

## CREATING A BILLBOARD GROUP – HOW TO STEPS

Log into WFM and select Schedule Admin from the Menu

### Overview for Creating Billboard Groups:

To add a billboard group, you will select Scheduling from the blue navigation bar, select Shift Billboard, and then select Billboard Group. A listing of billboard groups displays with a search field above the lists. Above the lists is a blue Create New Entry button. You will select this button to create the new billboard group.

When you select Create New Entry a page displays fields for Group Name and Group Description:

- Group Name - name of the billboard group– since the name must be unique it typically starts with the team's name and then a descriptor, example: VTHH CCU All Staff, VTHH CCU PRN, VUH Partner Group-3N,6T3,8T3, and WIC ALL WIC Locations – the name is your choice!
- Group Description - this field can be left blank

You will select Save after naming the group and additional parameters display:

Billboard Group Employee, Billboard Group Team, & Billboard Shift Team – we recommend adding the information in these groups from the bottom, starting with Billboard Shift Team and then working your way up.

Below the heading for each section is a:

- Field where the information added will display
- Save button - select to save information added or changed – *you can save as often as you want; any save button will save information on the page*
- Plus sign (+) - select the plus sign to add a row for entering information
- Return to form listing link – takes you back to the billboard group lists
- Top link will take you to the top of the page

You may be asking – what information am I going to enter? See below information needed in each section; sections are now referred to a Shift Team, Group Team, & Group Employee (leaving off Billboard before each to decrease repetition).

Shift Team (bottom of page)– Team or teams listed will be able to post shifts to this Billboard Group

Group Team – Add teams that will be able to view and claim shifts posted to this billboard – all employees whose home team is listed will be able to view and claim shifts posted to this Billboard Group –*for jobs they are qualified to work, for dates where shift time does not overlap with their schedule, and they will not exceed 4 consecutive 12-hour shifts or exceed 5 consecutive 10-hour shifts when claiming a shift.*

Group Employees – Employees are listed here if their home team is not listed in the Group Team section, however you want them to be able to view and claim shifts posted to this Billboard Group

### HOW TO CREATE A BILLBOARD GROUP FOR A TEAM

1. Select Scheduling from the blue toolbar, select Shift Billboard, and then select Billboard Group
2. Select Create New Entry and enter the billboard group's name (see information above about names), and then select Save and additional parameter display
3. From the Shift Team section- add a row, then type or select the team

4. Enter the current date for the start date and 01013000 for the end date, select the tab key to lock in the date, and then select the checkbox for Manager Can Post - If you want other teams to be able to post shifts to this billboard group, then repeat steps 4 & 5 until all teams have been added
5. Team section - add a row, then select the team - repeat step until all teams have been added
6. Group Employee – if needed, add a row, then type the employee’s last name and select tab, enter the current date for the start date and 01013000 for the end date – *repeat these steps until employees are added* – **Remember, you will only add employees whose home team is not listed in the Group Team section**
7. **Select Save** to save your entries

### HOW TO CREATE A BILLBOARD GROUP FOR PRN STAFF

1. Select Scheduling from the blue toolbar, select Shift Billboard, and then select Billboard Group
2. Select Create New Entry and enter the billboard group’s name (see information above about names), and then select Save and additional parameter display
3. From the Shift Team section- add a row, then type or select the team
4. Enter the current date for the start date and 01013000 for the end date, select the tab key to lock in the date, and then select the checkbox for Manager Can Post.

NOTE: *If you want other teams to be able to post shifts to this billboard group, then repeat steps 4 & 5 until all teams have been added*

5. Group Employee –add a row, type the employee’s last name, and select tab, enter the current date for the start date and 01013000 for the end date – repeat these steps until all PRN employees are added, and then select Save

Note: You did not enter teams in Group Team because you do not want all staff on the team to be able to view and claim these shifts. This is why you added each PRN employee to the Group Employee section.