

## Running the New QGenda Algorithm

*QGenda's brand new scheduling algorithm is finally here! Please note that this workflow will be temporary as we get ready to release the New Admin Tab. This guide will help walk through how to use it in the current Admin Tab.*

Currently, it is best to confirm 3 things before clicking Make Schedule:

1. Staff Filter
2. Task (Run) Filter
3. Active Week Selected

With the new algorithm, the first two steps stay the same. An Active Week can be selected; however, it is not necessary. Steps to run new algorithm are as follows:

1. Adjust the Staff and Task Filters as necessary.



2. Click Make Schedule. This will create a pop up that displays "AI Optimized Algorithm." This is the new algorithm! *Note: The drop down allows the option to run the current (Classic) algorithm.*

### Make Schedule

Algorithm: AI Optimized Algorithm

Start Date: 4/1/2019 📅

End Date: 4/7/2019 📅

☒ Sequential Automation

Run Close

### Make Schedule

Algorithm: Classic Algorithm

Run
Close

3. Choose the start and end date for which the algorithm should run.
4. “Sequential Automation” means that the algorithm will run week by week, in chronological order. Think of this as running the schedule as it is done today (week by week, changing the active week), but with one click.
  - a. Un-checking “Sequential Automation” will run the schedule based on scarcity. **Involving a QGenda representative is highly recommended to determine which run filters, if any, would benefit from *not* running sequentially.**
5. Click “Run”

In addition to the updated algorithm, there is now updated wording for certain conflicts within the schedule summary menu:

Messaging in Schedule Summary	Additional Details
Blocked by <Task Abbreviation> on <Date>	<i>No change</i>
Conflict with Staff Availability <startdate> - <enddate>	<i>Start date and end date here refer to the staff member's start and end date</i>
Last Available for <Task Abbreviation> on <Date>	<i>Previously called "Reserved for..."</i>
No Admin Access to Staff	<i>Scheduler does not have access to schedule this staff member</i>
Staff not selected as "Schedule" in current staff filter	<i>The staff member is not checked off as "Schedule" in the Staff filter being used</i>
Unable to link one or more tasks on <date>	<i>Previously called "Unable to fulfill try to assign"</i>
Last Available for <Task B> on <Date>. Assigning both tasks exceeds max of <#> by <#> between <startdate> - <enddate>.	<i>I can't assign the staff member Task A because doing so will max him out and make him unavailable for Task B and he's the last one available for Task B</i>
Exceeds Max of [#] by [#] between [startdate] - [enddate]	<i>No change</i>
Unable to couple to existing task	<i>This is for must couple rules (may not be applicable to all groups). Previously called "Unavailable for scheduling in staff filter"</i>
Unable to fulfill Must Assign with <Task Shift> on <Date>	<i>No change</i>