

# Visual Scheduling: Schedule Template Viewing Options

Job Aid

Schedule template viewing options let you adjust how much detail you will see in your schedule template. Work positions, schedule times, total schedule hours and employees assigned to a coverage schedule can all be hidden from your template view.

## Selecting Positions to View in Template

If your template includes more than one position, you can view all of them together or select just one position to view in the template. Select the positions you want to view in the Position menu item in the View drop-down list. In the template below, only the selected position is displayed.

The screenshot shows a schedule template for 'LPN (Glenwood-Skilled Nursing-LPN-All-All-All)'. The 'View' dropdown menu is open, showing options: Show Assignments, Show Schedules, Positions, Members, and Trade Activity. The 'Positions' sub-menu is open, showing 'All', 'Activity', 'CNAs', 'LPNs' (checked), and 'RNs'. The schedule grid shows days 14-17 of August with 'LPNs' and a '+' sign.

## Viewing Schedules in Template

If you would like to see schedules displayed in the schedule template, enable the Show Schedules menu item by clicking it in the View drop-down list.

The screenshot shows the same schedule template, but the 'View' dropdown menu is open and 'Show Schedules' is selected. The schedule grid shows days 14-17 of August with 'LPNs' and a '+' sign.

When schedules are showing, a check mark will appear next to the Show Schedules menu item in the View drop-down list. Coverage schedule times and total hours are displayed with the coverage numbers for employees assigned and employees needed.

The screenshot shows a detailed view of the schedule template for Wednesday, Thursday, and Friday of August. It displays coverage schedule times and total hours, along with the number of employees needed and assigned to the coverage schedule. Arrows point to the 'Number of employees needed for coverage schedule' and 'Number of employees assigned to the coverage schedule'.

Day	Time	Employees Needed	Employees Assigned
Wednesday (16)	7/16 8:30	2	2
	22/5:30 7:00	1	2
	23/7 8:00	1	0
Thursday (17)	7/16 8:30	2	2
	15/23 8:00	3	3
	22/5:30 7:00	3	2
Thursday (17)	23/7 8:00	1	0
	23/7 8:00	1	0
Friday (18)	7/16 8:30	2	2
	15/23 8:00	1	0
	22/5:30 7:00	1	1
Friday (18)	23/7 8:00	1	0
	23/7 8:00	1	0

## Viewing Assignments in Schedule Template

To view employees assigned to all of the coverage schedules in the template, select Show Assignments from the View drop-down list.

Wednesday		Thursday		August	
16	August	17	August		August
LPNs		LPNs		LPNs	
7/16 8:30	2 2	7/16 8:30	2 2	15/23 8:00	1 0
22/5:30 7:00	1 2	15/23 8:00	3 3	22/5:30 7:00	1 1
23/7 8:00	1 0	22/5:30 7:00	3 2		

Employees assigned to the coverage schedule will appear directly below the schedule times in the template. Coverage schedules with too few (yellow box) or too many employees (orange box) assigned are indicated to help you identify where adjustments are needed.

Employees assigned to 7/16 8:30 coverage schedule

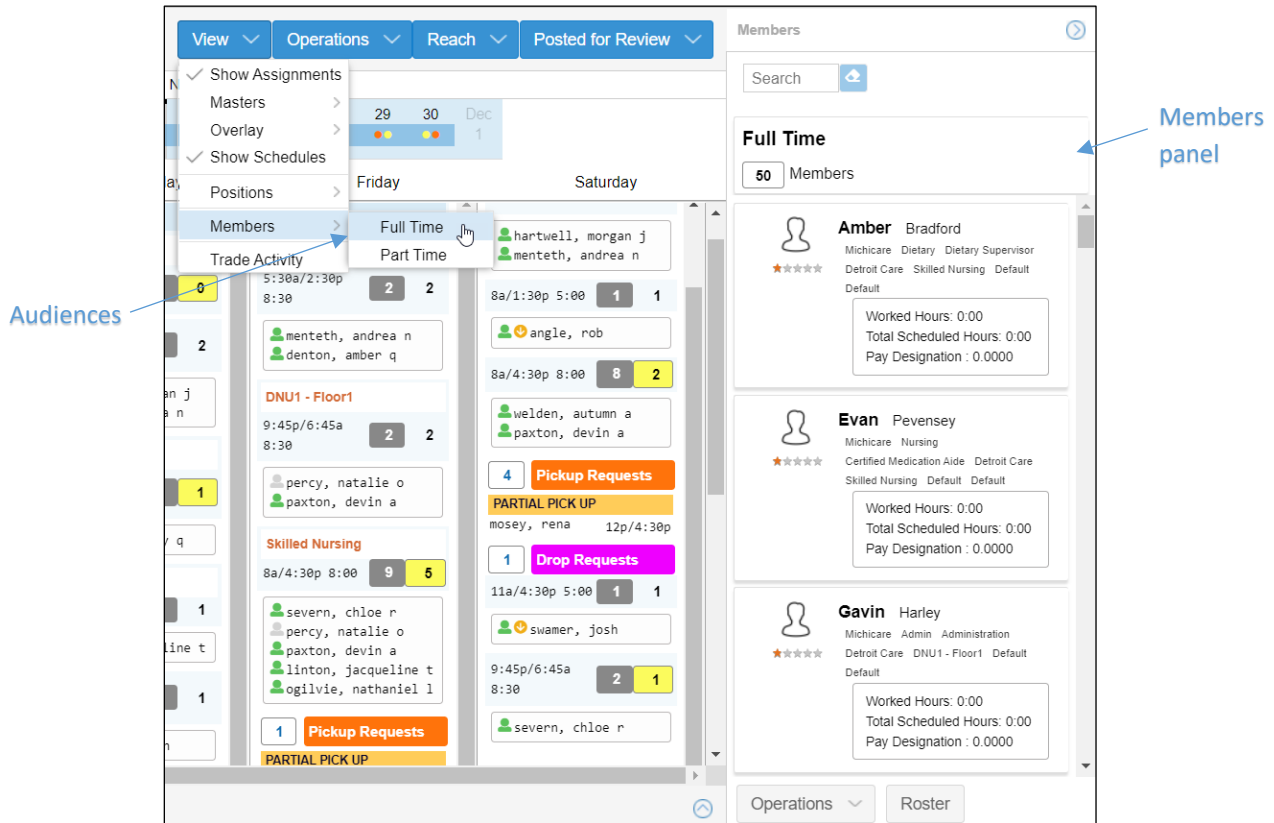
Coverage schedule with too many employees assigned

Wednesday		Thursday		Friday	
16	August	17	August	18	August
LPNs		LPNs		LPNs	
7/16 8:30	2 2	7/16 8:30	2 2	7/16 8:30	2 2
<p>poole, madeleine h</p> <p>sanderson, sean o</p>		<p>poole, madeleine h</p> <p>mills, victoria x</p>		<p>poole, madeleine h</p> <p>morrison, peter k</p>	
22/5:30 7:00	1 2	15/23 8:00	3 3	15/23 8:00	1 0
<p>swinburn, connor i</p> <p>mclean, luke z</p>		<p>morrison, peter k</p> <p>mclean, luke z</p> <p>sanderson, sean o</p>		<p>22/5:30 7:00</p> <p>1 1</p>	
23/7 8:00	1 0			22/5:30 7:00	1 1
				<p>swinburn, connor i</p>	

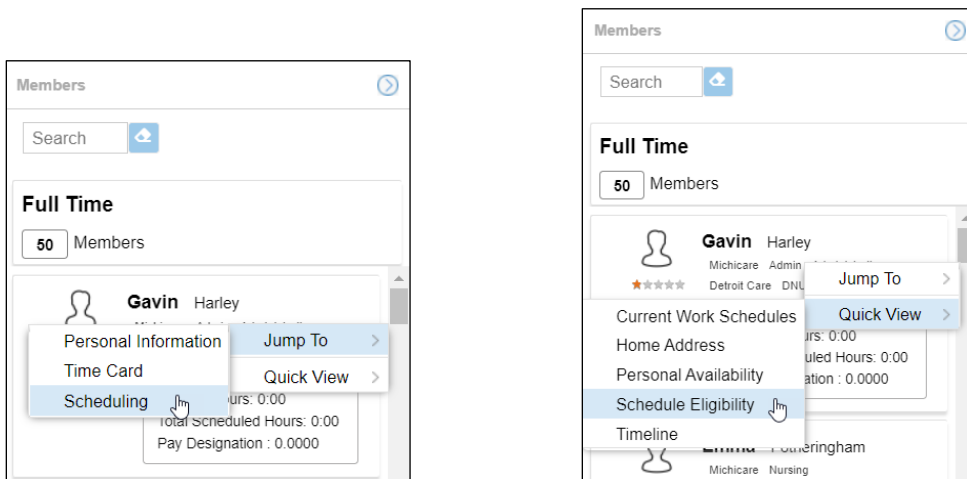
Coverage schedule with not enough employees assigned

## Viewing Members of the Schedule Template Audiences

If your schedule template has multiple stages that stagger template access for different groups of employees, the audience property defines each group. For example, if you have full time and part time employees, you may have separate stages for each audience to allow the full time employees to access the schedule template before the part time employees. The Members menu lets you view the employees in each audience. Click the Members menu and select an audience. The Members panel will expand with the employees listed.



Further access to employee time card and scheduling details can be accessed from the Jump To and Quick View menus by clicking an employee tile in the panel to access the menus.



The Operations menu in the Members panel has options for sorting the list of employees and sending a group message. The Roster button displays a list of the employees with a calendar view of their schedule for the week.

November					November					November					Dec									
Nov 11	Nov 12	Nov 13	Nov 14	Nov 15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	Dec 1				
<div style="display: flex; justify-content: space-between; align-items: center;"> <span>&lt;- Return</span> <span>Page 1 (Harle...Wethe) ▾</span> <span>Latest Filter Panel ▾</span> <span>Refresh</span> </div>																								
Sunday					Monday					Tuesday					Wednesday					Thursday				
<b>Gavin Harley</b> Michicare Admin Administration ★★★★★ Detroit Care DIV/1 - Floor1 Default: Default Worked Hours: 0:00 Total Scheduled Hours: 0:00 Pay Designation: 0.0000					24	December	25	December	26	December	27	December	28	December										
					+		+		+		+													
<b>Emma Fotheringham</b> Michicare Nursing ★★★★★ Certified Nursing Aide Kentwood Care Hospice Default Default: Default Worked Hours: 0:00 Total Scheduled Hours: 8:00 Pay Designation: 0.0000					24	December	25	December	26	December	27	December	28	December										
					+		+		+		+													

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