

PURPOSE

DCF sites will track, edit, and manages workload (staffing) plans though the Workload Planner. Schedulers can regularly track the number of workers needed for each job for time spans at locations.

The Scheduler compares staff requirements from the Workload Planner (Planned) with shifts that employees in the Scheduler (Scheduled) filled.

Your staffing requirements are referred to as workload requirements in Workforce Scheduler and are stored in the Workload Planner. A Budget Workload is defined for each department. Then, when or if your staffing needs change, you can make adjustments in the Workload Planner.

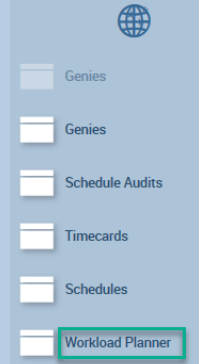
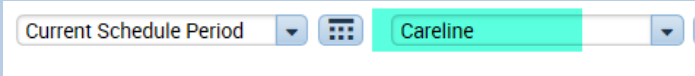
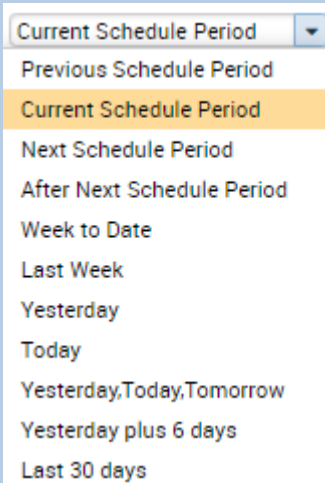
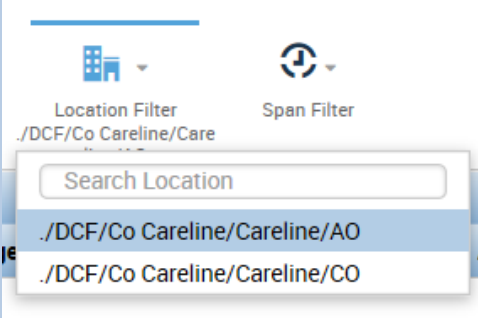
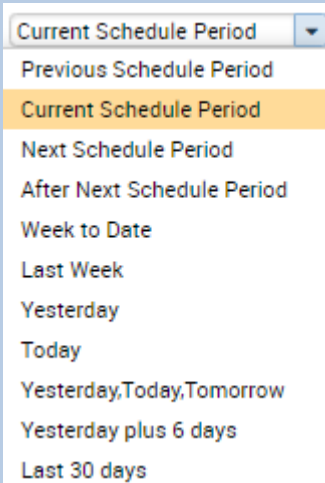
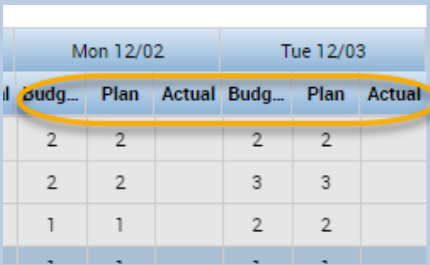
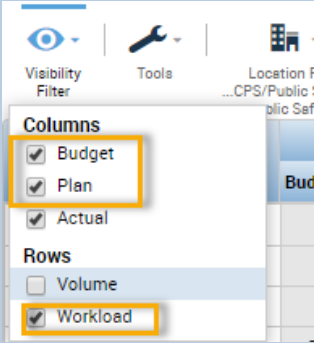
Example

When building the next schedule period, you may want to staff to a higher level than you have been budgeted. To adjust the next scheduled period's expected workload, you can increase your volume and review the workload.

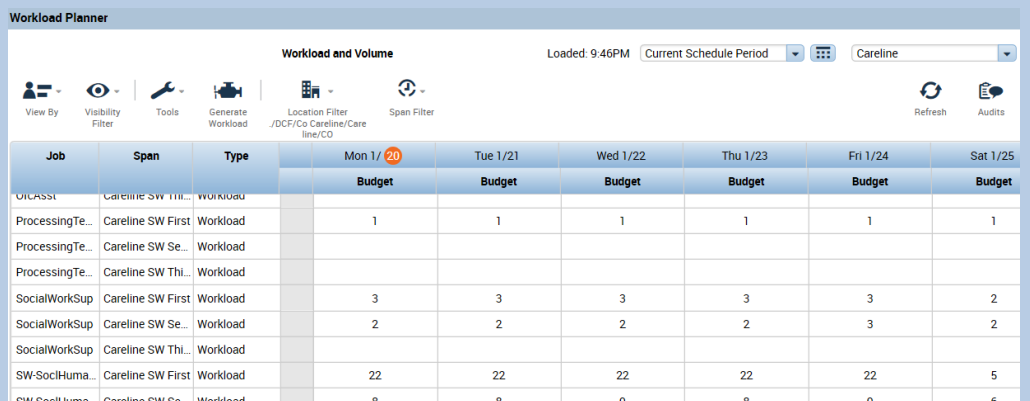
You can save several Budget and Plan (Adjusted) staffing plans. However, only one plan at a time can be in effect.



Workload Planner – Navigation

	Steps to Update Workload Planner Tab	Description
1	From the Related items list, click a Workload Planner.	
2	In the Location Show drop-down list, select a department from the Organization Map which will display employees for you to view. In the screen shot used a Location Query that contains all Caroline or DCF site	  
3	In the Time Period drop down list, select a specific time period.	
4	By default, the all plans will display (Budget, Plan, Actual) and Volume and Workload Rows. For ease of use filters to for Budget and Plan Columns and just the Workload Row	 

5 You may update columns today or in the future only. Budgets are usually update once a year. Plans (adjusted) can be leveraged as needed.



Workload Planner

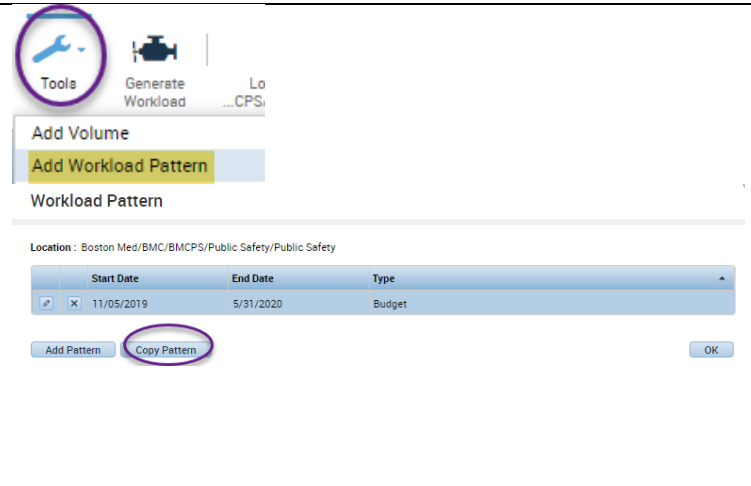
Workload and Volume | Loaded: 9:46PM | Current Schedule Period | Careline

View By | Visibility Filter | Tools | Generate Workload | Location Filter /DCF/Co Careline/Careline/CD | Span Filter | Refresh | Audits

Job	Span	Type	Mon 1/20	Tue 1/21	Wed 1/22	Thu 1/23	Fri 1/24	Sat 1/25
			Budget	Budget	Budget	Budget	Budget	Budget
ProcessingTe...	Careline SW First	Workload	1	1	1	1	1	1
ProcessingTe...	Careline SW Se...	Workload						
ProcessingTe...	Careline SW Thi...	Workload						
SocialWorkSup	Careline SW First	Workload	3	3	3	3	3	2
SocialWorkSup	Careline SW Se...	Workload	2	2	2	2	3	2
SocialWorkSup	Careline SW Thi...	Workload						
SW-SoclHuma...	Careline SW First	Workload	22	22	22	22	22	5
SW-SoclHuma...	Careline SW Se...	Workload	8	8	9	8	9	6

Changes to Workload Planner can only be saved for today and the future. To create a pattern, do the following:

1. Select the Location and Time Frame in the Workload Planner.
2. Click on Tools and choose " Add Workload Pattern."
3. Highlight the appropriate pattern and click on "Copy Pattern."
4. Create a new start date (today or a date in the future).
5. Make the desired changes and click Apply.
6. The old Pattern will now be end-dated to coincide with the start of the new Pattern.





The screenshot shows the 'Add Workload Pattern' dialog. It includes a 'Tools' menu with 'Generate Workload' and 'Lo...CPS'. Below, there's a section for 'Workload Pattern' with a location dropdown set to 'Boston Med/BMC/BMCPS/Public Safety/Public Safety'. A table shows a pattern with a start date of 11/05/2019, an end date of 5/31/2020, and a type of 'Budget'. At the bottom, there are 'Add Pattern' and 'Copy Pattern' buttons, with 'Copy Pattern' circled in red.

DCF Kronos Scheduler: Superuser Workload Planner Guide

To create a new Budget (Baseline) Pattern, click on the Tools Icon at the top of the page and select Add Workload.

Workload Pattern

Location : ./DCF/Co Careline/Careline/CO

	Start Date	End Date	Type
 	1/20/2020	1/02/2021	Budget



1. Click on the pencil icon to edit the existing pattern or click on the Add Pattern button to add a new Budget (baseline) pattern.
2. After the plan is edited/created, click on Apply.
3. If there is no Budget (previously named Baseline) Plan saved, DO NOT click on the Save Plan box above the workload plan grid. System will not allow a Plan (previously named Adjusted) without a Budget plan saved.
- 4.

Workload Pattern

Location : ./DCF/Co Careline/Careline/CO

	Start Date	End Date	Type
 	1/20/2020	1/02/2021	Budget

Edit Pattern

Start Date : * 1/20/2020  End Date : * 1/02/2021  Save as plan
 Forever

Job	Span	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Holiday
SocialWorkS...	Careline SW ...	2	3	3	3	3	3	2	2
	Careline SW ...	2	2	2	2	2	3	2	2
	Careline SW ...								
SW-SoclHum...	Careline SW ...	5	22	22	22	22	22	5	
	Careline SW ...	6	8	8	9	8	9	6	

If Daily Coverage in Schedule Planner should have an alternate set of required staff numbers (previously named Adjusted) After creating the Budget Workload Plan, create a second Workload Plan by:

1. Selecting Plan from the Columns and Workload from the Rows under Visibility Filter
2. Click on Tools > Add Workload Pattern
3. Click on Add Pattern
4. Add Plan numbers, click on Save as Plan then click Apply

Visibility Filter | Tools

Columns

- Budget
- Plan
- Actual

Rows

- Volume
- Workload

Workload Pattern

Location :

Start Date	End Date	Type
<input type="text"/>	Forever	Budget
<input type="text"/>	Forever	Plan

Edit Pattern

Start Date : *

End Date : *

Save as plan

Forever

Job	Span	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Holiday
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DCF Kronos Scheduler: Superuser Workload Planner Guide

To view Budget vs. Plan numbers from Visibility Filter select both Budget and Plan from Columns and Workload from Rows. View is side by side to note Budget vs. Planned numbers.

Workload and Volume Loaded: 10:40PM Next Schedule Period

View By
 Visibility Filter
 Tools
 Generate Workload
 Location Filter
/DCF/Co Careline/Careline/CO
 Span Filter

Job	Span	Type	Sun 1/26		Mon 1/27		Tue 1/28		Wed 1/29
			Budget	Plan	Budget	Plan	Budget	Plan	Budget
OfcAsst	Careline SW Third	Workload							
Processin...	Careline SW First	Workload	1	1	1	1	1	1	1
Processin...	Careline SW Second	Workload							
Processin...	Careline SW Third	Workload							
SocialWor...	Careline SW First	Workload	2	2	3	3	3	3	3
SocialWor...	Careline SW Second	Workload	2	2	2	2	2	2	2
SocialWor...	Careline SW Third	Workload							
SW-SocH...	Careline SW First	Workload	5	5	22	22	22	22	22

Viewing Budget/Plan Required Workload.

1. If a moderate to large number of Zones/Jobs/Workload Shifts are assigned to the location, the entire view of required staff by Zone/Shift/Job may not be viewable on one page. If that is the case the bottom of the Workload Planner screen will show the number of rows per page, generally 20, but other numbers; 15, 25, 40, can be selected for a view that may not require going to a different page, just the standard up and down scroll to view all the numbers. (Please Note: The default number of rows cannot be edited) NOTE: Next to the Show Rows box system will note how many rows are included in specific Workload Planner being view.

10	10	12	12	8	8
11	11	12	12	6	6
8	8	9	9	7	7

Go to page:
Show rows:
1-15 of 15
◀ ▶

The Go to Page box allows selection to go to the specific page for Job/Zones/Shifts to be reviewed. The Right and Left arrows allow scrolling through the pages, 20 rows at a time.