



# Job Descriptions User Guide

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## Scheduling Module



## Introduction

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This User Guide will provide an overview of Job Descriptions including layout, functions, practical application, and instructions for usage.

The Job Descriptions functionality allows you to create descriptions that can be assigned to employees, allowing them to work job description-specific shifts. Job Descriptions play a key role in the auto-schedule generation process that matches qualified employees with appropriate shifts. Within Job Descriptions, you can add, edit, assign, and customize existing descriptions at any time, sort and assign them as needed, and discontinue obsolete descriptions.

Automating Job Description functionality creates significant time-savings in the schedule generation process. It also reduces shift assignment errors and ensures that the right person is assigned to the right shift at the right time.

Once you've mastered Job Descriptions, you are one step closer to saving time and maximizing efficiency in schedule creation.

Other related topics are listed on the Resources page.

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# Adding Job Descriptions

To add a **Job Description**, begin by navigating to the **Job Description** tab within the Scheduling Setup menu. (Figure 1)

Select the **New** button to open the **New Job Description Menu**. (Figure 2)

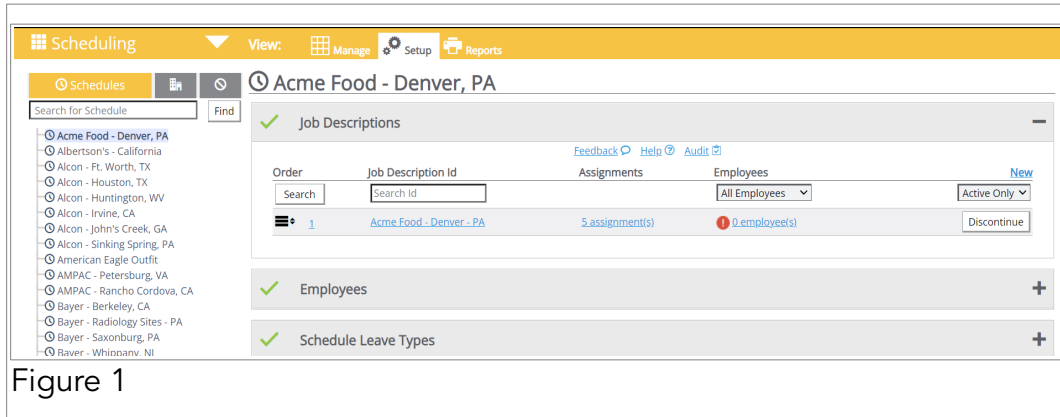


Figure 1

Enter your desired **Job Description ID** (The name it will appear as in the schedule). Next, select whether or not the job will have **Responsibility**. Selecting **Responsibility** means that the system will attempt to schedule this assignment to already scheduled people.

Once you have finished, select **Save Changes** to save that Job Description and Responsibility level. Your newly created job description will appear at the bottom of the list of all job descriptions within the schedule you initially selected. (Figure 3)

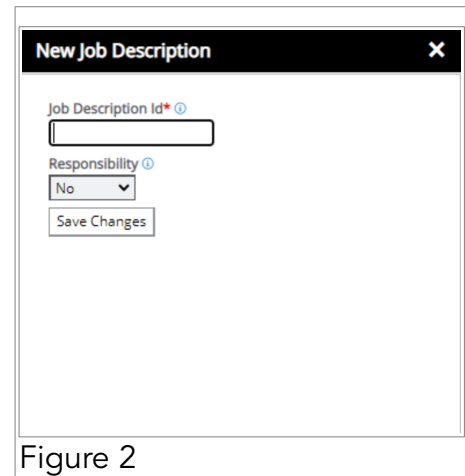


Figure 2

By default, newly created descriptions will have no employees assigned to them.

You will need to add shift assignments to that job description and qualify employees that are able to work the job description. This process is detailed on the following pages.

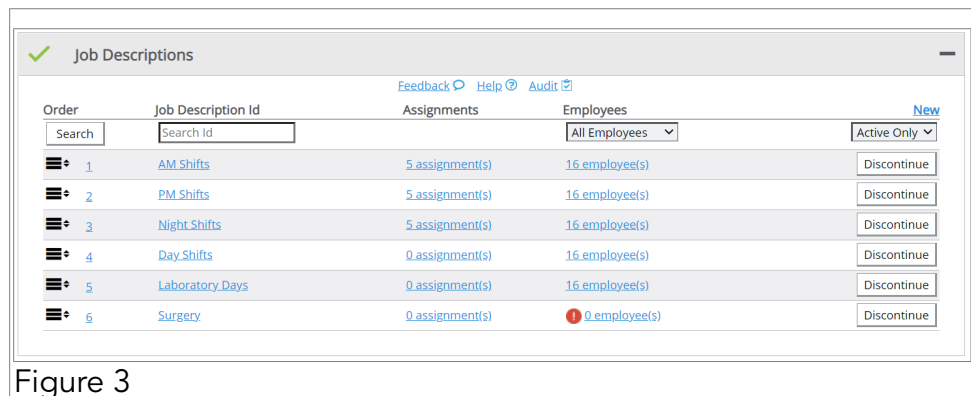


Figure 3

# Assigning Job Descriptions & Consecutive Days

Select the link with 0 employees (**Figure 1**) to open the **Employees Menu**. (**Figure 2**)



Figure 1

For each employee who is eligible to be scheduled for the job description, select the appropriate skill level from the skill level menu. (**Figure 3**)

Once you have selected the employees you want and selected their skill level, select save changes.

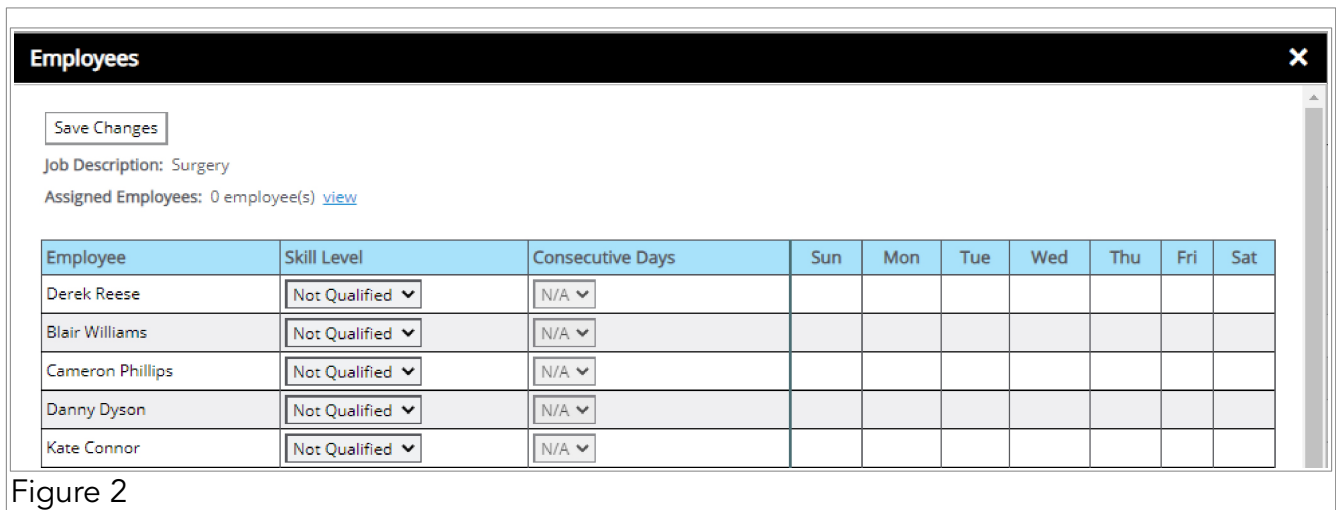


Figure 2

**Skill Levels:** Skill levels function as filters the system uses when it is auto-building a schedule. Depending on which level you assign to each employee, the system will prioritize employees with higher skill levels and schedule them first when a schedule is being built.

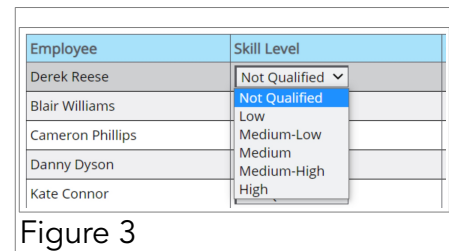


Figure 3

Once you've selected the employees you want assigned to that job description, you can also set consecutive days for each employee. The Consecutive days menu (**Figure 4**) allows you to set the maximum number of consecutive days that an employee can be assigned shift assignments that correspond to that job description.

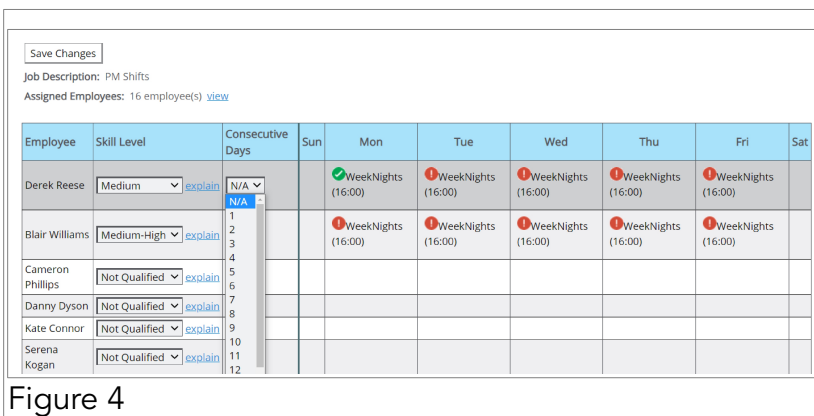


Figure 4

## Job Description Menu

After you have set each employee’s skill level for job description, the system will alert you to days where qualified employees’ availability does not match the shift assignments. One of the three symbols listed below (**Figure 1**) will be displayed next to each shift in the schedule.



The red exclamation icon indicates that the employee’s availability will not allow the shift assignment to be scheduled during the system build.

The yellow exclamation icon indicates that there are some days within the employee’s availability pattern that the employee can be scheduled for the shift assignments.

The green check icon indicates that the employee is available for the shift assignment on all days.

You can adjust an employee’s availability on a particular day to include the starting time and/or ending time of the shift assignment. If multiple days of availability need to be updated, use the Edit Available Times menu for that employee. Please consult the [Editing Employee Available Times User Guide](#) for more information.

Select the shift assignment link for the employee whose availability you wish to increase. (**Figure 2**)

Employee	Skill Level	Consecutive Days	Sun	Mon	Tue	Wed	Thu	Fri	Sat
Derek Reese	Medium-Low	N/A	✓ Surgery 1 (08:00)	! Surgery 1 (08:00)	! Surgery 1 (08:00)	! Surgery 1 (08:00)	! Surgery 1 (08:00)	! Surgery 1 (08:00)	! Surgery 1 (08:00)
Blair Williams	Medium	N/A	! Surgery 1 (08:00)	! Surgery 1 (08:00)	! Surgery 1 (08:00)	! Surgery 1 (08:00)	! Surgery 1 (08:00)	! Surgery 1 (08:00)	! Surgery 1 (08:00)
Cameron Phillips	Medium-High	N/A	! Surgery 1 (08:00)	! Surgery 1 (08:00)	! Surgery 1 (08:00)	! Surgery 1 (08:00)	! Surgery 1 (08:00)	! Surgery 1 (08:00)	! Surgery 1 (08:00)

For the shift you wish to alter the employee’s availability for, select the assign link. (**Figure 3**)

Once you have finished updating the availability change, select the save button. If you wish to undo the change you’ve made, select the cancel link.

		Monday Week 1 in Pattern																								
Availability		0	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	
Current Availability	Cancel																									
New Availability	Save																									
Shifts		0	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	
WeekDays	Assign																									
WeekNights	Assign																									
OverNight	Assign																									
Surgery 1	Assign																									

Figure 3

## Adding & Editing Shift Assignments

To add or edit a shift assignment, click on the Job Descriptions menu within the Scheduling Module to open it. Select the assignments link next to the Job Description Id you wish to edit. **(Figure 1)**

After selecting the Shift Assignment link, select the Add a Shift button **(Figure 2)** and you will be taken to the New Shift Assignment menu **(Figure 3)**.

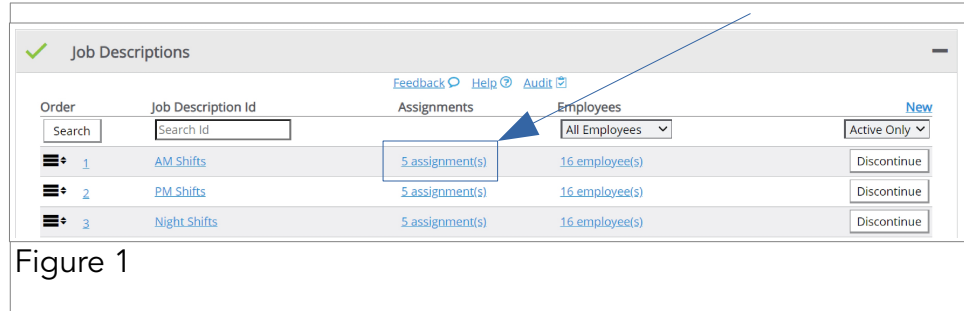


Figure 1

In the Assignment ID field, type in a value 8 characters or less that reflects the job description name.

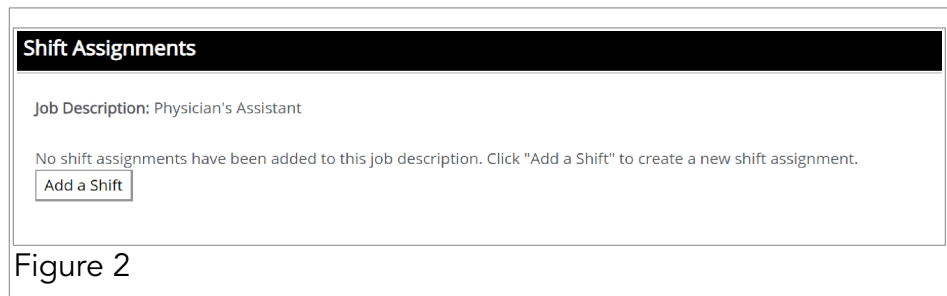


Figure 2

Next, select the check boxes for each day of the week that you need coverage on.

Next, select the location, enter a start time and duration, and the duration of the unpaid break.

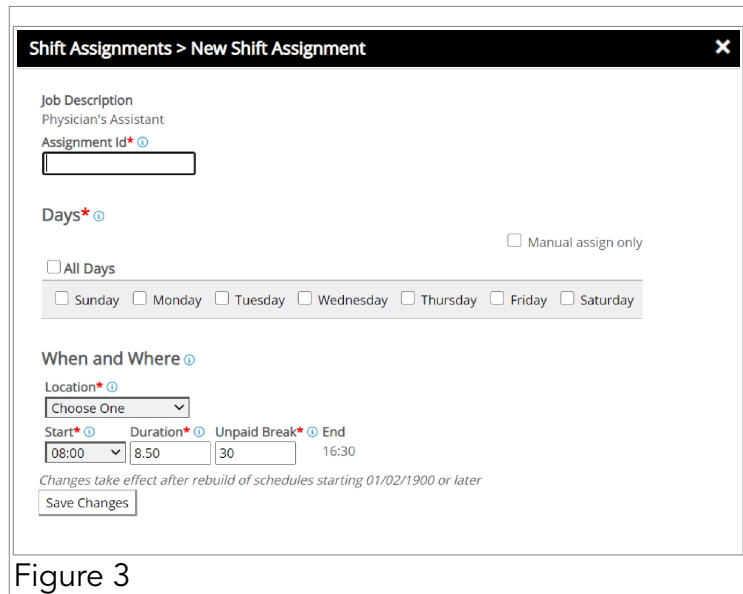


Figure 3

Once all these settings have been entered, select Save Changes.

To edit an existing shift assignment, follow the same steps as you would to add a shift. The Edit Shift Assignment menu is identical to the New Shift Assignment menu.

You can add or remove a day of the week from the assignment by selecting the on or off toggle buttons. **(Figure 4)**

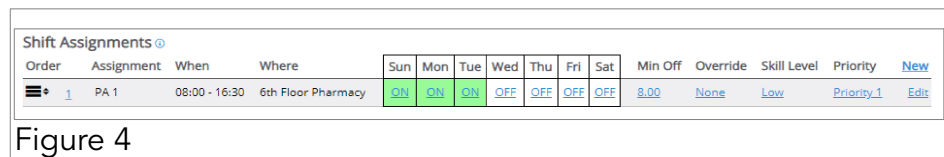


Figure 4

Once you have finished making edits, select save changes.

## Sorting and Discontinuing Job Descriptions

To sort Job Descriptions, begin by clicking to expand the Job Descriptions menu within the Scheduling Setup tab. Once expanded, you can select and drag each Job Description within a given schedule to where you want it to be by clicking and dragging the icon with 3 lines to the correct place. (Figure 1)

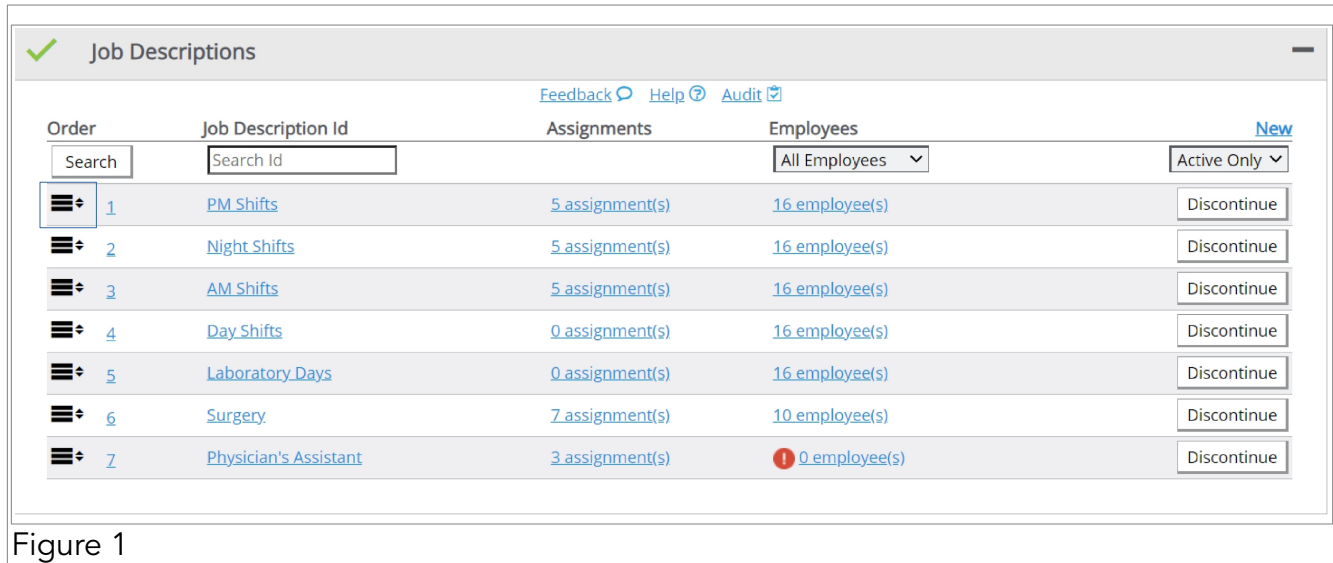


Figure 1

## Discontinuing Job Descriptions

Additionally, you can easily discontinue a Job Description from the same menu. Select the **Discontinue** button next to the Job Description you wish to discontinue to open the **Discontinue Job Description** menu. (Figure 2) Enter in the date for the last day on which that job description should be active. Select save changes to confirm the discontinuation of the Job Description.

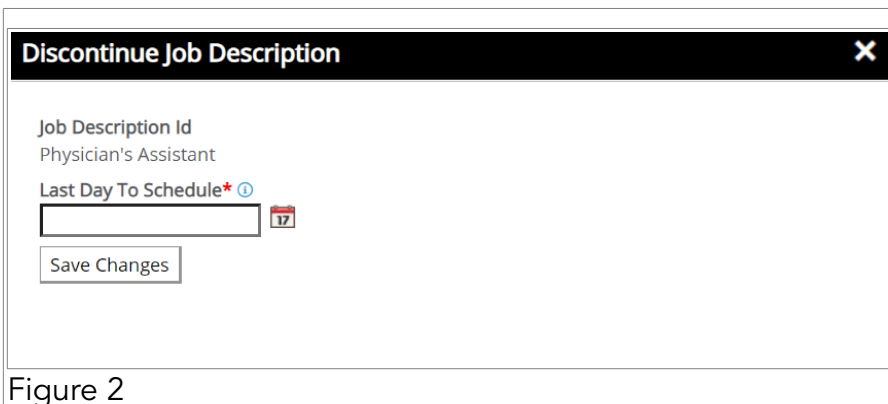


Figure 2

**Note:** If at any point you need to reactivate that Job Description for future use, the deactivated job description is visible at the bottom of the list of job descriptions within a selected schedule. Selecting the reactivate button (Figure 3) will reinstate that Job Description.



Figure 3

## Resources

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This concludes the user guide for Job Descriptions. We hope that you have a good grasp 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.

Phone: 1-877-229-5230

[Online Support Form](#)

## Related Topics

Please select any option to jump to that topic.

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Adding and Removing Employees

[PDF Document](#)

Modify Schedule Menu

[PDF Document](#)