

## Setting Up Rule Based Scheduling:

First, to navigate to the Rule Based Scheduling section, click “Schedule Place” then “Rules Engine”

Now rule based scheduling is used for a variety of reasons. Some industries that generally use this type of scheduling are: Nursing, Retail, Child Care, Etc.

The purpose of setting up different “Rules” are to make sure that you have enough people scheduled for whatever trigger that you may have defined.

In the Screen shot below, you can see an example that is set up for a Child Care Center. This Rule States that for every 24 children, schedule a Teacher at a particular location.

This would work very well in a retail environment. For example, If I have a certain amount of sales, schedule this many Cashiers.

The screenshot displays the Intuit HR System Monitor interface for rule-based scheduling. The browser address bar shows the URL: <https://workplace.intuit.com/db/bdq3tunj/g/bin-release/hermes.html#app=bd0087664-selectedIndex=0&a44-selectedIndex=2>. The page title is "QuickBase Workplace". The navigation menu includes "Start Place", "Documents", "People Place", "Schedule Place", and "System Space". The "Schedule Place" section is active, showing "Schedule Editor", "Defined Schedules", "Rules Engine", and "Schedule Generator". The "Rules Engine" page has a "New Rule" button and a "Save" button. The "Rule Name" is "3 Year Old" and the "Item Name" is "Children". The "Rule Items" section contains two rules:

- For every 24 Children, schedule a Teacher at Location 1 for Project 1. Regardless of amount of Children, schedule no less than 0 and no more than 0 employees. (Update Rule, Delete Rule)
- For every 10 Children, schedule a [ ] at [ ] for [ ]. Regardless of amount of Children, schedule no less than 2 and no more than 6 employees. (Update Rule, Delete Rule)

The footer includes "null | Terms | Privacy | Support" and the Intuit logo. The browser status bar shows "Internet | Protected Mode: On" and "100%".

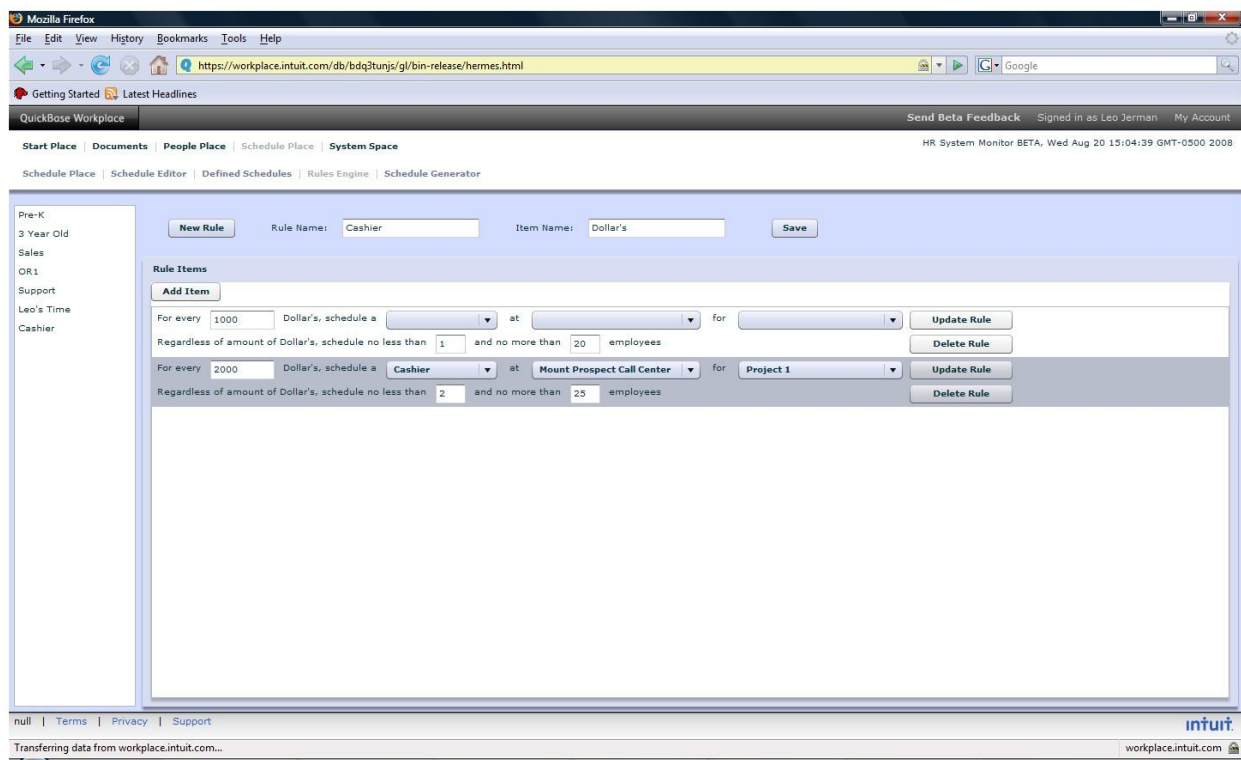
## In order to Define a rule based Schedule:

To generate a rule to use for scheduling your employees, Click on “New Rule”

Select a name for the “Rule” this would be displayed as “Rule Name” then select a name for “Item Name” This Would be displayed in the actual rule when setting up the “Rule”. Item name would actually be the “Trigger” so to speak. Then Click on “Save”

Then to get to the actual Rule, you need to click on “Add Item” This will give you the ability to add or edit rules. Once you have the line item available, you can define your amount of people you want auto scheduled based on the “Item name” you defined. (Note make sure to have all the people types that you need defined in “System Place”) Once you have entered this appropriate information, you can click on “Update Rule” to save.

For example, I have Created One before with the Rule called Cashier, and the Item name called “Dollars”



As you can see from the Screen shot. I have created a Defined rule that says, “For Every 20,000\$ in sales, I want there to be a cashier scheduled at the Mount Prospect Location. I have also told the system that I want to less than 2 and no more than 25 no matter the total sales. Now there is a rule that the system can go buy in order to create these schedules.

This can come in handy if you are the kind of business that is busier on certain days than on others. This helps you proactively schedule your employees for the busier times. Without having to spend lots of time doing this manually. Once these rules are set up, the system will do everything else for you.