

Scheduling

Setup

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Introduction

This user manual describes how to setup the scheduling system. Access the scheduling setup by pressing the down arrow next to the schedule button. Follow these steps to setup the scheduling system. Refer to each section for instructions on each step.

1. Select the Shift Names tab and enter all of the shift names.
2. Select the Shift Type tab and enter all of the shift types.
3. Select the Locations tab and enter all of the location.
4. Select the Apparatus tab and enter apparatus data.
5. Select the Rank tab and enter the ranks.
6. Select the Unit Assignment tab and enter the unit assignments.
7. Select the Shift Status and enter the shift statuses.
8. Select the Shift Rotations and enter each shift rotation.
9. Select the Personnel tab and assign each staff to a shift, rank, unit etc.
10. Select the General tab and enter the criteria for scheduling.
11. Select the Personnel tab and generate the schedule for the year.
12. Manage the schedule throughout the year.

Scheduling Setup Tab: General

Select the General Tab to enter the following fields.

Field Description	How it is Used	Special Notes	Example Entries
New Shift Status	Enter the New Shift Status that is automatically entered at the time of the shift generation.	Select from the pick list. This list is maintained in the Shift Status tab.	SCHD
Approved Shift Status	Enter the Approved Shift Status in the space provided.	Select from the pick list. This list is maintained in the Shift Status tab.	APP
New Shift Type	Enter the New Shift Type in the space provided. This is the default field.	Select from the pick list. This list is maintained in the Shift Type tab.	REG
Vacation Shift Type	Enter the default vacation type in the space provided.	Select from the pick list. This list is maintained in the Shift Type tab.	VAC
New Request Status	Enter the new request initial status in the space provided.	Select from the pick list. This list is maintained in the Schedule Request Status.	NEW
Point Type in Transfer	This field is used for departments that transfer personnel from the schedule to the incident apparatus screen.	Select from the pick list. This list is maintained in the personnel setup.	Y

Scheduling Setup Tab: Personnel

Select this tab to enter the personnel scheduling information. Edit the personnel data in this tab.

Scheduling Setup Tab: Shift Rotations

Select this tab to enter the Shift Rotations. A shift rotation represents a repeating shift type. The following are example shift rotations:

Name	Period	Work Sequence	Explanation
8 day rotation	8	D D O O N N O O	2 days on, 2 days off, 2 nights on, 2 days off. Days start at 8:00 and are 10 hours. Nights start at 18:00 and are 14 hours.
3 day rotation	3	D O O	1 day on, 2 days off. Days start at 8:00 and are 24 hours.
7 day administrative rotation.	7	D D D D D O O	5 days on, 2 days off. Days start at 9:00 and are 8 hours. The five days are

Follow these steps to create a rotation for the first time.

1. This step is only done once per shift rotation. Press New to enter a new shift.

Field Description	How it is Used	Special Notes	Example
Agency Number	Enter the agency number that this shift applies to.	This field is only used by multi agency systems.	12345
Shift	Enter the shift in the space provided.	Select from the pick list.	A
Starting Date	Enter the start date of the first day working.	This represents the date the shift rotation starts.	N/A
Ending Date	Enter the ending date of the shift period to be setup.	The process buttons will generate shifts up till this date.	N/A
Rotation Length in Days	The rotation length represents the number of days until the shift repeats the same rotation.		3
Description	The description of the shift.	Simple text field for displays	Administrative Shift

2. This step is only done once pers shift rotation. Press the Create Shift Rotation Slots. This will generate a slot for each day of the rotation.
3. Edit each Shift Rotation Slots

Field Description	How it is Used	Special Notes	Example
Day Number	Enter the day number in the space provided.	This field will already be filled in unless there is a two time period day.	1
Shift Start	Enter the shift start in the space provided.	Miliary format.	08:00
Length	Length of the shift.	How lunch is handled is up to the department.	12
Shift Type	Enter the default shift type in the space provided.	Use the pick list to select the type.	REG

4. Press the **Create Templates for Date Range** button. This function will generate shift slots for the entire range period enter for this shift.

5. Verify the schedule was properly generated by reviewing the schedule slot history.

6. Verify the schedule was properly generated by printing the 12 month calendar.

Scheduling Setup Tab: Shift Names

Enter the shift names in the browse. The following table shows several example shift names:

Career Department with 3 groups and 1 administrative shift	
Code	Description
G1	Group 1
G2	Group 2
G3	Group 3
ADM	Administrative Shift
Career Department with 4 shifts and 1 administrative shift	
Code	Description
A	Shift A
B	Shift B
C	Shift C
D	Shift D
ADM	Administrative Shift

Scheduling Setup Tab: Shift Type

Enter the shift type in the browse. The following is a summary of the shift type fields:

Field Description	How it is Used	Special Notes	Example
Agency Number	Enter the agency number that this shift applies to.	This field is only used by multi agency systems.	12345
Code	The shift type code.	This shift code is used in the entries.	REG
Description	The shift type description	N/A	Regular
On Roster, Working	This field determines if the schedule regular will be displayed on the calendar as a working shift.	A working shift states that the firefighter is actually present.	Y

Scheduling Setup Tab: Locations

Enter the location in the browse. The following is a summary of the location fields.

Field Description	How it is Used	Special Notes	Example
Agency Number	Enter the agency number that this shift applies to.	This field is only used by multi agency systems.	12345
Code	The location code.	This shift code is used in the entries.	STA1

Description	The description location	N/A	Station 1
Short Description	The short description of the location.	N/A	Sta1
Calendar	Enter a Y to display the location in the calendar window.	N/A	Y
Daily Log	Enter a Y to display the location in the daily log window.	N/A	Y

Scheduling Setup Tab: Apparatus

Enter apparatus settings by highlighting the apparatus and pressing the Edit button.

Field Description	How it is Used	Special Notes	Example
Schedule Calendar	Enter a Y in the field to enable the apparatus on the calendar.	N/A	Y
Schedule Menu	Enter a Y in the field to allow the apparatus to be used in the scheduling look ups and the right click menus.	N/A	Y
Minimum Manning	Enter the minimum manning in the space provided.	N/A	4

Scheduling Setup Tab: Position

Enter the position in the position browse.

Scheduling Setup Tab: Shift Status

Enter shift status in the shift status browse.

Field Description	How it is Used	Special Notes	Example
Agency Number	Enter the agency number that this shift applies to.	This field is only used by multi agency systems.	12345
Code	The shift status code.	This shift status code is used in the entries.	SCHED
Description	The description of the status code.	N/A	Scheduled
Locked	Enter a Y in the field to lock the shift record.	This is used for the historical records.	Y

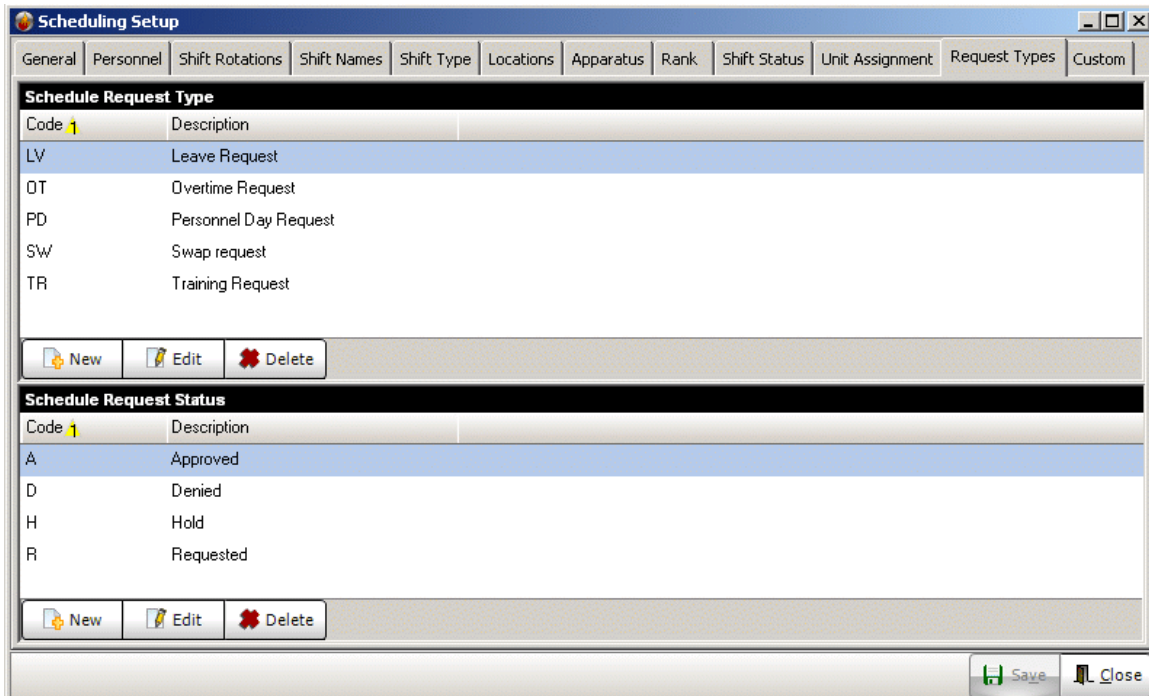
Scheduling Setup Tab: Unit Assignment

Enter the unit assignments in the browse.

Field Description	How it is Used	Special Notes	Example
Agency Number	Enter the agency number that this shift applies to.	This field is only used by multi agency systems.	12345
Code	Assignment Code	Enter a unique code in the space provided.	DR OIC
Description	Assignment Description	Enter the description	Driver Office in charge
Drove Apparatus	Signifies if the assignment should count towards driving an apparatus.	Enter a Y if this represents a driver.	Y
Show Usage on Form	Include this assignment on the usage form.	Enter a Y if this should show up on the usage form.	Y
Placement Order	Placement order on the usage form.	Enter the order.	1

Scheduling Setup Tab: Schedule Request Types

Select this tab to enter and turn on the Schedule Request System. This system is used for tracking leave, overtimes, personnel days etc. The following screen shows some examples of typical setups.



There are two tables found in this setup:

Schedule Request Type. Enter all of the request types in the space provided.

Schedule Request Status. Enter all of the statuses in the space provided.

Please note, none of the Schedule Request functions are displayed anywhere unless at least one type of Schedule Request Type is entered. By entering a schedule request type, you are effectively turning on the function for use throughout the system.

Shift Slot Generating

This section describes how to create the schedule. It is recommended that this be done 1 time per year, after the next year assignments are done.

Follow these steps:

1. Verify that all personnel are properly assigned to their shift, location, unit number, unit task, and rank.
2. Open the Scheduling Setup and select the Personnel tab.
3. Press the **Untag all personnel to be processed**. This resets the processing system.
4. Highlight the personnel to be process and press the space bar to tag them.
5. Enter the initial date and final date to generate the schedule.
6. Press the Generate Shifts. This process will generate the schedule for the tagged personnel.
7. Press the **Untag all personnel to be processed**. This resets the processing system.
8. Verify the schedule for each personnel.

Menu Choice: Vacation and Leaves

Enter vacations in this browse.