

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 the manager of more than one unit, multiple units can be selected. 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
 - 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
- Demand
- Acuity
- Patient Assign
- Administrative
- Management
- Custom

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 Orientee Psych Tech
	(Ac_3 North/South - 2171)0600 1430 Preceptor Psych Tech
	(Ac_3 North/South - 2171)0630 1500 RN 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 checked="" 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.

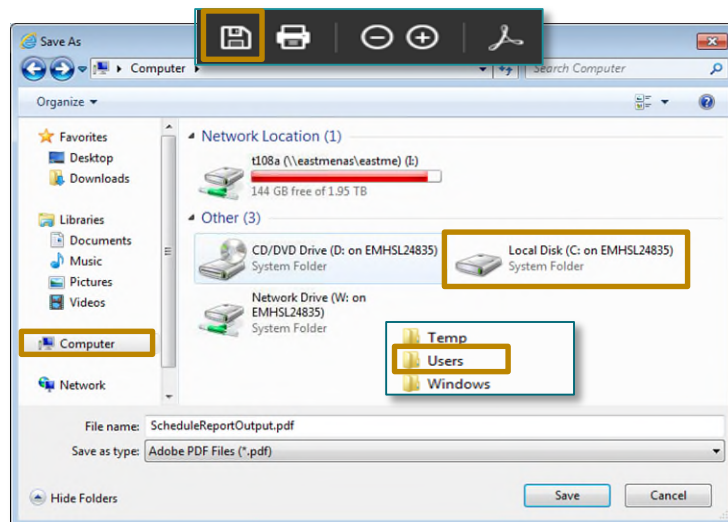
Saving Schedule Report to Local Desktop

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 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 the desktop.