



How do I set up Automatic Appointments in Schedula?

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Schedula provides organisations with the ability automatically appoint match officials based on certain criteria. Allowing Schedula to automatically appoint match officials can reduce the amount of time it takes for an administrator to finalise appointments for upcoming matches.

When processing appointments, Schedula takes the following configurations into account:

- Ranking of Panels (eg. from Senior panels down)
- Ranking of Competitions (eg. from Division One down)
- Number of Officials required for each competition
- Each Match Official's availability
- Number of Match Officials who qualify for a particular discipline
- Whether an Official has officiated at a particular club for a given number of weeks

To get started with the automatic appointments function, you will need to do the following in your Schedula database:

1. Define Custom Panels
2. Assign and qualify match officials within these custom panels; and
3. Configure one or more Appointment Groups

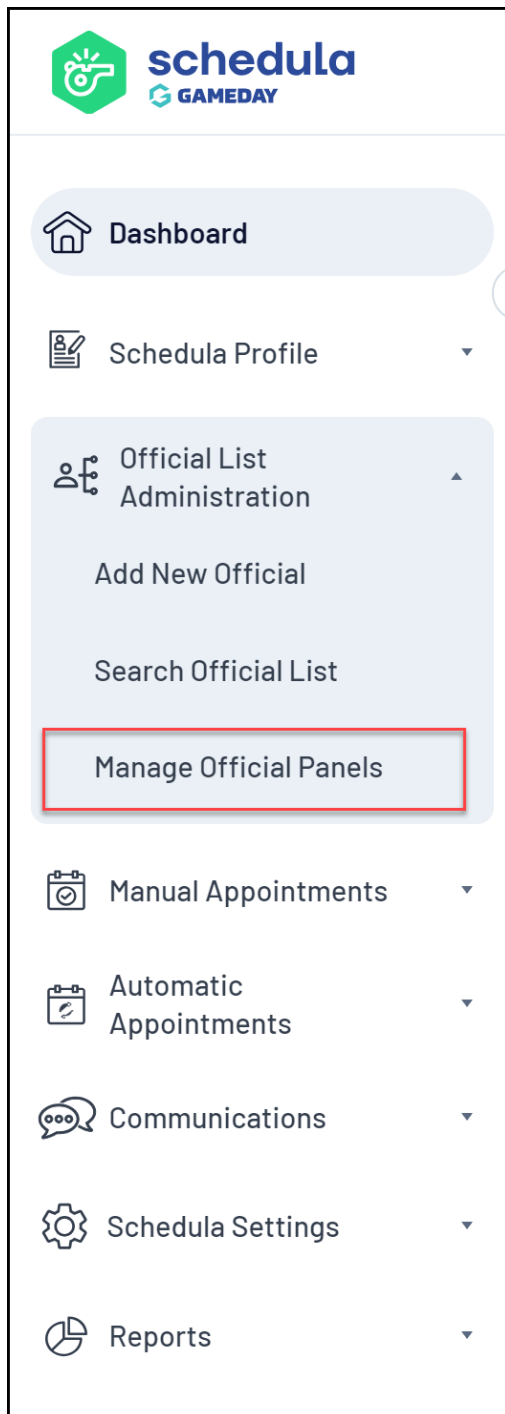
Note: You cannot use built-in panels within an automatic appointment group. You must define at least one custom panel to use this functionality. Configuring your custom panels and appointment groups only needs to be done once per season. After defining your panels and appointment groups, you then need to trigger an automatic appointment process for every week you want to assign appointments

Define a Custom Panel

As a Schedula administrator, you can group your officials into custom Official Panels, allowing you to easily make appointments based on specific groupings within your organisation's official structure.

To add a new Official Panel and assign officials to it in Schedula:

1. In the left-hand menu, click **Official List Administration > MANAGE OFFICIAL PANELS**



2. Select your **Organisation** and **Season**, then click **CREATE NEW PANEL**

Manage Official Panels ⓘ

Panel Management

Organisation

Season

Select Panel or

3. Enter your **Panel Name**, then click **SAVE & CLOSE**

Create New Panel

Panel Name

Assign and Qualify Match Officials

Once you have created a custom panel, you need to assign and qualify match officials. To add a match official to a custom panel:

1. Select your **Organisation**, **Season**, and **Panel**, then click **SHOW PANEL**

Manage Official Panels ⓘ

Panel Management

Organisation

Season

Select Panel or

2. To allocate an official to this Panel, click the **ADD** button next to the official name

Modify Panel

All Registrations (Season 2021)

ADMIN, FSP	Add
BLACK, Ashyhh	Add
COSTANZO, Tony	Add
JONES, Chris	Add
POWER, Maree	Add
SAUNDERS, Tony	Add
UMPIRE, Christian	Add
UMPIRE, Jorge	Add
WHITE, Andrew	Add

Members of Division 1 Officials panel (Season 2021)

This panel has no members for the selected season.

[Delete Panel](#)

3. Continue adding officials to the Panel until you have your desired grouping

Modify Panel


All Registrations (Season 2021)

ADMIN, FSP	Add
BLACK, Ashyhh	Add
COSTANZO, Tony	Add
JONES, Chris	Add
POWER, Maree	Add
SAUNDERS, Tony	Add
UMPIRE, Christian	Add
UMPIRE, Jorge	Add
WHITE, Andrew	Add

Members of Division 1 Officials panel (Season 2021)

		Field Umpire	Boundary Umpire	Goal Umpire	Emergency Umpire
Remove	JONES, Chris	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Remove	UMPIRE, Christian	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Remove	UMPIRE, Jorge	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Remove	WHITE, Andrew	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

4. Use the **Official Type checkboxes** to qualify your officials under a specific discipline



Modify Panel

All Registrations (Season 2021)

ADMIN, FSP	<input type="button" value="Add"/>
BLACK, Ashyhh	<input type="button" value="Add"/>
COSTANZO, Tony	<input type="button" value="Add"/>
JONES, Chris	<input type="button" value="Add"/>
POWER, Maree	<input type="button" value="Add"/>
SAUNDERS, Tony	<input type="button" value="Add"/>
UMPIRE, Christian	<input type="button" value="Add"/>
UMPIRE, Jorge	<input type="button" value="Add"/>
WHITE, Andrew	<input type="button" value="Add"/>

Members of Division 1 Officials panel (Season 2021)

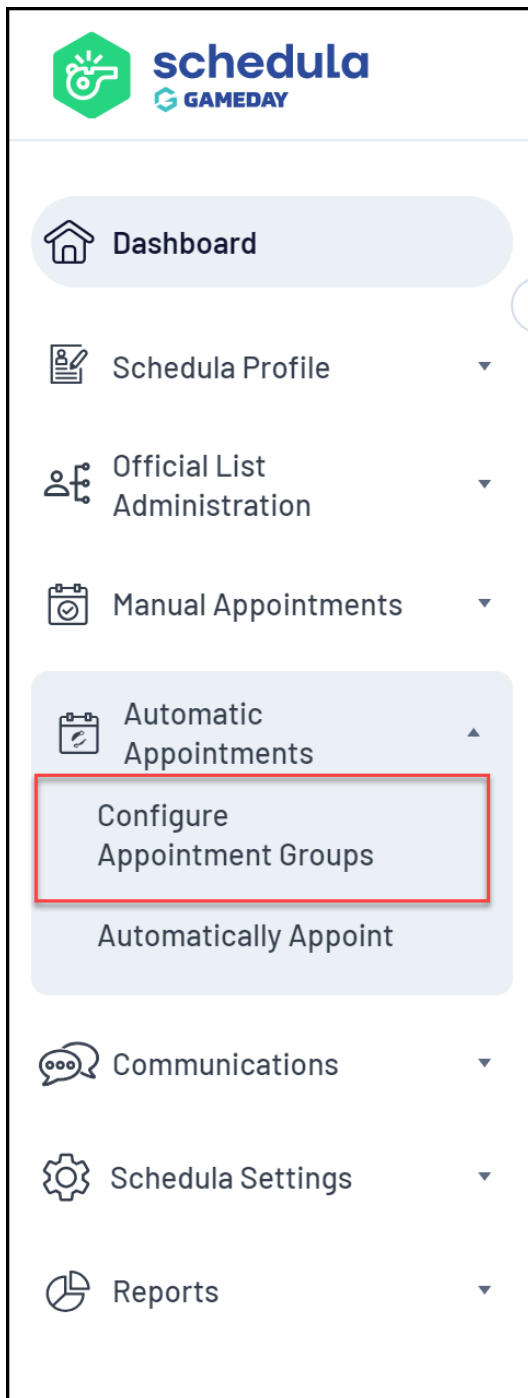
	Field Umpire	Boundary Umpire	Goal Umpire	Emergency Umpire
<input type="button" value="Remove"/> JONES, Chris	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="button" value="Remove"/> UMPIRE, Christian	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="button" value="Remove"/> UMPIRE, Jorge	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="button" value="Remove"/> WHITE, Andrew	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Configure an Appointment Group

An Appointment Group brings together competitions and panels for which you want to run an automatic appointment process. When building an appointment group, you can specify a list of competitions, associate and rank panels to each competition, and specify how many officials to appoint to each discipline.

To create a new appointment group:

1. From the left-hand menu, select **Automatic Appointments > CONFIGURE APPOINTMENT GROUPS**



2. Select the **Organisation** and **Season** for which you want to create your appointment group, then click **CREATE NEW GROUP**

Configure Appointment Groups ⓘ

Appointment Group Management

Organisation: SportsTG Schedules Support

Season: 2021

Appointment Group: DIV 1 Officials or **Create New Group**

Show Appointment Group

3. Enter a **Group Name**, then click **SAVE & CLOSE**

Appointment Group Management

Organisation: SportsTG Schedules Support

Season: 2021

Appointment Group: Saturday Seniors

Create New Appointment Group

Group Name: Saturday Seniors

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Save & Close Discard & Close

4. Now that you have an appointment group, you need to configure the group and assign some competitions and panels. On your Appointment Group list, click **SHOW APPOINTMENT GROUP**

Configure Appointment Groups ⓘ

Appointment Group Management

Organisation: SportsTG Schedules Support

Season: 2021

Appointment Group: Saturday Seniors or Create New Group

Show Appointment Group

In this section, you can apply the following configurations:

- **Allow Officials to be appointed below their selected panel** : This option allows you to

specify if you want to allow Officials within a particular competition to be appointed to lower ranked competitions, and how many levels below you will allow them to be appointed to.

- **Allow Officials to be appointed above their selected panel** : This option allows you to specify if you want to allow Officials within a particular competition to be appointed above to higher ranked competitions, and how many levels above you will allow them to be appointed to.
- **Enable Club Repeat Rule**: This option allows you to specify how many weeks you want to lapse between an official being appointed at a certain club, and when they are allowed to be appointed again. For example, you may not want to allow your officials to officiate at the same club multiple times within a 2-week period. In this case, you would enable this rule and enter 2 in the field.

Senior Group Appointment Group

Allow Referees to be appointed **below** their selected panel.
Maximum number of levels to appoint below:

Allow Referees to be appointed **above** their selected panel.
Maximum number of levels to appoint above:

Enable Club Repeat Rule
Number of weeks not to appoint to same club:

Save

Appointment Group Information
Total number of panel memberships: 4
Total number of unique umpires: 4
On average, 1 umpire is a member of 1 panels.

The **Appointment Group Information** section will update as you make changes to your Appointment Group. Within this section, you will be able to see how many Officials you have qualified for the various disciplines you require, how many Officials you require per discipline for a given week, and whether you have enough people available to fill appointments in the Appointment Group.

Senior Group Appointment Group

Allow Referees to be appointed **below** their selected panel.
Maximum number of levels to appoint below:

Allow Referees to be appointed **above** their selected panel.
Maximum number of levels to appoint above:

Enable Club Repeat Rule
Number of weeks not to appoint to same club:

Save

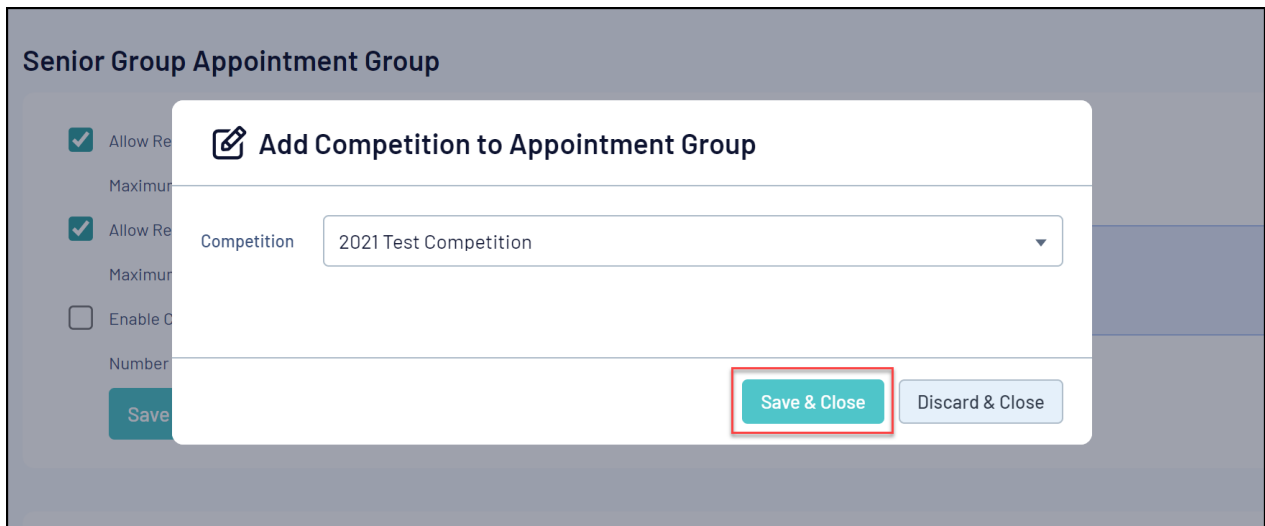
Appointment Group Information
Total number of panel memberships: 4
Total number of unique umpires: 4
On average, 1 umpire is a member of 1 panels.

5. To add a Competition to your Appointment Group, click the **ADD COMPETITIONS** button

Competitions **Add Competition**

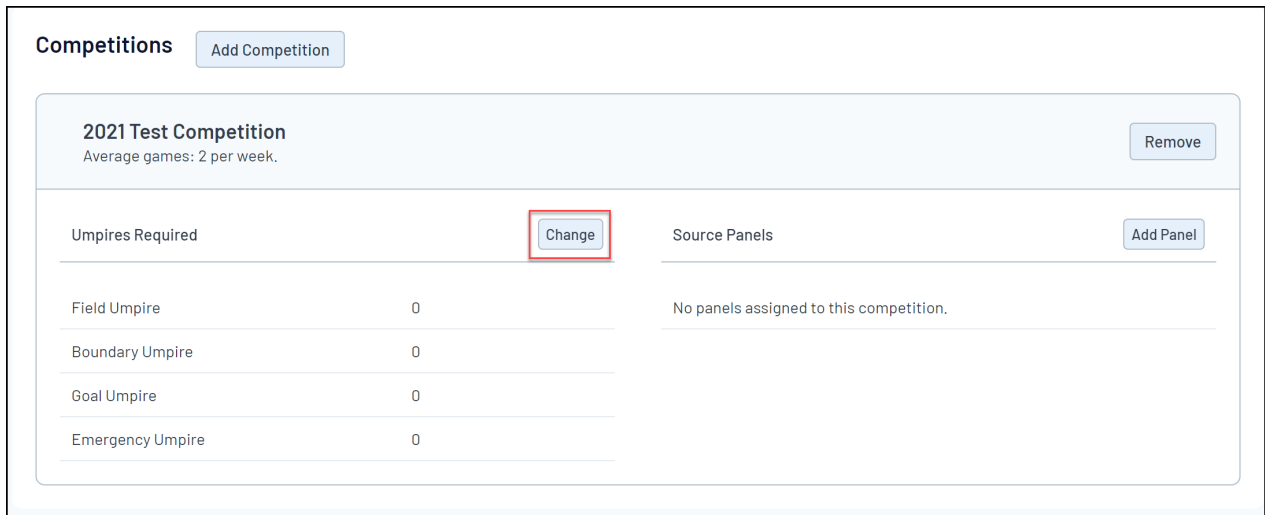
No competitions are assigned to this appointment group.

6. Select a **Competition**, then click **SAVE & CLOSE**

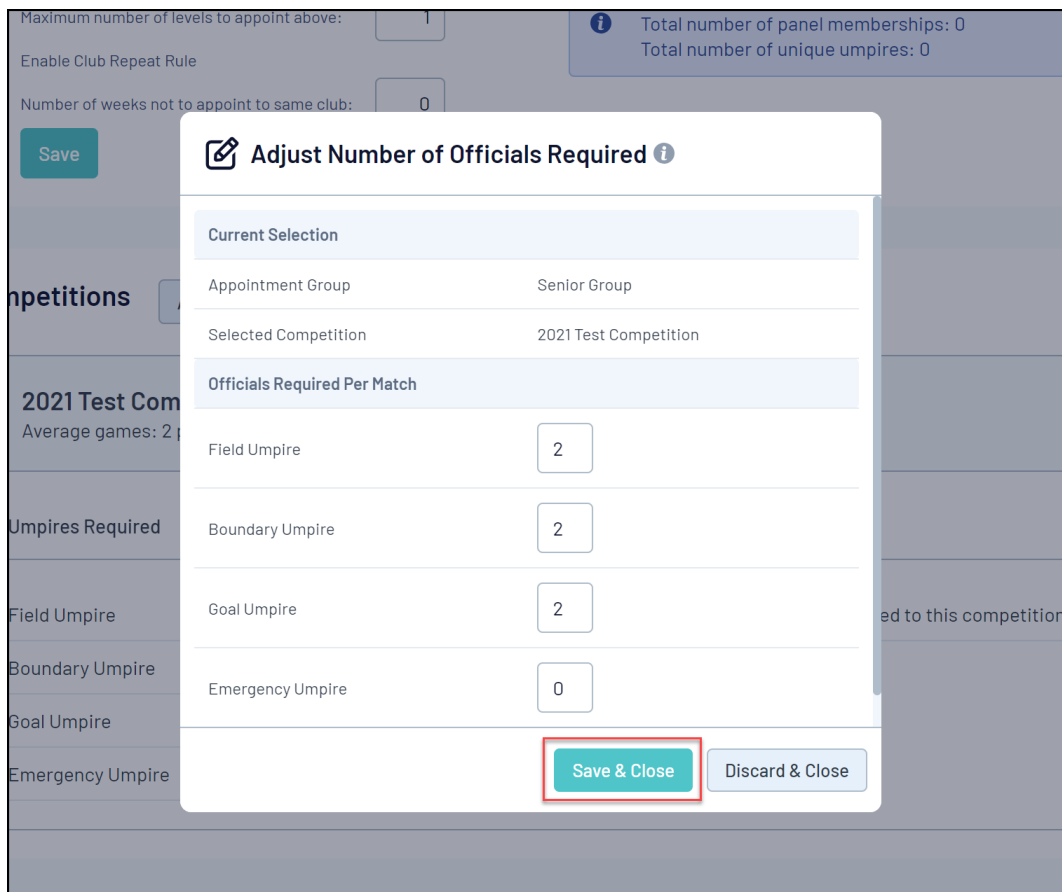


Keep repeating this process to list the competitions you want for this Appointment Group.

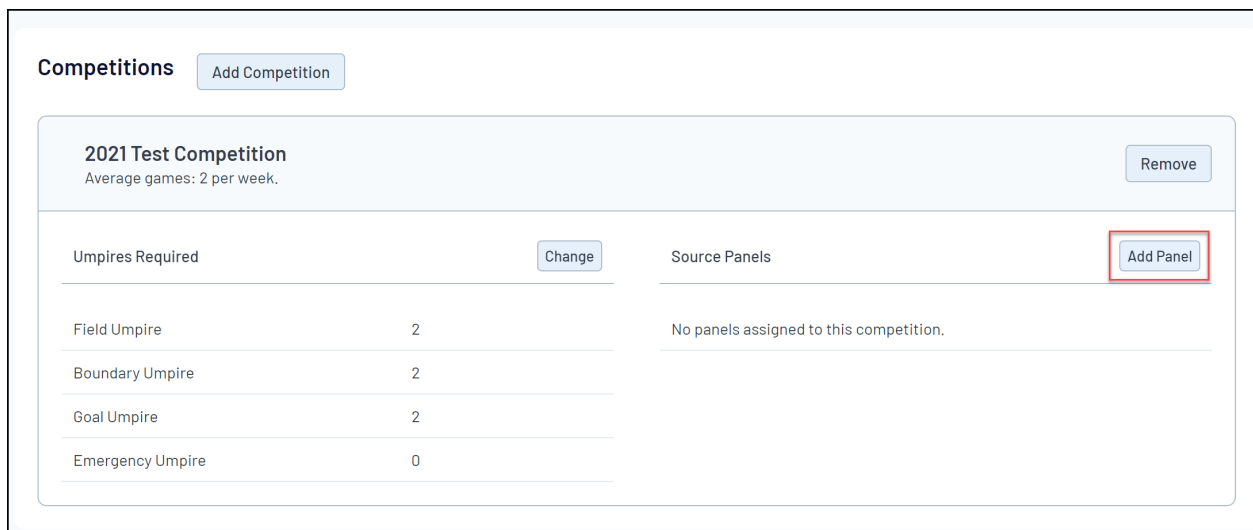
7. For each competition you add to an Appointment Group, define how many umpires are required by clicking the **CHANGE** button



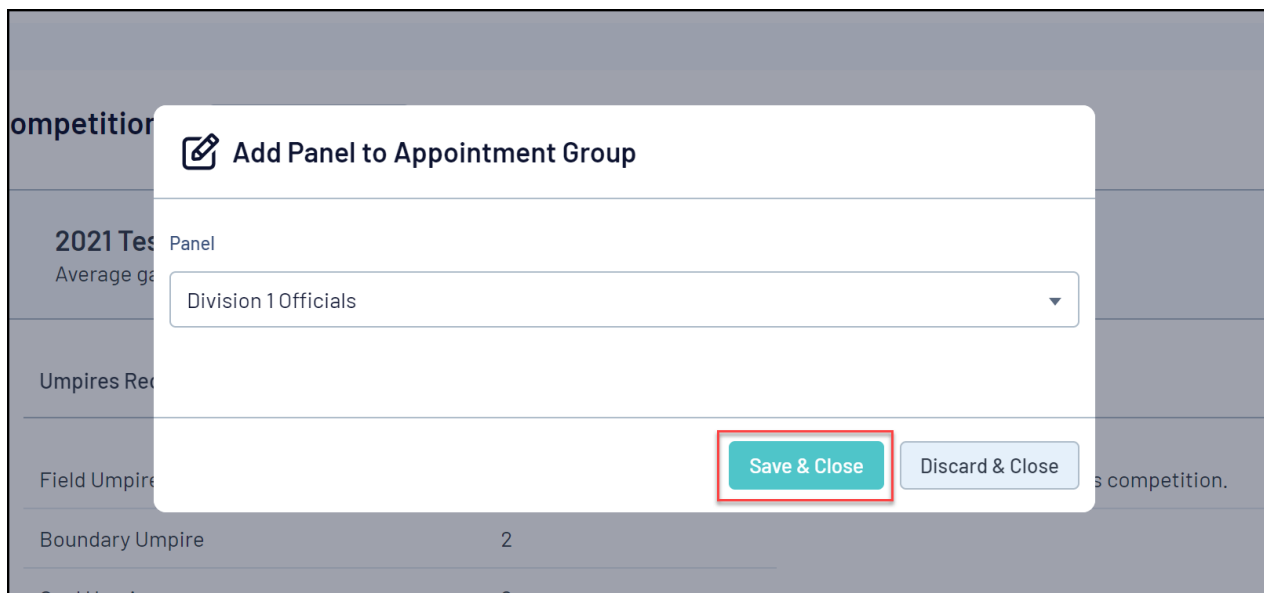
8. Enter the number of umpires required for each discipline, then click **SAVE & CLOSE**



9. Assign a Source Panel by selecting the **ADD PANEL** option



10. Select a **Panel**, then click **SAVE & CLOSE**



Managing Appointment Group Health

As you update these details, the Appointment Group Information dialog will update, advising you how many people you require within your Appointment Group.

For example, if you specify that you require 2 x Field Umpires, 2 x Boundary Umpires and 2 x Goal Umpires for a competition that has 2 games per week, then Schedules will determine that you require:

- (2 games x 2 Field Umpires) = 4 Field Umpires per week
- (2 games x 2 Boundary Umpires) = 4 Boundary Umpires per week; and
- (2 games x 2 Goal Umpires) = 4 Goal Umpires per week.

Notice as well how your Appointment Group Information section has now updated advising you how healthy your panel memberships are.

Senior Group Appointment Group

Allow Referees to be appointed **below** their selected panel.

Maximum number of levels to appoint below:

Allow Referees to be appointed **above** their selected panel.

Maximum number of levels to appoint above:

Enable Club Repeat Rule

Number of weeks not to appoint to same club:

Save

Appointment Group Information

Total number of panel memberships: 4

Total number of unique umpires: 4



Field Status

Unhealthy

Required: 4

Qualified: 1

On average, 1 umpire is a member of 1 panels.

Boundary Status

Unhealthy

Required: 4

Qualified: 1

Goal Status

Unhealthy

Required: 4

Qualified: 1

Competitions

Add Competition

2021 Test Competition

Average games: 2 per week.

Remove

Umpires Required

Change

Source Panels

Add Panel

Field Umpire 2

Boundary Umpire 2

Goal Umpire 2

Emergency Umpire 0

Panel Sort

Division 1 Officials 1

Remove

If your Appointment Group status is **Unhealthy**, you can either:

- Add more officials to your Source Panel; or
- Add more Source Panels to your Appointment Group

Notice that by adding a new Source Panel, our Field Umpires status is now **Healthy**

Senior Group Appointment Group

Allow Referees to be appointed **below** their selected panel.
Maximum number of levels to appoint below:

Allow Referees to be appointed **above** their selected panel.
Maximum number of levels to appoint above:

Enable Club Repeat Rule
Number of weeks not to appoint to same club:

Appointment Group Information

Total number of panel memberships: 8
Total number of unique umpires: 8
On average, 1 umpire is a member of 1 panels.

Field Status	Boundary Status	Goal Status
Healthy	Unhealthy	Unhealthy
Required: 4 Qualified: 6	Required: 4 Qualified: 2	Required: 4 Qualified: 2

Competitions

2021 Test Competition

Average games: 2 per week.

Umpires Required

Field Umpire	2
Boundary Umpire	2
Goal Umpire	2
Emergency Umpire	0

Source Panels

Panel	Sort	
Division 1 Officials	1	↓ <input type="button" value="Remove"/>
Field Umpires	2	↑ <input type="button" value="Remove"/>

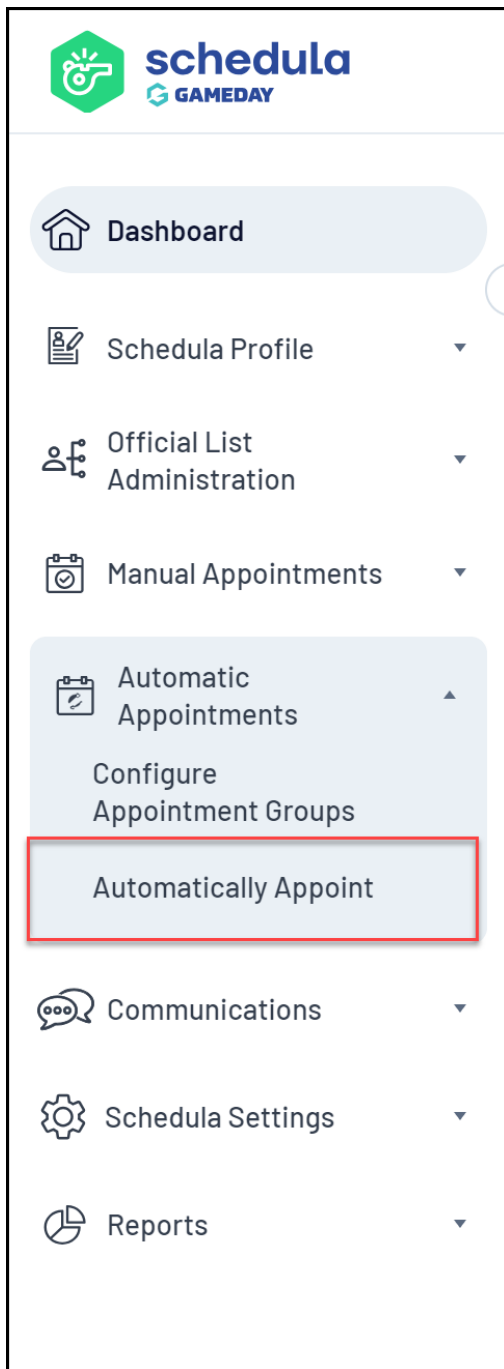
Trigger an Automatic Appointments Process

When you trigger an automatic appointment process, Schedula takes all of your competitions, panels, and settings into account and appoints officials based on your configuration and each official's availability.

Once you trigger an Automatic Appointments Process, you can continue to use Schedula as the engine performing the appointments is operating in the background.

To trigger an automatic appointment process:

1. From the left-hand menu, select **Automatic Appointments** > **AUTOMATICALLY APPOINT**



2. Select the **Organisation**, **Season**, and **Week**, and **Appointment Group** in which you want to perform an automatic appointment process, then click **BEGIN APPOINTMENT PROCESS**

Automatically Appoint Officials i

Automatic Appointments - Options

Organisation	<input type="text"/>
Season	<input type="text" value="2021"/>
Week	<input type="text" value="Week 1 (Feb 12 to Feb 18)"/>
Appointment Group	<input type="text" value="Seniors Division 1"/>

[Begin Appointment Process](#)

You will then receive an email from Schedula once the automatic appointment process is complete. In that email, you will see a link that will take you to a results page where you can view the appointments that Schedula has automatically made.
