to set up.
2. From the Employee Sections in the left pane, select the **Schedule Preferences** option.
3. Click on the **Add** button in the left pane to open the following set up screen.
4. Enter the Effective Date of when these preferences are effective.
5. Enter an Expiration Date if these preferences will expire on a certain date.
To leave these effective indefinitely, do not enter a value in this field.
6. If using Priority values, enter a number in this field.

Note

The system will only populate preferences in this record if this Priority value matches the Priority set up on the selection style.

7. Enter a Start Time for the preferred working time frame.

This setting is used with the Hour Value to indicate the preferred working time frame. For example, if the Start time is set to **700** and the Hour Value is set to **12.5**, the system can populate any activity code that starts on or after 0700 and ends on or before 19:30 (which is 12.5 hours after the start time).

8. In the Shift Length (Hours) field, enter the length of schedule the employee would like to work, for example, 8-hour or 12-hour.

This can be used in conjunction with the Start Time and Hour Value information.

9. In the Position Code field, enter the position code linked to profiles that the employee prefers to be assigned.
10. In the Activity Code field, enter the activity code the employee would like to be scheduled.
11. In the Sunday through Saturday fields, set each day of the week to **Yes** to indicate the types of schedules the employee prefers to work on the selected days of the week.

Different scheduling criteria can be set up for different days of the week. For example, the employee may want to work only 8-hour schedules on Saturday and Sunday but is willing to work any length shift the other days of the week.

12. Click **Save**.
13. To create additional preferences, click on the **Add** button in the left pane and complete steps 4-12 for each preference record.