**Lightning Bolt**

Creating Rules & Navigating the Scheduling Rules Page

How do I access my Scheduling Rules?

To get to this section, simply click on the **Scheduling Rules** tab of Administration - Setup. Here, you will be able to create, modify, deactivate, and delete rules.

How do I create a new rule?

To create a new rule, click on the **"+ Add New Rule" button** and then click on the applicable rule that you wish to create. You must give each rule a **name**, which should be as descriptive as possible, generally incorporating the applicable provider/personnel group, assignment/assignment group, and the given scheduling requirement that the rule is attempting to satisfy (e.g., Call Group: Can Work No More Than 3 Call Shifts Per Month). More descriptive rule titles will make it easier for you to search for and identify these rules down the road. Each rule must also be assigned a **priority** — ranging from low to maximum — in accordance with its relative level of importance. Finally, in the rule sentence, any word or phrase highlighted in blue text (e.g., personnel, assignment, etc.) is customizable. After you've made your rule, you can either click on **"Save & copy"** or **"Save & close".** After clicking on "Save & close", you will be taken back to the list of rules, where you must then **click on the "Refresh" button in order to be able to see the rule(s) that you just implemented appear in the list.**

Holidays | Personnel | Assignments | Assignments Compatibility | Personnel Groups | Assignm

+ Add New Rule   **Turn On Filtered Mode**   **Refresh**

Name

ne: Schedule only one MD on the 2nd Tuesday of the month
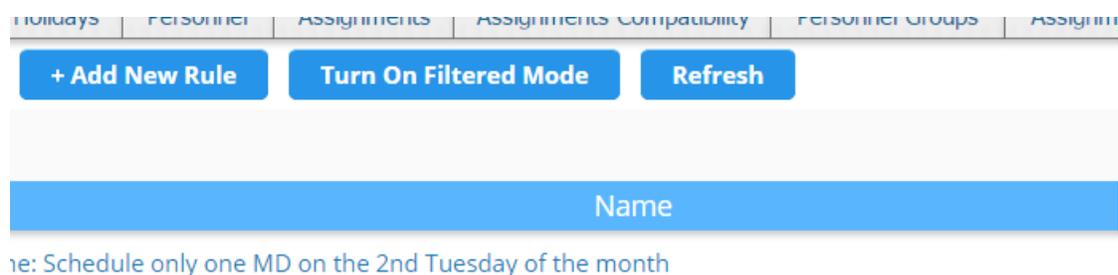
How can I sort or filter my list of rules?

In the list of rules, you can sort by priority and last modified date by left-clicking at the top of the appropriate columns. You may also enable filtering by left-clicking on **Turn On Filtered Mode** at the top of the page.

| ↓ Priority	↕ Last Modified	↕
1000000	03/02/2017	Ye
1000000	03/02/2017	Ye
300000	03/02/2017	Ye
100000	03/02/2017	Ye
100000	03/02/2017	Ye

Assignments   Assignments Com

Turn On Filtered Mode

How do I delete a rule?

The column located the farthest to the right is the "Delete" column, where you are able to delete any rule by clicking on "Delete" in the applicable row.

How to Deactivate (and Re-activate) Rules:

You can also **deactivate** rules if you wish instead of deleting them, in the event that you may want to re-activate them at some point in the future (deleted rules cannot be re-activated at any point in the future — they're wiped permanently from the system). To deactivate a rule(s), simply check the applicable rule(s) in the column located the farthest to the left and then click on the **"Take action" drop-down menu** on the upper left side of the page, where you will then have the option to deactivate the selected rule(s).
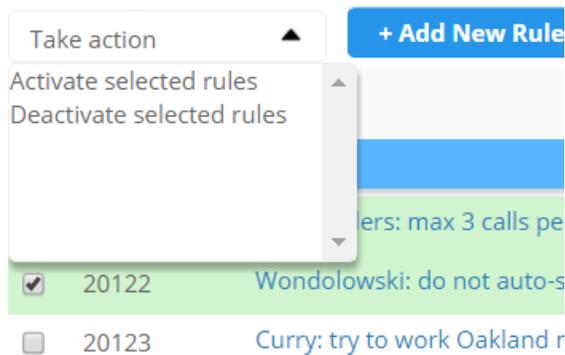
To view the list of inactive rules, simply click on **"Active Only"** drop-down menu on the upper left side of the page — located right underneath the Take action menu. You can choose to view Active rules only (the default setting), Inactive rules only, or both Active and Inactive rules in one big list. If you'd like, you can then re-activate any deactivated rules by using the Take action menu (as described above).
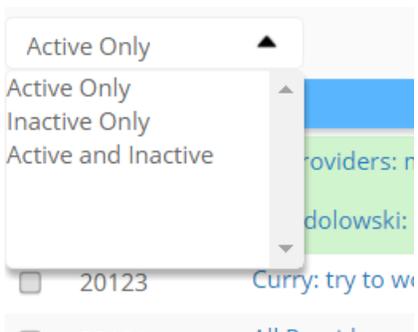
How to search for rules:

Finally, you can use the **search field** on the upper right side of the page to search for any rule that you've implemented (this feature comes in handy especially for groups with relatively high numbers of rules).