

Review Workload Allocation (Task 10)

Overview

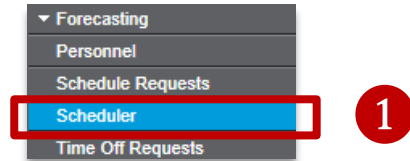
Store Managers/Schedule Writers are able to view workload allocation to compare targeted workload versus scheduled workload.

Process

This job aid will walk through reviewing workload allocation in the Scheduler tab.

From the main menu:

1. Go to the **Scheduler** tab.



2. Select the **Filter** icon from the toolbar.

A selection window will appear.

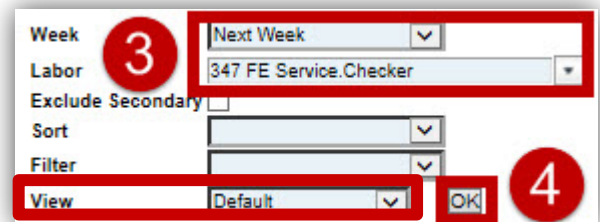


3. Change the Week setting to **Next Week** and set Labor to a **Specific Job** (and not department) using the drop down option.

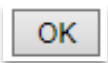


Filter to the labor of auto scheduled job (Checker)

***Note: **View** needs to be set to "Default"*



4. Click **OK**. The screen will return to the Scheduler page.



Review Workload Allocation (continued)

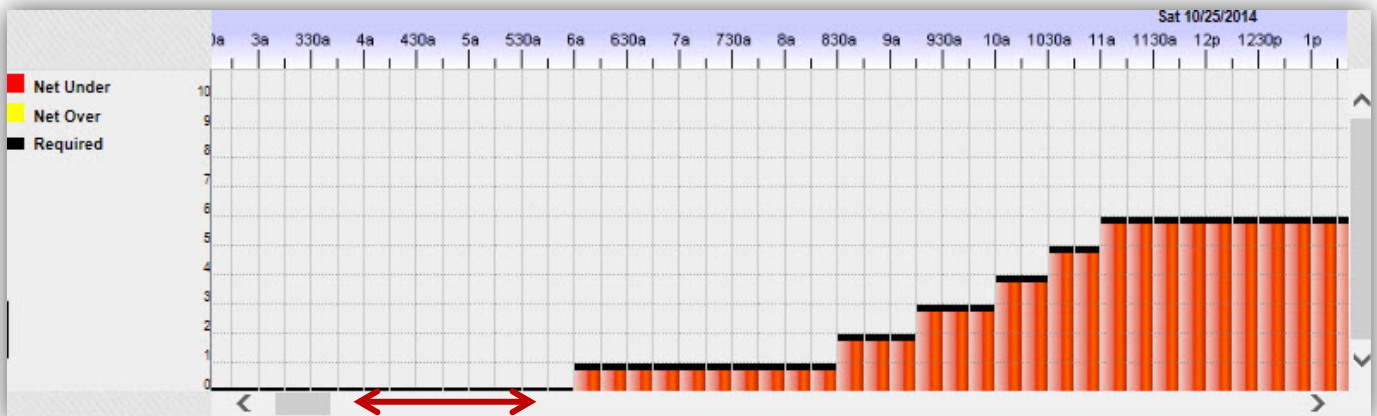
5. You need to be on the **View Graph** screen. You can toggle between **Visualizer** and **Graph** by clicking the alternating icons



If viewing **Visualizer**, click the **View Graph** icon to change the view to the graph from the secondary toolbar.



6. View the graph to assess the targeted workload.



Use the scrollbar to move the graph to different days.

Legend:

- **Red:** Targeted workload



Click **Visualizer** icon to return to the previous screen

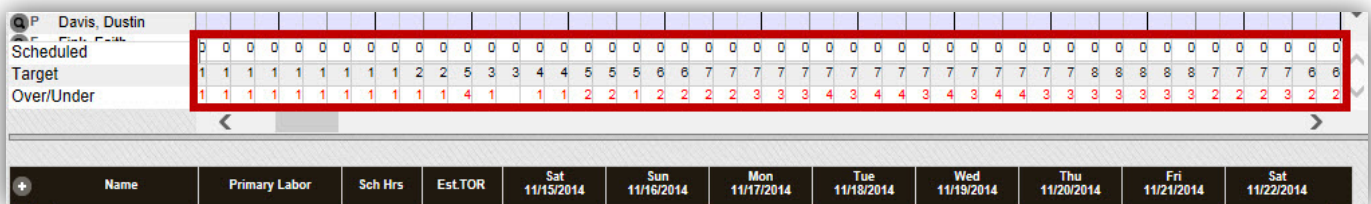


Review Workload Allocation (continued)

The Visualizer will display:

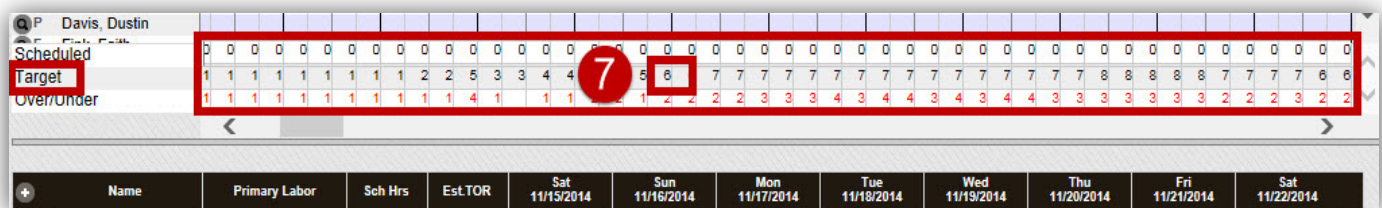
- Scheduled Workload
- Targeted Workload
- Over/Under Workload (Displayed in Red)

Each number represents an employee labor need.



Look over the Workload and if you determine an adjustment needs to be made.

7. Click the Target number you would like to change

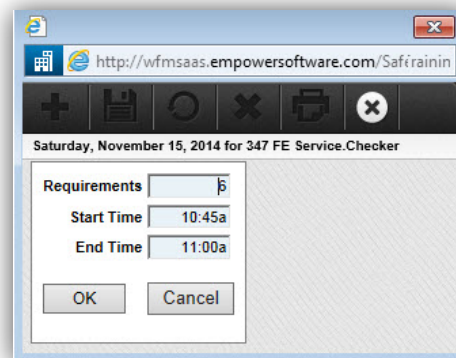


Note: You may not edit workload for multiple jobs. A single job must be selected when using the filter.

A pop up window will appear

You may now edit the:

- Workload Requirement
- Start Time
- End Time



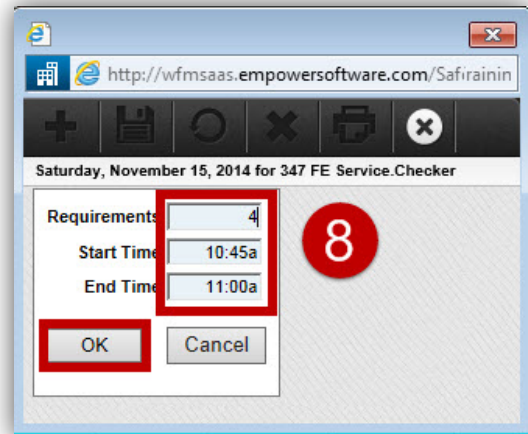
Review Workload Allocation (continued)

8. Make any changes to the Workload that you feel is necessary.

(This example changes the Requirement from 6 to 4)

Once you have entered the Workload changes

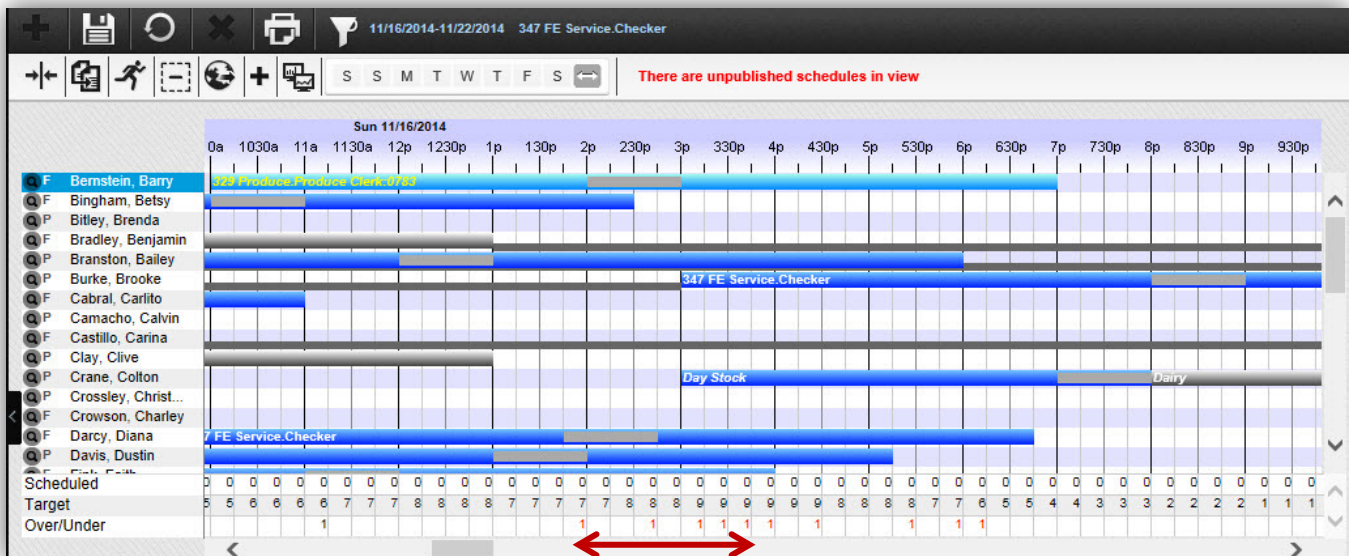
- Click **OK**



Note: You can make single or multiple changes throughout the day (short/long time frames).

You'll need to click each Workload if you wish to adjust separate timeframes.

When returning to the Visualizer screen the system will default you back to Sunday.



Use the scrollbar to move the visualizer to the appropriate different day.

