

#### **Purpose**

The Staff Management widget gives you quick access to your daily staffing plan so that you can make adjustments to your schedule when unforeseen events occur, such as when an employee calls in sick, or when an unplanned event requires extra staff (or less staff) during a scheduled time period.

The Staff Management widget allows you to operate optimally across departments or units with your available budget and staffing resources. *Note, however, that it is a tool for daily operations, and it does not take the place of the Schedule Planner or the Schedule widget.* 

The staff management process, involves:

- Importing or manually entering external data (planned workload, budget data, etc.)
- Verifying shift fidelity (time-off requests, sick calls, etc.)
- Adjusting staff to new demands based on the above factors
- Repeating the process as necessary, often several times a day

The locations and jobs that you can select are determined by the locations and jobs in your organizational group.

The Staff Management widget reflects changes to the schedule that are made, for example, in the Schedule Planner or the Schedule widget. Changes made to shifts in the Staff Management widget, are reflected in the schedule, as well. Use Refresh to ensure that you are seeing the most up-to-date information

## **Special Notes:**

#### **Features**

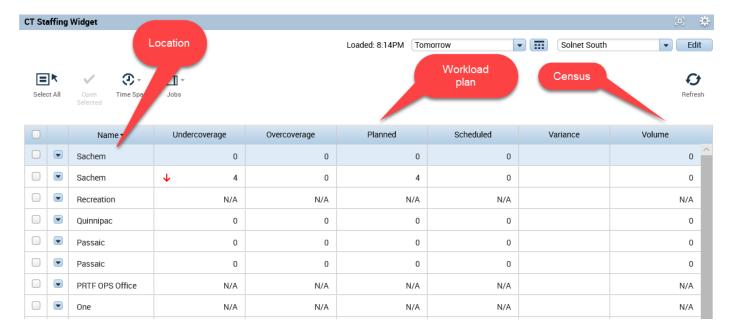
- Create, edit or delete shift segments
- Add, edit or delete breaks from Break Action Menu

### **Gaps**

- Staff Management Widget does not use any of the existing system settings or Coverage Counting settings when calculating Planned, Scheduled numbers and Volume.
- All Day ignores Day Divide information and calculates from Midnight to Midnight.
- Cannot delete ALL segments from a shift you must have at least one non break segment that remains in the shift.
- Cannot make changes to a locked shift/day

### **Areas of Staff Management Widget**

#### **Summary View**



#### Select the Location(s) that you want to view

The Summary View helps you identify at a glance which units and departments that you work with have staffing issues. Within the grid in the Summary View, you can sort any of the columns to display the data in a way that is most useful for you. Click a column header to sort the values in ascending order; click the header again to sort in descending order.

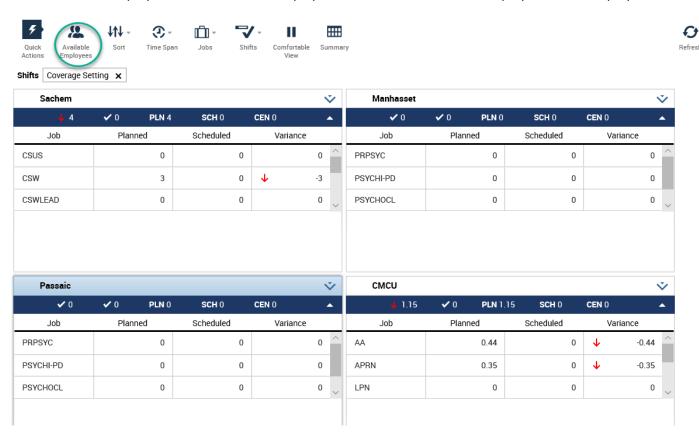
#### Date to display

You can select Today, Tomorrow, or Yesterday as the date to display.

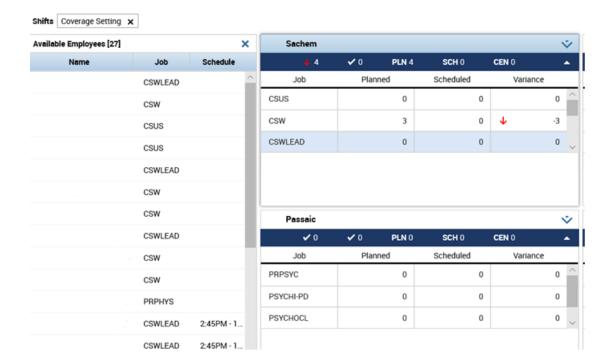


#### **Detail View - Compact**

Select Available Employees in the toolbar to display or hide the list of available employees in the Employee Pool.



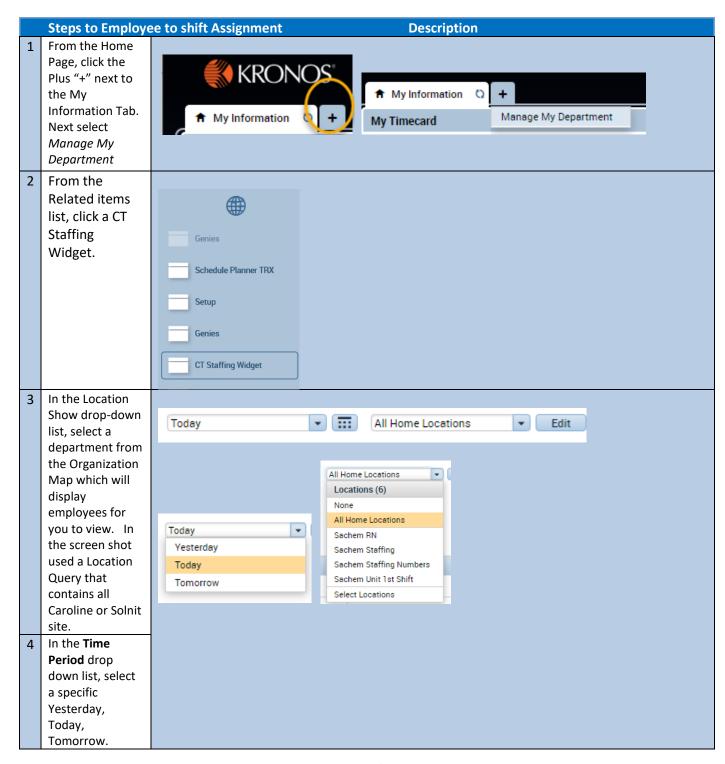




**The Employee Pool** is a list of employees who are not scheduled to work in the selected context and do not have pay codes in the selected context. Their primary job or a job in their transfer set matches the selected job and selected location in the context.

The Employee Pool includes all the people from the manager's/Scheduler's organizational group. Hover your mouse over an employee name to see a tooltip with job and shift details, and rule violations, if any.







#### Refresh Often

Each row for a location contains the last name, first name, and job (in the unit) for the first segment of the selected time span.

over the

employee name to see a tooltip with the job details, and shift or zone time details, for the employee. When there is a long list of employees in a location, you can use the scroll bar to scroll through the entire list. Pay codes Green type indicates a pay code. Pay codes show only for employees for whom this is the primary

location.

