Generate with Pending Requests

perfectserve Lightning Bolt Scheduling

Overview

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The **Generate with Pending Requests** feature allows scheduling administrators to create and save or autogenerate schedules while factoring in pending requests. This ensures that schedules can accommodate requests that are not yet granted, maintaining compatibility without committing to them.

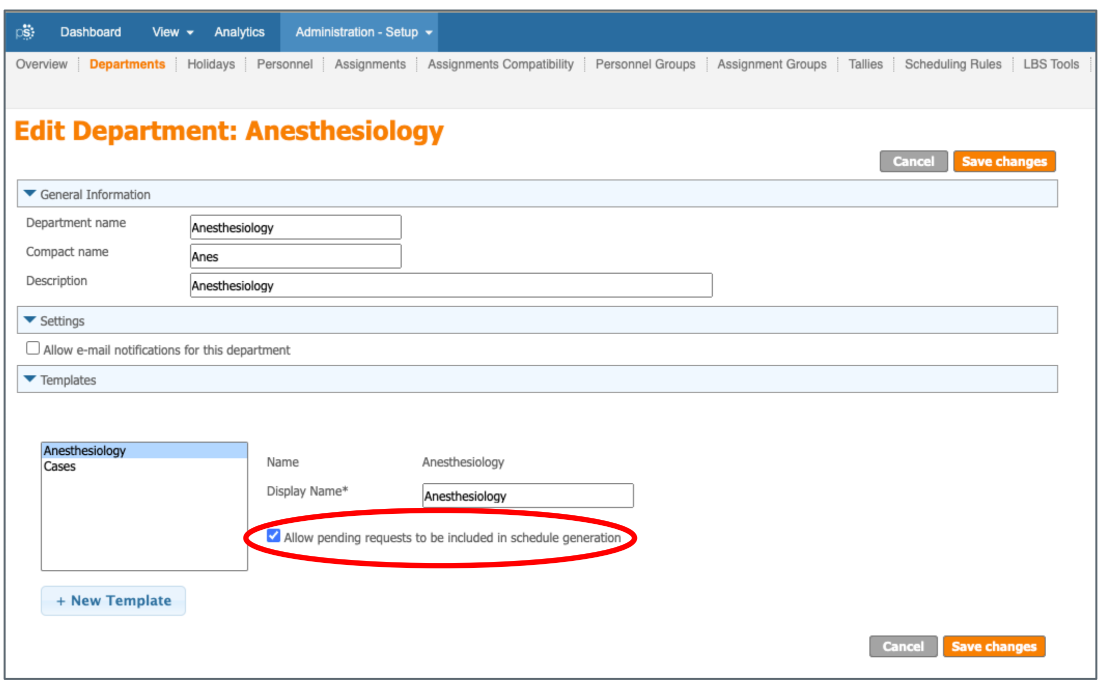
Once the schedule is generated, administrators can choose to grant or remove pending requests without sending notifications or changing their status.

Enabling the Feature

To enable **Generate with Pending Requests**, follow these steps:

1. Navigate to **Administration** dropdown menu
2. Select **Setup.**
3. Navigate to the **Departments** tab
4. **Select** the relevant schedule template.
5. Check the box labeled **Allow pending requests to be included in schedule generation.**

Note: You must have system administrator permissions to enable this feature.



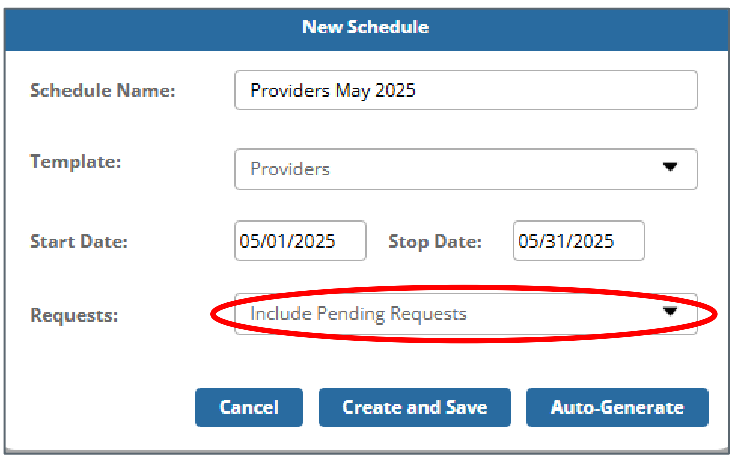
Including Pending Requests

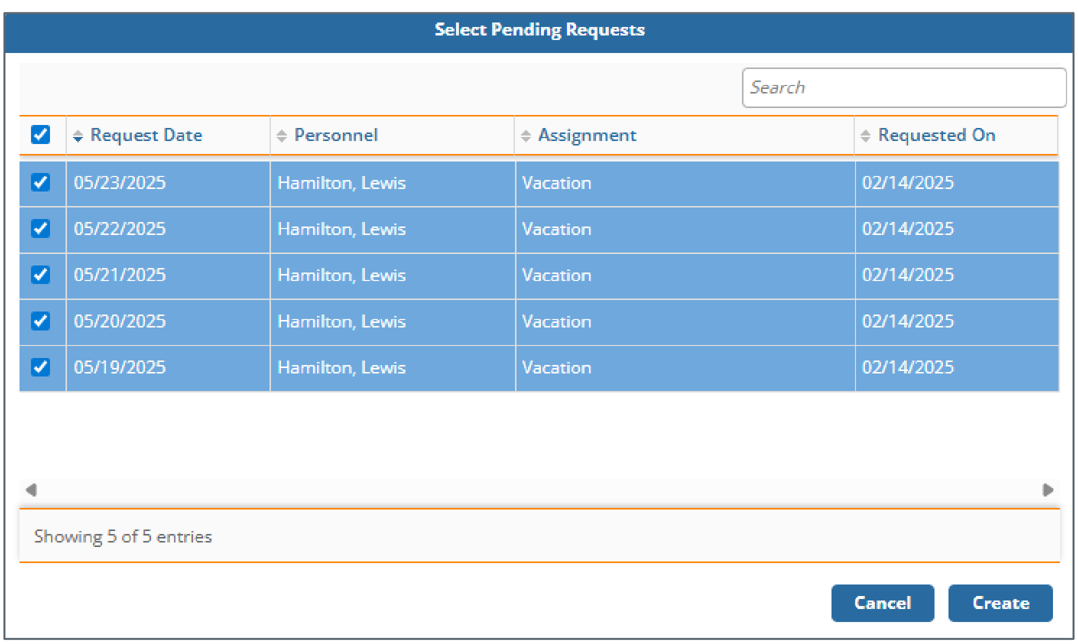
When the *Generate with Pending Requests* feature is enabled, you'll see an **Include Pending Requests** modal during schedule creation. This allows you to choose which pending requests to include in that specific version of the schedule.

1. Navigate to **Schedule Manager** under **Administration.**
2. Within the **Schedule Creator** tab, create a **New Schedule**.
3. Select **Include Pending Requests** from the Requests dropdown.
4. Click **Create and Save** or **Auto-Generate.**
5. Select the requests to be included.

Important Notes:

- Only the selected requests will be included in that version of the schedule.
- Requests that are not selected will remain in a pending state and can be added later using the **Refresh Web Requests** tool.
- Each schedule version is independent. If you remove a pending request from one version, it will still exist in any other versions where it was included.
- This flexibility allows you to test different scheduling scenarios without committing to requests prematurely.





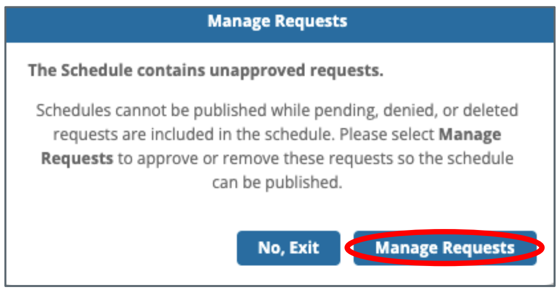
Managing Requests Before Publishing

Once your schedule is complete and you're ready to publish it to **Published to Everyone**, you may encounter the **Manage Requests** modal. This modal ensures that all pending requests are addressed before the schedule is made visible to all users.

What Triggers the Modal:
If there are any requests still in a **non-granted** state when you attempt to publish, the system will prompt you with options.

Options Available:

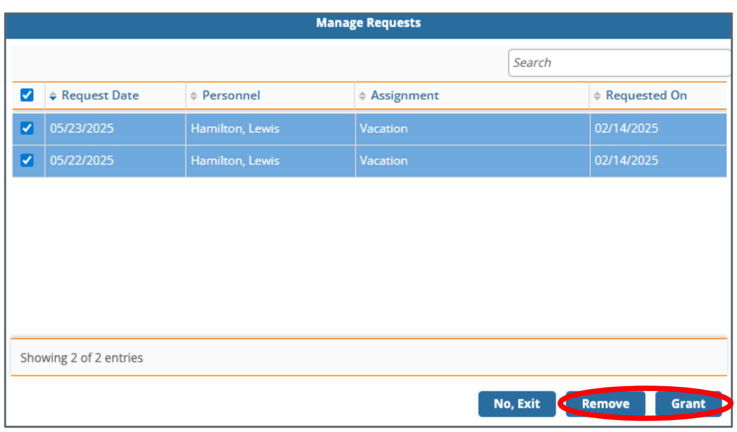
- **No, Exit:** Cancel the publishing action and return to the schedule.
- **Manage Requests:** Open the window to take action on pending requests.



Inside the Manage Requests window:

- **Grant Requests:**
  - Updates the request status to granted.
  - Keeps the request data in the schedule.
  - Sends a notification to the requester (if permissions allow).

- **Remove Requests:**
  - Deletes the request data from the current schedule version.
  - Keeps the request in a pending state.
  - No notification is sent.



Important Notes:

- Once all requests are managed, the modal disappears, and the schedule is successfully published to everyone.
- Requests can remain in a pending state if the schedule is only published to **Administrators**.

Refreshing Web Requests

If a schedule has already been created and you want to include additional pending requests, you can use the **Refresh Web Requests** tool. This tool allows you to bring in new requests without starting over.

How It Works:

- If the *Generate with Pending Requests* feature is enabled, the Refresh Web Requests tool will include a new tab for pending requests.
- Simply check the requests you want to add and click **OK**.

Behavior Based on Schedule Status:

- **Unpublished or Published to Admins:**
  You can freely add pending requests to the schedule. These will be evaluated alongside existing schedule data.
- **Published to Everyone:**
  You'll be prompted to **grant** any pending requests before they can be added to the schedule.

Important:

Any pending requests added through this tool will still trigger the **Manage Requests** modal if you attempt to publish the schedule to everyone without resolving them. This gives you the opportunity to **Grant** or **Remove** them before finalizing.