

# Visual Scheduling: Adding Work Position Filter Buttons

Job Aid

Work position filter buttons can be used to filter the schedule template display in Visual Scheduling to show only the selected work position(s). Only managed worked positions in the schedule template can have a filter button. Work positions are selected as managed work position in the basic template properties.

The screenshot shows the Visual Scheduling interface for 'Detroit Nurses'. At the top, there are filter buttons for work positions: BA, CNA, LPN, RN (highlighted with a blue arrow), and DON. To the right are buttons for 'Weekly', 'Roster', 'Daily', and a 'View' dropdown. Below this is a calendar grid for October, with columns for Sunday through Thursday. The main area displays a grid of shifts for 'Registered Nurse' on various days. Each shift includes a time range (e.g., 8a/8:30p 12:00), a count (e.g., 1, 1), and a list of staff members (e.g., barnum, nicholas e; ballantine, kimberly n; fordham, victor x; irvine, alyssa p; hawes, mason f). A 'No Shows' button is visible on Monday, October 8th.

The abbreviations of work positions are used as filter button labels.

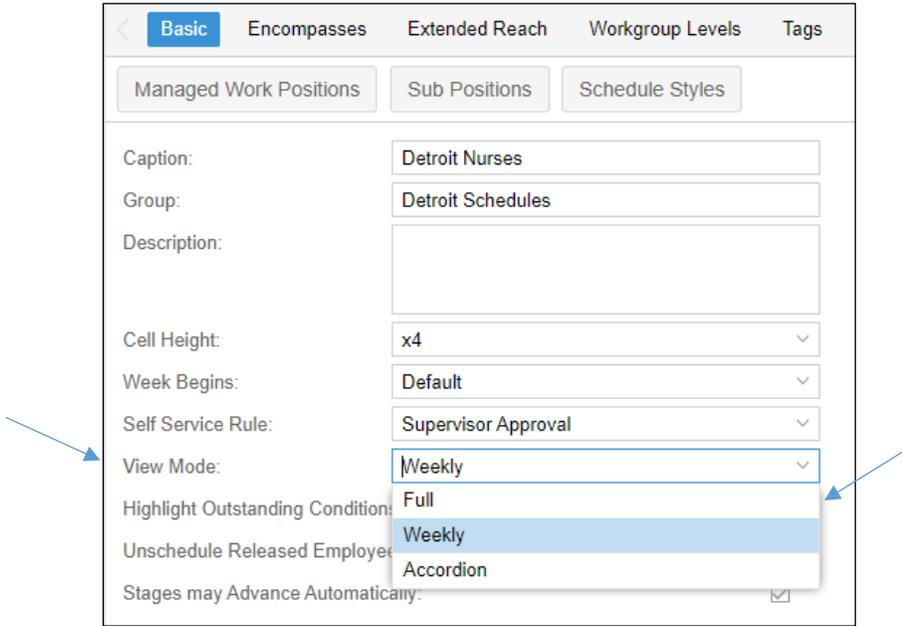


Work position abbreviations can be added and adjusted in the Work Positions menu item if you have access to the System Setup folder in your database.

The screenshot shows the 'System Setup' menu in a software application. The 'Work Positions' option is highlighted with a black box. To the right of the menu is a table listing work positions. The table has three columns: 'Name', 'Abb', and 'Workgroup'. The 'Abb' column is highlighted with a black box. The table lists the following work positions:

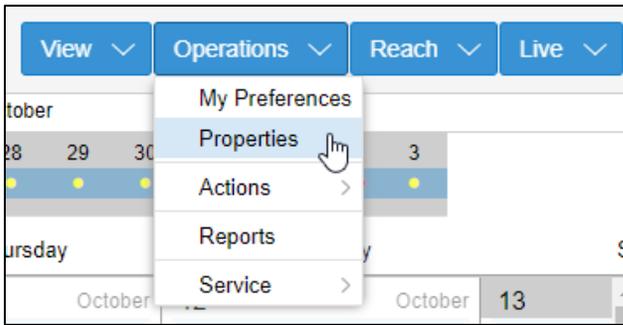
| Name                       | Abb       | Workgroup                  |
|----------------------------|-----------|----------------------------|
| Activities Aide            | ACTA      | Activities Aide            |
| Activities Director        | ACTDIR    | Activities Director        |
| Bath Aid                   | BA        | Bath Aid                   |
| Certified Medication Aide  | CMA       | Certified Medication Aide  |
| Certified Nursing Aide     | CNA       | Certified Nursing Aide     |
| Charge Nurse               | CNRS      | Charge Nurse               |
| Dietary Aide               | DIETA     | Dietary Aide               |
| Dietician                  | Dietician | Dietician                  |
| Director of Nursing        | DON       | Director of Nursing        |
| Licensed Practical Nurse   | LPN       | Licensed Practical Nurse   |
| Physical Therapist         | PT        | Physical Therapist         |
| Physical Therapy Assistant | PTASST    | Physical Therapy Assistant |
| Registered Nurse           | RN        | Registered Nurse           |

**Note:** Work Position filter buttons are available in the Full and Weekly View Mode, but NOT available in Accordion View Mode. These modes are selected in the Basic properties of the schedule template.



To add the work position filter buttons:

1. Click the Operations drop-down menu in the template header and select Properties to open the template properties panel.



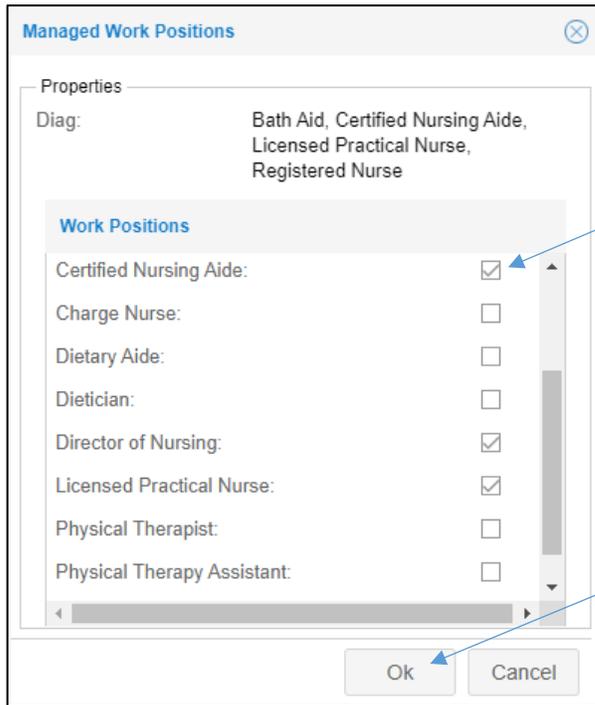
2. Click the Advanced tab in the template properties panel and enable the Work Position Selector Buttons check box.

The screenshot shows the 'Advanced' tab selected in a navigation bar. Below the navigation bar, there is a list of settings. The 'Work Position Selector Buttons' setting is checked and highlighted with a black rectangular box. Other settings include 'Fulfillment Rule' (All Employees), 'Enable Position Based Self Service Rules' (checked), 'Allow Coverage Types to Set Qty Required' (checked), 'Enable Individual Work Position Editing' (checked), 'Merge Reach Workgroups' (checked), 'Automatically Bring in Schedules' (unchecked), 'Transfer Rates Trade Eligibility' (checked), 'Transfer Rates Open Sch. Elig.' (checked), and 'Begin Lunch Deduction' (6:00).

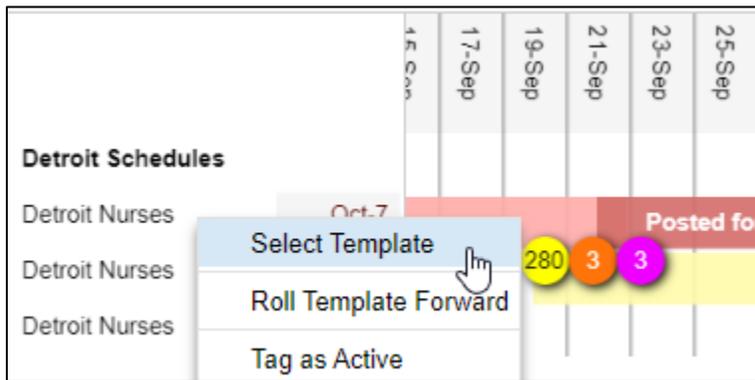
3. Click Managed Work Positions on the Basic tab. The Managed Work Positions dialog is displayed.

The screenshot shows the 'Basic' tab selected in a navigation bar. Below the navigation bar, there are three buttons: 'Managed Work Positions', 'Sub Positions', and 'Schedule Styles'. A blue arrow points to the 'Managed Work Positions' button. Below the buttons, there are three text input fields: 'Caption' (Detroit Nurses), 'Group' (Detroit Schedules), and 'Description' (empty).

4. Enable the check boxes for the work positions you want add a filter button for in the schedule template.



5. Click the OK button.
6. Return to the Visual Scheduling dashboard and access the template again to refresh the header with the filter buttons.



When none of the filter buttons are selected, all of the work positions will be displayed in the template.

The screenshot displays a scheduling interface for "Detroit Nurses (Michicare-Detroit Care-All-All-All+Michicare-Kentwood...)". At the top, there are filter buttons for "CNA", "DON", "LPN", and "RN", and view options for "Weekly", "Roster", and "Daily". A blue arrow points to the filter buttons. Below the filters is a calendar for the month of October, showing days from 7 to 30. The calendar is divided into columns for Sunday, Monday, Tuesday, Wednesday, and Thursday. Each day's column shows a list of work positions with their respective times and counts. For example, on Sunday, there are positions for "Certified Nursing Aide" (3?0) and "Licensed Practical Nurse" (1 1). On Tuesday, there is a "POLLING" section with a quantity of 15 and a "No Shows" section with a quantity of 3. The interface also includes a "View" dropdown menu.

When one or more filter buttons are selected, only those work positions will be displayed in the template.

The screenshot displays a scheduling interface for "Detroit Nurses (Michicare-Detroit Care-All-All-All-All+Michicare-Kentwood...)". At the top, there are filter buttons for "CNA", "DON", "LPN", and "RN", along with a "Weekly" button. The "LPN" button is selected, as indicated by a blue arrow. Below the filters is a calendar for the month of October, showing dates from 7 to 25. The calendar highlights the days 7, 8, 9, 10, 14, 15, 16, 17, 18, 19, 20, 21, 22, 23, 24, and 25. Below the calendar, there is a detailed view of work positions for "Licensed Practical Nurse" for the days Sunday (7), Monday (8), Tuesday (9), and Wednesday (10). Each day's view shows shifts with start and end times, counts, and staff names. For example, on Sunday (7), there are two shifts: 8a/8:30p 12:00 with 1 staff member (stokes, haley c) and 8p/8:30a 12:00 with 1 staff member (menteth, samuel e). On Monday (8), there are two shifts: 8a/8:30p 12:00 with 2 staff members (stokes, haley c and menteth, samuel e) and 8p/8:30a 12:00 with 2 staff members (menteth, samuel e and grimsby, mackenzie y). On Tuesday (9), there are two shifts: 8a/8:30p 12:00 with 2 staff members (stokes, haley c and menteth, samuel e) and 8p/8:30a 12:00 with 2 staff members (menteth, samuel e and grimsby, mackenzie y). On Wednesday (10), there are two shifts: 8a/8:30p 12:00 with 2 staff members (stokes, haley c and grimsby, mackenzie y) and 8p/8:30a 12:00 with 1 staff member (grimsby, mackenzie y). A "No Shows" button is visible on Monday (8) for the 8p/8:30a 12:00 shift.

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