



Implementation Survey

Company Name and Date:

The purpose of this questionnaire is to identify the key requirements of your organization. Please complete the questionnaire as thoroughly as possible as this ensures that we can better understand policies and procedures to assist you in your implementation. This is a critical document in the implementation process.

You may type directly into this form. Feel free to expand on the questionnaire with attachments if needed, but please **respond to each question**. If the question does not apply to you simply respond with “**N/A**” If you are unsure of a section in this document, please contact your Implementation Coordinator for further explanations or assistance.

Primary Contact

Name	
Phone Number	
Email	

Secondary Contact

Name	
Phone Number	
Email	

Company Information

Company Name	
Street Address	
City	
State	
Zip Code	
Company Web Site	



Staff Count Types

Staff Count Types allow you to define a counting method for shift requirements. These types are required to build staffing rules. For each configuration type indicate

Staff needs are based on:	Yes/ No	Count
Projected hours		
Percentage		
Amount / number of X		

Staffing Rules

Staffing Rules allow you to define how many employees are needed based on specific daily values. These rules are then attached to shifts

Configuration	Count	Equal to	Greater or Less than
Required Employees on Shift			
Staff needs: (based on count given above)			

Example:

The screenshot shows a software interface for configuring staffing rules. It features a sidebar with options like '+ New Rule Set', 'Edit Rule Set', 'Delete Rule Set', and 'Copy Rule Set'. The main area is titled 'Occupancy Hotel - Rules' and contains a table with the following data:

Rule Name	Rule Action	Conditions
Max Capacity	Shift requires 10 employees.	when staffing count Occupancy is equal to 100.
75 Percent	Shift requires 8 employees.	when staffing count Occupancy is greater than 74.
50 Percent	Shift requires 6 employees.	when staffing count Occupancy is greater than 49.
25 Percent	Shift requires 4 employees.	when staffing count Occupancy is greater than 24.
Minimum	Shift requires 2 employees.	when staffing count Occupancy is less than 25.

- When occupancy is equal to 100%, then I need 10 employees.
- When occupancy is at or greater than 75% occupancy, I need 8 employees.
- When occupancy is at or greater than 50%, I need 6 employees.
- When occupancy is at or greater than 25%, I need 4 employees.
- I need a minimum of 2 employees when occupancy is below 25%.



Schedule Permission Rules

This screen defines what rights an ESS User has on the Scheduler page. The Staffing Dashboard options controls which users can enter Count Type Values and view the Staffing Summary. By default, admin and client users will have access to these options on the scheduler. This screen allows you to control if employees, managers, and supervisors should have access to this as well.

Staffing Dashboard	Employee	Supervisor	Manager
Staffing Summary			
Set Count Type Value			

- **Staffing Summary:** This option controls the ability for the user type to view the staffing summary tab on the scheduler.

Hide (H) or Show (S)

- **Set Count Type Value:** This option controls which users have the ability to enter and/or view the daily count types.

Read Only (RO) or Edit (E)