



# Workload Planner Overview

Use the Workload Planner to create, view, and edit staffing plans. For each location, and each time frame, the staffing plan displays the number of workers that are needed for each shift or 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

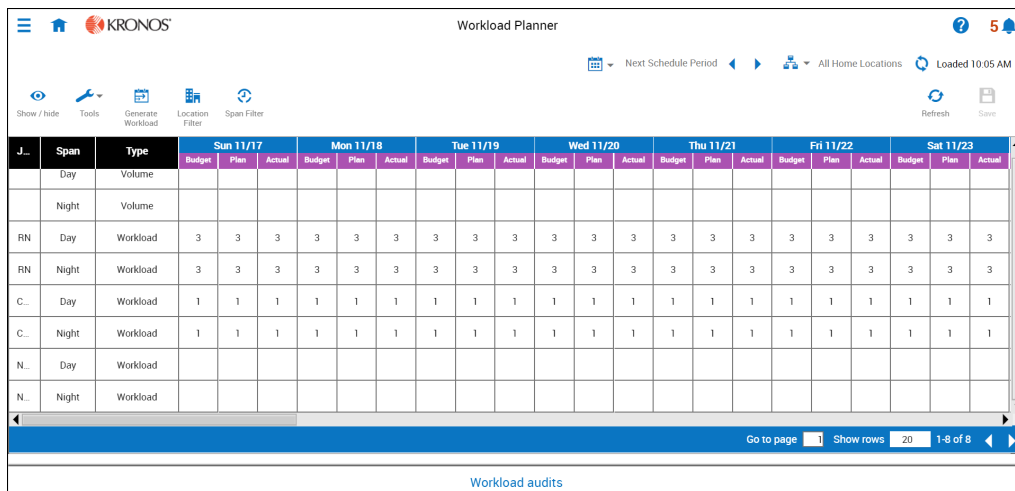
The staffing plan provides coverage information to Scheduler. Then, Scheduler compares the plan to the schedule to calculate variance. Scheduler can also create open shifts if your organization uses Schedule Generation.

- 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 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 associate to 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 – that are assigned to locations are 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 at a time can be in effect.



			Workload Planner																								
			Sun 11/17							Mon 11/18			Tue 11/19			Wed 11/20			Thu 11/21			Fri 11/22			Sat 11/23		
J_	Span	Type	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	3				
RN	Night	Workload	3	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	1				
C_	Night	Workload	1	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 allow you to add volume, add a workload pattern, lock one or more cells, and 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.