



Enforced Rotations User Guide

Scheduling Module



Introduction

This User Guide will provide an overview of the Enforced Rotations feature including layout, button functions, navigation, and its practical application.

Enforced Rotations ensures more control over your schedule by promoting a fair distribution and rotation of shifts among qualified staff. You will be able to distribute shifts over a set number of days to whichever qualified employees you choose. Your chosen rotations are supplemental to the Scheduling template and whatever rotation you set up is applied directly to your existing template.

Mastering this tool means that you will be able to seamlessly assign, distribute, and rotate shifts through a pool of qualified employees based on your configuration. In order to use this feature, you must have access to the Scheduling module in your StaffReady license.

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Setup

As this feature is robust and can adversely affect multiple schedules and systems if not correctly activated, this feature requires activation by our team. The service hours and contact information for the StaffReady customer Support Team are listed below.

Our service hours are Monday through Friday, 6am to 5pm PST.

Phone: 1-877-229-5230

[Online Support Form](#)

Once you have contacted our support team and the feature has been activated, please proceed to the next steps outlined below.

1. To begin, select **Setup** under the **Scheduling** menu. **(Figure 1)**
2. In the **Schedules Menu (Figure 2)**, select the schedule or schedules you intend to add a rotation.
3. Next, select the **Job Descriptions** menu to open it. **(Figure 3)**

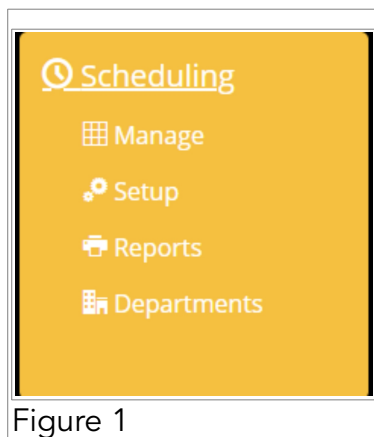


Figure 1

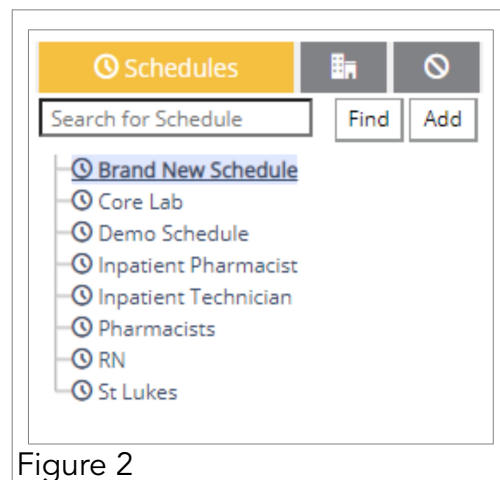


Figure 2



Figure 3

Job Descriptions & Edit Enforced Rotation

Once you've selected the **Job Descriptions** for your chosen schedule, find and select the **Enforced Rotations** link for the **Job Description** you wish to update. (Orange box, Figure 1)

Select the 'x' toggle button to enable **Enforced Rotations** for that assignment. (Figure 2)

Once you've enabled this feature, you will then be able to select which employees to add to the rotation. From the **Edit Enforced Rotation** menu (Figure 3) you can view all employees eligible to be part of the rotation, add employees to the rotation, set the build order for the rotation, and set how many consecutive days they are allowed to work, and select which shifts to include in the rotation. If you need to, you can also remove employees from the rotation using the **Remove from Rotation** button.

Once you've entered in all employees and the number of consecutive days they should have, select **Save Changes**. This will open the **Rotation Preview Menu**.

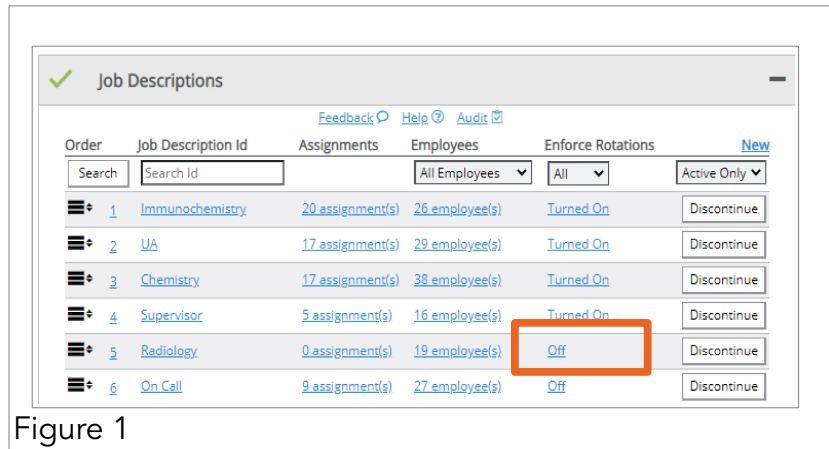


Figure 1

Note: Employee sort order determines the order in which employees are assigned to the rotation shifts, but does not affect the order that employees are displayed on the schedule. The employee sort order in the **Manage** and **Reports** tabs is configured in the Employee's menu within the Setup tab. Please see the **Employee Sort Order User Guide** for more information.

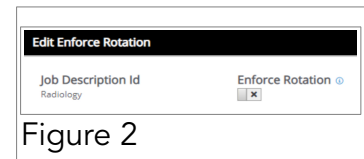


Figure 2

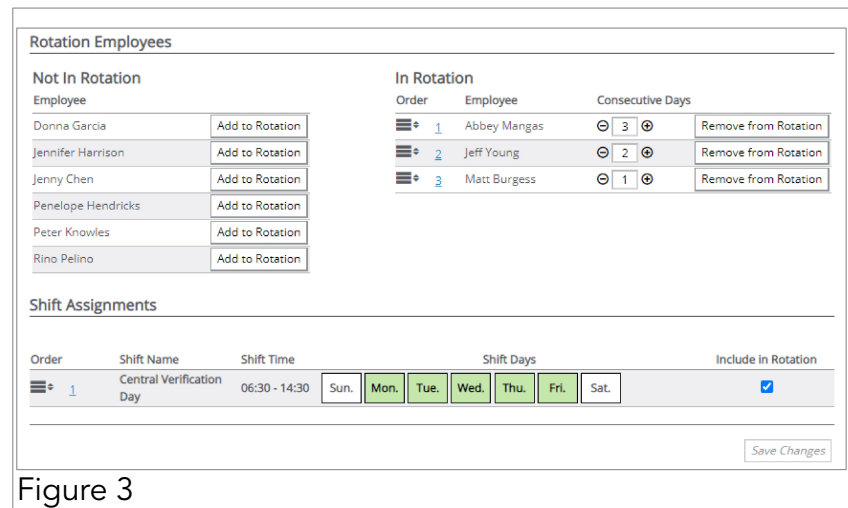


Figure 3

Rotation Preview & Template Management

After you've completed the previous steps, you'll be brought to the **Rotation Preview** menu. (Figure 1)

This will display the rotation you've setup on the calendar grid. If you're happy with your selection, select the **Apply Rotation to Template**. (Figure 1)

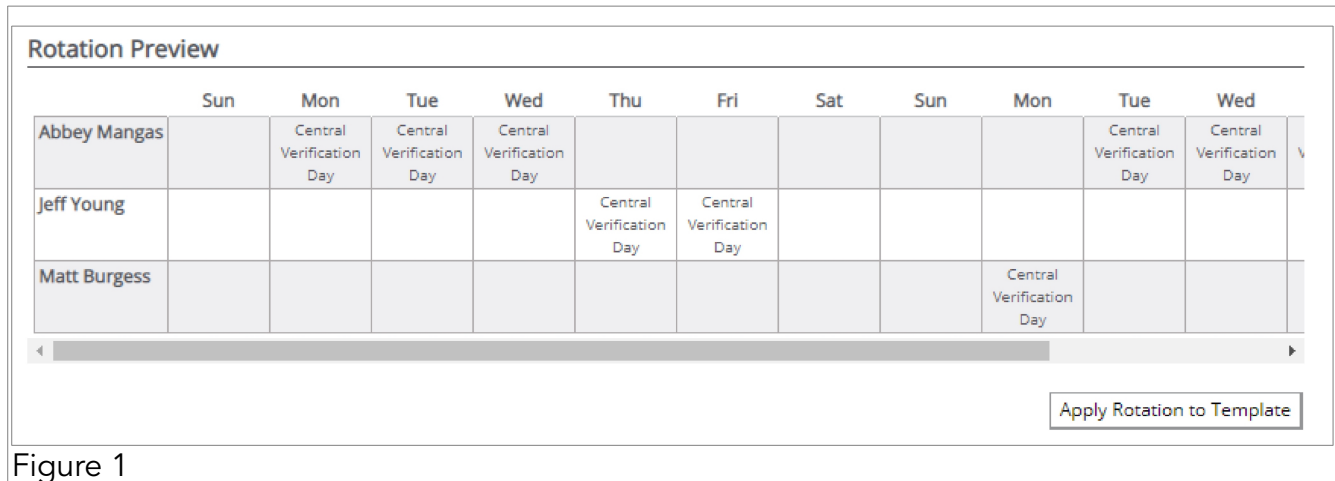


Figure 1

If you wish to review the **Rotation** within the Scheduling Template, select the manage tab in the **Scheduling Module**. (Figure 2)

Select the **Adjust Template** menu and then select either **Move** or **Unassign** to open the **Template Editing** menu. (Figure 3)

Select **Show Rotation Shifts** (Figure 4) to view Rotation shift assignments. Rotation shifts will be highlighted in blue (Figure 5)



Figure 2

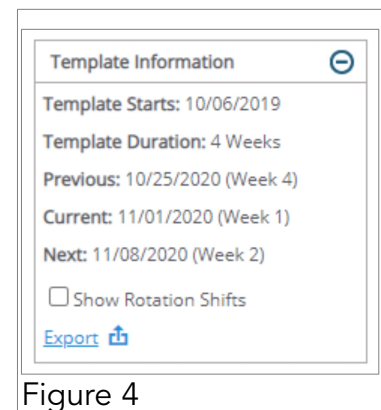


Figure 4

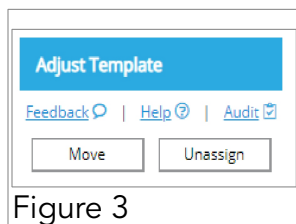


Figure 3

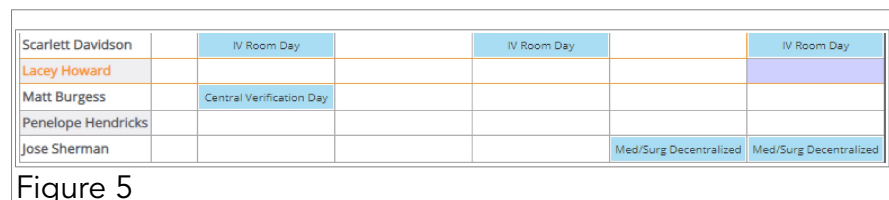


Figure 5

Resources

This concludes the user guide for **Enforced Rotations**. We hope that you have a better understanding of this feature and how it functions within the entire framework of the scheduling module.

For more focused Guides on the functions and features discussed in this document, please check out the linked guides on this page for supplemental reading.

For further assistance please contact our support team directly.

Our service hours are Monday through Friday, 6am to 5pm PST.

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