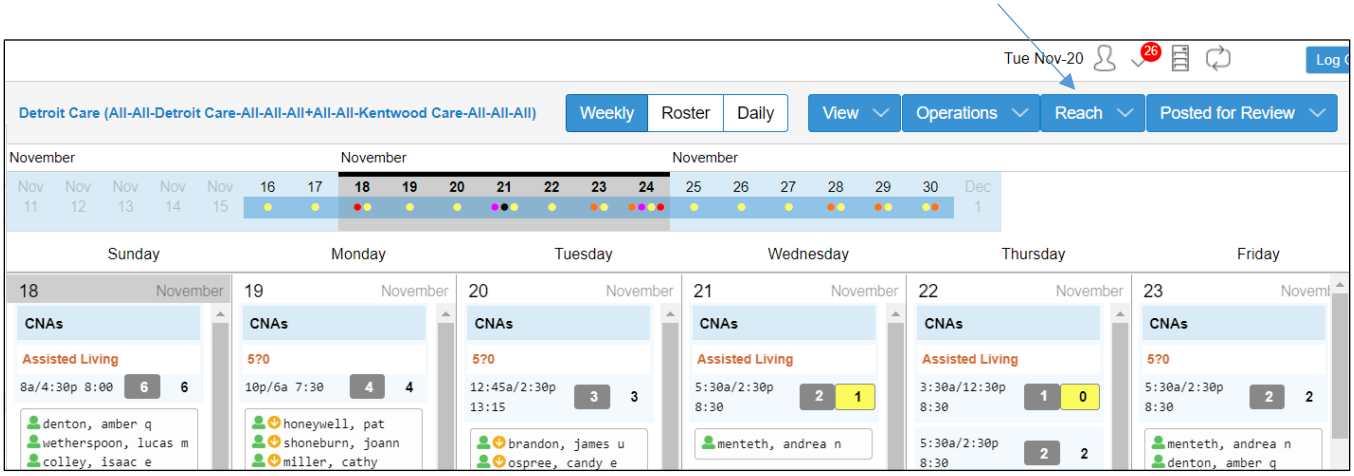
Visual Scheduling: Using Extended Reach

Job Aid

Schedule templates are created for a specific work location (facility, floor or department) defined in the Encompasses workgroup definition. If you have multiple work locations that can share employees as needed, you can apply Extended Reach to bring eligible employees from other locations into the candidate list for a coverage schedule in your template. Extended reach employees who are assigned to the coverage schedule will see a schedule transfer in their time card for that shift.

To use extended reach, it must first be added in the template properties. When extended reach has been added to the schedule template's properties, the Reach drop-down list will be visible in the schedule template page.

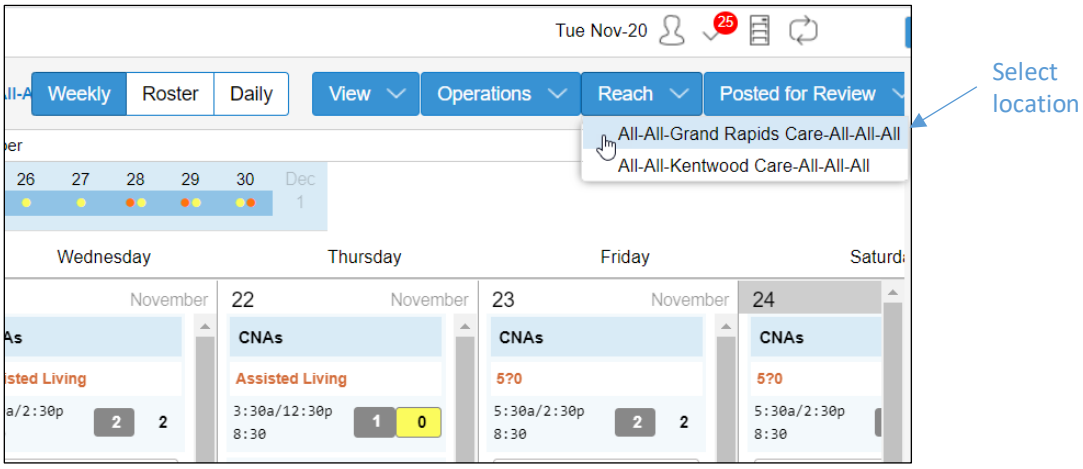


You can add Extended Reach to your template if you have access to the template's properties, see the *Adding Extended Reach to a Template* section below. If your system already has Extended Reach configured, you need to activate it in your schedule template to bring in eligible employees from other locations into your candidate list.

Activating Extended Reach

To activate extended reach:

1. Click the Reach button in the schedule template page and select the location you want to include in the drop-down list.

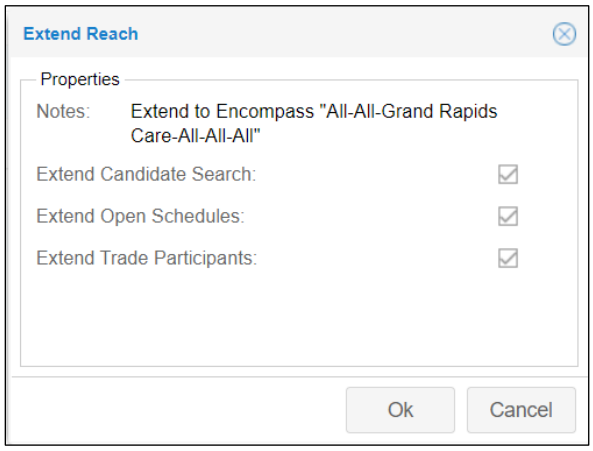


2. In the Extended Reach window, there are three options that can be enabled when engaging extended reach:

   Extend candidate search – allows eligible employees from the extended reach location to be brought in to the candidate lists.

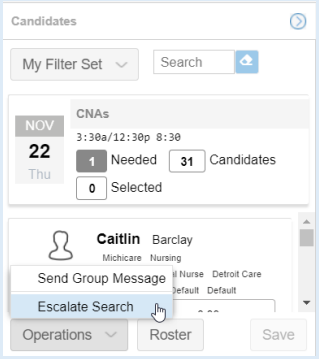
   Extend open schedules – allows eligible employees from the extended reach location to view open schedules in the schedule template.

   Extend trade participants – allows eligible employees from the extended reach location to respond with offers to trade schedules in the schedule template.

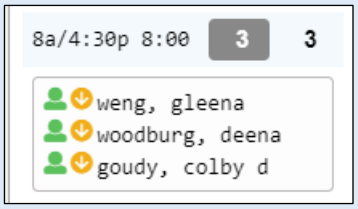


3. Click **OK** after enabling selections.

If an escalate search is performed with the reach setting enabled, the extended reach employees will also receive text messages in the ESS3 Mobile app about open schedules.



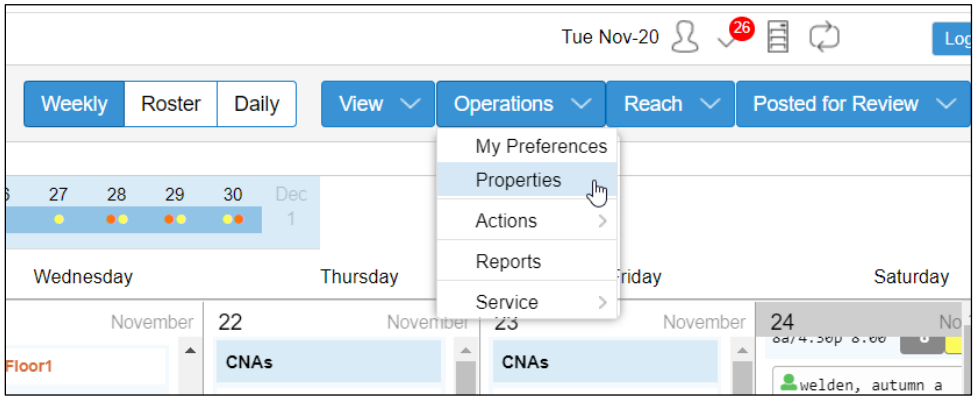
Employees who are from the extended reach workgroup will appear in the schedule template with a yellow down-arrow when added to a coverage schedule.



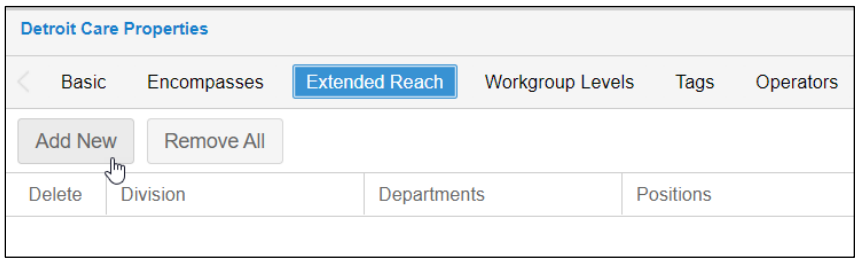
Adding Extended Reach to a Schedule Template

To add a workgroup to extended reach:

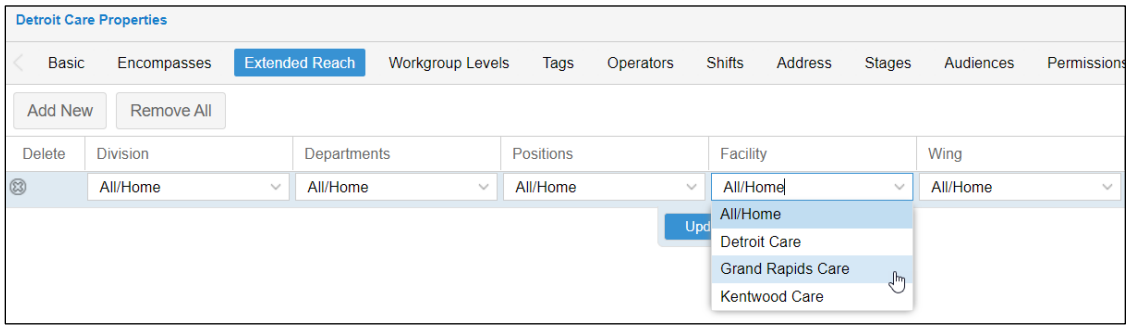
1. Access the template properties by clicking the Operations drop-down list and selecting **Properties**.



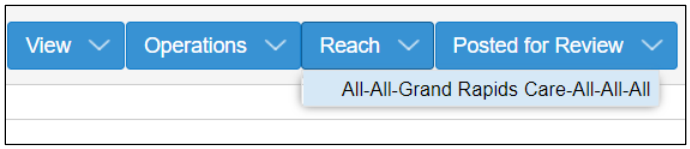
2. Click the Extended Reach tab in the properties panel.



3. Click the **Add New** button in the Extended Rach tab.
4. Click the added workgroup to activate the workgroup level drop-down lists and select the workgroup level for location you are adding for the Extended Reach.



5. Click the **Update** button to save your selection.
6. Refresh your template page and Reach will now appear in the schedule template page and your added workgroup can be found in the drop-down list.



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