

Scheduling How To

Creating Roster Patterns

Outcome: *Demonstrate how to create a “Roster Code”.
 Explain how a “Pattern Code” can be re-used.
 Demonstrate how to create, a “Roster Pattern”.
 Describe how to copy a “Roster Pattern”.*

Why Use

Roster patterns make it easier to plan a schedule by visually showing you how a person progress through the roster in each rotation.

Having created this visual representation it may then be applied to “Maintain Standard Schedules” to automate the insertion of each employee in the schedule, saving you a great deal of time.

Overview

Creating Pattern Codes

Creating Rotation Patterns

Copying a Pattern

Procedure

Pattern Codes

1. Set up a separate code for each shift in the client schedules
 - A. Open “Roster Pattern Codes” under “Optimised Scheduling” in the “Navigator”
 - 1) 06:00 – 14:00 (Day 1)
 - 2) 08:00 – 16:00 (Day 2)
 - 3) 16:00 – 24:00 (Aft 8)
 - 4) 24:00 – 08:00 (Nig 8)

The image displays four instances of the 'Roster Pattern Codes' dialog box, each representing a different shift pattern. Each dialog box has a title bar with standard window controls (minimize, maximize, close). The fields include:

- Pattern Code:** A dropdown menu.
- Description:** A text input field.
- Start/End:** Two time input fields.
- Time Span:** A group of radio buttons for Morning, Day, Afternoon, and Night.
- Legend:** A dropdown menu showing a color-coded code.
- Buttons:** Save, Cancel, and Exit buttons at the bottom.

The four patterns shown are:

- DAY1:** Pattern Code DAY1, Description 'Early Dayshift (Morning overlap)', Start 06:00, End 14:00, Time Span Day (selected), Legend 16711680 (blue).
- DAY2:** Pattern Code DAY2, Description 'Normal 8 hr day in a 24 hr site', Start 08:00, End 16:00, Time Span Day (selected), Legend 4227327 (orange).
- AFT8:** Pattern Code AFT8, Description 'Afternoon Shift 8 hours', Start 16:00, End 00:00, Time Span Afternoon (selected), Legend 8454016 (green).
- NIG8:** Pattern Code NIG8, Description 'Night Shift 8 hours', Start 00:00, End 08:00, Time Span Night (selected), Legend 8454143 (yellow).

2. The times in the codes are defaults only
 - A. They can be changed for each rotation pattern.

Note: A "Roster Pattern Code" is a "Code", "Description" and "Colour" where a "Rotation Pattern" is the use and arrangement of a collection of "Rotation Codes" used to form a "Rotation Pattern".

- B. A different "Roster Pattern Code" is needed for each shift type in the **same** "Rotation Pattern"
 - C. The same "Roster Pattern Code" can be used in **different** "Rotation Patterns" for similar but **different** shifts.
- Eg. The code "Day 1" could be used for:
- a) 06:00 – 14:00 in pattern A
and
 - b) 08:00 – 16:00 in pattern B

Rotation Patterns

1. A "Rotation Pattern" describes the sequence of shifts a group of people will rotate through.

2. Using the “Navigator” open “Optimised Scheduling / Rotation Pattern”

3. Type in a new code
 - A. It should be meaningful but 6 or less characters
4. Choose a role type
 - A. “Role Types” are created in the “System Codes” menu under “Time Scheduling / Role Type”
5. Enter a description for the pattern code
 - A. Try to explain the function of the code
6. Double click  a free cell in the “Shift” column and choose a shift type
 - A. In the example we have used “Day1”
 - B. Change the “Start” and “Finish” times if required
7. Repeat step 6 for each shift
8. Click  the “Pattern” tab

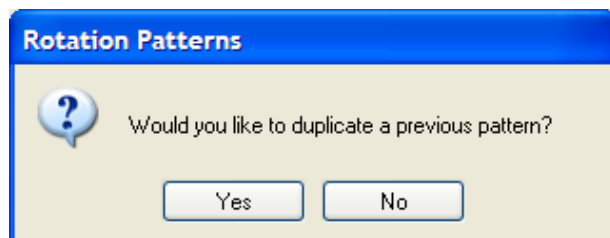
9. Highlight the shift description
10. Click day/s shift required

- A. If there are not enough rows in the pattern
 - 1) Save the record
 - 2) Open the record again and there will be more rows

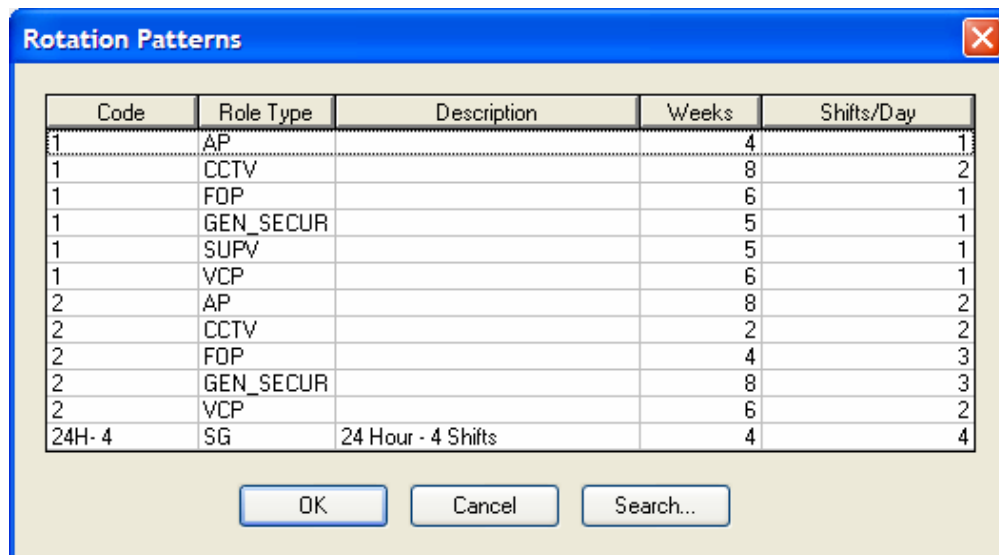
To Copy a Roster Pattern

Note: This pattern is chosen to contrast the previous pattern.

1. Create a new pattern as described in “Rotation Patterns” steps 1 to 8
 - A. The “Weeks in Rotation” must be the same as the pattern you are going to copy
 - B. The “Shift Codes” must be the same as the pattern you are going to copy
2. On the “Pattern” tab click  the Copy Pattern button
3. You will be asked if you like to duplicate a previous (an existing) pattern (layout only – no codes).



4. Click  Yes
5. Select a pattern to copy



6. A copy of the pattern layout will be placed in the window

	Mon	Tue	Wed	Thu	Fri	Sat	Sun
1	NIG8	NIG8	NIG8	NIG8			
2	DAY1	DAY1	DAY1		NIG8	NIG8	NIG8
3				DAY2	DAY2	DAY2	DAY2
4	DAY2						NIG8

Applying a Roster Pattern

Outcome: *Demonstrate how to design a schedule in “Maintain Standard Schedules” using a “Roster Pattern”.*
 Explain how to generate repetition of a “Standard Schedule”.
 Demonstrate how to view generated schedules.

Why Use

Roster patterns allow an existing plan of shift rotations to be applied to a client’s site saving time and reducing possible errors.

Overview

Design a Schedule in Maintain Standard Schedules

Generate repetitions of the schedule in “Generate Schedules”

View results of schedule generation in “Time Scheduling Workbench”

Procedure

Design a Schedule in Maintain Standard Schedule

This window is used to design a “Standard Schedule” from which the weekly schedules are generated.

1. From the “Navigator” open “Scheduling / Maintain Standard Schedules”
2. Enter the client code

Standard Schedule <POWERFORCE PARRAMATTA> <PARRA>

Client Code: POW-PAR Days/Rotation: 7 Last Rotated Cycle: 1

Schedule Type: ALL View: Times Rotations/Cycle: 4 Edit Settings

Last Rotation Week Ending Date: 30/01/2005

☐ Single Rotation
☐ Multiple Rotation
☒ Pattern Rotation

Rotation Pattern: (24H- 4*SG) 24 Hour - 4 Shifts

Hours Required: 832 Resources Required: 104
Hours Allocated: 0 Resources Allocated: 0 Delete

Leave Override Codes

Employment Type	Annual	Sick	RDO'S	Long Service
ADMIN				
CASUAL				
CONTRACTOR				

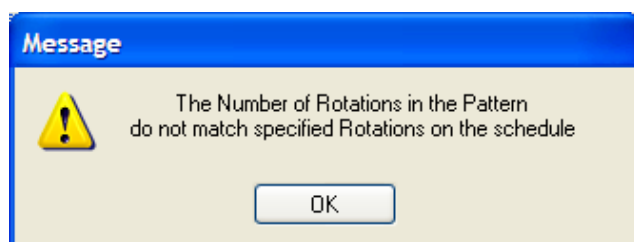
Summary Allocation

Employee	Max	Alloc	Base	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Shift/Hrs	Rotation	Average
NI/Security Guard	224.0			0000-0800	0000-0800	0000-0800	0000-0800	0000-0800	0000-0800	0000-0800	7/56.0	28/224.0	7.00/56.0
D/Security Guard	160.0			0800-1600	0800-1600	0800-1600	0800-1600	0800-1600	0800-1600	0800-1600	5/40.0	20/160.0	5.00/40.0
D2/Security Guard	224.0			1600-0000	1600-0000	1600-0000	1600-0000	1600-0000	1600-0000	1600-0000	7/56.0	28/224.0	7.00/56.0
AFT/Security Guard	224.0			0000-0800	0800-1600	1600-0000	0000-0800	0800-1600	1600-0000	0000-0800	7/56.0	28/224.0	7.00/56.0

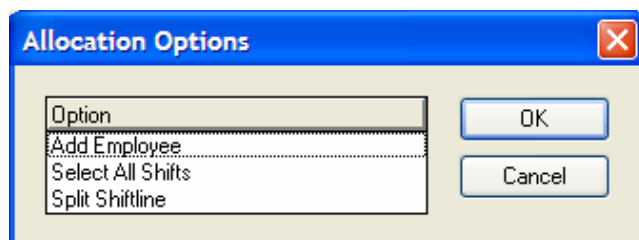
Rotation 1 of 4

Assign Un-Assign Print Save Clear Exit

3. Choose the schedule type
 - A. ALL – ever day of the year
 - B. REGULAR – every day except public holidays
 - C. PHOLS – public holidays only
4. Select “Pattern Rotation”
5. Select the “Rotation Pattern”
 - A. The following message will appear



- B. This is because the window assumes 1 week when you open it but changes to the number of rotations when you choose the rotation pattern.
6. Double click the employee column
 - A. The following window will appear

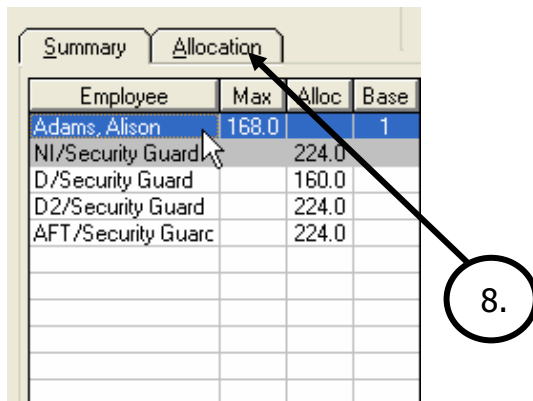


- B. Select “Add Employee”

C. Select an employee

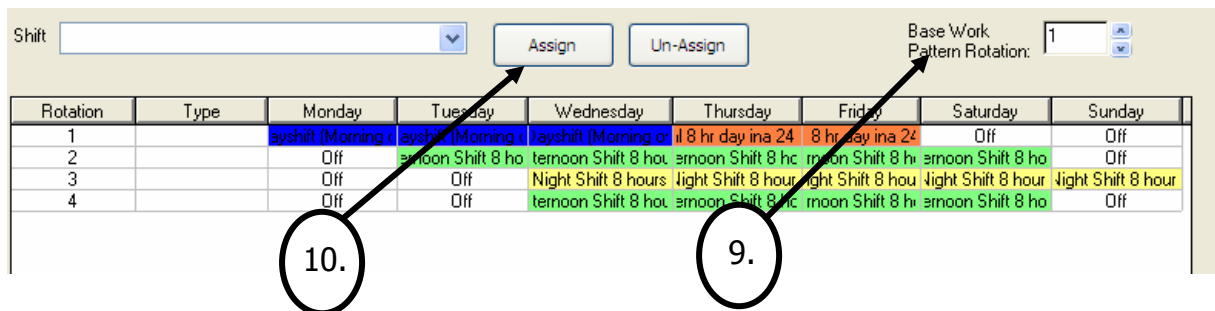
- 1) The “Rotation Pattern” will be applied to this employee

7. Highlight the employee



Employee	Max	Alloc	Base
Adams, Alison	168.0		1
NI/Security Guard		224.0	
D/Security Guard		160.0	
D2/Security Guard		224.0	
AFT/Security Guard		224.0	

8. Click the “Allocation” tab



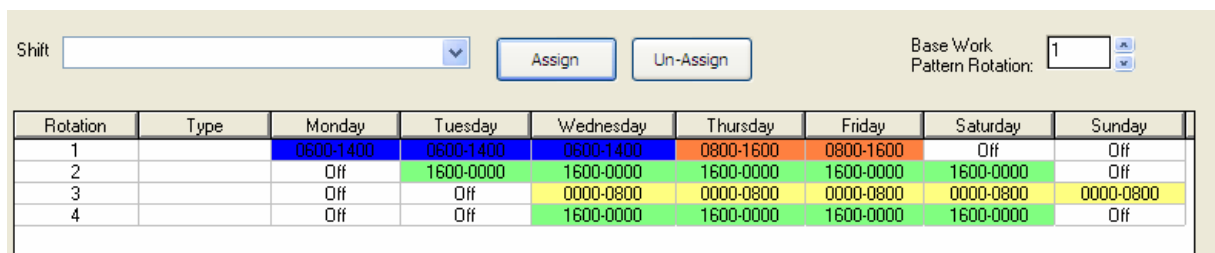
Rotation	Type	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
1	Dayshift (Morning)	Dayshift (Morning)	Dayshift (Morning)	Dayshift (Morning)	Dayshift (Morning)	Dayshift (Morning)	Off	Off
2	Off	Off	Off	Off	Off	Off	Off	Off
3	Off	Off	Off	Off	Off	Off	Off	Off
4	Off	Off	Off	Off	Off	Off	Off	Off

9. Select the “Base Work Pattern Rotation”

- A. The week of the rotation on which the employee will start
- B. It is easiest to have the first employee on week 1 of the rotation and the second on week 2 etc.

10. Click assign shifts

- A. All shifts in the pattern will now be assigned to the selected employee starting in week 1 of the pattern.



Rotation	Type	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
1	Dayshift (Morning)	0600-1400	0600-1400	0600-1400	0800-1600	0800-1600	Off	Off
2	Off	Off	1600-0000	1600-0000	1600-0000	1600-0000	1600-0000	Off
3	Off	Off	Off	0000-0800	0000-0800	0000-0800	0000-0800	0000-0800
4	Off	Off	Off	1600-0000	1600-0000	1600-0000	1600-0000	Off

11. Click the button

12. Return to the “Summary” tab

Summary		Allocation		CONTRACTOR						
Employee	Max	Alloc	Base	Mon	Tue	Wed	Thu	Fri	Sat	Sun
Adams, Alison	168.0	152.0	1	0600-1400	0600-1400	0600-1400	0800-1600	0800-1600	Off	Off
NI/Security Guard		184.0		0000-0800	0000-0800	0000-0800	0000-0800	0000-0800	0000-0800	0000-0800
D/Security Guard		136.0					0600-1400	0600-1400		
D2/Security Guard		208.0		0800-1600	0800-1600	0800-1600			0800-1600	0800-1600
AFT/Security Guard		152.0		1600-0000	1600-0000	1600-0000	1600-0000	1600-0000	1600-0000	1600-0000

Rotation 1 of 4

Assign Un-Assign Print Save

A. For week 1 the first shift in the pattern has been assigned to the employee

B. 152 hours have been allocated to the employee

1) 38 hours for each rotation

Day 1

Day 2

Afternoons

Nights

13. Repeat steps 6 through 12 until all rotations have been assigned.

Generate Schedule

This window is used to generate cycles of a “Standard Schedule” created in the “Maintain Standard Schedules” window.

1. From the “Navigator” open “Scheduling / Generate Schedule”

Schedule Generation

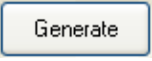
Company: PWRTRN Start Date: 07/02/2005

Weeks To Generate: 1 Add Standard Scheduling Sites: Re Generate: ☒

	Site	Name	Last Cycle	Last Date	Hours
1	POW-PAR	POWERFORCE PAR TTA		13/02/2005	80.00
2					
3					
4					
5					
6					
7					
8					
9					
10					
11					
12					

Generate Clear Exit

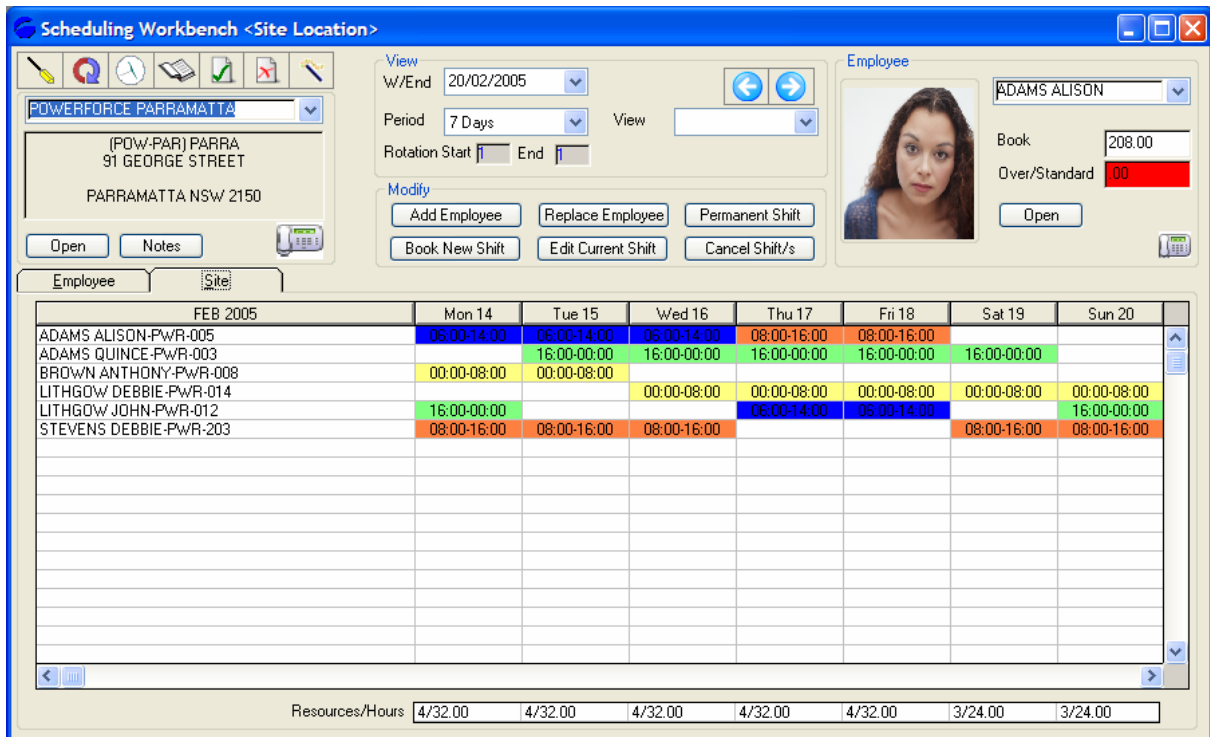
2. Select the company

3. Enter the “Start Date”
 - A. Schedules will be generated from this date
 - B. Select the first day of the week
4. Enter the number of cycles (weeks) to generate
5. Select site/s requiring schedule generation
6. Check the “Re Generate” box to cause existing shifts to be regenerated.
 - A. If not checked only additional shifts will be generated
7. Click  the  button to generate the schedules

View the Schedule in the Workbench

The “Scheduling Workbench” allows preview / editing of individual shifts in any created schedule. It may also be used to hand create schedules.

1. From the “Navigator” open “Scheduling / Time Scheduling Workbench”



2. Select the desired site
3. Click  the “Site” tab
4. The shift information will be displayed

Scheduler Comments

Outcome: *Explain how to add a new comment.*
 Explain how to delete a comment.

Why Use

Creating standard comment increases consistency and makes comments much faster to enter.

Overview

Rebuilding the scheduling comments table

Scheduling comments Maintenance

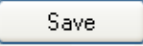
Using Scheduler Comments

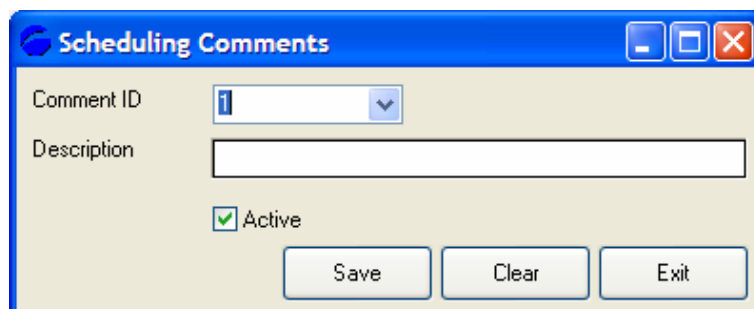
Available in these Windows

Procedure

Schedule Comments Maintenance:

Regular usage comments are stored in a PowerForce table. This window allows you to create edit and delete these comments.

1. Open “Time Scheduling / Scheduling Comments” from the “System Codes” menu.
2. The “Comment Id” is automatically created
 - A. If you wish to edit another comment open the list box and select the desired entry
3. Click  the description field and enter you new comment
4. Check “Active” to make the comment available or un-check to make the comment unavailable
5. Click  to save the comment
6. Comments may be deleted by opening the comment and click  the  button in the toolbar.

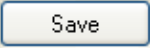


Note: Comments may only be deleted in this window.

Using Scheduler Comments

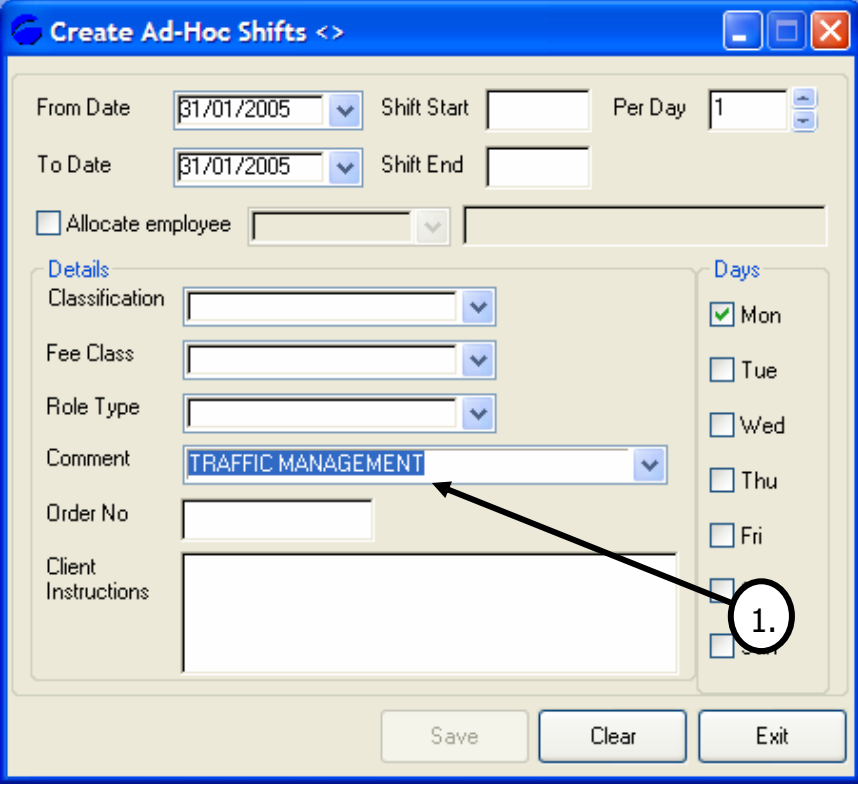
1. Select from the list box

or

2. Type your own and click 

Available in these Windows

1. “Scheduling / Time Scheduling Workbench / Ad-Hoc Schedule Button  / Create Ad-Hoc Shifts” window in the “Navigator”



Create Ad-Hoc Shifts <>

From Date: 31/01/2005 Shift Start: Per Day: 1

To Date: 31/01/2005 Shift End:

☐ Allocate employee

Details

Classification: Fee Class: Role Type: Comment: TRAFFIC MANAGEMENT

Order No: Client Instructions:

Days

☒ Mon ☐ Tue ☐ Wed ☐ Thu ☐ Fri ☐ Sat

1.

Save Clear Exit

2. “Scheduling / Time Scheduling Workbench / Booking Window / Comments Tab” in the “Navigator”

The screenshot shows a software window titled "Editing Booking for ALISON ADAMS At POWERFORCE NSW". At the top, there are tabs for "Times", "Comments", "Memo", "Order", "Tasks", and "T&A". The "Times" tab is selected. To the right of the tabs is a dropdown menu showing "Normal Day". Below the tabs, there is a "Day Late" dropdown menu. An arrow points from a circled "2." to this dropdown. Below the "Day Late" dropdown is a "Detailed Comments" text area. At the bottom of the window, there are two dropdown menus: "Standard Shifts" (showing "08:00-16:00 DAYS DAYS LATE") and "Role Types" (showing "GEN_SECURITY"). To the right of these are "Ok" and "Cancel" buttons.

How to Create an Adhoc Shift

Outcome: *Demonstrate how to create a shift that is not part of the normal cycle.*

Why Use

Use this procedure when you want to create a shift that will only be used once or that you do not want generated every cycle.

Procedure

1. Open "Scheduling / Time Scheduling Workbench" from the "Navigator"

Scheduling Workbench <Site Location>

View: W/End 06/02/2005, Period 7 Days, Rotation Start 1, End 1

Modify: Add Employee, Replace Employee, Permanent Shift, Book New Shift, Edit Current Shift, Cancel Shift/s

Employee: ADAMS QUINCE, Book 77.00, Over/Standard 77.00

FEB 2005	Mon 31	Tue 01	Wed 02	Thu 03	Fri 04	Sat 05	Sun 06
ADAMS QUINCE-PWR-003	09:00-17:00	07:00-15:00		09:00-17:00	09:00-17:00		
BROWN ALISON-PWR-010						15:00-23:00	15:00-23:00
LITHGOW JOHN-PWR-012	00:00-12:00		08:30-17:30 16:00-00:00				
PWR-002							

Resources/Hours: 2/20.00, 1/8.00, 2/17.00, 1/8.00, 1/8.00, 1/8.00, 1/8.00

2. Select a site and click the site tab to refresh the screen
3. Click the “Adhoc” button

Create Ad-Hoc Shifts <POWERFORCE PARRAMATTA>

From Date: 02/02/2005, Shift Start: 16:00, Per Day: 1

To Date: 02/02/2005, Shift End: 00:00

☒ Allocate employee: FWR-002, ANTHONY JOHN ADAMS

Details: Classification 10, Fee Class, Role Type GEN_SECURITY, Comment GENERAL SECURITY, Order No B-10235, Client Instructions

Days: Mon, Tue, ☒ Wed, Thu, Fri, Sat, Sun

Buttons: Save, Clear, Exit

4. Enter the dates for the shifts
5. Enter the start and end times
6. Enter the number of shifts required for each day

7. If you want to allocate this shift to an employee
 - A. Check “Allocate Employee”
 - B. Select the employee from the list
8. Check the boxes for the days these shifts will be required
9. Select the classification if required for payment of the shift
10. Select the role type of the shift if required
11. Enter comments if required
 - A. These can be viewed in the booking window
 - B. Sort on this field in the “Scheduling” report
12. Enter the order number if required
 - A. This will print on the invoice
 - B. The client can be set to “Split” invoices on order number
13. The client instructions can be entered if required
 - A. The client can be set to print this on the invoice
14. Click  the  button

<i>The shift must be assigned to an employee before it can be edited through the booking window.</i>
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