Advanced Scheduling:
Staffing Requirement Templates, Shift Templates and Generating Templates

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CREATING SHIFTS

Shifts are the basic building blocks of a schedule. In MVS, you can establish shifts for the team being scheduled or allow shifts to be inherited from a parent team, which has shifts that can be shared with child teams.

SHIFT ACTIVITIES AND LAYERS

Shift configuration is the process of defining the activities that are included in a shift when that shift is created in the schedule. These activities specify the start and end times of work, breaks, and on-call periods.

MVS stores and displays shifts in a layered representation, where the activities for work, breaks, and on-call comprise separate shift layers. Activities in one shift layer may overlap activities in other layers. For example, consider a shift from 9:00AM to 5:00PM with a break from 12:00PM to 12:30PM. This shift has two layers:

- Work 9:00AM to 5:00PM
- Break 12:00PM to 12:30PM

These rules must be followed when creating or updating the definition of a shift:

- A shift must have at least one work or on-call activity, but can include a combination of activities from all three layers.
- A shift cannot have any gaps between the start time and end time of the shift where there are no work or on-call activities.
- Multiple activities from the same layer can be added to a shift, as long as they do not overlap. For example, a shift can have multiple work activities that are performed by employees at different times of the day.
- Break activities must fully overlap work activities. Breaks cannot be added outside work time or during times that only have on-call activities.
- On-call activities can overlap work activities.

CREATING SHIFTS

The times, activities, and properties of a shift are specified during shift creation. These shift details are configured separately for each team or unit.

1. Select Scheduling > Multi-view Scheduler > Advanced Settings > ES Data Definitions > Shift Configuration.

2. Select a unit and date and click **Load**.
   The shifts that are available for the selected unit and date are displayed.

3. Click the plus sign (+) icon.

4. Specify this information:
   a. Display Label: Select a shift display label. The shift display label is shown in various screens to represent the shift in this team.
   b. Description: Specify a description for the shift
   c. Shift Type: Select the type of shift.
   d. Font Color: Select the color used for the font when the shift is displayed in MVS scheduling screens.
   e. Active Dates: Select the dates for this shift to be effective for this team
   f. Apply to Sub-teams?: Select this option if you want the child teams of this team to inherit this shift. The shift is then available for use in scheduling for all existing child teams.
      i. **Note:** New sub-teams do not automatically inherit shifts from their parent team. Shifts can be manually inherited for new sub-teams

g. Subscription Dates: Select subscription dates if the shift is applicable to child teams. These dates indicate the date range during which the shift is available in the child teams. Subscription dates must be within the active dates of the shift.

5. In the **Work Activity** table on the **Activity** tab, specify the working activities and hours for the shift.
    a. Click the plus sign (+) icon to add a work activity.
    b. Specify this information:
        i. Start Time: Specify the start time for the work activity
        ii. End Time: Specify the end time for the work activity.
        iii. Work Activity: Specify the work activity.
        iv. Repeat as needed to add additional work activities to the shift. Click the garbage can icon to delete an activity.
            1. **Note:** Work activity times cannot overlap the times of other work activities. Gaps are not allowed between the times of work activities.

6. Optionally, in the **On-Call Activity** section of the **Activity** tab, define any on-call activities for the shift. Times for on-call activities may overlap times for work activities.

7. Optionally, in the **Break Activity** section of the **Activity** tab, define any break or meal activities for the shift. The start and end times of a break must be during the work time of the shift, as defined by the shift's work activities.

8. Optionally, select the **Day Part** tab, and define the day parts for the shift. Shifts that are associated with day parts contribute to schedule coverage in the **By Shift** mode in the Advanced Schedule View, Staffing Center, and in the Master Rotation and One-time Schedule edit screens.

9. Optionally, select the **Property** tab, and define any shift properties that can be associated to the shift and their values.
    Note: Shift properties can be used to change how Auto-Assignment assigns the shift or to satisfy customer-specific requirements.

10. Click **Save**.

The newly created shift is now part of the list.

EDITING SHIFTS

You can edit shifts once the shifts are created. All shift edits are effective-dated. If a shift has been used in scheduling and has been published onto employees' timesheets, then the edit is only effective on or after the date following the shift's latest published date.

Note: If a shift is inherited by child teams, the "latest published date" of the shift also includes any child teams that have used the shift in scheduling. Any shift edits made to the shift are also applied to child teams that have subscribed to the shift.

1. Select Scheduling > Multi-view Scheduler > Advanced Settings > ES Data Definitions > Shift Configuration.

2. Select a unit and date and click **Load**. The shifts that are available for the selected unit and date are displayed.

3. Click the pencil icon for the shift you want to edit.

4. Select **Edit**.

5. Specify the date range for which the shift modification is effective in the **Edit Active Dates** fields.

6. Modify the attributes of the shift as needed.

7. Click **Save**.

INACTIVATING SHIFTS

You can inactivate a shift if the shift is no longer applicable to the unit. Before inactivating a shift, the system inspects for any scheduled instance of the shift, regardless of whether the shift is published. You can only inactivate a shift after the "Shift last used on" date. If the shift is subscribed by child teams, the "Shift last used on" date includes all subscribing child teams. After a shift is inactivated, the shift can no longer be used for scheduling in the team and all subscribing teams (if applicable).

Note: To inactivate a shift, there cannot be any schedule sources (Master Rotation, One-time Schedule, Advanced Schedule View, Relief Management, etc.) in MVS that allow the system to create the shift. For example, you cannot inactivate a shift if it is still used in an active rotation. A shift in a template that is effective until January 1, 3000 could be published to January 1, 3000. Therefore, the shift is still in active use. To remove the shift from the template, you can create a new version of the template row(s) that contain the shift. You would then remove the shift from the row(s) and activate the row version(s). Future schedules created on or after the effective start date of the new row version(s) would not include the shift, allowing you to inactivate the shift after this date.

1. Select Scheduling > Multi-view Scheduler > Advanced Settings > ES Data Definitions > Shift Configuration.

2. Select a unit and date and click **Load**. The shifts that are available for the selected unit and date are displayed.

3. Click the pencil icon for the shift you want to inactivate.

4. Select **Inactivate**.

5. Specify the last date on which this shift is to be available in the **Active Dates** end date field. This date should be later than the "Shift last used on" date displayed in the pop-up.

6. Click **Save**.

PLANNING FOR SCHEDULING

Before creating schedules, you need to plan how many shifts are demanded for each job in each unit. For example, you may need to determine how many RNs are required for each shift in the ER. By planning the number of shifts, you can determine if you are staffing for your requirements.

These tools are available for demand planning:

- Staffing Requirement Templates: Used to determine the number of staff members required to staff a unit. The staffing requirements are used for the purposes of calculating coverage in the Advanced Schedule View, Master Rotations, and One-time Schedules.

- Shift templates: Used to generate unassigned shifts to be filled in the Advanced Schedule View or through Self-Scheduling.

SCHEDULE TEMPLATES

Schedule templates provide you with two types of templates:

- Staffing Requirement Templates (SRT).
- Shift Templates (ST).

The schedule templates provide you with a tool for planning your staffing demands for specific periods. For example, you may have a demand for additional staff on holiday weekends or during the flu season. By creating a schedule template, you can use the Advanced Schedule View to view the overall needs for shifts during a given period of time.

Basic shift design

The shift design uses the Workforce Management team hierarchy to allow child teams to inherit shifts from parent teams. This inheritance minimizes the need to duplicate configuration and maintenance effort when teams share similar shift configuration.

The effective date range of a shift defines days on which the shift can be scheduled or be used in any templates or rotations. The shift's effective end date prevents the shift from being used.

A shift can also have zero, one, or more custom shift properties associated with specific values.

Upon creating the shift, if **Apply to Sub-teams** is selected, the system prompts the user for the subscription dates for the child teams inheriting the shift. This child inheritance makes the shift available in all sub-teams during the subscription period. If a child team already has a shift defined using the same shift label, the child team is excluded from the subscription. The user will be notified of these kinds of teams during shift creation. Any team subscribing to the shift will also inherit:

- Break definition from the original shift
- Any shift property from original shift that applies to sub-teams
- Any value of shift properties that applies to sub-teams

Each team also can unsubscribe from the subscribed shifts by end-dating the subscription to a specific date. New shifts can be established for this team by re-using shift labels from the unsubscribed shifts or from any unused shift labels.

STAFFING REQUIREMENT TEMPLATES (SRT)

Staffing Requirement Templates (SRT) let you define the mixture of shifts to be scheduled. There is no limit to the number of templates that you can create. An individual scheduling period can be comprised of multiple schedule templates. These templates let you manage the holiday and seasonal changes in staff that are required at any particular date.

The SRT feature lets you specify the amount of staff that are required for each combination of jobs and day parts for a given team. The level of required staff can be specified in terms of headcount. This defines how many employees are required to cover a particular day part. The level of required staff can also be specified by the number of employee hours that are required to cover the day part.

For each of the job-day part-workload requirements, you can further define the types of skills necessary to fulfill the requirement. For example, for any day in a SRT, you can specify that 5 RNs are required for the **DAY** day part. For those 5 RNs, you can also specify that they all require the ACLS skill. As well, you can also specify that 1 of the 5 RNs should have a FRENCH skill.

The end result is that the SRT becomes a matrix of the jobs, skills, and day parts that are required to staff a unit. SRTs can be used to generate required workload to display in the scheduling screens and compare to shift assignments to determine staff coverage. Shift Templates (ST) that are created from the SRT display the requirements for each job in each day part, in headcount or hour units.

DISPLAYING SRTS

1. Select Scheduling > Multi-view Scheduler > Schedule Template > Schedule Templates
2. Specify this information:
   a. Unit: Select the teams or units
   b. Date: Select the date on which the template is active from the calendar.
3. Click **Load**. A list of available SRTs is displayed on the **Templates** tab. If there are no templates available, the **Template Name** column only displays the term **NO TEMPLATE**.

CREATING AN SRT

SRTs are effective over a given date range. You can define multiple templates with different effective dates to account for staffing level variations. The variations are due to seasonal changes or other fluctuations in demand.

1. Display the available SRTs.
2. Click the plus sign (+) icon under the Schedule Templates heading, to add a new SRT.
3. Specify this information:
   a. Name: The name of the template
   b. Description: A text description of the template
   c. Unit: The unit or team to which the template belongs
   d. Subteam: The subteam to which the template belongs
   e. Length (Days): The number of days that the template covers
   f. Workload Unit: Specify **Headcount** or **Hours** to determine the units that the template uses to quantify workload requirements
   g. Active: Flag indicating that the template is in use
   h. Effective Dates: The date range over which the template can be used.
4. Click **Save**. Your new SRT is displayed on the **Staffing Requirements Template** tab. The unit's default workload requirements are automatically displayed in the bottom part of the tab.
5. Click the delete icon under the day part heading, for the jobs that you do not need. For example, under an early morning day part, delete the staff that do not need to be working in the early morning, such as a clerk or intern.
6. Click **Save**.
7. Click the **Templates** tab to view your new Staff Requirements template in the Schedule Templates list.
8.

ADDING STAFF TO A SRT

1. Display the SRTs for the team or unit to which you want to add staff.
2. Select the pencil icon beside the SRT to which you want to add staff. The SRT is displayed on the **Staffing Requirement Template** tab.
3. Click the plus sign (+) icon beside the name of the day part to which you want to add staff. A new row is added to the bottom of the list of current staff for the day part.
4. Specify this information:
   a. Job: Select a staff job in the new row
   b. Priority: Specify a priority level for the job. Use a number that is relative to other priorities that have been assigned
   c. Day 1: Specify the number of staff headcount or hours required for this job during the day part.
5. Repeat the previous step for each day of the day part
6. Click **Save**. Your SRT is saved with the new staff.

SHIFT TEMPLATE (ST)

The Shift Templates (ST) feature lets you specify the shifts that are needed for a unit.

There can one or more STs related to a single SRT. STs are not required to be related to any SRT. In STs that are related to a SRT, the workload requirements per job are displayed in the Shift Template as reference information.

Teams and units can have multiple Shift Templates.

ST represents the mixture of shifts you require when building a schedule.

ADDING A ST USING A SRT

1. Display the SRTs for the team or unit to which you want to add STs.
2. Click the expand arrow (^) beside the SRT to which you want to add a ST. A list of any current STs is displayed.
3. Click the plus sign (+) icon under the name of the SRT. The Create Shift Template window is displayed.
4. Specify this information:
   a. Name: The name of the ST
   b. Description: A text description of the ST
   c. Unit: Displays the unit or team to which the ST belongs
   d. Staff Req Template: Displays the SRT to which this ST belongs.
   e. Length: The number of days that the ST will cover
   f. Active: Select the check box to indicate that the ST is in use
   g. Effective Dates: The date range over which the ST can be used.
5. Under **Auto-assignment Options**, specify this information
   a. Remove Unassigned: Select the check box to remove any unassigned shifts once the schedule has been generated as part of the Auto-Assignment process
   b. Replacement Shifts: Select the check box to designate the shift template for replacement shifts during the Auto-Assignment process. This type of template must be used exclusively with Auto-Assignment groups containing the **Replace Shift Type**rule. For more information on configuring Auto-assignment groups, see *Infor Workforce Management Auto-Assignment Implementation Guide*.
   c. Click **Save**. Your new ST is displayed in the Shift Template tab. In the bottom half of the ST is the workload copied from the parent SRT.

ADDING SHIFTS TO A ST

1. Display the ST to which you want to add shifts.
2. Locate the day part to which you want to add shifts.
3. Click the plus sign (+) icon beside the job under the Shift heading. A row of blank fields is displayed directly below the plus sign (+) row.
4. Click the menu icon in the **Shift** column field.
5. Select a shift from the window.
6. Specify the number of staff needed for this shift in the **Day 1** column field.
7. Repeat the previous step for each day of the shift.
8. Click **Save**.
9. Repeat the previous steps for each shift that you want to add to the ST.

SCHEDULE GENERATING

Staffing Requirement Templates (SRTs) can be used to generate a team's workload requirements. The staffing levels contained in the SRT are then used to calculate coverage in the Advanced Schedule View (ASV) for the specified schedule period.

Shift Templates (ST) are generated to add shifts to the schedule. The shifts can then be assigned through the ASV or through other modules in MVS.

If both Staffing Requirement Templates and Shift Templates are selected, then both generation options are available.

GENERATING A SCHEDULE

1. Select Scheduling > Multi-view Scheduler > Schedule Templates > Generate Schedule
2. Select the unit or team for which you want to generate a schedule, in the **Unit** field on the **Unit** tab.
3. Optional. If sub units are used for the Unit, you can include them in the generation. To do so, select the **Include Sub Units** field. This shows the templates of the selected unit and its sub units. Only selected templates are generated.
4. Select the time period for the schedule using the **Generation Dates** fields.
5. Click **Next**.
6. Select a SRT from under the SRT heading and a ST from under the ST heading.
   - By selecting an SRT, you can generate workload.
   - By selecting an ST, you can generate unassigned shifts.
7. Click **Next**.
8. Select the **Generate Workload based on Staffing Requirements, Generate Shifts, and Create as unpublished shifts** options under the **Generate Options.**
9. Click **Generate**. The resulting SRTs and STs are displayed in the ASV.
10. A warning message is displayed if the shift template has already been generated for any of the selected dates. Click **OK** to regenerate the shift template or click **Cancel**. Regenerating with the **Create as unpublished shifts** option replaces any shifts that may have been deleted since the shift template was originally generated.