



## Workload Planner Overview

Use the Workload Planner to create, view, and edit staffing plans. For each location and time frame, the staffing plan displays the number of workers needed for each shift, zone, and job. You can import the staffing plan or enter it manually for each location, job, and shift or schedule zone.

### Staffing plan in the Workload Planner

The staffing plan provides coverage information to Scheduler. Then, the Scheduler compares the plan to the schedule to calculate variance. Scheduler can also create open shifts if your organization uses Schedule Generation.

- You can change the budgeted staffing plan or roll out the changes to the planned staffing plan and leave the budgeted unchanged.
- The staffing plans use headcounts, not full-time equivalents (FTEs).
- **Variance** compares headcount in the current schedule to requirements in the staffing plan. To see variance, use the Coverage tab or the daily coverage view in the Schedule Planner.
- **Open Shifts** have a date and start and end times, assigned location, and job, and may have a skill and certification profile associated with it, but no one is assigned to work the shift.

**Note:** To generate open shifts, configure the workload plan by Shift Set, not by Zone Set.

The Workload Planner requires stable time spans. If workload data – including changes to schedule period, zones, shift sets, and business structure – assigned to locations is edited, the current schedule period splits at the date of the changes. The period after the change contains no workload data. Select the period before the change or contact your system administrator.

You can save several budgeted and planned staffing plans. However, only one plan can be in effect at a time.



J_	Span	Type	Sun 11/17			Mon 11/18			Tue 11/19			Wed 11/20			Thu 11/21			Fri 11/22			Sat 11/23		
			Budget	Plan	Actual	Budget	Plan	Actual	Budget	Plan	Actual	Budget	Plan	Actual	Budget	Plan	Actual	Budget	Plan	Actual	Budget	Plan	Actual
	Day	Volume																					
	Night	Volume																					
RN	Day	Workload	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	
RN	Night	Workload	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	
C_	Day	Workload	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	
C_	Night	Workload	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	
N_	Day	Workload																					
N_	Night	Workload																					

**With Workload Planner, you can:**

**View the workload**

- Filter your view by location and span.
- View Budgeted, Planned, and Actual Workload values

**Create a staffing plan**

- View and edit weighted volume, volume, weight, and workload.
- Create or edit workload plans and patterns

**Run the Workload Generator**

- Generate the workload.
- View workload audits
- Copy Workload Patterns to other locations.

**Workload Planner options on the action bar include the following:**



**Show/Hide** — Controls which columns and which rows are visible

**Tools** — Menu choices let you add volume, add a workload pattern, lock one or more cells, or unlock one or more cells.



**Generate Workload** — Opens a panel that provides options for generating workload at the loaded location.



**Location Filter** — Provides configured dataview options to show specific jobs in the loaded location.



**Span Filter** — Provides options to restrict workload display to selected spans.