Scheduling Employees

Scheduling of activities

The scheduling of activities allows an **assignment** to freely definable **scheduling categories**, such as **floater duty**, workstation assignment, **on-call duty**, etc.
Employees are grouped in loose groups; multiple scheduling records per employee and day are possible.

- **Show search form initially**
  If the parameter is set to **Yes**, the search form is always displayed first when the menu item is opened. If the parameter is set to **No**, the overview of on-call duties is displayed initially, according to the parameters selected once. The search form can be shown at any time.
- **Rescheduling structure**
  The rescheduling structure is defined by the administrator and can relate to daily schedules or organizational units; here it is automatically prefilled with "Organization".
- **Rescheduling mode**
  Choice between group scheduling and group detail scheduling
  If **Group scheduling** is selected, an **optional detail display** additionally appears below
- **Interval**
  Scheduling in weekly or monthly intervals
- **Date format of heading**
  The date heading can be displayed in long, medium, or short format
  - long - date display with weekday, day, month, year
  - medium - date display with weekday, day of month
  - short - date display with day of month
- **Detail display**
  The detail display only appears if **Group scheduling** was selected above under rescheduling mode. The detail display can show optional additional details:
  - occupied time information (from GW system)
  - approved and unapproved absences from the time management system
  - approved absences from the time management system
  - requested, not yet approved absences
  - daily schedule target work time from the time management system
  - daily schedule number from the time management system
  - daily schedule name from the time management system
  - daily schedule core time from the time management system
  - day date from the time management system
- **Show title in detail display**
  If the parameter is set to YES and a field is selected in the detail display, e.g. target work time, "Target: 8.15" is shown in the respective cell; if NO, no title appears and only "8.15" is displayed.
- **Width of detail display** in pixels
- **Font size**
- **Groups to be scheduled**
  With this parameter, the department information can be queried either via the **org chart** or via the **favorites list .** The rescheduling is made with a **new rescheduling entry** .

Repetitions / entering series

If the rescheduling is not to be made for one day only but repeated on several days, the period is determined via "Repetitions".

The entire period is entered under **Date - repeat until**.

If you click "**Repetitions**", the entire period entered above appears checked.
If only certain weekdays are to be scheduled, the individual checkmarks can be removed by clicking them. In this way, for example, series can be created only for Mondays, or Monday and Friday, or any combination.
Weekends are marked in beige (Saturdays lighter, Sundays darker).

Deleting / changing scheduled organizational units

The scheduling entry for the organization can **not** be deleted under "My requests", unlike all other requests. To delete an organization scheduling request, the scheduling form must be opened.

Click the day to be changed > **Click here to edit**

If the scheduling entry is to be **deleted** completely, check the "**del.**" box in the upper field **Edit rescheduling**, then click **Apply**. This removes the scheduling entry.

If the scheduling entry is to be **changed**, the desired change can be made under **New rescheduling entry**:

- Change of period
- Change of the scheduled activity, etc.
- Entering a series / repetitions
- The change is applied with **Apply**

Scheduling of daily schedules

The scheduling of daily schedules allows an alternative assignment or the **swapping of daily and weekly schedules** for seasonal scheduling.

- **Show search form initially**
  If the parameter is set to **Yes**, the search form is always displayed first when the menu item is opened.
  If the parameter is set to **No**, the overview of on-call duties is displayed initially, according to the parameters selected once. The search form can be shown at any time.
- **Rescheduling structure**
  The rescheduling structure is defined by the administrator and can relate to daily schedules or organizational units; here it is automatically prefilled with "Daily schedules".
- **Rescheduling mode**
  Choice between group scheduling and group detail scheduling
  If **Group scheduling** is selected, an **optional detail display** additionally appears below
- **Interval**
  Scheduling in weekly or monthly intervals; the "Weeks" setting is recommended because the query performs better and is clearer.
- **Date format of heading**
  The date heading can be displayed in long, medium, or short format
  - long - date display with weekday, day, month, year
  - medium - date display with weekday, day of month
  - short - date display with day of month
- **Detail display**
  The detail display only appears if **Group scheduling** was selected above under rescheduling mode.
  The detail display can show **optional additional details**:
  - occupied time information (from GW system)

    - approved and unapproved absences from the time management system
    - approved absences from the time management system
    - requested, not yet approved absences
    - daily schedule target work time from the time management system
    - daily schedule number from the time management system
    - daily schedule name from the time management system
    - daily schedule core time from the time management system
    - day date from the time management system
- **Show title in detail display**
  If the parameter is set to YES and a field is selected in the detail display, e.g. target work time, "Target: 8.15" is shown in the respective cell; if NO, no title appears and only "8.15" is displayed.
- **Width of detail display** in pixels
- **Font size**
- **Groups to be scheduled**
  With this parameter, the department information can be queried either via the **org chart** or via the **favorites .** The rescheduling is made with a **new rescheduling entry** .
- **Employee**
  Selection of the employee whose daily schedule is to be rescheduled
- **Scheduled for**
  Selection of the daily schedule
- **Date**
  Entry of the date on which the rescheduling is to take place
- **Repetitions**
  If the rescheduling is not to be made for one day only but repeated on several days, the period is determined here. Simply click "Repetitions".
- **Remarks**
  Enter any remarks
- **Apply**
  Clicking the Apply button performs the rescheduling

The scheduling of the daily schedules appears in the calendar immediately after being applied. Further scheduling can be done right afterwards.

Repetitions / entering series

If the rescheduling is not to be made for one day only but repeated on several days, the period is determined via "Repetitions".

The entire period is entered under **Date - repeat until**.

If you click "**Repetitions**", the entire period entered above appears checked.
If only certain weekdays are to be scheduled, the individual checkmarks can be removed by clicking them. In this way, for example, series can be created only for Mondays, or Monday and Friday, or any combination. Weekends are marked in beige (Saturdays lighter, Sundays darker).

Deleting / changing scheduled daily schedules

The scheduling entry for the daily schedules can **not** be deleted under "My requests", unlike all other requests.
To delete a standby request, the scheduling form must be opened.

Click the day to be changed > "Click here to edit"

If the scheduling entry is to be **deleted** completely, check the "**del.**" box in the upper field **Edit rescheduling**, then click **Apply**. This removes the scheduling entry.

If the scheduling entry is to be **changed**, the desired change can be made under **New rescheduling entry**:

- Change of period
- Change of the daily schedule, etc.
- Entering a series / repetitions
- The change is applied with **Apply**