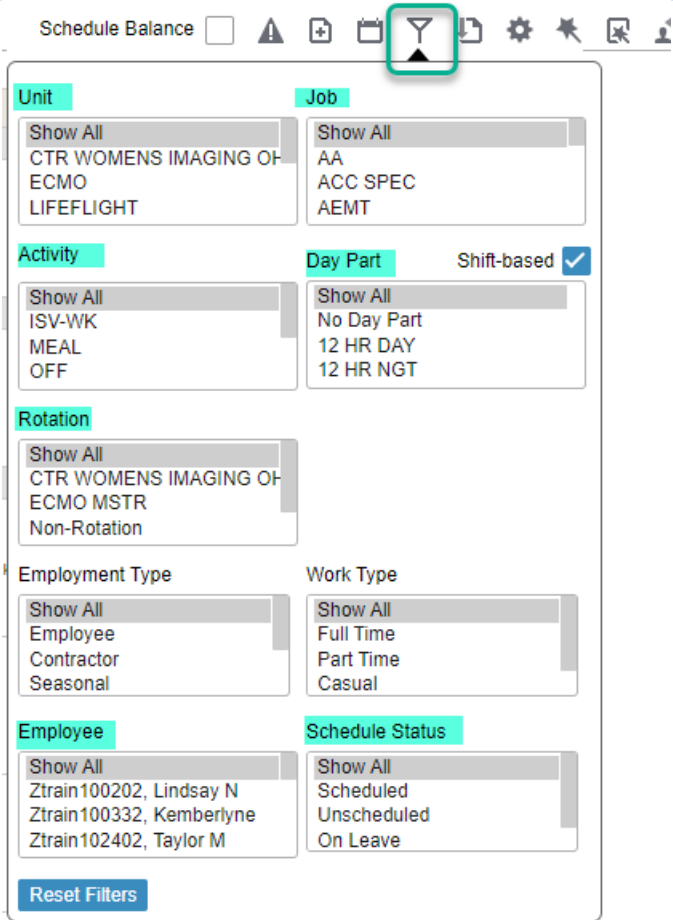


Filtering Information on the Advanced Schedule View

Are you having trouble with filtering? There are two sets of filters, the most used one is the filter icon from the function tools that displays when a schedule has been loaded



You can filter by one or more categories; the categories are shaded green in the screenshot to the left. To filter select the filter icon and then:

1. Select an item from the list in a selected category and the schedule immediately filters to the selected item
2. To filter to more than one item in the category, select the filter icon again, find the next item in the list, hold the control key (Ctrl) down on the keyboard, then select the next item.
3. Continue this process until all items in each category to view have been selected, Example: Jobs of RN, RN-Mid, SL and Day Part of 12 HR NGT

Follow same steps above for selecting items in any category!

Filtering from the Schedule Selection Filters

Once the schedule is loaded, select the expand icon (up arrow) on the right side of the page, above the function icons, to open the Schedule Selection area



The filters display with the same categories as above however, the parameters do not close each time you select an item. Also, these filters are only available after a schedule has been loaded!

See more next page

Filters

| Unit | Job | Activity | Day Part | Shift-based <input checked="" type="checkbox"/> | Rotation |
|---|--|---|---|---|--|
| Show All CTR WOMENS IMAGING OF ECMO LIFEFLIGHT | Show All AA ACC SPEC AEMT | Show All ISV-WK MEAL OFF | Show All No Day Part 12 HR DAY 12 HR NGT | | Show All CTR WOMENS IMAGING OF ECMO MSTR Non-Rotation |
| Employment Type | Work Type | Employee | Schedule Status | | |
| Show All Employee Contractor Seasonal | Show All Full Time Part Time Casual | Show All Ztrain100202, Lindsay N Ztrain100332, Kemberlyne Ztrain102402, Taylor M | Show All Scheduled Unscheduled On Leave | | |
| Primary Sort | Secondary Sort | <input type="button" value="Reset Filters"/> | | | |
| Employee Name | | | | | |

Filter using the filter categories in the Schedule Selection area:

1. Select item from category and the schedule immediately displays based on the filter selected
2. To select more than one item from a category, select the next item while holding down the control key (Ctrl), repeat until all items in the category have been selected
3. Repeat above steps for selecting items from other categories

Filtering Prior to Loading the Schedule

- There is only one category, Schedule Status, where filters can be selected before you select to Load the schedule
- The default is ALL, you could choose to view one or a combination of items below:
 - Only Employees Scheduled
 - Only Employee Unscheduled
 - Only Employees On Leave
 - Only the Unassigned Shifts

Note: There are two other categories available to use - Employment Type or Work Type however we are not using this data in WFM.

Creating a Preset:

If often use filters to view the schedule, create a Preset that includes your selected filters. See the document "Presets – How to Create, Use, and Delete" available from the WFM Help site in the Schedule Admin Toolbox in the Advanced Schedule View Section