LOADING A SCHEDULE IN THE ADVANCED SCHEDULE VIEW (ASV)

HOW DO I LOAD MY TEAM'S SCHEDULE? Log in to WFM Schedule Admin

1. Select Scheduling from the blue navigation bar, then select Advanced Schedule View
2. The schedule selection parameters display, type your team's name or select teams using the lookup
3. The Schedule Period section, defaults to the Current Week – change selection using the dropdown
4. Select the Load button (Blue button) – *the schedule for the team and dates selected displays*

NOTE: *Display options will default to Job, Unit & Activity. Display options determine what displays on the shift in the schedule calendar.*

Once you have loaded a schedule with the steps above you will only have two clicks to load the schedule in the future:

1. Select Scheduling from the blue navigation bar
2. Select View Schedule

The last schedule loaded displays without filters. If you had Current Week selected last time, then the schedule will load to the current week – no need to select dates or team.

OTHER OPTIONS WHEN LOADING A SCHEDULE:

Preset: After the schedule is loaded you have an option to Save as Preset – Presets allow you to choose filters or specific date ranges to view a schedule. *For more about Presets – see the how-to document, Presets – How to Create, Use and Delete on the WFM Help Site – ASV documents.*

Employee: You can skip selecting a team and select an employee or set of employees to view their schedules. Use the lookup to find and select employees, the first column is used to search by employee ID and the second column is used to search by last name – use the short code key, a percent sign %, followed by a few letters of employee's first name to search using first name.

Display Options: Job, Unit & Activity are preselected – you can deselect any or all of these or select additional options – Start/End Time or Unassigned at Top. Unassigned at Top will place the gold, unassigned shifts, before the job when viewing the schedule in the Position view.
We are not currently using Availability or Preference and the Shift Description is the description we add when creating a shift label.

Compact View: It is just that, a compact view of the schedule
- Employees' first and last initial are listed instead of their full name.

- Schedules display with shift label and start and end time. There is no activity, job or team listed on the calendar.
- Hover the computer mouse over the shift to view full name, shift label, activity, & team scheduled
- Unassigned shifts can manually be expanded by selecting the expand icon.
- Print view is not available from Compact View

Default View is Position, you can choose to load the schedule in the **Unit, Shift, Employee, or Rotation** view

Filters: The only filters available before loading a schedule are the Schedule Status items – defaults to Show All, could select only Scheduled, Unscheduled, On Leave, Unassigned or a combination of any of these.
*We do not use Employment Type or Work Type.*

When the schedule is loaded the schedule selection area is closed. Above the schedule calendar are the team and the schedule dates

- There are navigation arrows to view the previous or next schedule, per dates displayed
- If you choose another team of manually change the dates, then you will select Load
- To the right of the page, a toggle can be selected to switch to the Compact View
- There is also an expand icon to open the schedule selection area

Viewing the Schedule Calendar

Directly above the calendar are view options on the left and function icons on the right.
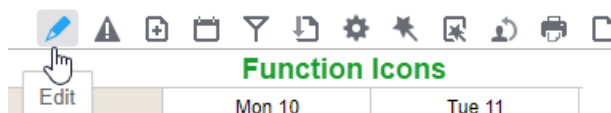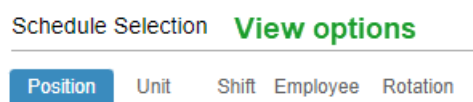
The default view is Position, which displays by job and then employees alphabetically within each job. There are 12 function icons listed in the screenshot above. The pencil icon (Edit) only displays when Mass edit mode is selected. The warning sign icon, second icon listed, only displays if an employee is scheduled >40 hours in a week (Sun-Sat). The paper icon on the end, only displays if the schedule needs to be published. The nine icons in-between are always displayed.

There are additional documents available from the WFM Help site in the Schedule Admin Toolbox under Advanced Schedule View that help with using the ASV.