LFSO Intraday Page

This section explains how to:

- Enable the use of the new Intraday page
- Display the new Intraday page
- Understand cross-midnight shifts on the last day of the loaded schedule

Overview

The Intraday is a focused daily view into a typical weekly (schedule period) LFSO schedule. You can scroll through the entire week (schedule period), but the currently selected day is the focus or target of all interactions performed in the Intraday.

The Intraday's graphical view provides drag-and-drop editing capabilities, allowing you to quickly:

- resize breaks/activities/shifts
- add/edit employee assignments
- position activities/breaks within shifts

The Intraday can be grouped by Department, Job, Employee, or can be left Ungrouped. It can also be filtered by Department, Job, Activity and Employee, allowing you to focus in on a subset of the day's information. All changes made in the Intraday view can be saved to the associated LFSO schedule. Coverage based on currently applied filters is accurately displayed, adjusting as the Intraday's filters are adjusted. Coverage sub-totals are also displayed for each applied grouping, if any.

Intraday Page

Enabling the New Intraday Page

By default, the old Intraday page is displayed when the Intraday view is launched from a weekly LFSO Schedule.

To enable the New Intraday page:

1 Select the following menu path:

MAINTENANCE > SYSTEM ADMINISTRATION > REGISTRY MAINTENANCE

The *Registry Tree* is displayed.

2 Navigate to the INTRADAY_PAGE_MODE entry:

SYSTEM > MODULES > SCHEDULEOPTIMIZATION > INTRADAY_PAGE_MODE
LFSO Intraday Page

3   Click **Edit**.

The *Edit Variable* section is displayed.

4   Type *New* in the **Variable Value** field.

5   Click **Save**.

Now whenever the Intraday is launched from an LFSO schedule, the new version is displayed.
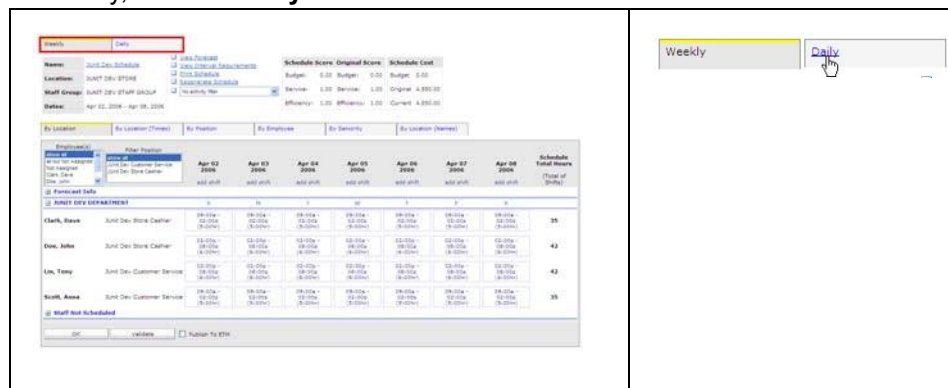
Displaying an Intraday Page

Before you can display an Intraday page, you must first display a Weekly LFSO schedule. For more information on working with Weekly LFSO schedules, see the *Workbrain 5.0 - Labor Forecasting and Schedule Optimization* user guide.

To display an Intraday Page:
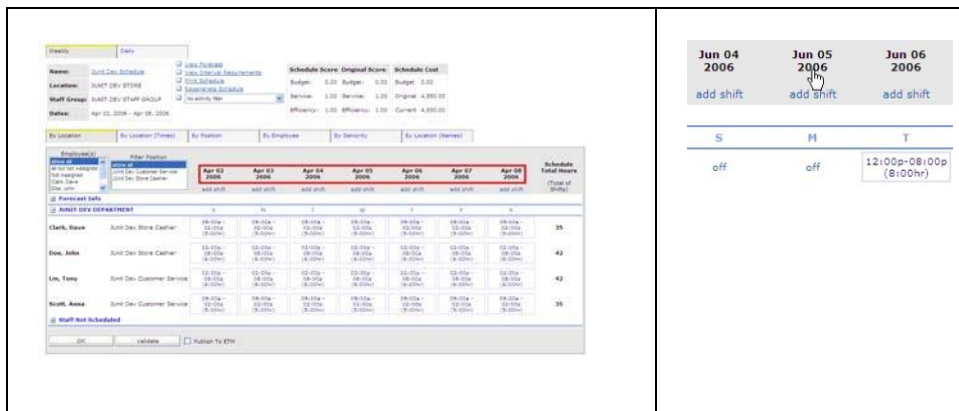
1   Select the following menu path:

SCHEDULING > SCHEDULE OPTIMIZATION > DISPLAY A SCHEDULE

2   Select **Edit** beside the schedule to display.

3   To open the Intraday page and make the first day of the loaded schedule the focus day, click the **Daily** tab.

To open the Intraday page and set a specific day from the loaded schedule as the focus day, click any date along the top of the weekly schedule that you want to use as the focus day.

Cross-Midnight Shifts on Last Day of Schedule

If a shift on the last day of the schedule period has a start time during the last day but has an end time that crosses midnight and as a result is in the next day, an extra day is displayed in the Intraday. Even though the extra day isn't really a part of the schedule period, it is displayed so you can see and work with the entire shift.

If this type of shift is deleted or edited so that it no longer crosses midnight beyond the typical constraint of the schedule period, the extra displayed day is removed from the display when the schedule is refreshed (**Submit** is clicked). Similarly, if a shift is added to a schedule currently displaying the expected schedule period (no extra days shown), when the schedule is refreshed, an extra day is displayed.

> **Note:**
>
> Even though an extra day may be displayed in the Intraday, no shifts with a start time in that extra day can be added to the schedule.

Understanding the Intraday

This section takes a top-down approach and explains the basic elements of the Intraday. Elements are addressed in the order you will encounter them while looking at the Intraday display. The main items discussed are:

- Grouping
- The View and Print Menu
- Changing the Focus Day
- Zooming the display
- Sorting and Filtering
- Schedule Summary
- The Intraday Main Grid
- Coverage
- Shift Display

Intraday Grouping

The Intraday display can be grouped by Department, Job, Employee or left Ungrouped. Coverage totals in the Coverage section at the bottom of the Intraday are unaffected by groupings, but the group headings (if grouped by Department or Job) will show different Coverage subtotals, since different groupings will include different group members.

By Department

Grouping by Department lists the employees currently scheduled to work in particular departments under those departments. For example, everyone scheduled to work on the currently selected day in the Customer Service department are listed together. Shifts currently Not Assigned are shown after the assigned shifts for each department.
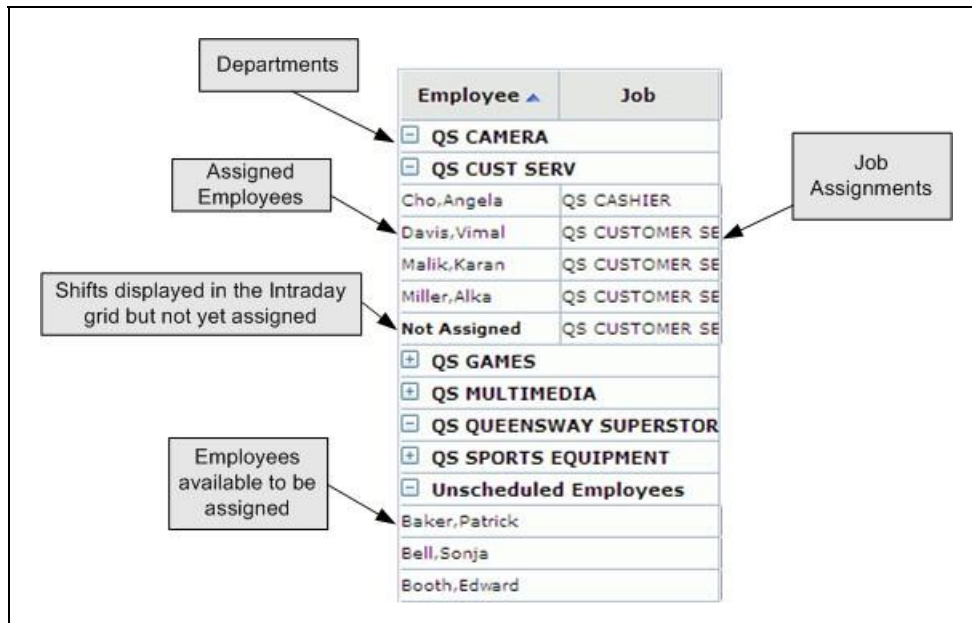
Intraday Department Grouping

Unscheduled Employees available to be assigned for the currently selected day are listed after all the departments in the currently loaded schedule. The graphical display of these rows indicates whether employees are available for specific time periods, whether they are on a fixed shift and if they have any time-off scheduled that could affect their ability to be assigned to shifts. For more information on interpreting the Intraday's graphical display, see *Intraday Page on page 6*.

An employee is displayed on a row beneath a department if their shift's start time is within the currently selected day. Or, if **All Days** has been selected as the focus day, an employee is displayed as scheduled if they have at least one shift with a start time anywhere within the entire schedule period. Alternatively, they are displayed beneath a department if the working location of the shift belongs to that department.

By Job

Grouping by Job lists the employees currently scheduled to perform particular jobs under those job titles. For example, everyone scheduled to work on the currently selected day as a Cashier are listed together. Shifts requiring a specific job which are currently Not Assigned are shown after the assigned shifts under that job.
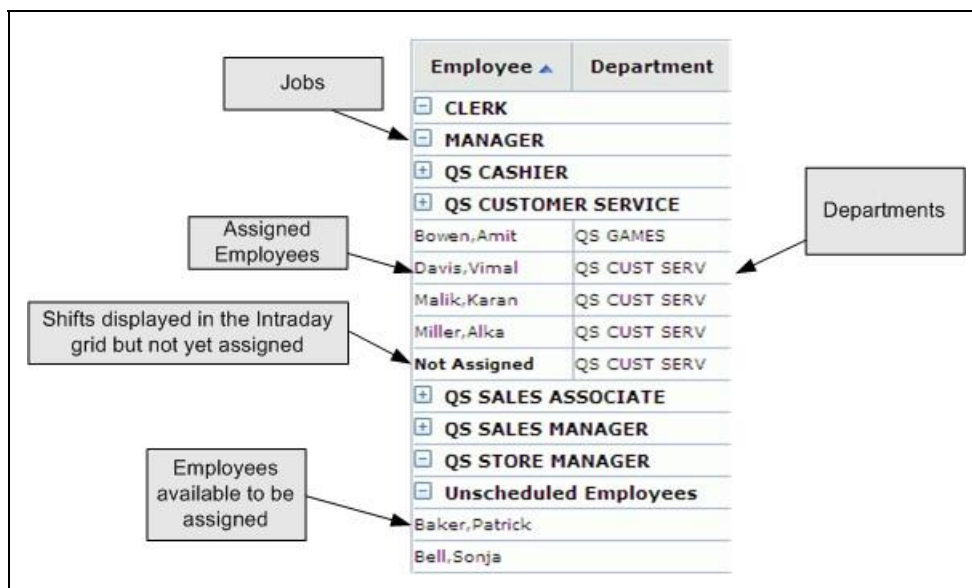
Intraday Job Grouping

Unscheduled Employees available to be assigned for the currently selected day are listed after all the job assignments. The graphical display of these rows indicates whether employees are available for specific time periods, whether they are on a fixed shift and if they have any time-off scheduled that could affect their ability to be assigned to shifts. For more information on interpreting the Intraday's graphical display, see *Intraday Page on page 6*.

An employee is displayed on a row under a job if the shift's start time is within the currently selected day. Or, if **All Days** has been selected as the focus day, an employee is displayed as scheduled if they have at least one shift with a start time anywhere within the entire schedule period.

By Employee

Grouping by Employee lists the employees currently scheduled with their Job and Department assignments for the focus day. For example, if someone had two shifts on the focus day in two separate departments, their name would appear as a group heading with those two shifts listed under them. Shifts currently Not Assigned are shown after the assigned shifts under the *Unassigned Shifts* heading.
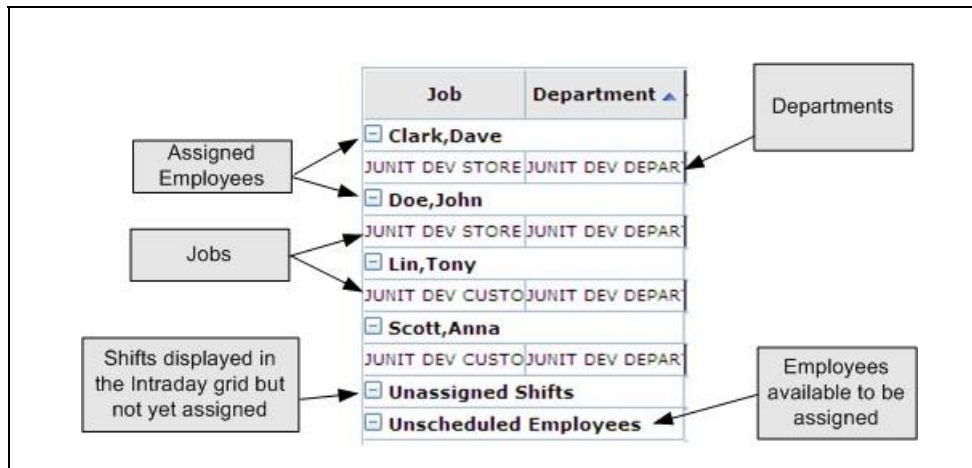
Intraday Employee Grouping

Unscheduled employees available to be assigned for the currently selected day are listed after all the employee assignments and unassigned shifts under the *Unscheduled Employees* heading. The graphical display of these rows indicates whether employees are available for specific time periods, whether they are on a fixed shift and if they have any time-off scheduled that could affect their ability to be assigned to shifts. For more information on interpreting the Intraday's graphical display, see *Intraday Page on page 6*.

An employee is displayed as scheduled if the shift's start time is within the currently selected day. Or, if **All Days** has been selected as the focus day, an employee is displayed as scheduled if they have at least one shift with a start time anywhere within the entire schedule period.

If an employee is assigned to a shift for a day, it is their only shift for that day and that shift is unassigned, the entire group is moved under the *Unscheduled Employees* section.

Ungrouped

When the Intraday is Ungrouped, all of the scheduled employees are listed together under the *Scheduled Employees* heading, with the unassigned employees listed after the assigned employees, with the row labeled **Not Assigned**.

Intraday Ungrouped Listing

Unscheduled employees available to be assigned for the currently selected day are listed after all the employee assignments and unassigned shifts under the *Unscheduled Employees* heading. The graphical display of these rows indicates whether employees are available for specific time periods, whether they are on a fixed shift and if they have any time-off scheduled that could affect their ability to be assigned to shifts. For more information on interpreting the Intraday's graphical display, see *Intraday Page on page 6*.

An employee is displayed as scheduled if the shift's start time is within the currently selected day. Or, if **All Days** has been selected as the focus day, an employee is displayed as scheduled if they have at least one shift with a start time anywhere within the entire schedule period.

The View Menu

The View menu at the top right of the Intraday allows you to access the Schedule Task List, the Interval Requirements and the Forecast. For more information on these windows, see the *Workbrain 5.0 Labor Forecasting and Schedule Optimization User Guide*.

Viewing the Schedule Task List

Tasks are subsets of activities. For example, an activity called "Cleaning" might be broken down into more specific tasks such as sweeping and dusting. You define tasks in the Task Type screen, and then create task templates by associating each task with an activity and allocated time. You can then use the task template to assign employees to the tasks, on a day-by-day basis, in an Intraday schedule.

To view the *Schedule Task List* from an Intraday page:

    1   Click the **View** hyperlink at the top right of the Intraday page.

The View pop-up menu is displayed.

2 Click **Task List** in the pop-up menu list.

The *Task List* window is displayed.

For more information on Tasks and Task Templates, see the *Workbrain 5.0 Labor Forecasting and Schedule Optimization User Guide*.

Viewing Interval Requirements

Interval Requirements determine a location's staffing requirements for each time interval during a day. You can create a new schedule based on an existing workload (i.e., a set of interval requirements defined for a location). After a location's forecast is generated, interval requirements are generated for each location. You can use the *Generate Workload* screen to edit a location's forecast-generated values and define a workload for a location before a schedule is created.

Alternatively, you can also edit interval requirements manually after a schedule is created.

To view Interval Requirements from an Intraday page:

1 Click the **View** hyperlink at the top right of the Intraday page.

The View pop-up menu is displayed.

2 Click **Workload** in the pop-up menu list.

The *Interval Requirements* window is displayed.

For more information see the *Workbrain 5.0 Labor Forecasting and Schedule Optimization User Guide*.

Note:

Interval Requirement changes are reflected in the Coverage panel.

Viewing Forecast

A forecast presents the predicted or anticipated volumes for a future scheduling period. A forecast can be created from historical results or entered manually.

Note:

Only one forecast can be created for a given date range. Forecasts cannot overlap each other.

Default distributions and budget information, as set up in the location information, are applied to the forecast. You can adjust these as necessary for the specific forecast (for one-off modifications) without impacting the location information or future forecasts. You can apply an automatic percentage adjustment override to all days when you create the forecast, and you can adjust these when you view the resulting forecast. Based on the anticipated traffic patterns (the distributions applied against the forecast volumes), the forecast volume for each time interval is displayed. The percentage allocation for each interval is

calculated by dividing the interval's average volume by the sum of average volumes for all intervals falling within the hours of operation of the department for the day.

Hours of operation must be defined in order for the system to distribute the volume over the intervals.

To view the *Forecast* window from the Intraday:

1   Click the **View** hyperlink at the top right of the Intraday page.

> The View pop-up menu is displayed.

2   Click **Forecast** in the pop-up menu list.

> The *Forecast* window is displayed.

> For more information see the *Workbrain 5.0 Labor Forecasting and Schedule Optimization User Guide*.

Print Menu

The Print Menu allows you to render a PDF file of the schedule for either the current focus day or for all of the days in the currently loaded schedule. All filters and view options currently applied to the intraday are reflected in the rendered PDF.

To print the current focus day:

1   Click the **Print** hyperlink at the top right of the Intraday page.

> The Print pop-up menu is displayed.

2   Click **Print Focus Day** in the pop-up menu list.

> A window with a rendered PDF of your selection is displayed. From here you can view, print or save the PDF.

To print all days:

1   Click the **Print** hyperlink at the top right of the Intraday page.

> The Print pop-up menu is displayed.

2   Click **Print All Days** in the pop-up menu list.

> A window with a rendered PDF of your selection is displayed. From here you can view, print or save the PDF.

Changing the Focus Day

When the Intraday is launched, the first day of the schedule period is set as the current focus day if you clicked the **Daily** tab. If you selected a specific date column header in the weekly schedule, that date becomes the current focus day in the Intraday. Once the Intraday is displayed, you can change the current focus day using the **Focus Day** drop-down list at the top-left of the Intraday page. The drop-down list is populated with each day from the weekly schedule's schedule period, as well as with an **All Days** list item.

> **Note:**
>
> Employees are displayed on a scheduled row for the current Focus Day if they have at least one shift and the shift's start time is within the currently selected Focus Day. If they don't have any shifts yet for the current Focus Day, Employees are displayed in the *Unscheduled Employees* section.
>
> When *All Days* is selected as the current **Focus Day**, all employees with any shifts on any day within the currently loaded schedule period (week) are displayed on a scheduled row. Employees will only be displayed under the *Unscheduled Employees* section if they have absolutely no shifts for the entire schedule period.
>
> Further note that since *All Days* no longer looks at a single specific day in the schedule period, the Schedule Summary data for Daily Costs is not displayed.

To change the current day focus:

1   Click the **Focus Day** drop-down list.

Days from the current schedule period are displayed.

2   Select the day you would like to make the new current day focus in the Intraday.

The day you selected is displayed in the **Focus Day** field.

3   Click **Submit** to apply the change and refresh the Intraday page.

![workbrain™ logo]

Note:

You can also change the focus day with a single mouse click by clicking the date at the start of a day:

The focus day will change and the clicked day will be repositioned as the first viewable day in the Intraday main grid, unless All Days has been selected as the focus day, in which case the display is resorted, but is not repositioned. The display is sorted by the shift start time, the sort direction indicated by a blue triangle beside the date:
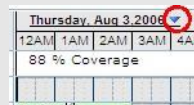
Zooming the Intraday Page

The zoom percent in the *Filter by* panel above the main Intraday grid can be used to adjust how many hours (columns) are displayed at one time. This feature can help you focus in on some elements in the Intraday and to get a bigger overall view of the schedule. The default zoom percent is 100.

To change the zoom on the Intraday page:

1   Select a new zoom value from the **Zoom** drop-down list located above the Intraday grid.
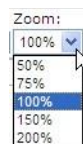
2   Click **Submit** to apply the new zoom value.

The size and number of columns displayed adjusts to your entered value.

Note:

Zoom values have no affect on the number of rows displayed.

Sorting and Filtering

Sorting and Filtering are two related features in the Intraday which have very different affects on the display. Sorting affects *how* information is displayed, where Filtering affects *what* information is displayed.

The information in the Intraday can be sorted in ascending or descending order by Employee, Job or Shift Start Time. Only one sort key can be used at a time and the results only affect the disp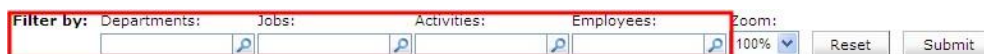lay of data. Any currently applied filters or shift display settings remain constant and schedule costs/coverage remain unchanged.

The information in the Intraday can be filtered by any combination of Departments, Jobs, Activities and Employees. Multiple selections can be made in each category. The filter selections are accumulative, meaning if you have a view already filtered so it only displays two specific employees, adding another criteria to filter on a specific department only shows which of those two employees, if any, are assigned to the selected department.

Filtering is based on the data in the currently selected day, but it should be noted that as you change the currently selected day, or the focus day of the Intraday, the filters from the original day remain applied for the data in the newly selected current day.

Unlike a sort, filtering also affects schedule costs and coverage, making careful use of the filtering function a powerful tool allowing you to focus in on specific costs and understaffing.

The **Filter by:** section allows you to filter the view, allowing you to work with a subset of the schedule's data.

Note:
Filter settings are not applied to the Intraday until you click **Submit**.

Filtering the Intraday

By default, no filters are applied when the Intraday is first displayed.

To add a filter:

1 Click the lookup for the type of filter you would like to apply, for example *Departments*.

   A lookup selection window is displayed.

2 Select the criteria you want to apply with this filter. Multiple selections are possible.

3   Click **Submit**.

The selected criteria is displayed in the **Departments** field.

4   Select more filters if desired.

5   Click **Submit** to apply the filters to the view.

The view is refreshed with a subset of the original data.

> **Note:**
> The Employees filter is the only one that affects the order of the Unscheduled Employees list.

Filtering and Employee Row Display

When an Intraday view has filters applied, making or editing shift assignments can have what at first seems some unusual results. For instance, if the view is filtered to only show the Shoe department, and you change an employee listed under the Shoe department so they are now working in the Cosmetics department, the employee row will disappear. The filter that was in place before the shift assignment change is still in place after the change, and your re-assignment has caused this particular employee to no longer be a part of the data subset currently being presented in the Intraday.

For more information on employee row behavior, see *Understanding Employee Row Display on page 24*.

Sorting the Intraday

By default, the schedule is sorted by Employee in ascending order.To indicate this, a small blue arrow icon is displayed beside the column heading, pointing up.

Employee ▲	Job	Sunday, Jun 4,2006			
		12AM	1AM	2AM	3AM
DV DON VALLEY MARKET					
DV CLOTHING					
Garcia,Erin	DV SALES MANAGE				
Langdon,Kathleen	DV CASHIER				
Moore,Jessica	DV CASHIER				
ONeal,Ciaran	DV CASHIER				
DV SHOES					
Lewis,Sarah	DV CASHIER				
Martin,Ellis	DV CASHIER				

To change the sort key and order:

1   Open an Intraday schedule.

A small blue arrow indicates the default sort key and order:

Employee ▲

2   Click the column header of either the Employee or the Job column, or click the
day and date above the hour columns:

3   If you want to change the sort order of a column, click the column header a
second time. The rows will reorder and the blue arrow icon will point in the
opposite direction.

Schedule Summary

Above the main Intraday grid, is a collapsible *Schedule Summary* displaying schedule details such as Performance Indicators, as well as both Weekly and Daily Labor Cost values for the schedule. These values are dynamic and update as scheduling assignments are made and saved. The values also reflect any filters currently applied to the view.
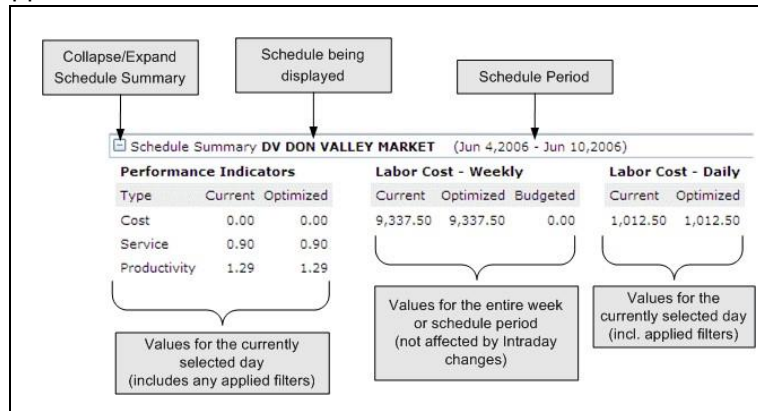
Schedule Summary

The *optimized* values represent the original system-generated schedule values. These are unchanged by manual edits, which are reflected in the *current* values.

The *Cost* Performance Indicator represents whether the schedule is within the payroll budget. A perfect score is 1. A score of less than 1 indicates that the payroll, based on the scheduled employees, is under budget. A value greater than 1 indicates the payroll is over budget for the schedule.

The *Service* Performance Indicator represents a percentage of intervals which are adequately staffed. A perfect score is 1. A score of less than 1 indicates understaffing.

The *Productivity* Performance Indicator reflects the level of service. Again, a perfect score is 1. The Productivity value is based on weighted productivity ranges. The more understaffed an interval is, the harder the staff is working and therefore the higher the productivity, but the lower the level of service.

Note:
If *All Days* is currently selected as the focus of the Intraday, the Daily cost data is not shown.

Intraday Main Grid

The Intraday's main grid is divided into rows (employees) and columns (hours), making it easy to discern who is assigned to which shifts by where the rows and columns intersect.

Employee Row and Hour Column Intersection

Understanding Employee Row Display

Employee rows are displayed in a grouped section (see *Intraday Grouping on page 10*) or in the *Unscheduled Employees* section of the Intraday. If an employee has any shift assignments with a start time within the currently selected day, even if they haven't had any activities assigned to them yet or if they are only working a partial shift, they will not appear in the *Unscheduled Employees* section.

Employee Row Display

As you make further shift assignments, the display of the employee rows can change drastically, in some cases. Filtering can also affect the display, and produce some unusual results. For more information on filtering and the Intraday display, see *Filtering and Employee Row Display on page 21*.

When an employee is assigned to a shift in the currently selected day, the employee row moves from under the Unscheduled Employees section to under the appropriate grouping the shift activity belongs to, or, in the case of department grouping, if there are no activities yet, the row is moved under the department which is the shift's working location.

If an employee's shift is dragged from the currently selected day to the same row in another day (and this is the only shift that employee has for the currently selected day), the employee row is removed from the scheduled grouping to under the Unscheduled Employees section. Regardless of the number of days that can be seen in the Intraday grid (as a result of zooming or scrolling), the currently selected day (focus day) is always the only focus of actions in the Intraday. The exception to this, is if All Days has been selected in the **Focus Day** drop-down. For more information, see *Changing the Focus Day on page 17*.

The Main Grid

The main grid is where all interactions with the Intraday take place. All shifts, activities and breaks in their various states of assignment are shown. The figure below shows a typical main grid prior to shift creation or assignments:
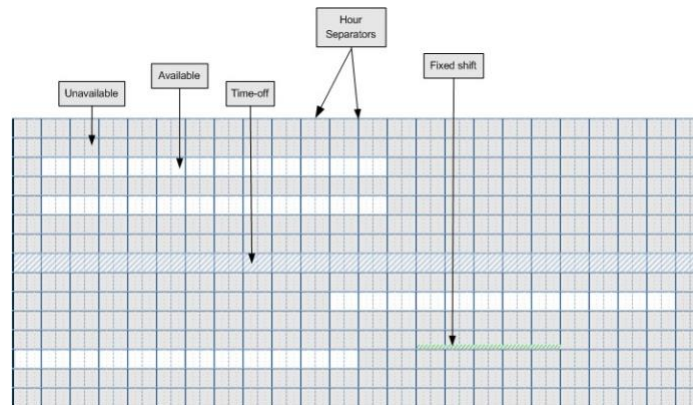
Main Grid Shift Assignments

As shifts are created and shift assignments are made, the elements are laid on top of the base grid. All of this information together delivers a very complete scheduling picture. The figure below shows the above main grid after shifts are added:
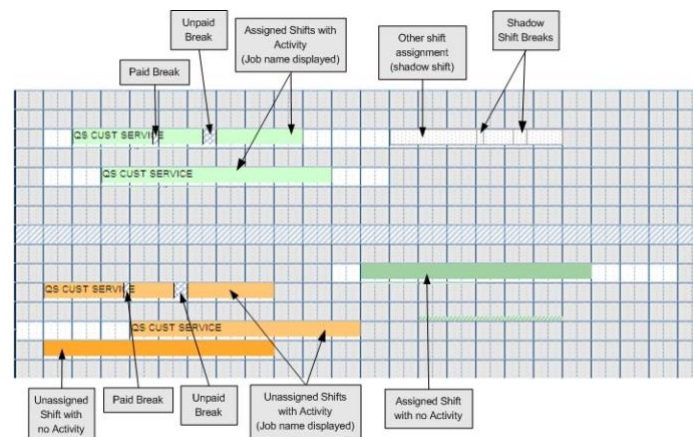
Shadow Shifts

Shifts displayed in the Intraday to show that an employee is scheduled for a shift within a specific time period, but which are not part of that particular employee row for the currently selected day are known as *shadow shifts*. Shadow shifts display as dotted white patterns, but shift details can be seen by hovering your mouse over the shadow shift and viewing the informational pop-up window.

Shift Transitions

Employees may be displayed on more than one row for the currently selected day if there is a shift transition between departments or if they are working more than one shift in the current day and the shifts belong to different departments.

Employees can also be displayed more than once within the same department if they are working more than one shift for that department on the current day, but each shift has a different job.

For example, an employee might work half a shift in the shoe department and then the second half of their shift in the cosmetics department. Since the rows of the Intraday are designed to show employees and their activities in their assigned departments on a given day, one row is not capable of presenting this information properly. So, an employee who is working in two departments on a given day would actually have a row under each of those departments.

Shifts for rows in the *Unscheduled Employees* section, indicating that while the employee is available for the currently selected day they have shift assignments for other days, are always displayed as shadow shifts.

When you hover your mouse over a shadow shift, the information popup displays the expected information, as well as the working location of the shadow shift in parenthesis.

Note:

Shadow shifts can be edited using the *Shift Edit* form, accessible from the pop-up menu launched by holding down CTRL and clicking on the shadow shift.

Coverage

Below the Intraday main grid are the Total Coverage values for the displayed schedule, showing the *Scheduled Hours*, the *Required Hours* and the *Difference* between the two. The Coverage section can be collapsed/expanded using the +/- node in the top left corner.

Total Coverage Section

Coverage shortcomings are displayed in red to make it easy to tell when further shift assignments are required. As with the Schedule Summary, these values are dynamic, updating as scheduling assignments are made and as filters are applied.

Detailed Department/Job Coverage

Detailed coverage per group as either a percent or hourly metric is available when the Intraday is grouped by department or job. These values are displayed on the group heading rows.
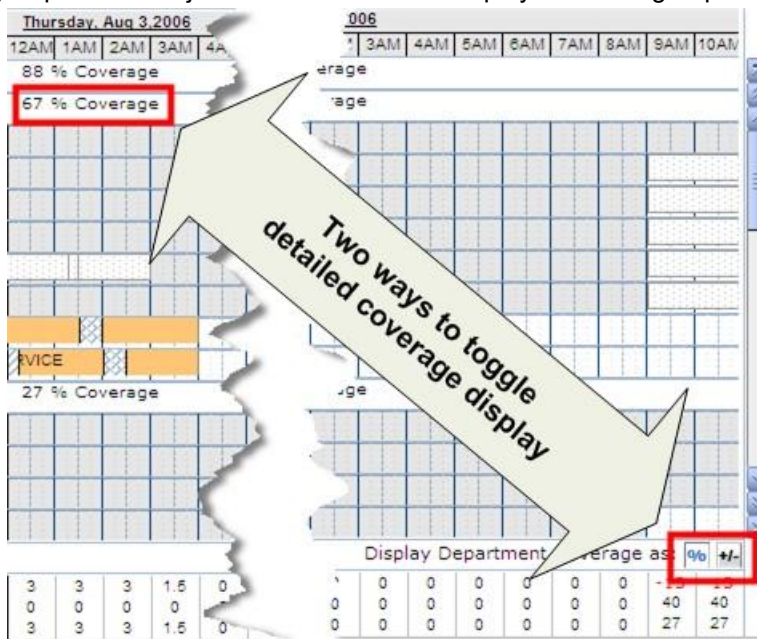
To toggle department/job detailed coverage from percent to interval:

1 Click either **Department** or **Job** grouping with the Intraday displayed.

2 To toggle the detailed coverage display: **a**   Click a department group heading row.

or **b** Click the +/- button above the Total Coverage

section.

Detailed coverage is now displayed in interval mode.

Note:

If a midweek regeneration has taken place, the detailed coverage will default to the interval mode. See *Midweek Regeneration Display on page 31* for more information.

Makeshift Department/Job Coverage Report

Using the Detailed Department/Job Coverage, explained above, and the Show Shifts settings, explained below, you can produce a makeshift coverage report using the intraday.

To produce the report:

1 Group the Intraday by **Department** or **Job**. See *Intraday Grouping on page 10* for more information.

2 Switch the detailed coverage view to intervals. See *Detailed Department/Job Coverage on page 27* for more information.

3 Clear the **Assigned** and **Unassigned** check boxes in the Show Shifts section and click **Submit**.

The following "report" is displayed:

Note:

The same result can be achieved incrementally on-the-fly by collapsing the Department/ Job groups instead of altering the assigned/unassigned shift display and having to click **Submit**.

Show Shifts

Beneath the *Coverage* section is the *Show Shifts* section of the Intraday. This is a legend or key to all the colors and patterns you'll see in the Intraday's main grid. You can also select or clear respective check boxes to adjust what is displayed in the main grid. Note that these are display options and don't affect schedule costs or coverage values, as filtering does.
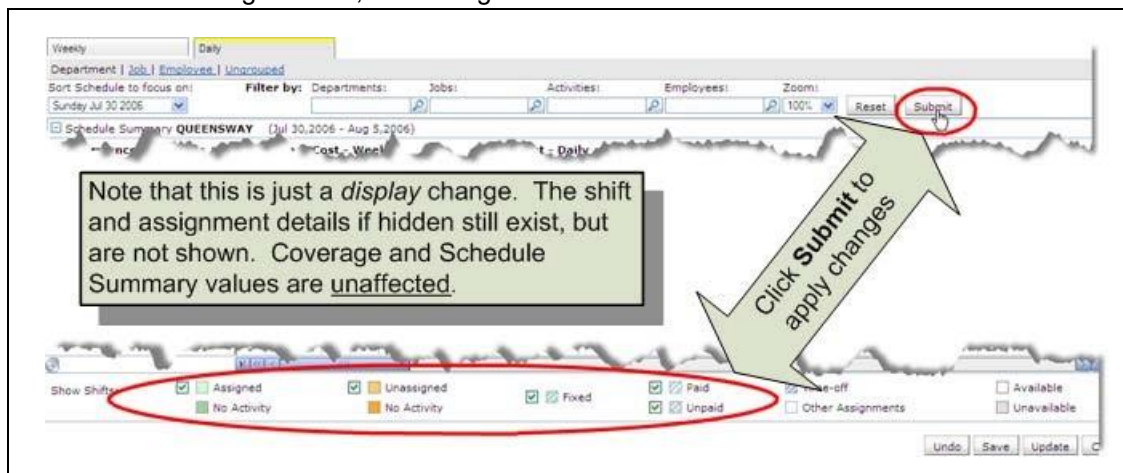
Show Shifts Section

Setting	Function
☑ ☐ Assigned ■ No Activity	Indicates shifts with an employee assigned, both with and without at least one activity applied. This check box shows/hides both types of shifts.
☑ ☐ Unassigned ■ No Activity	Indicates shifts without an employee assigned, both with and without at least one activity applied. This check box shows/hides both types of shifts.
☑ ▨ Fixed	Indicates a fixed shift. Note that fixed shifts display at half height.
☑ ▨ Paid	Indicates a paid break.
☑ ▨ Unpaid	Indicates an unpaid break.
Setting	**Function**

1 Midweek Regen Overstaffing **-1** Midweek Regen Understaffing	Indicates overstaffing and understaffing as a result of a midweek regeneration. These elements are not shown in the *Show Shifts* section until a midweek regeneration takes place. Even then, they are only shown while the Intraday is grouped by department or job and Detailed Coverage is active. These elements cannot be hidden.
Time-off	Indicates an employee's time off. This element cannot be hidden.
Other Assignments	Indicates the employee has other assignments for the indicated time period. Typically these are shifts or activities in other departments or performing other types of jobs. This element cannot be hidden.
Available Unavailable	These colors are used for the background of the Intraday grid, indicating an employee's availability. These elements cannot be hidden.

Selecting Shift Types To Display

To allow you to focus on specific elements in the Intraday, you can select which types of shifts or activities to show or hide by using the *Show Shifts* section.

With an Intraday page displayed:

> **1** Select or clear check boxes for the shifts or activities for which you would like to show/hide in the Intraday main grid.

> **2** Click **Submit** above the Intraday grid to apply the change.

> The Intraday page refreshes with your changes.

Midweek Regeneration Display

Midweek regeneration can cause overstaffing or understaffing if the staffing requirements have changed since the original schedule generation and as a result, current staffing becomes inefficient. To indicate the change, when Detailed Coverage is active, the affected intervals are highlighted in the appropriate color in the Intraday if it is currently grouped by either Department or Job.

The following table shows some possible results from a midweek regeneration:

Before Midweek Regeneration

Employee ▲	Job	1AM	12PM	1PM	2PM	3PM	4PM	5PM	6PM	7PM
⊟ EVENT DEPARTMENT 1		0	0	0	0	0	0	0	0	0
A2,Event	EVENT MANAGER		EVENT ACT 1							

After Midweek Regeneration
(Overstaffing Result)

Employee ▲	Job	11AM	12PM	1PM	2PM	3PM	4PM	5PM	6PM	7PM
⊟ EVENT DEPARTMENT 1		0	2	2	2	2	2	2	2	2
A2,Event	EVENT MANAGER		EVENT ACT 1							

After Midweek Regeneration
(Understaffing Result)

Employee ▲	Job	1AM	12PM	1PM	2PM	3PM	4PM	5PM	6PM	7PM
⊟ EVENT DEPARTMENT 1		0	-3	-3	-3	-3	-3	-3	-3	-3
A2,Event	EVENT MANAGER		EVENT ACT 1							

Midweek regeneration information is affected by the filtering in the Intraday, the same way other information is. If a schedule has midweek regeneration information, the schedule's coverage is automatically set to detailed coverage, assuming the Intraday is grouped by Department or Job. If no midweek regeneration information exists, the schedule's coverage defaults to a percent display.

Using the Intraday

Through the use of pop-up menus, drag-and-drop functionality, resizable schedule elements and pop-up informational windows, the Intraday enables users to not only see a comprehensive daily view of their schedule, but to interact with it directly.

This section explains how to use the Intraday.

Graphical vs. Menu/Form Functionality

Much of the functionality in the Intraday can be accomplished in more than one way. Users of the *Weekly Schedule* screen will recognize the familiar field-based forms accessed through various pop-up menus. But there is also a graphical interface component to the Intraday, allowing users to perform many tasks directly.

If you need to resize an activity you can use your mouse to grab an edge and resize it. If you are wondering about a shift's details, you can hover your mouse over it and read the details in a pop-up window. If you need to move a scheduled shift from today to tomorrow you can use your mouse and drag it there.

The following table illustrates how to accomplish most tasks in the Intraday both graphically and using traditional menu/form functionality:

Task	Graphical Method	Menu/Form Method
Add a shift assignment.	N/A	Select **Add Shift Assignment** from the pop-up menu and fill in the form fields. You can also click the employee's name to display the *Shift Edit* form.
Edit a shift assignment.	Drag shift to another employee row and drop it there.	Select **Edit Shift Assignment** from the pop-up menu and edit the form fields.
Unassign a shift.	Drag shift to **Unassigned Shifts** row and drop it there.	Select **Unassign Shift** from the popup menu. You can also unassign a shift by clearing the employee selection in a populated *Shift Edit* form.
Delete a shift.	Drag the shift off of the Intraday grid.	Select **Delete Shift** from the pop-up menu.
View shift assignments.	Hover mouse over shift.	Select **Edit Shift Assignment** from the pop-up menu.
View employee assignments.	Hover mouse over employee name.	N/A
Adding an activity or break.	N/A	Select **Edit Shift Assignment** from the pop-up menu.
Resizing an activity or break.	Hold down ALT and drag the edge to the new size.	Select **Edit Shift Assignment** from the pop-up menu.
Moving an activity or break within a shift/to a different shift.	Hold down ALT and drag and drop an activity or break.	Select **Edit Shift Assignment** from the pop-up menu.
Removing an activity or break.	Hold down ALT and drag an activity or break off of the Intraday grid.	Select **Edit Shift Assignment** from the pop-up menu.

Interaction Conventions

The following explains some page-wide conventions used to accomplish many different tasks in the Intraday:

Pop-up Menus and Field-based Forms

Pop-up menus provide access to actions, such as unassigning or deleting a shift, and to field-based forms for more complex actions, such as editing or assigning a shift.

To display a pop-up menu, hover your mouse over an element, such as a shift (your cursor will change shape). Hold down the CTRL key and then left-click your mouse. You can also perform this action anywhere in the Intraday grid to see a pop-up menu allowing you to add a shift assignment.
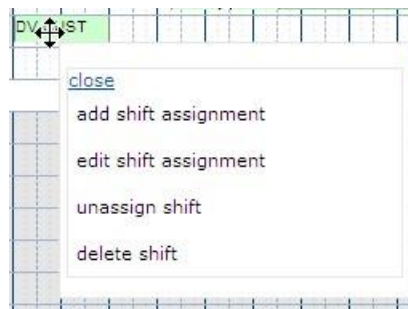
Once the menu is displayed, click the desired action or click **Close**.

Once the form is displayed, create or edit the content as desired. Clicking **Apply** saves your changes, but keeps the form displayed for further changes. Clicking **OK** saves your changes and dismisses the form. Clicking **Cancel** undoes any changes that have not been applied or saved and dismisses the form.

Resizing Elements

To resize an element, such as an activity or break, hold down the ALT key and hover your mouse over the edge of the element (your cursor will change shape). Hold down the left mouse button and drag the edge until the element is the desired size.

Dragging Elements

To drag an element, such as an activity within a shift, hold down the ALT key and hover your mouse over the element to be moved (your cursor will change shape). Hold down your left mouse button and drag the element where you want it to go.

Informational Pop-ups

To see information about an element that has an informational pop-up associated with it, such as a shift, job or employee, hover your mouse over the element for a moment. When you move your mouse, the popup is dismissed.

Collapsible/Expandable Regions

Many of the regions in the Intraday can be collapsed to clarify the display and allow you to focus in on certain sets of data. When such a region can be collapsed, a minus sign (-) node is displayed at the region's top left corner. When such a region has already been collapsed, meaning it can be expanded, a plus sign (+) node is displayed at the region's top left corner. In either case, click the node to expand or collapse the region.

The Submit Button

All items in the *Filter by* section, including the **Zoom** factor, and selections in the *Show Shifts* bar are not applied to the view until the **Submit** button is clicked. This is also a good way to get back to where you were if you've scrolled off of your original view.

The Reset Button

If you have several filters applied to your view, you can use the **Reset** button to clear all currently selected filters. Now when you click **Submit**, the view refreshes and is displayed with no filters applied.

Processing Message

While most actions in the Intraday are almost instantaneous, if an action takes some time to complete, the Workbrain icon beneath the Unscheduled Employees section will blink from gray to orange and display *processing...*, letting you know what's happening.

The Undo/Save/Update/Cancel Button Set

The buttons at the bottom right of the Intraday page save or undo your changes. Even when you've made some changes and they currently appear in the Intraday page, they have not yet been applied to the schedule.

Clicking **Undo** backs out of a previously applied change. Once any changes have been saved (by clicking **Save** or **Update**), you can no longer Undo them. When undoing a change is not possible, this button is grayed out.

Clicking **Update** saves your changes to the schedule and continues displaying the Intraday so you can make further changes. When there are no changes to save, this button is grayed out.

Clicking **Save** saves your changes to the schedule, closes the Intraday view and returns you to the *Display a Schedule* page. When there are no changes to save, this button is grayed out.

Clicking **Cancel** rejects any changes you've made (you'll be prompted on whether you really want to do this or not), closes the Intraday page and returns you to the *Display a Schedule* page.

> **Note:**
>
> When changes are cancelled, this includes changes to shift assignments, even if you used the fieldbased form and applied your changes there.

Scrolling

The Intraday grid is really just a keyhole view into the larger weekly schedule data. To enable you to move horizontally or vertically to see the data which at times is hidden or out of the keyhole view, use the vertical and horizontal scroll bars on the Intraday main grid.
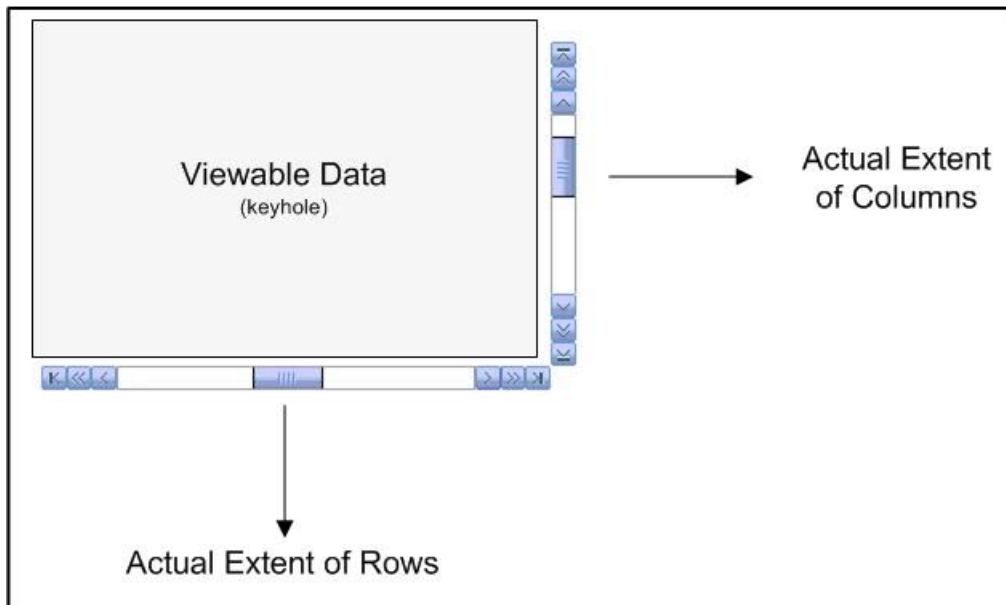
Both the vertical and horizontal scroll bars have controls to help you move quickly through all of the available data:

Control	Action
|<	Jump to the start (first hour of the first day) of the loaded schedule period.
>|	Jump to the end (last hour of the last day) of the loaded schedule period.
<<	Jump 24 hours backward. If there is less than 24 hours between the day and hour that currently is displayed in the first column and the start of the loaded schedule period, this control has the same effect as jumping to the start of the loaded schedule period. In other words, you can't jump beyond the beginning of the loaded schedule period.
>>	Jump 24 hours forward. If there is less than 24 hours between the day and hour that currently is displayed in the last column and the end of the loaded schedule period, this control has the same effect as jumping to the end of the loaded schedule period. In other words, you can't jump beyond the end of the loaded schedule period.
>	Jump forward by one hour.
<	Jump backward by one hour.

		Jump to the start (first row) of the loaded schedule period.
		Jump to the end (last row) of the loaded schedule period.
	‾ ∧ ◇ — ∧ ∧ ∨ ∨ ∨ ∨	Jump up one screen.
		Jump down one screen.
		Move up one row.
		Move down one row.

Aside from the above controls, you can also click anywhere in the scroll bar to jump quickly up/down or forward/backward. The slider within both the vertical and horizontal scroll bars can also be clicked and dragged to move around the data set.

Working from the Employee Point of View

There are many ways to accomplish the same task in the Intraday, including shift assignments. You can work from the shifts, themselves, in the Intraday grid or from the Employees. The following tasks show how to work from the Employee point of view.

> **Note:**
> If the registry key LOCK_SCHEDULE_EDITING is set to TRUE, shifts in the past in a published schedule cannot be edited. See *LOCK_SCHEDULE_EDITING on page 52* for more information.

Displaying Employee Details

To display details about an employee's shift assignments, whether they are assigned to a department or in the Unscheduled Employees list, hover your mouse over the employee's name in the list. After a moment, an informational pop-up is displayed as shown below:

When you move your mouse, the pop-up is dismissed.

Adding a Shift Assignment

To add a shift assignment:

1   Hold down CTRL and click in an employee row.

The *Shift Assignment* Menu is displayed.

2   Select **Add Shift Assignment** from the menu.

The *Shift Edit* form is displayed, propagated with the name of the employee who's row you clicked in to display the menu and with a default shift time of the column in which you clicked.

3   Edit the form as desired.

4   Click **OK** to dismiss the form and add the shift assignment.
If you didn't change the date, and you clicked in the currently selected day, the shift is added to that employee's row under the appropriate grouping. If the employee was in the *Unscheduled Employees* list before the action, they are removed from under there.

> **Note:**
> Even if you clicked on top of an existing shift, adding a shift assignment doesn't take any details from that shift, but only sees the employee row and column you clicked in to display the menu. Notice that if you did click over a shift, there will be more menu options available.

Assigning Employees to Shifts

To add a shift assignment for an employee:

1   Click the employee's name either in the *Unscheduled Employees* list or under an existing grouping.

The *Shift Edit* form is displayed.

2   Enter/edit the details for the shift, activities and breaks.

3   Click **OK** to accept the changes and return to the Intraday page.

If the employee was unscheduled before this and you assigned them to a shift for the currently selected day in the Intraday with your edits, the employee row is moved from the *Unscheduled Employees* list to under the respective grouping. Note that if you assigned the employee to a day other than the currently selected one, the employee's listing for the current day will not change.

> **Note:**
>
> If the employee is unavailable for the shift you assign them to, you are prompted and asked if you want to assign them anyway. If the employee is inactive (not hired yet or terminated on the target date), an error message is displayed indicating that the employee is inactive and the assignment is not made.
>
> Also note that if you enter any incorrect values in the Shift Edit form, red error text is displayed in the form and the assignment is not made. Correct the indicated errors and try again.

Working from the Shift Point of View

Most operations are easier when performed from the shift point of view. When you are making an assignment this way, all of the relevant shift data is already entered for you, saving time. There are also some actions which can only be performed from this point of view. The following tasks show how to work from the shift point of view.

> **Note:**
>
> If the registry key LOCK_SCHEDULE_EDITING is set to TRUE, shifts in the past in a published schedule cannot be edited. See *LOCK_SCHEDULE_EDITING on page 52* for more information.

Displaying Shift Details

To display details about a shift in the Intraday, including assignments, activities and breaks, hover your mouse over the shift. After a moment, an informational pop-up is displayed as shown below:
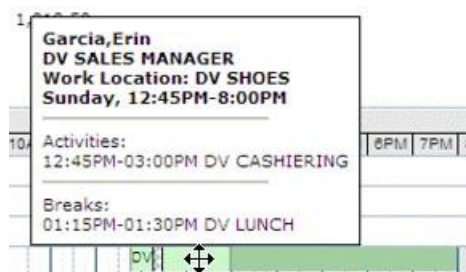
> **Note:**
> This works for all shifts, including shadow shifts. For more information on shadow shifts, see *Shadow Shifts on page 26*.

Moving a Shift by Dragging

Using the Intraday's interactive user interface, you can drag a shift to a new day or time. When you drag a shift, you also drag any activities, assignments or breaks along with it.

To move a shift:

1   Hold down the left mouse button on the shift to be dragged.

2   Drag the shift to the new location and release the mouse button to place it.

If there is an employee assigned to the shift and they are not available for the time slot you are moving the shift to, you are prompted with this fact and asked if you really want to continue.

> **Tip:**
> Once you start dragging a shift, the Intraday display will NOT scroll if you try to drag the shift beyond the edge of the current display. Be sure you can see both the shift you are going to drag and the location you are going to drag it to before you start the dragging operation. For help with this see *Scrolling on page 38* and *Zooming the Intraday Page on page 19*.

Deleting a Shift by Dragging

You can delete a shift by dragging it off of the Intraday grid.

To delete a shift by dragging:

1   Hold down the left mouse button on the shift you want to delete.

2   Drag the shift off of the Intraday grid and release the mouse button.

The shift and any activities or breaks assigned to it are deleted.

> **Note:**
> If this is the only shift assignment an employee has in the currently selected day, the employee row is moved from under the respective grouping to the *Unscheduled Employees* section.

Resizing a Shift

You can resize a shift graphically by grabbing an edge and dragging it. When you resize a shift, you also impact employee assignments, activities and breaks. In fact, if you reduce the size of a shift by dragging the edge of a shift past an existing break, you will completely eliminate that break.

To resize a shift:

1   Move your cursor over the edge of the shift until you see the double-headed arrow cursor, indicating you can resize the object beneath the cursor.

2   Hold down the left mouse button and drag the edge of the shift to resize it. When the shift is the size you want, release the mouse button.

> **Note:**
>
> If you resize a shift with an employee assigned to the shift and they are not available for the time slot you resize the shift into, you are prompted with this fact and asked if you really want to continue.

> **Tip:**
>
> Once you start resizing a shift, the Intraday display will NOT scroll if you try to resize the shift beyond the edge of the current display. Be sure you can see both the entire shift you are going to resize and the location you are going to resize it to before you start the resizing operation. For help with this see *Scrolling on page 38* and *Zooming the Intraday Page on page 19*.

Displaying the Shift Assignment Menu

To display the Shift Assignment Menu:

1   Hold down CTRL and click the shift you want to work with.

The *Shift Assignment* Menu is displayed.

> **Note:**
>
> You can also display a Shift Assignment Menu with only one option (Add Shift Assignment) by holding down CTRL and clicking anywhere in the Intraday grid that doesn't already have a shift displayed. The **Shift Edit** form will take the time, day and employee (if any) from the intersection you clicked and populate its fields with that info, though you can change the data if you want to. For more information see *Intraday Main Grid on page 24*.

2   To dismiss the *Shift Assignment* Menu, you must click the **Close** option.

Editing a Shift Assignment

1   Hold down CTRL and click on the shift in the Intraday for which you want to edit assignments.

The *Shift Assignment* Menu is displayed.

2   Select **Edit Shift Assignment** from the menu.

The *Shift Edit* form is displayed, propagated with the current shift assignment details.

3   Edit the form as desired.

4   Click **OK** to dismiss the form and add the shift assignment.

Unassigning a Shift

Sometimes you may want to keep all the shift details, but remove any existing employee assignments to that shift.

To unassign a shift:

1   Hold down CTRL and click on the shift in the Intraday for which you want to remove assignments.

The *Shift Assignment* Menu is displayed.

2   Select **Unassign Shift** from the menu.

The color of the shift changes, to indicate it is now unassigned. The row is renamed as **Not Assigned** and the row is moved to the last position under the department. The employee who was originally assigned to the shift is added to the *Unscheduled Employees* section if this was their only shift assignment for that day.

Deleting a Shift

To delete a shift:

1   Hold down CTRL and click on the shift in the Intraday that you want to delete.

The *Shift Assignment* Menu is displayed.

2   Select **Delete Shift** from the menu.

The shift is removed from the Intraday and the employee who was assigned to the shift is added to the *Unscheduled Employees* section if this was their only shift assignment for that day.

Working With Activities and Breaks

An activity is a task an employee is scheduled to do. While their job may be *Manager*, during their shift they may be required to perform several tasks, such as filling in for someone on break or who is off sick.

A break is just that, a break from an activity to rest or have a meal. Breaks can be paid or unpaid, but are configured as such outside of the Intraday.

> **Note:**
> If the registry key LOCK_SCHEDULE_EDITING is set to TRUE, shifts in the past in a published schedule cannot be edited. See *LOCK_SCHEDULE_EDITING on page 52* for more information.

Adding an Activity

To add an activity:

1   Hold down CTRL and click on the shift in the Intraday to which you want to add the activity.

The *Shift Assignment* Menu is displayed.

2   Select **Edit Shift Assignment** from the menu.

The *Shift Edit* form is displayed, propagated with the current shift assignment details, including any existing activities or breaks.

3   Click **Add** in the *Activities* header row and enter the details for the activity in the row that is appended to the list of activities.

4   Click **OK** to save the changes and refresh the Intraday with them.

Adding a Break

You don't need to have activities created to add breaks to a shift. Depending on the labor rules or laws, certain breaks will need to be in place regardless of the person assigned to the shift or any activities assigned to them.

To add a break:

1   Hold down CTRL and click on the shift in the Intraday to which you want to add the break.

The *Shift Assignment* Menu is displayed.

2   Select **Edit Shift Assignment** from the menu.

The *Shift Edit* form is displayed, propagated with the current shift assignment details, including any existing activities or breaks.

3   Click **Add** in the *Breaks* header row and enter the details for the break in the row that is appended to the list of breaks.

4   Click **OK** to save the changes and refresh the Intraday with them.

Resizing an Activity

You can use either the shift edit form, accessed by using the Shift Assignment pop-up menu, or the Intraday's graphical features to resize elements. The following describes how to graphically resize an activity.

To resize an activity:

1   Hold down ALT and move your mouse over the edge of the activity you want to resize.

The cursor will change to a double-headed arrow.

2   Hold down the left mouse button and drag the edge of the activity to the size you want, releasing the mouse button when you're done.

Note:
You cannot resize an activity beyond the start or end times of the shift. To do this, first resize the shift as described in *Resizing a Shift on page 43* and then resize the activity.

Resizing a Break

You can use either the shift edit form, accessed by using the Shift Assignment pop-up menu, or the Intraday's graphical features to resize elements. The following describes how to graphically resize a break.

To resize a break:

1   Hold down ALT and move your mouse over the edge of the break you want to resize.

The cursor will change to a double-headed arrow.

2   Hold down the left mouse button and drag the edge of the break to the size you want, releasing the mouse button when you're done.

Note:

> You cannot resize a break beyond the start or end times of the shift. To do this, first resize the shift as described in *Resizing a Shift on page 43* and then resize the break.

Moving an Activity or Break

Existing activities and breaks can be moved within a shift or to a completely different shift.

To move an activity or break within a shift:

1 Hold down ALT and move your mouse over the activity or break.

The cursor will change shape.

2 Hold down the left mouse button and drag the activity or break to the new location.

3 Release the mouse button to place the activity or break.

> **Note:**
> Make sure that where you are dropping the activity or break is completely within the existing shift. If a break or activity is dropped and part of it is outside of the shift, the part outside of the shift will be truncated.

To move an activity or break to a completely different shift:

1 Hold down ALT and move your mouse over the activity or break.

The cursor will change shape.

2 Hold down the left mouse button and drag the activity or break to the new location in the different shift.

> **Tip:**
> Once you start moving an activity or break, the Intraday display will NOT scroll if you try to move beyond the edge of the current display. Be sure you can see both the activity or break you want to move and the location you are going to move them to before you start the move operation. For help with this see *Scrolling on page 38* and *Zooming the Intraday Page on page 19*.

3 Release the mouse button to place the activity or break.

> **Note:**
> Make sure that where you are dropping the activity or break is completely within the existing shift or you will get an error and the operation will fail.

Removing an Activity or Break

You can use either the shift edit form, accessed by using the Shift Assignment pop-up menu, or the Intraday's graphical features to remove elements. The following describes how to graphically remove an activity or break.

To remove an activity or break:

    1   Hold down ALT and move your mouse over the activity or break you want to remove.

        The cursor will change shape.

> **Tip:**
> To ensure you are grabbing the element you really want to remove, wait a moment for the element's informational pop-up to display. This will tell you which element is indeed beneath the cursor.

    2   Hold down the left mouse button on the activity or break you want to remove.

    3   Drag the activity or break off of the Intraday grid and release the mouse button.

        The activity or break is removed.

Workbrain Parameters

The Workbrain system relies on the Workbrain registry parameter configuration for its function and behavior. Registry parameters define the way in which certain parts of the application appear.

This section describes the Workbrain Parameters which affect the Intraday.

Intraday Parameters

All of the Intraday parameters are found under the following menu path:

MAINTENANCE > SYSTEM ADMINISTRATION > REGISTRY MAINTENANCE > SYSTEM > MODULES > SCHEDULEOPTIMIZATION

INTRADAY_PAGE_MODE

Valid Values   NEW or OLD (default)

This parameter controls whether the new or old Intraday view is used. When set to OLD, the old version of the Intraday page is displayed when a Daily Schedule View is launched from a displayed schedule. When set to NEW, the new version is launched.

HORIZONTAL_FETCH_SIZE

Valid Values   NUMBER (measured in hours). Default = 48.

This parameter determines how many schedule hours are loaded when the Intraday is launched. The more hours that are loaded on initial display, the longer the wait before the initial view is displayed, but it also means there will be less required transactions between the client and the server. A value of -1 loads the entire schedule.

VERTICAL_FETCH_SIZE

Valid Values   NUMBER (measured in rows). Default = 15.

This parameter determines how many rows are loaded when the Intraday is launched. The more rows that are loaded on initial display, the longer the wait before the initial view is displayed, but it also means there will be less required transactions between the client and the server. A value of -1 loads the entire schedule.

Associated Parameters

The following parameters are not Intraday parameters, but their configuration can affect functionality within the Intraday. As with the Intraday parameters, they are located under the following menu path:

MAINTENANCE > SYSTEM ADMINISTRATION > REGISTRY MAINTENANCE > SYSTEM > MODULES > SCHEDULEOPTIMIZATION

LOCK_SCHEDULE_EDITING

Valid Values   TRUE (default) or FALSE

This parameter determines whether or not the user is able to edit the schedule. When set to TRUE, the user is not able to edit past date published schedules.

Field Reference

This section provides definitions for fields found in the Intraday.

Main Intraday Page

Day Filter Drop-Down

The day of the schedule period to use as the current day focus.

Departments Filter Lookup

The department(s) to use to filter the employee rows in the Intraday.

Jobs Filter Lookup

The job(s) to use to filter the employee rows in the Intraday.

Activities Filter Lookup

The activity(s) to use to filter the employee rows in the Intraday.

Employees Filter Lookup

The employee(s) to use to filter the employee rows in the Intraday.

Zoom Drop-Down

The zoom percent to use when displaying the main Intraday grid. Note that this only affects the number of columns displayed and not the number of rows, which is always constant.

Assigned check box

Whether or not to display assigned activities in the Intraday.

Unassigned check box

Whether or not to display unassigned shifts in the Intraday.

Break (paid) check box

Whether or not to display paid breaks in the Intraday.

Break (unpaid) check box

Whether or not to display unpaid breaks in the Intraday.

Field Reference

workbrain™

Shift Edit Page

Date
The date to which you want to apply the shift assignment.

* Start
The shift start time.

* End
The shift end time.

* Department
The department the employee will be working in or the working location of the activity.

Job
The job in the department the assigned employee will be doing.

Employee
The employee to assign to the shift.

Activities - Start
The start time of the activity. This must be equal to or greater than the start time of the shift and cannot overlap any other existing activities.

Activities - End
The end time of the activity. This must be equal to or less than the end time of the shift and cannot overlap any other existing activities.

Activities - Activity
The activity the employee will be performing.

Activities - Department
The department that is the working location of the activity.

Breaks - Start

The start time of the break. This must be equal to or greater than the start time of the shift and cannot overlap any other existing breaks. Note that breaks CAN overlap activities.

Breaks - End

The end time of the break. This must be equal to or less than the end time of the shift and cannot overlap any other existing breaks. Note that breaks CAN overlap activities.

Breaks - Break

The type of break.