

Managers who wish to maintain a copy of original schedules can do so through Clairvia Web and save a copy onto their personal desktop.

Schedule Report

Keeping a copy of the original schedule can be beneficial for managers who need to track trends or are asked to confirm original finalized post.

STEP 1: From Clairvia Web toolbar, select Reports→Schedule→Schedule.

STEP 2: Select Profile.


- If you are the manager of more than one unit, you can select both. The schedules will generate with a page break.

STEP 3: Select all Shift Category Partitions, Skills, and Tasks.

- Click Home key to start at the top and Shift + End to highlight all.

STEP 4: Set the following settings with the below recommended selections:

- **Date:** Set to the **First Sunday** of the schedule.
- **Number of Weeks:** Based on MO schedule pattern: either 4 or 6 weeks.
 - Legal or Letter option is dependent on available printer settings.
- **Display Format By:** Profile
- **Group Employees by Partition:** Uncheck Group by Shift Category Partition
 - Leaving this box checked will print in the 8-4-4-8 format.
- **Include Profile Based Unscheduled Employees:** Yes
- **Display Name Format:** Full Name
- **Employee Sort By:** Manager preference



Reports Tools Search Configure Help

- Schedule
- Demand
- Acuity
- Patient Assign
- Administrative Management
- Custom

- Daily Staffing Board
- Daily Staffing Board for Demand and Outcomes-driven Acuity
- Schedule
- Housewide Staffing
- Housewide Staffing for Demand and Outcomes-driven Acuity
- Central Staffing
- Central Staffing for Demand and Outcomes-driven Acuity
- Group Staffing
- Staff Finder
- Filled Opportunities

Selection Criteria Report Output

Profiles	Shift Categories
Ac_1 Sou - 2174	(Ac_1 Sou - 2174) 12-12
Ac_2 North/South - 2172	(Ac_2 North/South - 2172) 12-12
Ac_3 North/South - 2171	(Ac_Behav Resource Cntr - 1054) 12-12
Ac_Behav Resource Cntr - 1054	(Ac_Child & Adolescent Amb - 4280) 8-4-4-8
Ac_Child & Adolescent Amb - 4280	
Ac_Family Nurse Pract - 3051	
Ac_Float Staff - 1097	
Ac_Infection Control - 1231	
Ac_Med & Phy Practice - 1048	
Ac_Nursing Admin - 1096	

Shift Category Partitions with Spillover	
	0600 1800 (Spill: Front 60 - Back 60)
	1800 0600 (Spill: Front 60 - Back 60)

Skills	
	(Ac_1 Sou - 2174)ISS
	(Ac_1 Sou - 2174)PSYCH TECH
	(Ac_1 Sou - 2174)PT OBS
	(Ac_1 Sou - 2174)RN

Tasks	
	(Ac_3 North/South - 2171)0600 1430 Orientes Psych Tech
	(Ac_3 North/South - 2171)0600 1430 Preceptor Psych Tech
	(Ac_3 North/South - 2171)0630 1500 3N ISS
	(Ac_3 North/South - 2171)0630 1500 LCPC

Number Of Weeks	6 Weeks (Letter)
Display Format By	<input checked="" type="radio"/> Profile <input type="radio"/> All Employees
Group Employees By Partition	<input type="checkbox"/> Group By Shift Category Partition
Include Profile Based Unscheduled Employees	<input checked="" type="radio"/> Yes <input type="radio"/> No
Display Name Format	<input checked="" type="radio"/> Full Name <input type="radio"/> Abbreviation
Employee Sort By	<input type="radio"/> Skill and then Employee Name <input type="checkbox"/> Break out by Job Skill <input type="radio"/> Employee Name Only <input checked="" type="radio"/> Employee Custom Display Order
Include Phone Number	<input type="radio"/> Yes <input checked="" type="radio"/> No
Exclude Scheduled Tasks	<input type="radio"/> Yes <input checked="" type="radio"/> No
Show Task	<input type="radio"/> Abbreviation <input checked="" type="radio"/> Abbreviation w/ Scheduled Start/End Times When Different <input type="radio"/> Abbreviation And Coverage Start/End Times
Mark Filled Opportunities with (O)	<input checked="" type="radio"/> Yes <input type="radio"/> No
Show Unfilled Opportunities and Open Shifts	<input type="radio"/> Schedule Only; Don't Show Opportunities/Open Shifts <input checked="" type="radio"/> Show Opportunities/Open Shifts and Schedule <input type="radio"/> Show Opportunities/Open Shifts Only
Include Paid Hours By Employee	<input checked="" type="radio"/> Yes <input type="radio"/> No
Total By	<input type="radio"/> FTEs <input type="radio"/> Staff <input checked="" type="radio"/> Hours <input type="radio"/> None
Calculate Totals By	<input checked="" type="radio"/> Employee Skill <input type="radio"/> Task Skill
Float In Display	<input type="radio"/> Separate Table <input type="radio"/> Show in Red <input type="radio"/> Show with '(In)' <input type="radio"/> Display After Profile Based Employees <input type="radio"/> Do not Display
Float Out Display	<input type="radio"/> Separate Table <input type="radio"/> Show in Blue <input checked="" type="radio"/> Show with '(Out)' <input type="radio"/> Do not Display
Show Notes	<input checked="" type="checkbox"/> Show Notes in Page Footer
Write-in Lines	0

Run Report Clear Form

- **Include Phone Number:** No
- **Exclude Scheduled Tasks:** No
- **Show Task:** Abbreviation w/ Start/End Times When Different
- **Mark Filled Opportunities with (O):** Yes
- **Show Unfilled Opportunities and Open Shifts:** Show Opportunities/Open Shifts and Schedule
- **Include Paid Hours by Employee:** Yes
- **Total By:** Hours
- **Calculate Totals By:** Employee Skill
- **Float In Display:** Show with '(In)'
- **Float Out Display:** Show with '(Out)'
- **Show Notes:** Show Notes in Page Footer
- **Write-in Lines:** 0

STEP 5: Run Report: A print preview will appear on the screen.

NOTE: The Schedule Report is a large report, depending on the unit size. Printing is discouraged. Managers can follow the steps below to copy the report to their desktop, as needed.

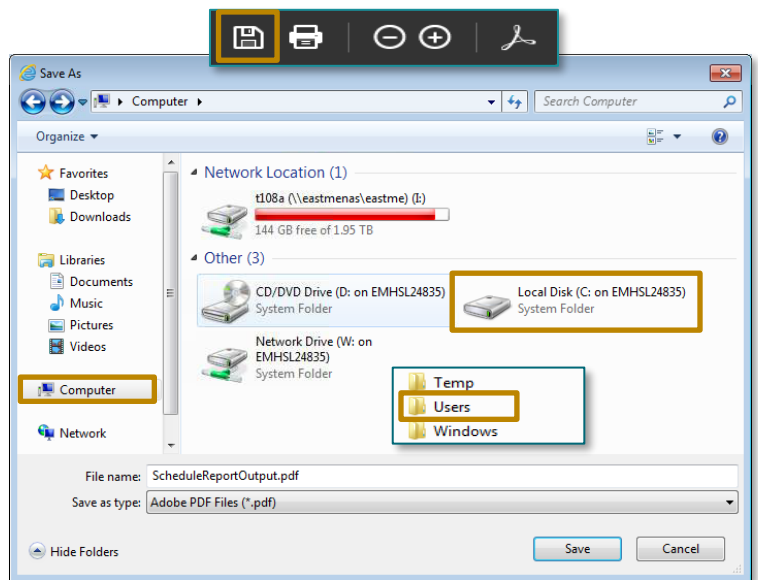
Saving Schedule Report to Local Desktop

STEP 1: Hover over the top of the screen. to show icons and click the **Save (Disk)** button.

STEP 2: From the **Save As** window, click **Computer** in the left view pane, then **Local Disk (C: on <*yourdevice*>.**

STEP 3: Double-click to open the **Users** folder and search for your network sign on.

STEP 4: Double-click to open and select **Desktop**  and **Save.**



NOTE: To create a specific folder for Schedules, expand the left view pane down to **Desktop** and **Right Click**→**Folder** and name. The new folder will be available on your desktop.