

## Scheduling

### Usage

#### Table on Contents

|  |    |
|--|----|
| Introduction . . . . .   | 2  |
| Scheduling Calendar Management . . . . .                               | 2  |
| Button Functions . . . . .   | 3  |
| Time and View Settings . . . . .                                       | 3  |
| Splitting a Shift . . . . .  | 3  |
| Deleting Schedule Records for a Person . . . . .                       | 4  |
| Reassigning a Person to another Unit, Group, Shift, Rank, etc. . . . . | 4  |
| Right Click Menu . . . . .   | 5  |
| Duplicating a Shift . . . . .  | 6  |
| Processing a Shift Swap . . . . .                                      | 7  |
| Schedule Change Requests . . . . .                                     | 8  |
| Change Request Review from Calendar . . . . .                          | 9  |
| Change Requests Main Menu Access . . . . .                             | 10 |
| Change Requests from the Personnel Scheduling Tab . . . . .            | 11 |
| Printing Change Requests . . . . .                                     | 12 |
| Schedule Reports . . . . .   | 13 |

## Introduction

This manual describes how to use the scheduling system. The calendar is accessed by pressing the schedule icon.



Scheduling Icon

## Scheduling Calendar Management

The calendar is used for tracking who is working on any give day or night. The following is a break down and description of the Scheduling Calendar.

| Component                      | Description   | How it us used   |
|--------------------------------|---|--|
| Calendar                       | Daily calendar that is used for displaying the daily schedule.  | Click on the day to display.   |
| Personnel Working at Time      | Enter time that you would like to display personnel working.  | The calendar system is real time. If you enter 11:00pm as the time for a selected date, the calendar will display all of the those working at 11:00pm. |
| Manpower: Show Minimum Manning | This window displays the total number of required personnel for each apparatus.   | Check the Show Minimum Manning check box to turn on the Manpower window.   |
| Show off duty personnel        | Off duty personnel include vacations, sick, training, etc.  | Check the Show off duty personnel box to display personnel that are not working.   |
| Shifts                         | The Shifts window allows you to filter only personnel working on a particular shift.  | N/A  |
| Schedule Tabs                  | This window displays all of the personnel working for the selected tab. This window displays all personnel working for the selected day and select shift. Select the All tab to display all personnel for the selected day. | Both locations and unit numbers can be included in the tab.  |

## Button Functions

Several buttons and functions are found on the bottom tool bar.

| Component            | Description   | How it us used  |
|----------------------|---|---|
| New                  | Add new shifts.   | Add new personnel to the selected day and inventory or location.                                  |
| Edit                 | Edit shift.   | Press the edit button to edit the shift.  |
| Delete               | Delete shift.   | Press the delete button to delete the selected shift.   |
| Split                | Split a shift.  | Press this button to split the highlighted shift.   |
| Approve and Lock     | Lock the shift to restrict editing.                     | Press the lock button approves the shift for the historical record.                               |
| Approve and Lock All | Lock the all of the visible shifts to restrict editing. | Press the button to lock all of the shifts in the select unit or location.                        |
| Find                 | Find a specific text in the shift record.               | Press the find button. This activates the find system. You can find text in any field using this. |
| Reports              | Schedule Reports.                                       | Press the reports button to access the list of reports for your scheduling system.                |

## Time and View Settings

The calendar displays the personnel that are working on the selected day at the entered time.

| Component                         | Description   | How it us used   |
|-----------------------------------|---|--|
| View Personnel Scheduled at Day   | Current time of day for displaying of personnel.      | Enter the time of day you would like to view personnel. The personnel browse will automatically update with the personnel. |
| View Personnel Scheduled at Night | Current time of night for displaying of personnel.    | Enter the time of Night you would like to view personnel.  |
| Show Off Duty Personnel           | Check box for display personnel that are not working. | Check this box to display all personnel that are not working as well as personnel that are working.                        |

## Splitting a Shift

There are several reasons to split a shift.

- A firefighter is sent home sick before his shift is finished.
- A firefighter is moved from one unit or station to another.

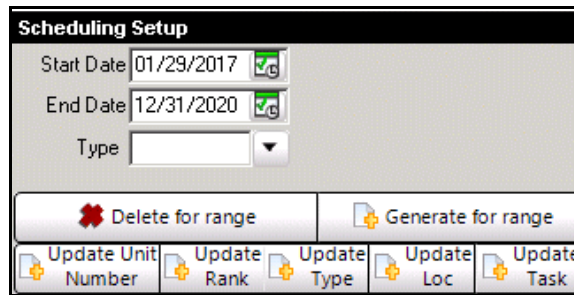
Follow these steps to split a shift.

1. Highlight the shift to be split. Press the **Split** button.
2. Modify the appropriate fields. Fields on the left represent the first half. Fields on the right represent the second half of the shift.
3. Press the Save button. The screen will close and the browse will update with the appropriate information.

### Deleting Schedule Records for a Person

This section describes how to delete schedule records for 1 person. This can happen if the person is retiring or moving on:

1. Access the personnel record.
2. Select the Schedule Tab.
3. Enter the start and end date.



4. Press the **Delete for range** button.
5. Verify records are deleted.

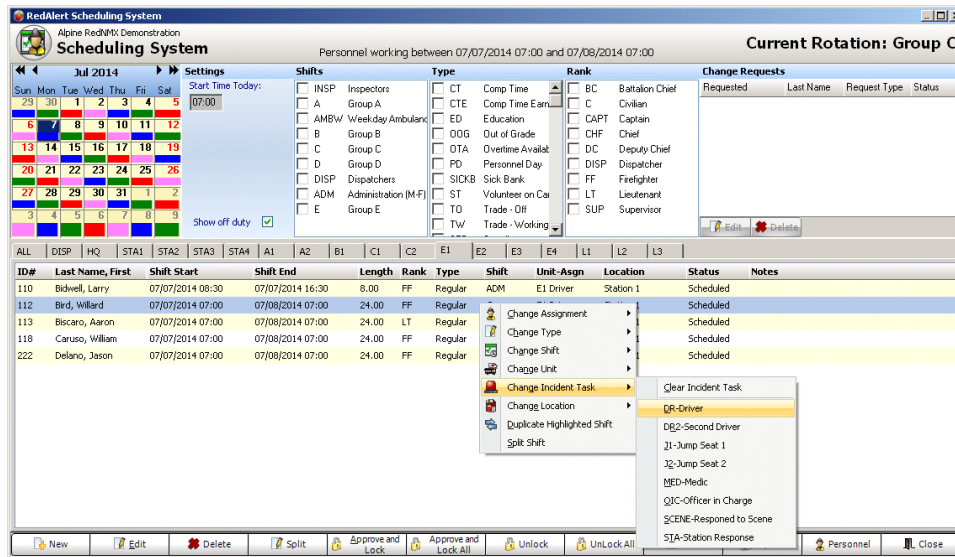
### Reassigning a Person to another Unit, Group, Shift, Rank, etc.

This section describes how to reassign a person to a different shift, unit, rank etc. This examples show how to move a firefighter from one shift group to another.

1. Edit the personnel record.
2. Select the **Schedule** tab.
3. Enter the new scheduling parameters in the Scheduling Setup window.
4. Enter the **Start Date** and **End Date** for the period you planning on moving the person.
5. Press the **Delete for Range** button. This deletes all shifts between the date range that have not been approved. The program will prompt you to perform the deletion, say Yes.
6. Press the **Generate for Range** button. This generates all shifts between the date range for the selected shift.
7. Verify that the operation was successful. Also, verify that any scheduled vacations are also included.

### Right Click Menu

While viewing the calendar, highlight a shift record and then press the right mouse button. This will bring up the first menu.



From here there are several function that can be done. You can do the following:

| Menu Choice                 | How it us used  |
|-----------------------------|---|
| Change Assignment           | Select this choice to change the rank or assignment.  |
| Change Type                 | Select this choice to change the shift type.  |
| Change Shift                | Select this choice to change the shift.   |
| Change Unit                 | Select this choice to change the unit.  |
| Change Unit Task            | Select this choice to change the unit task. This will bring up a list of valid unit tasks.                                |
| Change Location             | Select this choice to change the location.  |
| Duplicate Highlighted Shift | Select this choice to duplicate the highlighted shift. Refer to the Duplicate a Shift section for additional information. |
| Split Shift                 | Select this choice to split a shift. Refer to the Splitting a Shift section for additional information.                   |

After changes are made, the grid will refresh. Please that the staff changes will cause some shifts to not be displayed, because the criteria no longer applies. There is also a menu choice labeled **Clear <Field Name>** that you can select to clear the field.

**Duplicating a Shift**

There are several reasons to duplicate a shift:

- You need to assign someone overtime for a person that has gone home sick.

Follow these steps to duplicate a shift.

1. Highlight the shift you would like to duplicate.
2. Press the right click mouse button, select the Duplicate Highlighted Shift.
3. Enter the appropriate criteria.
4. Save the record.

## Processing a Shift Swap

This section covers how to do a shift swap. This can be done from either version of the scheduling system. A swap represents when a staff is working for another staff. Follow these steps to process a swap:

- 1 Select the shift that will be taking the time off. You can double click on the shift to edit.

The screenshot shows the 'Shift Entry' window. Under 'Personnel Information', the 'Covered or Replaced' field is highlighted with a red box and contains '802' and 'Bollin'. Under 'Schedule Information', the 'Type' field is highlighted with a red box and contains 'HOL' and 'Holiday'. Other fields include ID# 099, Rank FF, Location STA2, Group C, Starting Date 01/09/2018, Ending Date 01/10/2018, Length 24.00, and Verbal 24 Hour(s) 0 Minute(s). The Status is 'SCHED' and the Reason is 'Holiday'.

2. Change the fields in the red boxes. This example takes John Martins and puts him on Holiday. David Bollin will be covering for him.
3. If you are using the Gui Schedule, basically highlight a person in the available personnel, and then drag that person to the unit or the station location. Enter the new fields.

The screenshot shows the 'Shift Entry' window after editing. Under 'Personnel Information', the 'Covered or Replaced' field now contains '099' and 'Martins'. Under 'Schedule Information', the 'Type' field is highlighted with a red box and contains 'O1' and 'Overtime'. Other fields include ID# 802, Rank DC, Location STA1, Group C, Starting Date 01/09/2018, Ending Date 01/10/2018, Length 24.00, and Verbal 24 Hour(s) 0 Minute(s). The Status is 'SCHED' and the Reason is 'Filing In'.

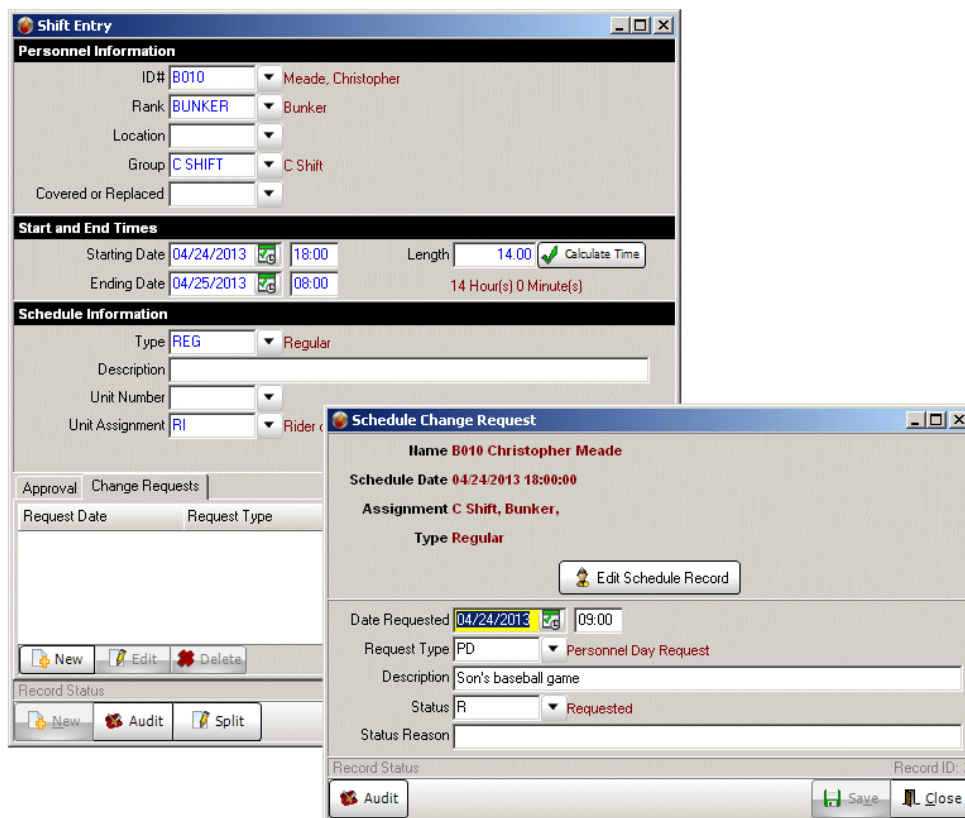
This example shows David Bollin covering for John Martins and his shift type is OT. This also includes a reason as FI, Fill In.

### Schedule Change Requests

This section covers how to manage Schedule Change Requests (SCR). SCR's occur when a staff request a change in their schedule. Typical steps are as follows:

1. Staff accesses a schedule record from the calendar. Please note, they need access to the calendar.
2. Select Change Requests tab.
3. Staff presses new to enter a request from the schedule record.
4. Administrator reviews pending requests and either approves, denies or postpones.
5. If approved, administrator changes the schedule to reflect the request.

You can access the schedule change request entry screen from a schedule slot. The following screen shows this entry screen.



Select the Change Requests tab in the Shift Entry Screen. The following fields are entered in the Schedule Change Request Entry Screen:

| Field Name     | Description  | Requirement | Comments  | Example |
|----------------|--|-------------|---|---------|
| Date Requested | Date and Time the request was made by the end user | Required    | This field is based on the time of entry. You can override what is defaulted. | N/A     |



|               |   |          |   |  |
|---------------|---|----------|---|--|
| Request Type  | The type of request the user is making. | Required | Use the drop down for a list of valid choices.            | PD   |
| Description   | Description of request.                 | Optional | Enter a description of the request in the space provided. | Teacher Meeting. You can also enter in something like <b>Requesting 3<sup>rd</sup> week in May</b> |
| Status        | Status of the request.                  | Optional | Use the drop down for a list of valid choices.            | R  |
| Status Reason | Reason of the status.                   | Optional | Enter the reason for the final status.                    | You are not able to take that day off because . . .  |

You can access the Schedule Change Request from several places.

### Change Request Review from Calendar

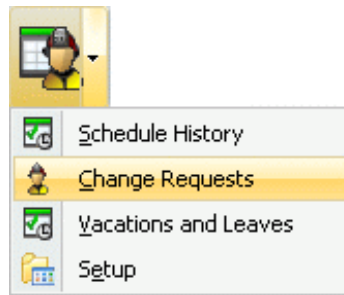
The screenshot shows the RedAlert Scheduling System interface for the City of Cortland Fire Department. It features a calendar for April 2013, a list of personnel with their shift details, and a 'Change Requests' panel on the right. The 'Change Requests' panel is highlighted with a red box and contains a table with columns for Requested, Last Name, Request Type, and Status. The table shows one request for 04/24/2013 at 09:00 by Knickerbocker, which is a Leave Request and has been approved.

| Requested        | Last Name     | Request Type  | Status   |
|------------------|---------------|---------------|----------|
| 04/24/2013 09:00 | Knickerbocker | Leave Request | Approved |

The Red Box displays all of the schedule requests for the currently displayed day.

**Please note, from here you cannot enter new ones, but you can update the current ones.**

### Change Requests Main Menu Access



You can access the Change Requests history by selecting the drop down menu found in the scheduling icon on the main menu. This will bring up the request history.

**RedAlert View Schedule Requests**

### Schedule Requests

Search Engine

| Date Requested | Start Date | Last Name | Request Type | Status   | Description                     |
|----------------|------------|-----------|--------------|----------|---------------------------------|
| 03/13/2008     | 03/18/2008 | Boyst     | Personal Day | Approved | Doctor's Appointment            |
| 07/01/2008     | 07/04/2008 | Caruso    | Personal Day | Approved | See the Fireworks with the Kids |
| 07/11/2008     | 07/30/2008 | Furco     | Personal Day | Request  |                                 |
| 08/11/2008     | 08/11/2008 | Shannon   | Personal Day | Request  | Son's Soccer Game               |
| 08/20/2008     | 08/30/2008 | Delano    | Personal Day | Request  |                                 |
| 09/25/2009     | 09/25/2009 | Calbretti | Swap         | Request  | This is a Request               |
| 01/11/2010     | 01/13/2010 | Roth      | Personal Day | Request  |                                 |
| 04/13/2011     | 04/13/2011 | Bopp      | Personal Day | Approved |                                 |
| 11/04/2011     | 12/01/2011 | Corey     | Personal Day | Approved |                                 |
| 04/24/2013     | 08/24/2013 | Corey     | Personal Day | Request  |                                 |
| 04/24/2013     | 04/26/2013 | Goosley   | Personal Day | Request  | Teacher Conference              |
| 04/24/2013     | 04/26/2013 | Koss      | Personal Day | Request  | Teach Conference                |
| 04/24/2013     | 04/30/2013 | Bremer    | Overtime     | Request  | Need to cover for JR.           |

Find Records | Clear Criteria | Print This Query | Export Data | Save Settings

Date Requested: // / / | Request Type: | Request Status: | Last Name:

New | Edit | Print | Delete | Maximum Number Records for Query: 1000 | Query returned 3 | Close

## Change Requests from the Personnel Scheduling Tab

You can access all of the requests for a specific member by pulling up the staff record. Select the Schedule tab. Then select the Schedule Change Requests tab. This displays all of the schedule requests for the selected staff record.

The screenshot displays the 'Personnel Record Edit' window for '195 John Adams'. The 'Schedule' tab is active, showing a 'Schedule Change Request' dialog box. The dialog box contains the following information:

- Name:** 195 John Adams
- Schedule Date:** 05/06/2014 07:00:00
- Assignment:** Group A, Firefighter, L3
- Type:** Regular
- Date Requested:** 05/28/2014 16:25
- Request Type:** Personal Day
- Description:** Brothers Graduation
- Status:** REQ
- Status Reason:** Request

The 'Personnel Information' section shows:

- ID#:** 195
- Rank:** FF
- Location:** STA1
- Group:** A
- Starting Date:** 05/06/2014 07:00
- Ending Date:** 05/07/2014 07:00

The 'Schedule Information' section shows:

- Type:** REG
- Description:** (empty)
- Unit Number:** L3
- Unit Assignment:** DR

The 'Approval Change Requests' table shows:

| Request Date     | Request Type | Status  |
|------------------|--------------|---------|
| 05/28/2014 16:25 | Personal Day | Request |

The 'Personnel Summary' section shows:

- On Roster?** Yes
- Year of Service:** 11.24
- Age:** 28

The 'Schedule' tab shows a table of schedule entries:

| Start            | End        |
|------------------|------------|
| 04/24/2014 07:00 | 04/25/2014 |
| 04/28/2014 07:00 | 04/29/2014 |
| 05/02/2014 07:00 | 05/03/2014 |
| 05/06/2014 07:00 | 05/07/2014 |
| 05/10/2014 07:00 | 05/11/2014 |
| 05/14/2014 07:00 | 05/15/2014 |
| 05/18/2014 07:00 | 05/19/2014 |
| 05/22/2014 07:00 | 05/23/2014 |
| 05/26/2014 07:00 | 05/27/2014 |
| 05/30/2014 07:00 | 05/31/2014 |
| 06/03/2014 07:00 | 06/04/2014 |

1. Staff selects the day to request off.
2. Staff edits the schedule record.
3. Staff selects the Change Requests tab.
4. Press new to enter a new request.

### Printing Change Requests

You can also print the Schedule Change Request history by access the following report:



**Schedule Reports**

Press the Reports button to access the schedule reports. There several reports listed in this screen. Follow these steps to print reports.

1. Press the report button.
2. Highlight the appropriate report.
3. Enter the criteria.
4. Press the preview button.

This section of the program is highly customized. Therefore there are additional instructions in your custom user manual. This manual is created after all reports are finished.