



Infor
Workbrain

EMVS Implementation and System Administration Guide

Release 6.0

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About This Guide

The purpose of this guide is to provide you with questions and ideas about implementing your Infor Workbrain application, specifically for the new features in the Multi-View Scheduler module. The application is highly versatile and can be implemented in a number of ways. This guide is designed to help you sort through the options and setup the application to best suit your client's needs.

Intended Audience

This guide is intended for system implementers and system administrators. This guide assumes that you have sufficient knowledge of the EMVS enhancement features in the application.

Related Documents

You can find the other documents that are referred to in this document, in the product documentation section of the Infor Xtreme Support portal. See "Contacting Infor".

- Time and Attendance Implementation Guide
- Job Scheduler Implementation Guide
- Availability Management Implementation Guide
- Employee Transaction Manager Implementation Guide

Contacting Infor

If you have questions about Infor products, go to the Infor Xtreme Support portal at <http://www.infor.com/inforxtreme>.

If we update this document after the product release, we will post the new version on this Web site. We recommend that you check this Web site periodically for updated documentation.

Chapter 1 Scheduling Process Overview

1

Healthcare scheduling generally begins with long term labor planning, and eventually proceeds to the execution of the planned schedule from scheduling period to scheduling period. The new features in Infor Workbrain 6.0 support both the long term planning phase and the schedule execution phase. As various scheduling transactions take place, the system also tracks these transactions in the auditing functionality.

Long Term Schedule Planning

Healthcare professionals fall into three general scheduling categories: fixed scheduled, partially fixed scheduled, and flexibly scheduled. Typically full time staffs in the organization work a relatively static, fixed schedule. Some full timers and part timers work a partially fixed schedule (in which only a portion of their schedule repeats regularly and the rest of the schedule is much more varying over different scheduling periods).

The Master Rotation (MR) feature is the ideal schedule planning mechanism for full time staff in a healthcare organization. This feature supports the creation of long term shift patterns, along with pre-defined costing metrics for each pattern. These patterns are then assigned to the employees and become the employee's baseline work schedule upon publishing.

The One-Time Schedule (OTS) feature supports the schedule planning phase for healthcare staff who work a partially fixed schedule. Partially fixed schedules are setup with a schedule template. The schedule template is used to define the fixed part of the employees' schedule. The template is used to generate the actual schedule for each scheduling period. The scheduling period contains the fixed part of the employees' schedule and provides the platform for defining the remainder of the employee's non-fixed schedule. The schedule is then published for the scheduling period and becomes the employee's work schedule. The next schedule period is created by repeating this process.

Schedule Execution

Schedule execution follows the completion of long term schedule planning. Central staffing officers, line schedulers, supervisors, and managers execute the schedule by performing various scheduling transactions according to the day-to-day activities. These transactions include leave requests (also known as book-offs), shift swaps, and shift modifications.

As employees take leave for various reasons (sickness, vacation, etc.), their absences leave behind outstanding workload that needs to be covered. This workload is known as relief shifts, which are replacement shifts to backfill the workload left behind by employees' absences. Relief shifts can also be unplanned workload that is not fulfilled by the currently scheduled staff. The Relief Management

(RM) functionalities support the organization of these relief shifts, and the offering of these shifts to available employees. Relief shifts are then filled via Relief Management and as a result, schedule coverage is managed.

Auditing

In healthcare organizations with unions and collective bargaining units, employees are often guaranteed certain scheduling best practices. For example, senior staff members are given higher priority than less senior staff when relief shifts are offered. Because disagreements can arise with past scheduling decisions, it is crucial that the scheduling system keeps sufficient historical records. This audit log data helps both the employer and the employees to understand the reasons behind the past scheduling decisions, and ultimately to resolve these disagreements and avoid the filing of grievances to labor unions.

The application provides the Shift History feature for keeping historical records of all the transactions performed on employees' shifts once they are initially published. These auditing records include the date and timestamps of the transaction, the name of the user that performed the transaction, as well as the details of the transactions.

Chapter 2 Integration with Other Modules

2

The following sections highlight how other modules in the application integrate with EMVS.

Availability Management

Availability information defined using availability overrides is visible in the Relief Calling Area Employee Pool. You can filter the employees in the pool based on their availability to the relief shifts being offered. For more information about availability overrides, see the Availability Management Guide.

Employee Transaction Manager (ETM)

Employees can view published schedules in the ETM. For more information, see the Employee Transaction Manager Guide.

Balance and Accruals

When an employee's leave requests (book-off) have been applied and successfully processed, the corresponding absence is reflected in the EMVS in the following ways:

- The time code for an absence, such as VAC for vacation, is displayed in the shift cells of the Enhanced Schedule View and the Relief Calling Area Employee Pool section.
- Employees previously scheduled to a shift are no longer scheduled and do not contribute to coverage of the requirements.
- An employee's bi-weekly total hours on the Enhanced Schedule View exclude the absence if the corresponding time code is configured to exclude the absence.

For more information about the Balances and Accruals module, see the Balances and Accruals Guide.

Schedule Compliance

When the Schedule Compliance module is enabled, shifts created or edited using any of the EMVS functions are validated against the core and custom rules. For more information, see the Schedule Compliance Guide.

Timesheet

Published employee schedules are displayed on the timesheet as Schedule Detail and LTA overrides. For more information, see the Time and Attendance Implementation Guide.

Chapter 3 Basic Element Configuration

3

Certain data elements need to be configured in the system before you can start scheduling employees using the new features of the EMVS module. These data elements include:

- Time Codes
- Shifts
- Jobs
- Employee Default Labor Metrics
- Team
- Day Parts

The following sections describe each of the data elements in further detail.

Time Codes

Time codes classify the time an employee is scheduled to work. Each period of an employee's work time is represented by a time code. The time code identifies what the employee did for the time period. The time codes are usually determined as part of the initial requirements gathering or discovery sessions that are conducted before the application is installed.

Each shift that is published to the employees as part of the schedule contains a time code. Time codes used in EMVS scheduling are categorized into one of the three types (using ES Shift Type attribute):

- ON type – This includes time codes that indicate work or productive time. Typical ON type time codes include but are not limited to UAT and WRK.
- ON-TIME-OFF type – This includes time codes that indicate leave time. Typical ON-TIME-OFF type time codes include but are not limited to SICK and VAC.
- OFF type – Time codes of the OFF type are special leave time. When employees use these time codes to book time off, the shift is removed altogether from their timesheet (instead of keeping the shift on timesheet and applying an LTA override in addition). The shift is however still visible in the schedule execution screen (Enhanced Schedule View, the ESV) as a historical indicator of its previous existence.

Time Codes - Details [Create New Entry](#)

[Time Code Balance](#) [Time Code Data](#) [Time Code Reader Groups](#)

| | | | |
|-----------------------------|--------------------------|--------------------------|-------------------------------------|
| Del | <input type="checkbox"/> | | |
| Time Code * | WRK | Irregular Code | <input type="checkbox"/> |
| Description | Work - Regular | Default Rate | <input type="text"/> |
| Default Minutes | 0 | Time Code Summarize | <input checked="" type="checkbox"/> |
| Create on Days | All Days | Time Code ETM | <input type="checkbox"/> |
| Apply Only When Scheduled | <input type="checkbox"/> | Labour Metric Security * | STANDARD DATA Q |
| Color * | Silver Q | Is LTA | <input type="checkbox"/> |
| Hour Type * | REG Q | ES Shift Type | ON type Q |
| Unauthorize | <input type="checkbox"/> | Is Productive | <input checked="" type="checkbox"/> |
| Sort Order | 1 | Exclude from Total Hours | <input type="checkbox"/> |
| Include in Year at a Glance | <input type="checkbox"/> | Is BRK | <input type="checkbox"/> |
| Affects Balances | <input type="checkbox"/> | FTE Qualify | <input type="checkbox"/> |

[Save](#) [Return to form listing](#)

By default, the application uses TCODE_UDF10 to store the ES Shift Type attribute. The following configuration can be applied to TCODE_UDF10 field:

Field UI Configuration

| | |
|---------------------------------------|---|
| Delete | <input type="checkbox"/> |
| Wbf Id | |
| Field | TCODE_UDF10 |
| Required | Default |
| Default | <input type="text"/> |
| Field Type | <input type="button"/> |
| Field UI | ComboBoxUI <input type="button"/> Help |
| Field Parameters | <pre>labelList='OFF type, ON type, ON-Time Off type' valueList='0,1,2,' nullable='true'</pre> |
| Maintenance Form | |
| Localize the field UI using this form | |

Localize Field Captions

| Delete | Caption | Locale |
|--------------------------|----------------------|------------------------|
| <input type="checkbox"/> | ES Shift Type | ENGLISH |
| <input type="checkbox"/> | <input type="text"/> | <input type="button"/> |
| <input type="checkbox"/> | <input type="text"/> | <input type="button"/> |
| <input type="checkbox"/> | <input type="text"/> | <input type="button"/> |

Use this form to localize the field captions in different languages

Prev Next

If TCODE_UDF10 is already used for other purposes in client's implementation, other TCODE_UDF fields can be used. In this case, the registry parameter /system/modules/emvs/TIMECODE_SHIFT_TYPE_UDF needs to be updated to reflect the chosen UDF field.

In addition to the ES Shift Type, an additional attribute called "FTE Qualify" can be configured as a Boolean field type (e.g. CheckboxUI) for time codes that account for employees' total working hours in the Enhanced Schedule View. Typically, time codes such as WRK has FTE Qualify field checked to indicate productive time. Leave time codes usually are not indicated as FTE Qualify to signify non-productive time.

Any time codes that are to be used for breaks and meals must be indicated as IS BRK and ON-type. This will allow the system to properly process the shifts containing breaks in book-off and other transactions.

For instructions on how to configure the Time Codes, see the Time and Attendance Implementation Guide.

Shifts and Shift Labels

Shifts specify the start and end times of work periods and breaks for employees. Master Rotation, One-time Schedule, Relief Management, and other features of EMVS, establish employee schedules based on pre-configured shifts.

[Maintenance](#) > [Schedule Settings](#) > [Shifts](#) > [Details](#)

Shifts - Details [Create New Entry](#)

Shift Break

Shift Labels

| | | | |
|---|--------------------------|---|----------|
| Del | <input type="checkbox"/> | | |
| Shift * | DAY | Shift Group * | NO GROUP |
| Description * | Day Shift | Include in Year at a Glance <input checked="" type="checkbox"/> | |
| Start Time * | 9:00a | Color | Green |
| End Time * | 5:00p | | |
| Save Return to form listing | | | |

Shift Break

| | |
|---|----------------------|
| <input type="checkbox"/> | Find |
| Start * End * Duration * Time Code * Hour Type * Default Start (HH:MM) | |
| No Records Found | |
| Save + Return to form listing Top | |

Shift Labels

| <input type="checkbox"/> | Find | | | | | | | |
|---|----------------------|-------------|---------------------|---------|------------------------------|--------------------------|--------------------------|--------------------------|
| Del | Shift Label Name * | Description | Displayed Label * * | Shift * | Time Code * | In Charge | In Charge 2 | Stat Holiday |
| <input type="checkbox"/> | D9-17 | Day 9-17 | D9-17 | DAY | <input type="checkbox"/> WRK | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Save + Return to form listing Top | | | | | | | | |

Each shift used in the enhanced EMVS features, requires a shift label for the shift. A shift label is an additional naming reference to the shift and is limited in length. Typically the shift label name is up to 6 characters in length. This shorter shift label name allows more shifts to be displayed on a single screen by controlling the width of the shift cells. This 6-character limit on the length of Shift Label name can be modified in the field's default localization via Config Mode.

This shift label is unique in the system, and typically represents attributes of the shift. For example, a shift label called "9D8" can represent a day shift ("D") of 8 hours ("8"), starting at 9:00am ("9").

Once a shift label is created for a shift, the shift label must be associated to each of the teams that use the shift label. Each team that uses the shift label can have their own specific color which will be used for the font color in the Enhanced Schedule View shift cells. We recommend that you choose colors for the shift label that coordinate with the Shift Status colors, to avoid legibility issues (for example, blue font on blue shift cells).

The team-specific instance of the shift labels are then available for use in the team's master rotations, one-time schedules, and other features for scheduling employees.

For instructions on how to set up a shift and a shift label, see Appendix A and the Time and Attendance Implementation Guide.

Jobs

Shifts in EMVS are associated with a job. The job assures that the assigned employees are qualified to work the shifts. Jobs are associated to the teams for which the schedules are established. Employees to be scheduled using EMVS require the job qualifications for the shift.

For instructions on how to associate a job with a team and with employees, see the Time and Attendance Implementation Guide.

Labor Metrics

Shifts that are published to employees as their work schedule can have their costing metrics defined either as part of the long term schedule planning, or using the assigned employee's default labor allocation. This costing metric decision is made as part of the long term schedule assignment. The labor metrics used in EMVS are:

- Project
- Docket
- Department

For instructions on how to configure these labor metrics as well as employee default labor metrics, see the Time and Attendance Implementation Guide.

Day Parts

Day part sets must be defined for teams to be scheduled using the EMVS. A day part set is a non-overlapping group of day parts which span a 24-hour period. For example, a day part set of a unit in a healthcare environment can be morning, afternoon, and evening shifts.

Day parts are defined with a start and end time. The day parts must cover the entire 24-hour period and must NOT overlap with each other within the same set.

Once a day part set is defined, the set must be assigned to the teams that operate in those day parts using the Team maintenance form. You can also indicate if the day part set applies to sub-teams of a team.

For instructions on how to configure these labor metrics as well as employee default labor metrics, see the Multi-view Scheduler Implementation Guide.

Chapter 4 Configuring Master Rotations

4

The Master Rotation is a scheduling tool used by the Unit Manager & Scheduler in the schedule planning stage. The tool helps plan labor coverage for the expected labor demand (workload requirements) within a unit according to the rules of their specific collective bargaining agreement or healthcare organization. Schedules created as Master Rotations repeat until an operational need requires changes to the schedule. For example, a rotation with a length of 7 days repeats every week, and rotations with length of 21 days repeats every three weeks. Each rotation is anchored to a start date, on which the first rotation starts.

A team or unit can create multiple master rotations for planning the schedule of the unit. Each of the rotations can be a different length. The number of rotations to use is typically a business decision. If the staff members work on different repetition lengths, then multiple rotations can be used. If the staff members all work on the same duration of repetition length (for example, all the staff members work a 7-day schedule), then there is no need to use multiple rotations.

Some units may prefer to configure multiple master rotations even if the staff members all work the same duration of repetition. For example, the unit may wish to group the similar jobs into rotations, which results in multiple rotations for the multiple categories of jobs.

The repeating nature of master rotation schedules means that this scheduling mechanism is best suited for units with staff members working relatively static schedules.

The following sections describe the configuration of the Master Rotation.

Schedule Compliance Rules Selection in Master Rotation Plotting

During the planning stage of master rotations, you should perform schedule compliance validation on the shifts in the rotation. This validation helps you to identify any potential schedule-related issues such as overtime scenarios or violations with scheduling practices or rules. Corrections to the schedule can be made before the master rotations are deployed.

Since schedule compliance can be configured in multiple ways in the system, master rotation supports two configurations for schedule compliance validation.

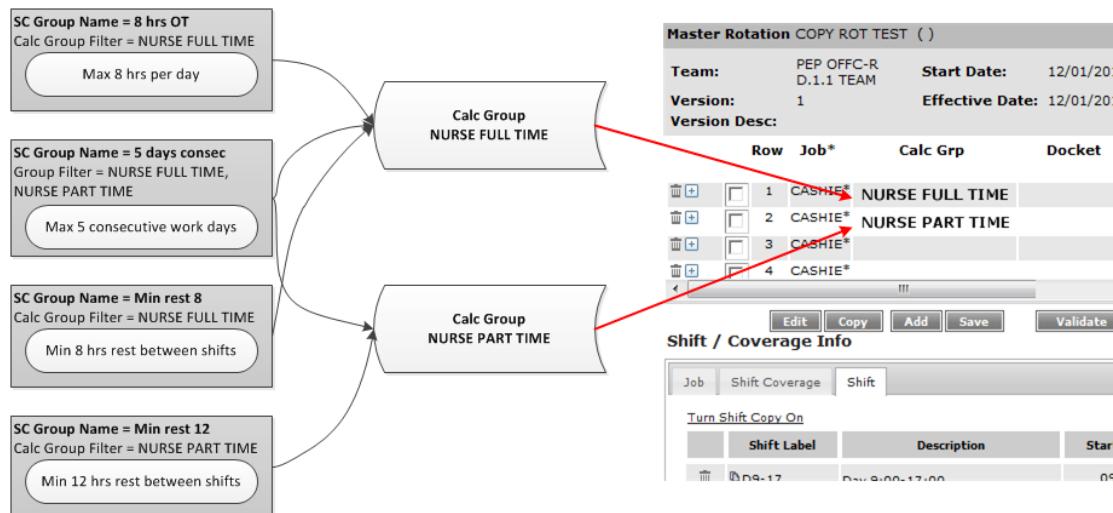
Master Rotation COPY ROT TEST ()

| Team: | PEP OFFC-R D.1.1 TEAM | Start Date: | 12/01/2012 | Length (days): | 7 |
|---------------|--------------------------|-----------------|------------|----------------|---------------------------------|
| Version: | 1 | Effective Date: | 12/01/2012 | End Date: | 01/01/3000 |
| Version Desc: | | No. Rows | | | |
| Row | Job* | Calc Grp | SC Group | Docket | Dept |
| | | | | | Week 1 Sat1 Sun2 Mon3 Tue4 Wed5 |
| 1 | CASHIE* | | | | D9-17 D9-17 D9-17 D9-17 D9-17 |
| 2 | CASHIE* | | | | D9-17 D9-17 D9-17 D9-17 D9-17 |
| 3 | CASHIE* | | | | D9-17 D9-17 D9-17 D9-17 D9-17 |
| 4 | CASHIE* | | | | D9-17 D9-17 D9-17 D9-17 D9-17 |

Shift / Coverage Info

| Job | Shift Coverage | Shift | | | | | |
|--------------------|----------------|------------|----------|-----------|-----------|------|--------------|
| Turn Shift Copy On | | | | | | | |
| Shift Label | Description | Start Time | End Time | Time Code | In Charge | INCR | Stat Holiday |
| D9-17 | Day 9:00-17:00 | 09:00 | 17:00 | WRK | N | N | N |

If your schedule compliance groups are configured such that one or more schedule compliance groups are applicable to employees in each calculation groups (that is, each schedule compliance group contains a calculation group filter), then the SC Group column in the Master Rotation Plotting screen should be set to “HiddenUI” via Config Mode. This setting will hide the SC Group column, and allow you to designate a calculation group to each of the rows in the master rotation. In this setup, the schedule compliance rules in each of the schedule compliance groups applicable for the selected calculation groups, will be validated against the rows.



Alternatively, if your schedule compliance groups are configured such that multiple compliance rules are in each schedule compliance group, and each group is associated to multiple employees via other filters, then the Calc Grp column in the Master Rotation Plotting screen should be set to “HiddenUI” via Config Mode. This setting will hide the Calc Grp column, and allow you to designate a Schedule Compliance group to each of the rows in the master rotation. In this setup, the schedule compliance rules in each of the schedule compliance groups will be validated against the rows.

SC Group Name = NRS FULL TIME
Emp Type Filter = FULL TIME

- Max 8 hrs per day
- Min 8 hrs rest between shifts
- Max 5 consecutive work days

SC Group Name = NRS PART TIME
Emp Type Filter = PART TIME

- Min 12 hrs rest between shifts
- Max 5 consecutive work days

Master Rotation COPY ROT TEST ()

Team: PEP OFFC-R D.1.1 TEAM **Start Date:** 12/01/2012 **Length:** 12/01/2012

Version: 1 **Effective Date:** 12/01/2012 **End Date:** 12/01/2012

Version Desc:

| Row | Job* | SC Group | Docket | Dept |
|-----|---------|---------------|--------|------|
| 1 | CASHIE* | NRS FULL TIME | | |
| 2 | CASHIE* | NRS PART TIME | | |
| 3 | CASHIE* | | | |
| 4 | CASHIE* | | | |

Shift / Coverage Info

Job **Shift Coverage** **Shift**

Turn Shift Copy On

| Shift Label | Description | Start Time |
|-------------|-------------|------------|
| | | |

Again, this setup is dependent on the configuration of your schedule compliance group. The configuration required in the Master Rotation Plot screen can be achieved in Config Mode.

Schedule Compliance Validation in Master Rotation Plotting

Schedule Compliance is enabled in Master Rotation by default. If you are not using schedule compliance, then disable the feature. Go to the registry parameter `/system/modules/emvs/MR_COMPLIANCE_ON`. Then change the parameter from “true” to “false”. This change disables schedule compliance validation in Master Rotation.

Automatic Save Reminder in Master Rotation Plotting

In larger units or healthcare environments, it is possible that some master rotation reaches sizes above hundreds of rotation rows. As you continue to design rotation shift patterns, save your changes to the rotation once every few minutes to prevent the loss of changes. The application provides an automated save reminder, which is displayed intermittently over a configurable time interval. This interval is configured via the registry parameter `/system/modules/emvs/SAVE_TIMEOUT` (in seconds). The default value of this parameter is set to 300 seconds or 5 minutes.

Master Rotation Assignment Date Range Limit

You can display very large date ranges in the Master Rotation Assignment screen. However, there is an upper limit to prevent you from running into performance issues or degradation in system responsiveness. This limit restricts you to display a maximum number of weeks in the Master Rotation Assignment screen. You can configure this limit via the registry parameter

/system/modules/emvs/MRA_MAX_SELECT_DAYS. The default value of this parameter is 35 days. Use caution when configuring larger numbers.

Chapter 5 Configuring One-Time Schedules

5

One-time Schedules are effective for each of the scheduling periods and are established only for the scheduling period. Users first establish a template of shift patterns, and the template is then used to generate the one-time schedules. One-time schedules are typically 4 to 6 weeks in duration, while some organizations might also use longer scheduling period. Each one-time schedule is established based on the shift patterns dictated in the template. Each template will only be used to generate one “set” of one-time schedules. Some units in the organization may have multiple templates, each established for different job or employee groups. Each of these templates will then be used to generate series of one-time schedules for each of these job or employee groups.

Due to the fact that one-time schedules are generated for each scheduling period, they are also published only for each scheduling period. This is one of the key differences between one-time schedules and master rotations, where master rotation schedules are published for a long time range and self-generates as time progresses.

Another key difference is that users have the flexibility of modifying the shifts on each one-time schedule, without affecting its originating template and other one-time schedules generated from this template. With this flexibility, one-time schedules are generally suited for units where employee schedules are more fluid. Whereas units with staff schedules that are comparatively static will benefit from using master rotations in their long-term schedule planning. This distinction should be kept in mind when selecting a long-term planning mechanism.

It is common for some units in an organization to use one-time schedule and other units to use master rotations. It is also possible that a single unit can use both master rotation and one-time schedule for their long-term schedule planning. While there is no systematic restriction, the decision on which schedule planning mechanism to use is purely based on scheduling practice of the employee groups or units.

The following sections describe the configurable details in the one-time schedule functionalities.

Automatic Save Reminder in Template and One-time Schedule

The same automated save reminder mechanism exists in the One-time Schedule Template screen and the One-time Schedule screen. Please see “Automatic Save Reminder in Master Rotation Plotting” section for details.

Limit on the Length of One-time Schedules

Each one-time schedule is created for the duration of a unit’s schedule period. Typical schedule periods are 4 to 6 weeks. An upper limit has been established in the system to prevent users from generating one-time schedules that are not compliant with the client’s scheduling practices. This

configurable limit is modifiable via the registry parameter /system/modules/emvs/OTS_NUMBER_OF_DAYS. The default value of this parameter is 84 days. Determine the typical schedule period lengths for the organization, and set this upper-limit accordingly.

Limit on the Days Displayed from Previous One-time Schedule

The One Time Schedule screen provides the user with visibility into employee schedules for the two weeks prior to each schedule period. This additional schedule information allows users to plan the schedule period with each employee's previous schedule in mind. By default, the one-time schedule displays 3 days of previous schedule information, and the user is able to scroll to the left to view the remainder of the two-week schedule information. The number of days visible by default is configurable via the registry parameter /system/modules/emvs/OTS_DFLT_SHIFT_GRID_PANEL. The default value of this parameter is set to 3 days.

| One Time Schedule | | | | | | Description: | | | Team: | | | | | | |
|-------------------|------------------------|----------|---------------------|------------|------------|--------------|------------|-----------|-----------|-----------|---------------------------|-----------|-----------|-----------|-----------|
| OTS Name: | ICUNURS SKD-10/15/2012 | | | # Rows: | 33 | Start Date: | 11/11/2012 | | | Status: | 70068793ICUNURS PUBLISHED | | | | |
| Row | Job | Pln. FTE | Employee | Start Date | End Date | P/T | Fri 10/12 | Sat 10/13 | Sun 10/14 | Mon 10/15 | Tue 10/16 | Wed 10/17 | Thu 10/18 | Fri 10/19 | Sat 10/20 |
| 1 | NRSMANA | 1.000 | Clyde, Thornton | 09/17/2012 | 01/01/3000 | | E1 | E1 | E1 | E1 | E1 | E1 | E1 | E1 | |
| 2 | NRSMANA | 1.000 | Timothy, Moss | 09/17/2012 | 01/01/3000 | | 15E8 | 15E8 | 15E8 | 15E8 | 15E8 | 15E8 | 15E8 | 15E8 | |
| 3 | NRSMANA | 1.000 | Smith, Harrison | 09/17/2012 | 01/01/3000 | | | | | 15E8 | 15E8 | 15E8 | 15E8 | 15E8 | |
| 4 | NRSMANA | 1.000 | Jones, Thomas | 09/17/2012 | 01/01/3000 | | | | 23N8 | 23N8 | 23N8 | 23N8 | 23N8 | 23N8 | |
| 5 | NRSMANA | 1.000 | Williams, Max | 09/17/2012 | 01/01/3000 | | E1 | E1 | E1 | | | | | | |
| 6 | NRSMANA | 1.000 | Brown, Benjamin | 09/17/2012 | 01/01/3000 | | 23N8 | 23N8 | 23N8 | E1 | E1 | E1 | E1 | E1 | |
| 7 | CNC | 1.000 | Curtis, Love | 09/17/2012 | 01/01/3000 | | E1 | E1 | E1 | | | | | | |
| 8 | CNC | 1.000 | Dana, McLean | 09/17/2012 | 01/01/3000 | | 15E8 | 15E8 | 15E8 | E1 | E1 | E1 | E1 | E1 | |
| 9 | CNC | 1.000 | Jennifer, Christian | 09/17/2012 | 01/01/3000 | | | | 15E8 | 15E8 | 15E8 | 15E8 | 15E8 | 15E8 | |
| 10 | CNC | 1.000 | Brett, Lamb | 09/17/2012 | 01/01/3000 | | | | 23N8 | 23N8 | 23N8 | 23N8 | 23N8 | 23N8 | |
| 11 | CNC | 1.000 | Brandon, James | 09/17/2012 | 01/01/3000 | | E1 | E1 | E1 | | | | | | |
| 12 | CNC | 1.000 | Keith, Chandler | 09/17/2012 | 01/01/3000 | | 23N8 | 23N8 | 23N8 | E1 | E1 | E1 | E1 | E1 | |

Chapter 6 Configuring Relief Management

6

The Relief Management module allows users to manage the relief shifts generated as a result of employee absences and unplanned workload requirements. The two main components in Relief Management are:

- The Relief Queue organizes the relief shifts into various statuses.
- The Relief Calling Area allows users to offer the outstanding relief shifts to employees in the relief pool.

The following sections describe the configurable details in the Relief Queue and the Relief Calling Area.

Relief Time Codes

For each of the leave type time codes to be used in EMVS, a corresponding relief time code must be configured. The relief time code is used in the relief shift and can be backfilled by employees. The relief time code also typically signifies the reason or the type of leave that caused the relief shift.

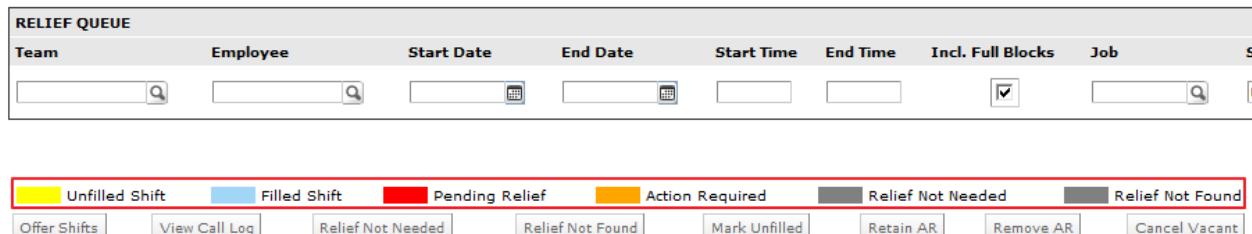
Relief time codes are ON-type time codes, whereas the time codes in the maintenance form are leave type time codes (that is ON-TIME-OFF-type and OFF-type).

| Relief Time Code | | |
|------------------|-----------|------------------|
| | Time Code | Relief Time Code |
| Edit | VAC | RVAC |
| Edit | SICK | RSCK |
| Edit | MTRNTY | RMAT |
| Edit | OFF | RWRK |
| Edit | SWPOFF | SWPWRK |
| Edit | RDO | RWRK |
| Edit | BTRN | RTRN |

For instructions on how to configure a relief time code, see Appendix A.

Color of Shift Statuses

In the Relief Queue and in the Enhanced Schedule View, shifts are color-coded to represent their statuses.

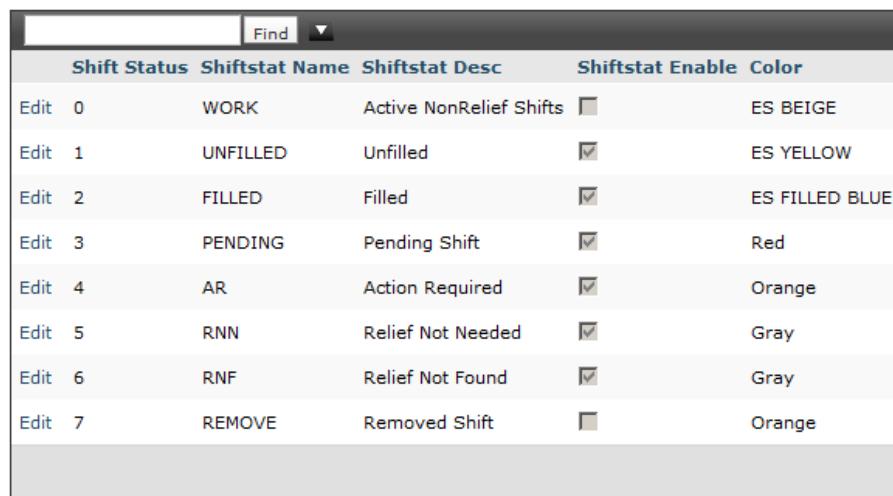


The screenshot shows the 'RELIEF QUEUE' selection panel. At the top, there are search fields for Team, Employee, Start Date, End Date, Start Time, End Time, Incl. Full Blocks, and Job. Below the search fields are buttons for 'Offer Shifts', 'View Call Log', 'Relief Not Needed', 'Relief Not Found', 'Mark Unfilled', 'Retain AR', 'Remove AR', and 'Cancel Vacant'. A legend at the bottom identifies the colors: Unfilled Shift (yellow), Filled Shift (light blue), Pending Relief (red), Action Required (orange), Relief Not Needed (gray), and Relief Not Found (dark gray).

The colors corresponding to each of the statuses are configurable, and can be modified to match client's operational needs. The configuration is done in the Scheduling > Multi-view Scheduler > Advanced Settings > ES Data Definition > Shift Status screen.

[Scheduling](#) > [Multi-view Scheduler](#) > [Advanced Settings](#) > [ES Data Definitions](#) > Shift Status

Shift Status [Create New Entry](#)



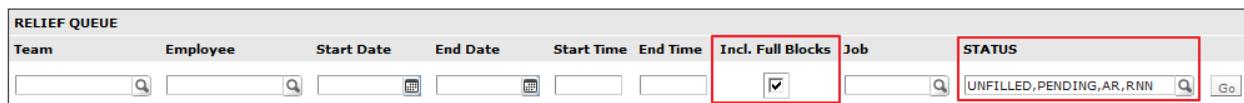
The screenshot shows a configuration table for Shift Status. The columns are Shift Status, Shiftstat Name, Shiftstat Desc, Shiftstat Enable, and Color. The rows are:

| Shift Status | Shiftstat Name | Shiftstat Desc | Shiftstat Enable | Color |
|--------------|----------------|-------------------------|-------------------------------------|----------------|
| Edit 0 | WORK | Active NonRelief Shifts | <input type="checkbox"/> | ES BEIGE |
| Edit 1 | UNFILLED | Unfilled | <input checked="" type="checkbox"/> | ES YELLOW |
| Edit 2 | FILLED | Filled | <input checked="" type="checkbox"/> | ES FILLED BLUE |
| Edit 3 | PENDING | Pending Shift | <input checked="" type="checkbox"/> | Red |
| Edit 4 | AR | Action Required | <input checked="" type="checkbox"/> | Orange |
| Edit 5 | RNN | Relief Not Needed | <input checked="" type="checkbox"/> | Gray |
| Edit 6 | RNF | Relief Not Found | <input checked="" type="checkbox"/> | Gray |
| Edit 7 | REMOVE | Removed Shift | <input type="checkbox"/> | Orange |

If there are colors that are not available in the system, add the colors to the system using the Maintenance > System Administration > Colors maintenance form.

Default Values in Relief Queue Selection Panel

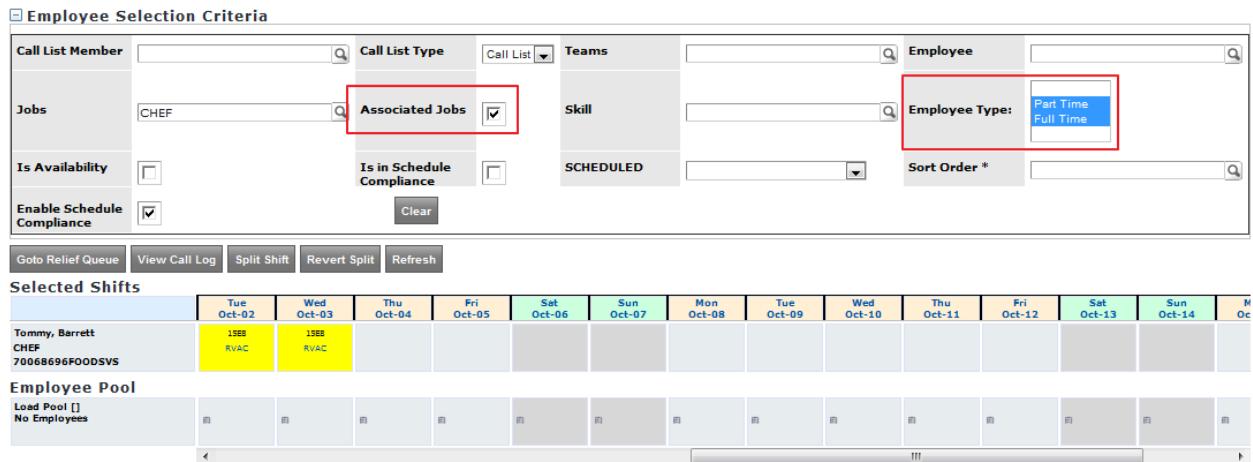
The “Incl. Full Blocks” field and “Status” fields in the Relief Queue selection panel can be modified with other default values and settings via Config Mode if required.



The screenshot shows the 'RELIEF QUEUE' selection panel. The 'Incl. Full Blocks' field is highlighted with a red box. The 'STATUS' field is also highlighted with a red box and contains the value 'UNFILLED,PENDING,AR,RNN'. There is a 'Go' button to the right of the status field.

Default Values in Relief Calling Area Selection & Filter Panel

Certain fields in the Relief Calling Area selection and filter panel have default values that make the relief shift calling process more efficient.



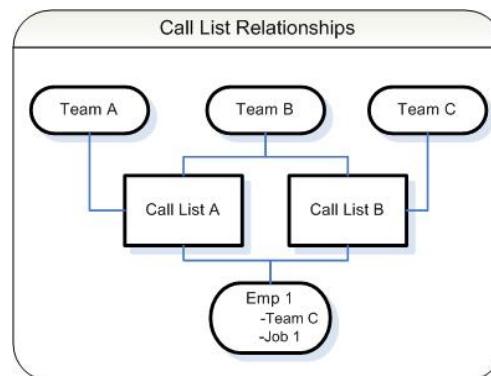
The screenshot shows the 'Employee Selection Criteria' and 'Selected Shifts' panels. In the 'Employee Selection Criteria' panel, the 'Associated Jobs' checkbox is checked and highlighted with a red box. In the 'Employee Type' dropdown, 'Part Time, Full Time' is selected and highlighted with a red box. The 'Selected Shifts' panel shows a weekly grid of shifts for an employee named 'Tommy, Barrett' in the 'CHEF' job. The shifts for Tuesday, October 02 and Wednesday, October 03 are highlighted in yellow, indicating they are selected. The 'Employee Pool' panel shows a list of employees, with 'No Employees' currently selected.

The default for the Associated Jobs field is “checked”. The default setting is configurable via the registry parameter /system/modules/emvs/RCA_DEFAULT_ASSOCJOBS.

The default for the Employee Type is both “Full Time” and “Part Time”. The default setting is configurable via the registry parameter /system/modules/emvs/RCA_DEFAULT_EMPSTATUS.

Call Lists

Employees to which relief shifts are to be offered in the Relief Calling Area can be retrieved by Teams, by Employees, or by Call Lists. Call Lists are used in the Relief Calling Area to determine the list of employees that will display in the Employee Pool. Call lists are associated with teams. There can be multiple call lists associated with a team and a team can be associated with multiple call lists. There is no limit to the number of call lists that any particular user can create.



The Call List form is listed under Scheduling > Multi-view Scheduler > Advanced Settings > ES Data Definitions > Call List Creation and Management > Call List. The list:

- Allows the user to edit and create call lists for teams to which they have access.
- Includes a section for team assignments.

- Includes a section for employee assignments.

| Del | Call List Name * | Description |
|--|------------------|----------------|
| <input type="checkbox"/> | TEST CALL LIST | Test Call List |
| <input type="button" value="Save"/> Return to form listing | | |

Team Assignment Section:

- Each team assignment has an effective start and end date.
- Scheduler can only see their teams in the lookup.

| Call List Team | | | | |
|---|--------|---------------------------------|--|--|
| Top | | | | |
| Find | Team * | Start Date * | End Date * | |
| Del | | | | |
| <input type="checkbox"/> | 000053 | <input type="button" value=""/> | 01/01/2010 <input type="button" value=""/> | 01/01/3000 <input type="button" value=""/> |
| <input type="checkbox"/> | 000614 | <input type="button" value=""/> | 09/01/2010 <input type="button" value=""/> | 01/01/3000 <input type="button" value=""/> |
| <input type="checkbox"/> | 000093 | <input type="button" value=""/> | 09/01/2010 <input type="button" value=""/> | 01/01/3000 <input type="button" value=""/> |
| <input type="checkbox"/> | 000515 | <input type="button" value=""/> | 09/01/2010 <input type="button" value=""/> | 01/01/3000 <input type="button" value=""/> |
| <input type="checkbox"/> | 000243 | <input type="button" value=""/> | 09/01/2010 <input type="button" value=""/> | 01/01/3000 <input type="button" value=""/> |
| <input type="button" value=""/> <input type="button" value=""/> <input type="button" value=""/> | | | | |

Employee Assignment Section (Available in the Call List and in the Employee Profile):

- Effective Start and End Date
 - Employees are assigned shifts for a call list within the start and end dates.
 - An employee on a call list with effective dates outside the range of the selected shifts in the relief calling area will not appear in the employee pool.
 - The employee appears in the employee pool if the selected shifts are within the employee effective dates. For example, Employee A is on a call list from 8/1/2010 – 8/7/2010. The Selected Shifts section include shifts from 8/1/2010 – 8/31/2010. The employee is displayed in the Employee Pool but a warning message appears for shift assignments after 8/7/2010.
- Job Code
 - The job code that the employee is allowed to work for the call list.
 - The available jobs are limited to the existing employee jobs.
 - An employee is allowed to work multiple jobs on a call list and typically can have up to 5 job codes.

| Call List Employee | | | | |
|--------------------------|------------|---------------------------------|--|---|
| Top | | | | |
| Find | Employee * | Job Code * | Start Date * | End Date * |
| Del | | | | |
| <input type="checkbox"/> | TEST_MS_01 | <input type="button" value=""/> | TEST_JOB <input type="button" value=""/> | 08/01/2010 <input type="button" value=""/> 01/01/3000 <input type="button" value=""/> |
| <input type="checkbox"/> | TEST_MS_01 | <input type="button" value=""/> | TEST_JOB <input type="button" value=""/> | 08/01/2010 <input type="button" value=""/> 01/01/3000 <input type="button" value=""/> |
| <input type="checkbox"/> | TEST_MS_01 | <input type="button" value=""/> | 01200 <input type="button" value=""/> | 08/01/2010 <input type="button" value=""/> 01/01/3000 <input type="button" value=""/> |

Rejection Reasons in Relief Calling Area

For each group of shifts rejected by an employee, a reason must be specified for the rejection. There are multiple mechanisms in the Relief Calling Area to reject offered shifts:

- Rejection quick link
- Availability rejection quick link
- Compliance rejection quick link
- Rejection in Employee Call Pop-up

Employee Selection Criteria

Goto Relief Queue | View Call Log | Split Shift | Revert Split | Refresh

Selected Shifts

| | Tue Sep-25 | Wed Sep-26 | Thu Sep-27 | Fri Sep-28 | Sat Sep-29 | Sun Sep-30 | Mon Oct-01 | Tue Oct-02 | Wed Oct-03 |
|---|------------|------------|------------|------------|------------|------------|------------|--------------|--------------|
| Tommy, Barrett CHEF 70068696FOODSVS | | | | | | | | 1SEB RVAC | 1SEB RVAC |

Employee Pool

| | E1 WRK | E1 WRK | E1 WRK | E1 WRK | E1 WRK | E1 WRK | E1 WRK | UK 1SEB WRK | UK 1SEB WRK | UK 1SEB WRK | UK 1SEB WRK |
|---------------------------------|--------|-----------|-----------|-----------|-------------|-----------|--------|-------------|--------------|--------------|-------------|
| Constance, Black [] QLD1243 | ■ | ■ | ■ | ■ | ■ | ■ | ■ | ■ | ■ | ■ | ■ |
| Gladys, Hatcher [] QLD1245 | ■ | ■ | ■ D12 WRK | ■ D12 WRK | ■ EA SWPWRK | ■ | ■ | ■ UK | ■ UK | ■ UK | ■ |
| Sarah, Fox [] QLD1244 | ■ | ■ INB WRK | ■ D12 WRK | ■ D12 WRK | ■ D12 WRK | ■ D12 WRK | ■ | ■ UK | ■ UK INB WRK | ■ UK INB WRK | ■ |

1-3

Compliance rejection quick link
Availability rejection quick link
Rejection quick link

The three rejection quick links in the employee pool header default to a rejection reason that is configurable under Scheduling > Multi-view Scheduler > Advanced Settings > ES Data Definitions > Reason:

Reason | Create New Entry

| Reason | | | | | | |
|-------------|------------------------------------|-------------------------------------|---|--|-------------------------------------|-------------------------------------|
| Reason Name | | Reason Desc | | Reason Sort Order Reason for Refuse QL Reason for SC QL Reason for Availability QL | | |
| Edit | 0 None | 0 None | 0 | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Edit | 1 Answering Machine | 1 Answering Machine | 1 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Edit | 2 Availability | 2 Availability | 2 | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| Edit | 3 Schedule Compliance Violation(s) | 3 Schedule Compliance Violation (s) | 3 | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Edit | 4 Employee Refused | 4 Employee Refused | 4 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

The default reasons configured for each of the quick links are:

| Quick Link | Reason |
|-----------------------------------|------------------|
| Rejection quick link | "0 None" |
| Availability rejection quick link | "2 Availability" |

| Quick Link | Reason |
|---------------------------------|--------------------------------------|
| Compliance rejection quick link | "3 Schedule Compliance Violation(s)" |

Additional reasons can be configured using this maintenance form. Only ONE of the reasons should be flagged for each of "Reason for Refuse QL", "Reason for SC QL", and "Reason for Availability QL".

In the Employee Call Pop-up, the same list of reasons configured in the Reason maintenance form is available. Users must specify a reason for each of the shifts being rejected.

Employee Relief Calling

| Employee | HOME PHONE | Today's Shift | Yesterday's Shift | Employee Comments |
|---|---------------------------------|---------------------|---------------------|-------------------|
| Constance , Black Jobs AIN - AIN2 [09/01/2012-01/01/3000] | MOBILE PHONE 70068793ICUNURS | 07:00-15:30 Team | 07:00-15:30 Team | 70068793ICUNURS |
| OTHER | | | | |

Shifts **Reassign**

Relief Block

| | | |
|---|---|---|
| <input checked="" type="checkbox"/> Tommy, Barrett | <input type="radio"/> Accept RNN RNF Reject | <input type="radio"/> 0 None |
| <input checked="" type="checkbox"/> Tommy, Barrett | <input type="radio"/> Accept RNN RNF Reject | <input type="radio"/> 0 None |
| <input checked="" type="checkbox"/> 10/02/2012 15:00 23:30 15E8 70068696FOODSVS | <input type="radio"/> Accept RNN RNF Reject | <input type="radio"/> 0 None |
| <input checked="" type="checkbox"/> 10/03/2012 15:00 23:30 15E8 70068696FOODSVS | <input type="radio"/> Accept RNN RNF Reject | <input checked="" type="radio"/> 0 None |
| | | 1 Answering Machine 2 Availability 3 Schedule Compliance Violation(s) 4 Employee Refused |

Reason for Reject

Submit **Save & Continue** **Close**

Number of Reassign Days in Employee Call Pop-up

The Reassign tab in the Employee Call Pop-up provides users with visibility into the employee's schedule around the days of the relief shifts being offered. Users can potentially give up one or more of their existing shifts in order to accept the relief shifts being offered. This can be done for prevention of overtime or other schedule exceptions.

Employee Selection Criteria

Selected Shifts

| | Tue Sep-25 | Wed Sep-26 | Thu Sep-27 | Fri Sep-28 | Sat Sep-29 | Sun Sep-30 | Mon Oct-01 | Tue Oct-02 | Wed Oct-03 | Thu Oct-04 | Fri Oct-05 | Sat Oct-06 | Sun Oct-07 | Mon Oct-08 | Tue Oct-09 |
|---|------------|------------|------------|------------|------------|------------|------------|--------------|--------------|------------|------------|------------|------------|------------|------------|
| Tommy, Barrett CHEF 70068696FOODSVS | | | | | | | | 15E8 RVAC | 15E8 RVAC | | | | | | |

Employee Pool

| | | | | | | | | | | | | | | | |
|--|--------------|-----------|-----------|-----------|-----------|-----------|-----------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|
| Constance, Black [1] QLD1243 Gads: Hatcher [1] | 15E8* WRK | E1 WRK | E1 WRK | E1 WRK | E1 WRK | E1 WRK | E1 WRK | 15E8 WRK |
| | 012 | 012 | 012 | 012 | 012 | 012 | 012 | 012 | 012 | 012 | 012 | 012 | 012 | 012 | 012 |

Employee Relief Calling

| Employee | HOME PHONE | Today's Shift | Yesterday's Shift | Employee Comments |
|---|--------------|---------------------|---------------------|------------------------------------|
| Constance , Black Jobs AIN - AIN2 [09/01/2012-01/01/3000] | MOBILE PHONE | 07:00-15:30 Team | 07:00-15:30 Team | 70068793ICUNURS 70068793ICUNURS |
| OTHER | | | | |

Shifts Reassign

| Date | Start | End | Shift Label | Team | Master Time Code | Send to RQ | RNN | RNF | Keep |
|------------|-------|-------|-------------|-----------------|------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| 09/27/2012 | 07:00 | 15:30 | E1 | 70068793ICUNURS | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 09/28/2012 | 07:00 | 15:30 | E1 | 70068793ICUNURS | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 10/01/2012 | 15:00 | 23:30 | 15E8 | 70068793ICUNURS | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 10/02/2012 | 15:00 | 23:30 | 15E8 | 70068793ICUNURS | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 10/03/2012 | 15:00 | 23:30 | 15E8 | 70068793ICUNURS | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 10/04/2012 | 15:00 | 23:30 | 15E8 | 70068793ICUNURS | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 10/05/2012 | 15:00 | 23:30 | 15E8 | 70068793ICUNURS | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 10/08/2012 | 15:00 | 23:30 | 15E8 | 70068793ICUNURS | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Submit Save & Continue Close

By default, the Reassign tab displays the employee's shift 5 days before the first day in the relief shifts being offered, and 5 days after the last day in the relief shifts being offered. This 5-day parameter is configurable via the registry parameter `/system/modules/emvs/RCA_REASSIGN_NUM_OF_DAYS` (default value = 5).

Display of Skills in Relief Calling Area

Employee skills are displayed in the employee header of the employee pool in the Relief Calling Area. Names of the skills associated to the employees are displayed after the employee number (EMP_NAME field).

The color of text used to display employee skills in the header can be configured via the registry parameter `/system/modules/emvs/EMP_SKILLS_DISPLAY_COLOR` (default value is ES BLUE).

In case that the employee header cannot accommodate the entire list of skills for the employee, the skills will be truncated and display "..." at the end to indicate the truncation. Truncation is only applied after the default 25 character limit is exceeded. The 25 character limit is configurable via the registry parameter `/system/modules/emvs/EMP_SKILLS_SINGLE_LINE_LIMIT` (default value is 25). The setting of this registry parameter should take into account the typical length of employee numbers in the client's implementation.

The screenshot shows the 'Employee Selection Criteria' interface. At the top, there are buttons for 'Goto Relief Queue', 'View Call Log', 'Split Shift', 'Revert Split', and 'Refresh'. Below this is a section titled 'Selected Shifts' with a table for 'Tue Sep-25', 'Wed Sep-26', 'Thu Sep-27', and 'Fri Sep-2'. A row for 'Tommy, Barrett' is shown. Below this is the 'Employee Pool' section, which is a grid of employees. The grid columns are labeled 'Tue Sep-25', 'Wed Sep-26', 'Thu Sep-27', and 'Fri Sep-2'. Each row contains an employee's name, skill icons, and shift status. A tooltip for 'Sarah, Fox' shows the text 'AIN - AIN2 [09/01/2012-01/01/3000]'.

Hovering over the employee header will also display the list of skills acquired by the employee. Two rows of text is available, each 46 characters in length, to list the skills. The first of the two rows contains "Skills: " which uses 8 characters. This means 38 characters are available for displaying skill names in the first two rows. This 46-character length is configurable via the registry parameter /system/modules/emvs/EMP_SKILLS_MULTI_LINE_LIMIT, as a comma-separated-value of two numbers. The default value is set to "46,46".

Performance-related Configurations in Relief Calling Area

RCA_SELECTED_SHIFT_MAXIMUM_ROWS (4)

RCA_NUMOF_RECORDS_PERPAGE (75)

Priority in Shift Statuses and Shift Types

In the Relief Queue and the Relief Calling Area, there can be situations where multiple shifts on a single day belong to the same relief block. However, the multiple shifts on that day will still be displayed in a single shift cell on the screen. The shift displayed in the cell is determined by a priority sequence based on the shift status hierarchy. This hierarchy is configurable via the registry parameter /system/modules/emvs/SHIFT_STATUS_PRIORITY. The value of this registry parameter is a comma-separated list of numerical values, representing the list of shift status from the highest to lowest priority. The default value is "1,3,4,2,5,6,7".

For reference, these numbers are the database primary key IDs in the ES_SHIFT_STATUS table:

| SHIFTSTAT_ID | SHIFTSTAT_NAME |
|--------------|----------------|
| 0 | WORK |

| SHIFTSTAT_ID | SHIFTSTAT_NAME |
|--------------|----------------|
| 1 | UNFILLED |
| 2 | FILLED |
| 3 | PENDING |
| 4 | AR |
| 5 | RNN |
| 6 | RNF |
| 7 | REMOVE |

In the employee pool section of the relief calling area, where pool employee schedule information is displayed, there can be incidents where pool employees might be scheduled with multiple shifts in a single day. When multiple shifts are scheduled on a single day, the employee pool will display the information of the shift having the highest shift type priority, as per dictated by the registry parameter /system/modules/emvs/SHIFT_TYPE_PRIORITY. The following table lists the numerical value of the three shift types:

| Shift Type ID | Shift Type |
|---------------|-------------|
| 0 | OFF |
| 1 | ON |
| 2 | ON-TIME-OFF |

The default value of this registry parameter is “1,2,0”, which means that ON-type shift is displayed first, then ON-TIME-OFF type shifts, and finally OFF-type shifts.

Schedule Compliance Validation in Relief Management

Similar to Master Rotations, schedule compliance validation is enabled by default in the system. If client is not using schedule compliance and would like to disable the feature, the registry parameter /system/modules/emvs/RM_COMPLIANCE_ON can be modified from “true” to “false”. This will disable schedule compliance validation in Relief Management.

For instructions on configuring schedule compliance, see the Schedule Compliance Implementation Guide.

Chapter 7 Configuring the Enhanced Schedule View

7

The Enhanced Schedule View helps users execute their schedules. Users can choose to view employee schedules from various teams for different date ranges, and perform various actions on the shifts for the required scheduling transactions. The following sections describe the configurable features in the Enhanced Schedule View.

Color of Shift Statuses

The color-coding of shift statuses in the Enhanced Schedule View uses the same configuration as relief management. See “Color of Shift Statuses” section in Chapter 6.

Time Codes used in Shift Swaps

Shifts that have been swapped in the Enhanced Schedule View are displayed similarly to shifts that have been booked-off and backfilled. It is not required, but is beneficial to designate or create special time codes to indicate shifts that have been “swapped away” and “swapped in”. For example, a time code called “SWPOFF” can be established for the swapped away shift, and “SWPWRK” can be established for the shift received from a shift swap. These two time codes are configured via the registry parameters `/system/modules/emvs/SWAP_BOOKOFF_CODE` (used for the swapped away time code) and `/system/modules/emvs/SWAP_WORK_CODE` (used for the swapped in time code).

It should be noted that the `SWAP_BOOKOFF_CODE` should be configured using an OFF-type time code, and the `SWAP_WORK_CODE` should be configured using an ON-type time code. Even if no special swap-specific time codes are established, these two registry parameters should still be configured with a pair of OFF- and ON-type time codes.

Limit on Number of Days Selected

The user is able to display any date range to view employee schedule in the Enhanced Schedule View. However, an upper limit is established in the system to avoid performance issues or degradation in system responsiveness. This configurable limit restricts users to view a maximum number of weeks in the Enhanced Schedule View. It is configurable via the registry parameter `/system/modules/emvs/ESV_MAX_SELECT_DAYS`. The default value of this parameter is 70 days. While configurable to larger numbers, modifications to this parameter should be within a reasonable range.

Note: For this 10-week default period, always start from one week prior to the current date, to 9 weeks into the future from current date.

Limit on Number of Teams Selected

The amount of schedule information can be large for units that are larger in size, and thus there is an established limit to the number of teams that can be selected in the Enhanced Schedule View. This limit prevents performance issues or system responsiveness degradation. The limit to the number of teams selectable is configurable via the registry parameter `/system/modules/emvs/ESV_MAX_TEAM_SELECTION` (default value is 40). While configurable to larger numbers, modifications to this parameter should be within a reasonable range.

Display of Skills in Enhanced Schedule View

The display of employee skills in the Enhanced Schedule View uses the same configuration as relief management. See the Display of Skills in Relief Calling Area section in Chapter 6.

Chapter 8 Configuring the Enhanced Schedule View

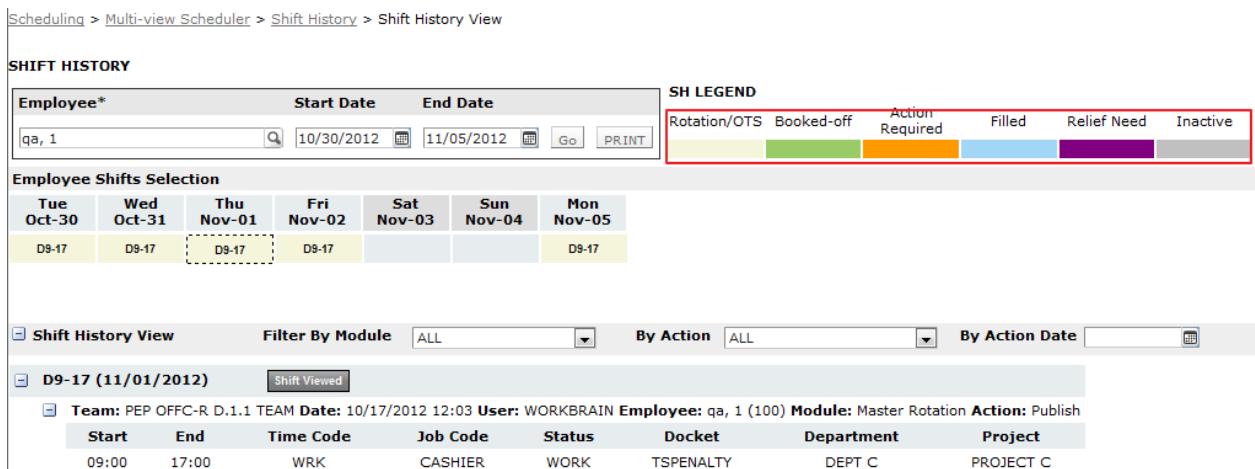
8

The Shift History feature allows users to investigate historic transactions that occurred on employees' schedules. Transactional history of a shift can be launched either from the Shift History form or from a shortcut link from a shift in the Enhanced Schedule View. Typically Shift History is used when schedulers or managers require the detail history of what has happened to a certain shift for an employee. This information is particularly useful in grievance filings and setting labor disputes.

The following sections describe the configurable features in the Shift History feature.

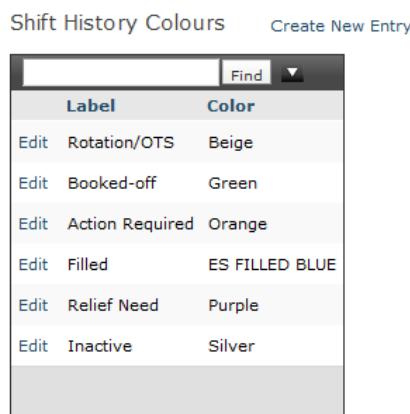
Color-coding in Shift History Legend

Shift cells in the Shift History screen are color-coded to represent their status.



The screenshot shows the Shift History View screen. At the top, there is a navigation path: Scheduling > Multi-view Scheduler > Shift History > Shift History View. Below this is a 'SHIFT HISTORY' section with a table for 'Employee*'. The table has columns for 'Employee*', 'Start Date', and 'End Date'. The 'Employee*' row contains 'qa, 1' and the dates '10/30/2012' and '11/05/2012'. To the right of the table is a 'SH LEGEND' table with six rows: 'Rotation/OTS' (Beige), 'Booked-off' (Green), 'Action Required' (Orange), 'Filled' (Light Blue), 'Relief Need' (Purple), and 'Inactive' (Grey). Below the legend is a 'Employee Shifts Selection' table for the week of Oct 30 to Nov 05. The 'D9-17' shift on Nov 01 is highlighted with a dashed border. At the bottom of the screen are various filters and a detailed view of the selected shift (D9-17 on 11/01/2012).

The colors and their corresponding statuses are displayed in the legend, and are configurable via the maintenance form Scheduling > Multi-view Scheduler > Shift History > Shift History Color.



The screenshot shows the 'Shift History Colours' maintenance form. At the top, there are buttons for 'Shift History Colours' and 'Create New Entry'. Below is a table with columns 'Label' and 'Color'. The table contains six entries: 'Edit Rotation/OTS' (Beige), 'Edit Booked-off' (Green), 'Edit Action Required' (Orange), 'Edit Filled' (ES FILLED BLUE), 'Edit Relief Need' (Purple), and 'Edit Inactive' (Silver). A 'Find' button is located at the top of the table.

If additional colors are required and are not already available in the system, add the new colors via the Maintenance > System Administration > Colors maintenance form.

Shift Details displayed in Shift History

The user can expand the shifts and view the details of the shifts in the Shift History screen. The list of shift detail columns to display is configurable via the registry parameter /system/modules/emvs/SH_DISPLAY_ES_SHIFT_DETAIL_LIST. The default value of this registry parameter is "SHIFTDTL_START_TIME,SHIFTDTL_END_TIME,TCODE_ID,JOB_ID,SHIFTSTAT_ID,DOCK_ID,DEPT_ID,PROJ_ID". It can be expanded to include various flags (SHIFTDTL_FLAGn) and UDF fields (SHIFTDTL_UDFn) on the shift details.

The screenshot shows the Shift History View interface. At the top, there is a navigation bar: Scheduling > Multi-view Scheduler > Shift History > Shift History View. Below the navigation is a 'SHIFT HISTORY' section with a search bar for 'Employee*' (qa, 1) and date fields for 'Start Date' (10/30/2012) and 'End Date' (11/05/2012). To the right is a 'SH LEGEND' with color-coded categories: Rotation/OTS (light yellow), Booked-off (light green), Action Required (orange), Filled (light blue), Relief Need (light blue), and Inactive (dark purple). Below the legend is a 'Employee Shifts Selection' grid for the week of Oct 30 to Nov 05. The grid shows shifts for employee qa, 1, with specific shift details like 'D9-17' highlighted. At the bottom of the screen, there are filter options: 'Shift History View', 'Filter By Module' (set to 'ALL'), 'By Action' (set to 'ALL'), 'By Action Date' (empty), and a 'Shift Viewed' button. A detailed view for 'D9-17 (11/01/2012)' is expanded, showing shift details for 'Team: PEP OFFC-R D.1.1 TEAM Date: 10/17/2012 12:03 User: WORKBRAIN Employee: qa, 1 (100) Module: Master Rotation Action: Publish'. The shift details table includes columns: Start (09:00), End (17:00), Time Code (WRK), Job Code (CASHIER), Status (WORK), Docket (TSPENALTY), Department (DEPT C), and Project (PROJECT C).

Limit on Number of Days Selected

The user is able to display any date range to view employee schedule in the Shift History screen. However, an upper limit is established in the system to prevent users from running into performance issues or degradation in system response. This configurable limit restricts users to viewing a maximum number of weeks in the Shift History screen. The limit is configurable via the registry parameter /system/modules/emvs/SH_MAX_DAYS_FOR_DATE_RANGE. The default value of this parameter is 63 days. Be cautious when modifying this parameter. Use a reasonable date range because shift history also retrieves information regarding an employee's past schedules.

Chapter 9 Configuring the Enhanced Schedule View

9

There are several job scheduler tasks that support the operation of multi-view scheduler features. The following sections describe the job scheduler tasks required.

Configuring Publish Tasks

As per discussed before and in the User Guide, rotation schedules are applied to employees via the Publish Tasks. Three publish tasks are configured in the system to handle the short term, long term, and daily publishing of rotational schedules. The three tasks and their typical publishing periods are as follows:

| Task | Start of Publish Period | End of Publish Period | Task Frequency |
|------------|-------------------------|--|-----------------|
| Short Term | Current Date | Current Date + 55 days (8 weeks into future) | Every X minutes |
| Long Term | Current Date + 56 days | Current Date + 365 days | Every X minutes |
| Daily | Current Date + 366 days | 1 day | Once a day |

All three of these publish tasks are configured as the EMVS Publish Rotation Task, with different execution frequencies:

Task

| | |
|------------------|--|
| Task Description | EMVS Short Term Publish Task |
| Task Type | <input checked="" type="radio"/> Java Task <input type="radio"/> Shell script |
| | EMVS Publish Rotation Task <input type="button" value="▼"/> |
| | <input type="checkbox"/> Runs in a dedicated process |
| Task Affinity | Default <input type="button" value="▼"/> |
| Task Security | <input type="button" value="Set"/> |

The parameters of each one of the three tasks are also different.

Publish Rotation Task

| | |
|-----------------------|--|
| Publish Mode | Short Term Publish <input type="button" value="▼"/> |
| Publish From | Current Pay Period Start Date <input type="button" value="▼"/> |
| Offset | 0 <input type="text"/> |
| Offset Unit | Day(s) <input type="button" value="▼"/> |
| Value | 55 <input type="text"/> |
| Unit | Day(s) <input type="button" value="▼"/> |
| Success Status | Short Term Published <input type="button" value="▼"/> |
| Failure Status | Error Publishing <input type="button" value="▼"/> |
| Send Notification | <input checked="" type="checkbox"/> |
| Thread Count | 1 <input type="text"/> |
| Batch Size | 30 <input type="text"/> |
| TASK NUMBER | 0 <input type="text"/> |
| TOTAL NUMBER | 1 <input type="text"/> |
| CHUNK SIZE | 56 <input type="text"/> |
| Client Name | DEFAULT <input type="button" value="🔍"/> |
| Backup User to Notify | <input type="text"/> <input type="button" value="🔍"/> |

The Offset and Publish Value are used respective of the current date.

The following table summarizes the configuration details to achieve the above publishing periods:

| Parameter | Short Term Task | Long Term Task | Daily Task |
|-----------------------|-----------------------|-----------------------|-----------------------|
| Publish Mode | Short Term Publish | Long Term Publish | Daily Publish |
| Offset | 0 | 56 | 365 |
| Offset Unit | Day(s) | Day(s) | Day(s) |
| Value | 55 | 309 | 1 |
| Unit | Day(s) | Day(s) | Day(s) |
| Success Status | Short Term Published | Published | Short Term Published |
| Failure Status | Error Publishing | Error Publishing | Error Publishing |
| Send Notification | Checked | Checked | Checked |
| Thread Count | 1 | 1 | 1 |
| Batch Size | 30 | 30 | 30 |
| Task Number | 0 | 0 | 0 |
| Total Number | 1 | 1 | 1 |
| Chunk Size | 56 | 56 | 1 |
| Client Name | DEFAULT | DEFAULT | DEFAULT |
| Backup User to Notify | <determine by client> | <determine by client> | <determine by client> |

Based on the client's operational needs, the short-term publish period can be longer or shorter than this typical 8-week period. This variation depends on the amount of future schedule information that the client wants to make available to users in the immediate future. For example, a certain organization may only require 6 weeks of schedule to be made available for scheduling transactions shortly after a rotation is published. Thus, the Short Term Publishing task could end at the 6-week (42 day) mark, and the Long Term Publishing task will resume publishing after 42 days from the current date.

The "Backup User to Notify" field in the publish task parameters allows system administrators to set up a backup user to receive the publish notification workmails. Backup users can be used in cases where the original user who published a rotation is no longer an active user (for example, due to termination of employment, or changing of roles in the company). If the original user who published the rotation is not found, system will broadcast the publish notifications to the backup user.

Default Pay Group used in Publish Tasks

When rotation assignments are published, employee's schedules are inspected from a certain cutoff date, specific to the assigned employee's pay group. This limit serves as the starting point for the short term publishing task. By default, system uses the Hands Off Date as this cutoff for publishing rotation row assignments. If needed, this date can be modified via the registry parameter `/system/modules/emvs/PAYGRP_CUTOFF_DATE` (default value is "PAYGRP_HANDS_OFF_DATE"). Choose one of the dates in the pay group for this limit.

For unassigned rows in a rotation or one-time schedule, there is no employee assignment and thus no reference to a pay group from the assignment information. A default pay group is configured via the registry parameter `/system/modules/emvs/PAYGRP_NAME` (default value is "0"). The pay group specified in this registry parameter is used for determining the publishing start date of the unassigned rotation or one-time schedule rows. This registry must be modified to use one of the client's actual pay groups (instead of the default pay group). The best practice is to use the pay group with earliest set of hands-off, adjust, or start date (depending on the cutoff date specified in `PAYGRP_CUTOFF_DATE` registry).

Unlock Shift Task

When relief shifts are being offered by a user, the shifts become locked by that user. This locking mechanism prevents other users from accidentally trying to offer the same shifts to different employees simultaneously. This locking occurs when shifts are offered via the Launchpad, the Relief Queue, and from the Offer Shifts button in Enhanced Schedule View.

As the user proceeds with the relief calling process, the relief shifts are unlocked by either offering the shifts to an employee, or by returning the shifts to the relief queue when there are no available employees. However, shifts that were not offered can remain locked due to the user not navigating back to the relief queue. The Unlock Shift job scheduler task is executed at regular intervals to unlock these shifts. This task allows other schedulers to offer these shifts again.

Unlock Shift Task

| | |
|---------------|---------|
| Timeout Value | 5 |
| Client Name | DEFAULT |

The "Timeout Value" in the Unlock Shift Task's parameters screen represents the amount of time, in minutes, that shifts can remain locked for before the task unlocks them. For example, the Unlock Shift task can be configured to run every 15 minutes daily, and will unlock any locked relief shifts that have been locked for more than 15 minutes.

Chapter 10 Configuring the Enhanced Schedule View

10

The following topics describe the administration of the EMVS features. These topics discuss functionalities that typical end-users do not have access to, and should be used with caution and special attention.

Publish Console

It is possible for master rotations and one-time schedules to encounter errors during the publishing process. These errors can be caused by various reasons, such as unexpected power failure, network failure, or other unexpected system issues. In such cases, the rotation or one-time schedule will be stuck at the PENDING PUBLISH status, and will not complete the publishing process.

The Publish Console allows system administrators to unlock rotations and one-time schedules that are stuck in the PENDING PUBLISH status. Upon inquiries from end users regarding publishing requests that were not completed within reasonable time, or that the rotation or one-time schedule being published encountered errors, system administrators should first verify the publishing error. Once verified, system administrators can use the Publish Console to search for the master rotation or one-time schedule that encountered the error. Once found, the rotation or one-time schedule can be unlocked.

Scheduling > Multi-view Scheduler > Advanced Settings > Publish Console

| Search Criteria | | | |
|-----------------------------------|---------------------------------------|--|--|
| Team | Rotation/Template | Start Date | End Date |
| <input type="text"/> | <input type="text"/> | 10/16/2012 <input type="button" value="Calendar"/> | 10/23/2012 <input type="button" value="Calendar"/> |
| <input type="button" value="Go"/> | <input type="button" value="Unlock"/> | | |

Once a rotation or one-time schedule is unlocked, their publish status returns to PUBLISH REQUIRED. The user is now able to initiate a new publish request again.

It is crucial that publish requests only be unlocked when rotations or one-time schedules actually encounter errors. System administrators should always be aware of the status of the overall system before deciding to use the Publish Console. Otherwise, valid publish requests can be unnecessarily interrupted by Publish Console unlocking.

Shift Statuses

The Shift Status maintenance form under Scheduling > Multi-view Scheduler > Advanced Settings > ES Data Definitions should be set to editable only for system administrators. Only the colors and the names of the statuses should be modified. Additional shift statuses defined by the user will NOT be recognized and thus not be used by the system.

Frequently Asked Questions

The following are questions that are often raised by end-users. Responses and reactions are provided to help system administrators handle the questions.

| | |
|----------------------|--|
| Inquiry: | "Why is publishing of my rotation taking such a long time?" |
| Response / Reaction: | <p>The system administrator should first investigate and determine whether the publishing request has encountered any errors and was not able to complete the request.</p> <p>If no errors were encountered, verify that the publishing task is still in progress. If so, continue to wait until publishing completes. However, if publishing does not complete after a reasonable time, the system administrator should verify that there are no server resource issues or database connection issues with the job scheduler.</p> <p>Alternatively, if an error is encountered, system administrator should inspect the error message for clues and indications of the root cause. If no obvious causes are found, log an Infor Extreme Support ticket.</p> |
| | |
| Inquiry: | "I cannot locate my relief shifts." |
| Response / Reaction: | <text> |
| | |
| Inquiry: | "Why has my rotation failed publishing? What can be done to republish the rotation?" |
| Response / Reaction: | The system administrator should use the Publish Console to unlock the rotation. The user can then re-publish. |
| | |
| Inquiry: | "I have encountered a conflict while attempting to publish the rotation. Why is the UNASSIGN action on the existing shift?" |
| Response / Reaction: | It should be kept in mind that the user is not allowed to perform actions on a shift without team security access to the shift. Also, if the existing shift is from other scheduling modules, the system will also display the UNASSIGN action. |

Appendix A Process Steps

A

TBA

Appendix B Registry Parameters



B

The following is a listing of registry parameters related to the EMVS enhancement features.

BOOKOFF_LEAVE_REASON_FIELD

Description: This parameter defines a UDF field on the ES_SHIFT_DETAIL table for storing a string-based leave reason for the client's usage.

Valid Values: Field name on the ES_SHIFT_DETAIL table

Default Value: Null

Location: /system/modules/emvs/

Effective: 6.0

CALL_LOG_SHIFTTAB_SHIFTNUM_LIMIT

Description: This parameter limits the number of shifts displayed in the Shift tab of the Employee Call Pop-up in the Relief Calling Area.

Valid Values: Any positive integer

Default Value: 1000

Location: /system/modules/emvs/

Effective: 6.0

DUMMY_DEPT_ID

Description: This parameter defines the default department value used in schedule compliance validation in the Master Rotation Plotting screen.

Valid Values: Any valid DEPT_ID in the DEPARTMENT table

Default Value: 0

Location: /system/modules/emvs/

Effective: 6.0

DUMMY_DOCKET_ID

Description: This parameter defines the default docket value used in schedule compliance validation in the Master Rotation Plotting screen.

Valid Values: Any valid DOCK_ID in the DOCKET table

Default Value: 0

Location: /system/modules/emvs/

Effective: 6.0

DUMMY_JOB_ID

Description: This parameter defines the default job value used in schedule compliance validation in the Master Rotation Plotting screen.

Valid Values: Any valid JOB_ID in the JOB table

Default Value: 0

Location: /system/modules/emvs/

Effective: 6.0

DUMMY_PROJECT_ID

Description: This parameter defines the default project value used in schedule compliance validation in the Master Rotation Plotting screen.

Valid Values: Any valid PROJ_ID in the PROJECT table

Default Value: 0

Location: /system/modules/emvs/

Effective: 6.0

EMP_SKILLS_DISPLAY_COLOR

Description: This parameter defines the color of text used to display employee skills in the Relief Calling Area and in the Enhanced Schedule View

Valid Values: Any valid color name in the Colors maintenance form

Default Value: ES BLUE

Location: /system/modules/emvs/

Effective: 6.0

EMP_SKILLS_MULTI_LINE_LIMIT

Description: This parameter defines the number of characters, on two rows, available to display skills in the employee header hover in the Relief Calling Area.

Valid Values: A comma-separated pair of positive integers

Default Value: 46,46

Location: /system/modules/emvs/

Effective: 6.0

EMP_SKILLS_SINGLE_LINE_LIMIT

Description: This parameter defines the number of characters available to display skills in the employee header hover in the Relief Calling Area.

Valid Values: Any positive integers

Default Value: 25

Location: /system/modules/emvs/

Effective: 6.0

EMVS_PUBLISH_BATCH_SIZE

Description: This parameter defines the size of employee schedule detail records processed by the Publishing task in each database transaction.

Valid Values: Any positive integers

Default Value: 50

Location: /system/modules/emvs/

Effective: 6.0

ESV_MAX_SELECT_DAYS

Description: This parameter defines the maximum number of days selectable to view employee schedules in the Enhanced Schedule View.

Valid Values: Any positive integers

Default Value: 70

Location: /system/modules/emvs/

Effective: 6.0

ESV_MAX_TEAM_SELECTION

Description: This parameter defines the maximum number of teams selectable to view employee schedules in the Enhanced Schedule View.

Valid Values: Any positive integers

Default Value: 40

Location: /system/modules/emvs/

Effective: 6.0

LABOUR_METRICS_VALIDATOR

Description: This parameter defines...

Valid Values:

Default Value: phsa-labourMetricService

Location: /system/modules/emvs/

Effective: 6.0

MRA_MAX_SELECT_DAYS

Description: This parameter defines the maximum number of days viewable in the Master Rotation Assignment screen.

Valid Values: Any positive integers

Default Value: 35
Location: /system/modules/emvs/
Effective: 6.0

MR_COMPLIANCE_ON

Description: This parameter controls whether schedule compliance validation is enabled or disabled on Master Rotation Plotting screen. When set to “true”, schedule compliance validation is enabled. When set to “false”, schedule compliance validation is disabled.
Valid Values: true or false
Default Value: true
Location: /system/modules/emvs/
Effective: 6.0

MR_OFF_DAYS_SHIFT_LABEL

Description: This parameter defines the name of the shift labels that also count as non-scheduled days in the Master Rotation Plotting screen. Shift labels that matches the names specified in this parameter get counted in the OFF DAYS column.
Valid Values: Comma-separated list of names of shift labels
Default Value: Off,OFF,off
Location: /system/modules/emvs/
Effective: 6.0

MR_PAYGRP_START_DATE_CHECK_REQ

Description: This parameter controls whether a user can create a master rotation with a start date earlier than the pay group start date. The pay group used is specified by the registry parameter PAYGRP_NAME.

Valid Values: YES or NO

Default Value: YES

Location: /system/modules/emvs/

Effective: 6.0

MR_VIRTUAL_EMP_NAME

Description: This parameter specifies the EMP_NAME of the employee record used for schedule compliance validation in Master rotation Plotting. Note that this employee record, even though the record exists in the database, is not visible in the system and will not be included in any payroll related processing.

Valid Values: n/a

Default Value: 000000-0

Location: /system/modules/emvs/

Effective: 6.0

OFF_TYPE_BOOKOFF_SUMMARY_LINK_UDF

Description: This parameter defines the UDF field to link the original shift being booked off with OFF-type time codes, with the actual book-off shift.

Valid Values: Any of the shift detail UDF fields, indicated as "DETAIL_UDFn"

Default Value: DETAIL_UDF9

Location: /system/modules/emvs/

Effective: 6.0

OTS_DFLT_SHIFT_GRID_PANEL

Description: This parameter defines the default number of days from the previous schedule that are visible without scrolling when the user views or edits a one-time schedule.

Valid Values: Any positive integer

Default Value: 3

Location: /system/modules/emvs/

Effective: 6.0

OTS_NUMBER_OF_DAYS

Description: This parameter defines the maximum number of days for a one-time schedule.

Valid Values: Any positive integer

Default Value: 84

Location: /system/modules/emvs/

Effective: 6.0

PAYGRP_CUTOFF_DATE

Description: This parameter defines the cutoff limit for publishing employee schedule, prior to which the publishing tasks will NOT modify schedules.

Valid Values: Date-type column name in the PAY_GROUP table

Default PAYGRP_HANDS_OFF_DATE

Value:

Location: /system/modules/emvs/

Effective: 6.0

PAYGRP_NAME

Description: This parameter defines the name of the pay group used for validating the creation of master rotations and templates, as well as publishing shifts on unassigned rows.

Valid Values: Any name of valid pay groups

Default Value: 0

Location: /system/modules/emvs/

Effective: 6.0

PUBLISH_IN_APP_SERVER

Description: This parameter controls whether schedule publishing is performed by a job scheduler task or by the application. When set to NO, publishing is handled by the job scheduler publishing tasks. When set to YES, the main application handles the publishing. It should be noted that this is a debugging feature and should NOT be used in production or near-production environments. It should also be noted that when the application performs publishing, only the date range displayed in the Master Rotation Assignment screen is published.

Valid Values: YES or NO

Default Value: NO

Location: /system/modules/emvs/

Effective: 6.0

RCA_DEFAULT_ASSOCJOBS

Description: This parameter defines the default setting of the Associated Jobs field in the Relief Calling Area Employee Selection Criteria. When set to true, the Associated Jobs field is checked. When set to false, the Associated Jobs field is unchecked.

Valid Values: true or false

Default Value: true

Location: /system/modules/emvs/

Effective: 6.0

RCA_DEFAULT_EMPSTATUS

Description: This parameter defines the default setting of the Employee Types field in the Relief Calling Area Employee Selection Criteria. "Y" refers to full-time employees, and "N" refers to part-time employees.

Valid Values: Null or Y or N or Y,N

Default Value: Y,N

Location: /system/modules/emvs/

Effective: 6.0

RCA_NUMOF_RECORDS_PERPAGE

Description: This parameter defines the number of employees displayed in the employee pool before pagination begins. This parameter also defines the number of employees displayed on each page in the employee pool when the number of employees displayed is larger than this value.

Valid Values: Any positive integers

Default Value: 75

Location: /system/modules/emvs/

Effective: 6.0

RCA_REASSIGN_NUM_OF_DAYS

Description: This parameter defines the number of days on which shifts will be included in the Reassign tab of the Employee Call Pop-up in the Relief Calling Area.

Valid Values: Any positive integer

Default Value: 5

Location: /system/modules/emvs/

Effective: 6.0

RCA_SELECTED_SHIFTS_MAXIMUM_ROWS

Description: This parameter defines the maximum number of rows displayed in the Selected Shifts section in the relief calling area, before a scrollbar is displayed.

Valid Values: Any positive integer

Default Value: 3

Location: /system/modules/emvs/

Effective: 6.0

RM_COMPLIANCE_ON

Description: This parameter controls whether schedule compliance validation is enabled or disabled in Relief Management. When set to “true”, schedule compliance validation is enabled. When set to “false”, schedule compliance validation is disabled.

Valid Values: true or false
Default Value: true
Location: /system/modules/emvs/
Effective: 6.0

SAVE_TIMEOUT

Description: This parameter defines the time interval, in seconds, at which the automatic save reminder is displayed after the master rotation, template, or one-time schedule is saved for the first time.
Valid Values: Any positive integer
Default Value: 300
Location: /system/modules/emvs/
Effective: 6.0

SC_VALIDATION_PERIOD_EXT_DAYS

Description: This parameter defines the number of days before and after the relief shifts to be offered, for which schedule compliance validation will include the Relief Calling Area.
Valid Values: Any positive integer
Default Value: 9
Location: /system/modules/emvs/
Effective: 6.0

SHIFT_STATUS_PRIORITY

Description: This parameter defines the hierarchy, in descending priority sequence, of shift statuses for shift cells in the Relief Calling Area, on days where multiple shifts exist.

Valid Values: Any comma-separated list of SHIFTSTAT_IDS

Default Value: 1,3,4,2,5,6,7

Location: /system/modules/emvs/

Effective: 6.0

SHIFT_TYPE_PRIORITY

Description: This parameter defines the hierarchy, in descending priority sequence, of shift statuses for shift cells in the Employee Pool section of the Relief Calling Area, on days where multiple shifts exist.

Valid Values: Comma-separated list of values containing 0, 1, 2

Default Value: 1,2,0

Location: /system/modules/emvs/

Effective: 6.0

SH_DISPLAY_ES_SHIFT_DETAIL_LIST

Description: This parameter defines the list of columns in the shift details, to display in the Shift History screen.

Valid Values: Comma-separated list of column names

Default Value: SHIFTDTL_START_TIME,SHIFTDTL_END_TIME,TCODE_ID,JOB_ID,SHIFTST AT_ID,DOCK_ID, DEPT_ID,PROJ_ID

Location: /system/modules/emvs/

Effective 6.0
:

SH_MAX_DAYS_FOR_DATE_RANGE

Description: This parameter defines the maximum number of days viewable in the Shift History screen.

Valid Values: Any positive integer

Default Value: 63

Location: /system/modules/emvs/

Effective: 6.0

SWAP_BOOKOFF_CODE

Description: This parameter defines the name of the time code used to signify a shift that is swapped away from an employee. In other words, the shift that the employee is giving up to receive the shift to be swapped.

Valid Values: Any valid time code name that is set to OFF-type

Default Value: null

Location: /system/modules/emvs/

Effective: 6.0

SWAP_WORK_CODE

Description: This parameter defines the name of the time code used to signify a shift that is received by an employee via a shift swap.

Valid Values: Any valid time code name that is set to ON-type

Default null
Value:
Location: /system/modules/emvs/
Effective: 6.0

TCODE_BREAK_FLAG

Description: This parameter defines the name of the column in the TIME_CODE table that designates a time code for break or meal time.
Valid Values: Any column name in the TIME_CODE table
Default Value: TCODE_IS_BRK
Location: /system/modules/emvs/
Effective: 6.0

TEAMVIEW_OPENPANEL

Description: This parameter lists the names of the panels that are expanded by default when schedules are displayed in the Enhanced Schedule View. Panels that are not part of this list are collapsed by default.
Valid Values: Any comma-separated list of panel names
Default Value: FILTER_PANEL,SHIFTDETAIL_PANEL,EMPLOYEE_PANEL,ROTATION_PANEL
Location: /system/modules/emvs/
Effective: 6.0

TIMECODE_SHIFT_TYPE_UDF

Description: This parameter defines the time code UDF field used to categorize the time

codes to be used in Multi-view Scheduler features. The features can be master rotation, enhanced schedule view, relief management, and others.

Valid Values: Column name of any one TCODE_UDF field

Default Value: TCODE_UDF10

Location: /system/modules/emvs/

Effective: 6.0