MULTI-VIEW SCHEDULER

USER RESEARCH FINDINGS

AUGUST 2017

Prepared by Mary Curren, Angela Fagg, Lenya King, and Isha Shukla

 $HOOK \infty LOOP$

tor each line over if same for a employee

affects I rotation ato

WHAT'S INSIDE

OUR METHODOLOGY KEY INSIGHTS RECOMMENDATIONS NEXT STEPS APPENDIX

10St left



IF THE USER IS HAVING A PROBLEM T'S OUR PROBLEM.

– STEVE JOBS



INTRODUCTION

Infor MVS (Multi-View Scheduler) is a platform for Scheduling Managers and other staff with similar responsibilities. The insights from this study will help expose user pain points and challenges, fueling an informed design process.

We were able to recruit three organizations that currently use the Workbrain MVS platform and conducted eight interviews in total (three from Queensland Health, three from PHSA, and two from the State of South Dakota). The roles of the users interviewed ranged from Nursing Directors to Portfolio Clerks to Lab Assistant Coordinators. Each role used the MVS platform to some capacity.



COMPETITIVE ANALYSIS



A heuristic evaluation is a usability inspection method for computer software that helps to identify usability problems in the user interface (UI) design. It specifically involves evaluators examining the interface and judging its compliance with recognized usability principles (the "heuristics").

Benefit:

Each observed usability problem is explained with reference to an established usability principle, it is fairly easy to generate fixes. It is a good method for finding both major and minor problems in a user interface.



A Competitive Analysis is an assessment of the strengths and weaknesses of current and potential competitors.

Benefit:

A competitive analysis can be beneficial on two fronts; one it can help establish market understanding and two it can help to see how similar products are approaching the problem and solution.

OUR METHODOLOGY:

As a first step in the design process, Hook & Loop conducted a series of contextual interviews over WebEx where we asked users to describe their roles and responsibilities and how their organization manages scheduling. We then watched and listened as they walked us through their installed version of MVS and asked them how they would go about completing certain tasks.

Benefit:	The results we observed from these interviews were p
	the end-user, their roles and responsibilities and how
	workflow. Users were encouraged to voice their thoug
	the MVS which gave us insights on the platform such a
	issues, workflows, etc.

orimarily to learn about MVS fits into their daily ghts as they went through as pain points, technical



KEY INSIGHTS: LACK OF COMMUNICATION

LACK OF **COMMUNICATION:** TAXONOMY

Naming conventions are confusing and often illegible.

Each organization has their own method of naming shifts.



LACK OF **COMMUNICATION:** NOTIFICATIONS

No system or confirmation notifications

Error notifications and system messaging unclear/non-existent



KEY INSIGHTS: **INEFFICIENT WORKFLOW**



INEFFICIENT WORKFLOWS: OVFRALL

Too many steps to complete various tasks

Must go outside tools to find nurse to backfill shifts (can be lengthy process)

Inconsistent workflow when creating, assigning, booking off and selecting from relief queue



INEFFICIENT WORKFLOWS: NAVIGATION

To assign shifts the user needs to navigate away from master rotation and then navigate back again



INEFFICIENT WORKFLOWS: DIFFERENT METHODS OF BACKFILL SHIFTS

Each organization had a different way of backfilling shifts: PHSA "Employee Pool", Queensland Health "Relief Queue", S. Dakota "Needs List"

INEFFICIENT WORKFLOWS: INEFFICIENT DROPPING / PICKING UP

Managers rely on inefficient and slow methods to communicate with available nurses and other staff (ie: phone calls, text messaging, emails)

KEY INSIGHTS: **USABILITY ISSUES**

USABILITY ISSUES: OVERALL UI

Not enough relevant content visible on screen

Icons and text are often too small and illegible



USABILITY ISSUES: DIFFICULTY WITH MAIN TASKS

Screen real estate in master rotation screens causes excessive horizontal scrolling

Shift labels can't be created by users and instead have to use the JIRA ticketing system

Assigning & plotting shifts is time consuming



KEY INSIGHTS: EXCEL DEPENDENCY



EXCEL DEPENDENCY: OVFRALL

Excel spreadsheets are still widely used in shift scheduling process, often being used to view staff member's schedule



KEY INSIGHTS: TECHNICAL CHALLENGES

TECHNICAL CHALLENGES: OVFRALL

Users found the system difficult to use for various reasons including long loading times, opening the current session in multiple tabs causing errors, and being timed-out while waiting for data to process.



KEY INSIGHTS: MISSING ROLE

MISSING ROLE: NURSES/EMPLOYEES

Individual employees do not have access which prevents them from being able to utilize the system to log dropped shifts, pick up shifts, or even view their schedules.

As a result of this, individual employees still refer to printed schedules

MISSING ROLE: NURSES/EMPLOYEES

Queensland Hospital particularly would like individual employees to have access, create potential schedules that need to get approved and have access to drop and pick up shifts. Unlike North America, Nurses in Australia have more autonomy to select their own schedules.

COMPETITOR INSIGHTS

COMPETITOR INSIGHTS: MATRIX

	Infor Nurse Scheduling Tool	Humanity	NurseGrid	Deputy	Homebase	Shiftboard	TrackSmart	When I Work
CORE FEATURES								
Attendance Monitoring		v						 ✓
Automated Scheduling		v			 ✓ 	 ✓ 	 ✓ 	 ✓
Calendar Integration (Google Cal, iCal, Outlook, Exchange)			 Image: A start of the start of					
Calendar Management			 ✓ 		 ✓ 	 ✓ 		
Cloud Platform			 ✓ 		 ✓ 	 ✓ 	 ✓ 	 ✓
Desktop App	 ✓ 							
Drag-and-Drop				 ✓ 	 			 ✓
Email integration (Gmail, Outlook, Exchange, Yahoo)			 					
Employee Database			 ✓ 		 ✓ 	 ✓ 		 ✓
Event Planning			 ✓ 					
GPS	 ✓ 							v

COMPETITOR INSIGHTS: MATRIX

	Infor Nurse Scheduling Tool	Humanity	NurseGrid	Deputy	Homebase	Shiftboard	TrackSmart	When I Work
CORE FEATURES								
In-App Messaging		 ✓ 	 ✓ 	 Image: A start of the start of	 Image: A second s			
Leave / Vacation Tracking				 ✓ 	 Image: A set of the set of the	 Image: A second s		 ✓
Mobile Application		 ✓ 	 ✓ 	 Image: A set of the set of the	 	 Image: A second s		 ✓
Report Builder		 ✓ 		 ✓ 	 ✓ 			
Report Viewing	 ✓ 			 ✓ 	 ✓ 			
Responsive UI								
Shift Scheduling	 ✓ 	 ✓ 	 ✓ 	 ✓ 	 ✓ 	 ✓ 	 ✓ 	 ✓
Third-Party Integrations		Address Book, Facebook, Google Apps	Facebook, Email	POS/Payroll providers, live weather feed		Payroll and HR Systems Integration		
Time Clock		 ✓ 			 ✓ 			
Time Tracking/Timesheets		 ✓ 		 Image: A start of the start of	 ✓ 	 Image: A second s	 Image: A second s	 ✓
Web-based App	 ✓ 		 ✓ 			 Image: A second s		

COMPETITOR INSIGHTS: SCHEDULE MANAGEMENT



▼ 4 🛱 19 Sep - 25 Sep ▼ Search... 11 - Mon 19th -Open/Empty Shifts 61.87 Hrs / \$0.00 9am - 4:36pm Manager 8.40 Hrs / \$1,959.6 Ali Kazi 14.20 Hrs / \$293.94 9am - 4:36pm Barista 8am - 4:30pm 2 shifts Amber Middleton 28.17 Hrs / \$0.00 Anna Hambly 32.65 Hrs / \$772.22 Leave Annie Carroll 7.10 Hrs / \$0.00 10am - 5:36pm Manager Bentley MacDonald 10.68 Hrs / \$0.00 2:15am - 10:15am Deliveries Brody Thompson 28.80 Hrs / \$759.46 Dan Smith 34.19 Hrs / \$231.84 Darren Inder 43.70 Hrs / \$0.00 Frankle Mason © 9am - 4:36pm 31.92 Hrs / \$651.13 Jeremy Becker 0.00 Hrs / \$0.00 Add new employee よ



Homebase

Deputy

NurseGrid

People Schedul	e Timesheets - Rej	ports		Help -	🚱 👹 Hello, Jessica -
Day Week • M	onth	CR	iefresh Copy Shifts 💌	Stats Print Option	6 Unpublished Shifts
20th -	Wed 21st +	Thu 22nd 👻	Fri 23rd +	Sat 24th -	Sun 25th -
- 5:36pm ifts 26.0hrs	10am - 5:36pm Manager	9am - 5:36pm 2 shifts 14.2hrs	9am - 4:36pm Cashier Nory, if you Pak	6pm - 2am 🔺 Barista	
- 4:36pm ter	9am - 4:36pm Manager	10am - 5:36pm Manager			
a - 4:36pm Ista					
Leave		2pm - 9pm Waiter		9am - 4:36pm Manager	
1 - 4:36pm Ista	9am - 5pm 🚔 Manager	9am - 4:36pm Bartenders	9am - 4:36pm Waiter	9am - 4:36pm Waiter	Leave
i - 4:36pm nager			9am - 5pm Manager Please provide t	9am - 4:36pm Manager	9am - 4:36pm Manager
n - 4:36pm 🔒 nager	9am - 12pm 🚔 Manager	12pm - 4:36pm Manager	9am - 4:36pm 🔺 Manager		
n - 2am Iveries	7am - 2am 3 shifts 14.5hrs		9am - 2am 2 shifts 14.6hrs	9am - 4:36pm Waiter	
	9am - 4:36pm 📾 Bartenders	9am - 5pm Deliveries	6pm - 2am Deliveries		9am - 4:36pm 🔺 Manager
					+

		😕 Em	all Team		OZYMAND	IAS'S 1 -		Leo Runolfsson 👻
My Availab	ility							Page Tips
WEEK	MONTH Sear	ch Employees.			0	0	P	Current
				Sh	ow scheduled u	users only	157.00 H	ours Scheduled
AUG 23	WED, AUG 2 24.00 HRS	4 THU, 7 22.0	ALIG 25 0 HRS	TODAY 25.00 HRS	S	AT, AUG 27 8.00 HRS		SUN, AUG 28 22.00 HRS
				TPH LAN				
R-9AM	aan tara			11AM - GPM				EPM - 2AM
	12AM - 8AM	746	там					104M-4PM
							P	толи вям
8 - 11AM		7PM	- 2/AM			SPM - SAM		
Š 96'	66' ģ.	98, 65, 3	j. 98'	64° - \Q	97 64'	¢	94' 60'	Q

COMPETITOR INSIGHTS: SCHFDUI F MANAGEMENT

Ability to quickly view staffing and schedule details

Easily review, edit, and distribute the schedule to staff calendars as it changes

COMPETITOR INSIGHTS: INTELLIGENT STAFFING

NurseGrid



This message will be displayed inside the NurseGrid app.

		1		
Select				
CNA Certified Nursing Ass	istant			
RN Registered Nurse				
Submitted	Hired	Scheduled Hours	FTE Status	Actions
8/2016 14:56	02/01/1996	0.0000	Full Time	View Profile
8/2016 14:56	09/30/1999	36.0000	Full Time	View Profile
8/2016 14:57	11/28/1995	12.0000	Full Time	View Profile
8/2016 14:58	10/20/2012	0.0000	Full Time	View Profile

COMPETITOR INSIGHTS: INTELLIGENT STAFFING

Ensure proper staffing levels while managing overtime costs

- Access real-time data on staff availability and scheduled hours to make mutually beneficial staffing decisions
 - Quickly fill Open Shifts, summon On Call staff members, and share resources between departments

COMPETITOR INSIGHTS: TEAM COMMUNICATION



Trade Shift	All
JPERVISOR	Coffee & Co.
Submit	
s	
:00AM-6:00PM	
:00AM-5:00PM	
:00AM-5:00PM	

۰

Homebase
COMPETITOR INSIGHTS: TEAM COMMUNICATION

In-app messaging system

Quick filtering helps managers reach the right staff

COMPETITOR INSIGHTS: MOBILE-FRIENDLY

NurseGrid





- septements rover to	ne Off Team Availabl	my My Availabelity					
Mar 12 - Mar 18 🗦	Employee View 💌	Day Week	Month		⊖ Q @ Tool	s D Revent O C	*
	Sun 12 15 hrs./\$144.00	Mon 13 30 hrs / \$295.00	Tue 54 26 htt:/\$234.00	Wed 15 26 hrs/\$234.00	Thu 16 26 hrs / \$234.00	Fri 17 30 Hrs / \$285.00	
LN SHIFTS Kito Anslign							All Locations My Shifts Team Open
D Even H 000 HHS							THU FRI SAT SUN MON TUE V
B Fabrico S cooles							10 11 12 13 14
Discovers Opened via timat	h	ANN NUM COLINITIE	APR- NPH R.AvCID.COR	Environment Example and the	ANI ON DAGEDOUS	ANN - SPM RUNCE BUILDER	TODAY THURSDAY, MARCH 9
Mys R cost-Hts Zesta E USD-Hts V Consent via Ernal					KOLANI - 3 SCHAN RUMARA DA SKAN	NAM - 3 JONN HUMMER OLIVIA	10:00 AM Comerce Comer
Art s Into yes Opcored yna Email	KUMA APA RUMARKOUSSER	SOAM - APR BUTHER BUTHER	NAME AND A	MINI TANA RUMANENTIKE			10:00 AM 2:00 PM 0 Coffee Co 2:00 PM 4 Hours
Sam J Second S Copenal via Email	CONVER	COUNTER	COUNTER	State - and Countries	COUNTER	COUNTRY COUNTRY	un en euro - Mus B I Barista
Accessed M Accessed Conferent do SMS	BINI - TANK LENOLINE	and the Unions	LEAD UNE	3996-1996 1042106	Ĩ.		2 00 PM
Cost His	SPR. HIM LNC COOK	SPM - 1994 LINE COOK	i l		394 - 1994 1922	30% - 1598 2622	2:00 PM 1 Store Co
Carles V 35.46 rems		ene ten Dise	and the Dist	driel tarie Other	ene mee DSH	494-1944 004	B CO PM + SHours
							2:00 AM

Homebase

	·
SAMSUNG	eeeee Teldra ♥ 8:15 AM (100%) Charlies Cafe - Cronulla Publich
€ tal ∎ Work	MON TUE WED THU FRE SAT SUN 17. 18 19 20 21 22 23
9:00am - 5:00pm @ Kitchen	Today, Wed, 19 Jan 2015
	Late All Jaggard Scheduled & 00pm at Waiter
Start Shift	Amber Middleton 8:00am - at Manager Scheduled # 50am - 4:00pm at Manager
	Brody Thompson 8:46am - at Waiter Scheduled 8:45am - 4:45pm at Waiter
	Michelle Huang 9:01am - at Waiter Scheduled 8:00am - 4:00pm at Waiter
people today. 👔 🌆 🚧 🛓	News Tapes Schedule Table Me

COMPETITOR INSIGHTS: MOBILE-FRIENDLY

Staff can swap shifts and receive responses directly on their phones



39

RECOMMENDATIONS



THERE ARE TWO APPROACHES TO ENHANCING MVS

Short term usability fixes on the current tool or a rehaul of the workflows in MVS



APPROACH A: IMPROVEMENTS ON CURRENT TOOL

APPROACH A: IMPROVEMENTS ON CURRENT TOOL

LOAD TIME

Resolve challenges with load time

REVIEW

Review Heuristic Evaluation to address challenges and opportunities

TACTICS

Review Short Term Recommendations Matrix for tactical changes

APPROACH B: MVS REVAMP

APPROACH B: MVS REVAMP

USER ROLES

Establish user roles (Identify if Nurses or Employees will get access to MVS)

- Introducing "Nurse roles" to the system would address challenges around repeat work, manager workload, relief management.
 - Mobile-First approach

WORKFLOWS

Recreate process workflows to inform navigation, content hierarchy, and reduce time required to complete tasks

NOMENCLATURE

Establish user-friendly nomenclature

APPROACH B: MVS REVAMP

NOTIFICATIONS

Introduce notifications and in-context/predictive error messaging

FUNCTIONALITY

Redesign all functionality leveraging insights from research around usability challenges and user needs



APPROACH A

NEXT STEPS: APPROACH A

SOHO XI

Reach out to SoHo Team and implement SoHo Xi

WFM

Reach out to Workforce Management team to engage with a design team

APPROACH B

NEXT STEPS: APPROACH B

NURSE ROLES

Evaluate from Product standpoint the benefits of introducing Nurse roles into MVS

WFM

Reach out to Workforce Management team to engage with a design team

DESIGN TEAM

Work with design team to build out process workflows and content maps inclusive of notifications and error messaging.

NEXT STEPS: APPROACH B

COPY

Work with copywriter/UX writer to conduct research and identify user-friendly nomenclature

WIREFRAMES

Create wireframes for new workflows

USER RESEARCH

Continuous User Research: 1) Nurse enduser research 2) Usability Tests on new designs

QUESTIONS?



APPENDIX

54

APPENDIX A:

Heuristic Evaluation



Create New Rotation

Desktop



Create New Rotation

Desktop



Wizard Time Off Approval

A Use of iconography accurately is consistent.
 A global top nav bar is displayed at the top of the screen at all times making it unnecessary to have an entire page be utilized for a navigation tree. It is also nessecary to display the navigation as a breadcrumbs at the same time.

Create New Rotation

Desktop

ome	Messages(428)	Timesheet Mainte	enance My I	Reports S	Scheduling My A	pproval Super	visor Approval	Weekly Timesheet	Payroll Close Wizard	Time
chedul	ing > Multi-view Scheduler	r > Master Rotation > Ma	aster Rotation - Cr	eate New Rota	tion					
01000		P master riotation P ma		011011010						
Create	New Entry									
Mast	er Rotation - Create	New Rotation		Find	2					
						_				
	Name	Description	Length in Days	Start Date	Default No. of Rows	Team	Publish Status			
Edit	PERF_MR01	PERF_MR01	7	06/01/2015	100	EMVS_PERF	UNPUBLISHED			
Edit	RN REGULAR		14	04/24/2017	8	CARDIO	PUBLISHED			
Edit Edit	RN REGULAR RN SUPPLEMENTARY		14 14	04/24/2017 04/24/2017	8	CARDIO	PUBLISHED PROCESS REQUIR	RED		
Edit Edit Edit	RN REGULAR RN SUPPLEMENTARY VERSIONS	test activations	14 14 7	04/24/2017 04/24/2017 07/03/2017	8 3 2	CARDIO ICU ANAESTHETICS	PUBLISHED PROCESS REQUIR UNPROCESSED	RED		
Edit Edit Edit Edit	RN REGULAR RN SUPPLEMENTARY VERSIONS ANA DRAFT	test activations	14 14 7 7	04/24/2017 04/24/2017 07/03/2017 06/05/2017	8 3 2 2	CARDIO ICU ANAESTHETICS ANAESTHETICS	PUBLISHED PROCESS REQUIR UNPROCESSED UNPROCESSED	RED		
Edit Edit Edit Edit Edit	RN REGULAR RN SUPPLEMENTARY VERSIONS ANA DRAFT FIRST SHIFT	test activations First Shift	14 14 7 7 7 7	04/24/2017 04/24/2017 07/03/2017 06/05/2017 05/28/2017	8 3 2 2 10	CARDIO ICU ANAESTHETICS ANAESTHETICS CARDIO	PUBLISHED PROCESS REQUIR UNPROCESSED UNPROCESSED UNPROCESSED	RED		
Edit Edit Edit Edit Edit Edit	RN REGULAR RN SUPPLEMENTARY VERSIONS ANA DRAFT FIRST SHIFT CLERKS	test activations First Shift	14 14 7 7 7 7 7 7	04/24/2017 04/24/2017 07/03/2017 06/05/2017 05/28/2017 07/03/2017	8 3 2 2 10 4	CARDIO ICU ANAESTHETICS ANAESTHETICS CARDIO ICU	PUBLISHED PROCESS REQUIR UNPROCESSED UNPROCESSED UNPROCESSED PUBLISHED	RED		
Edit Edit Edit Edit Edit Edit Edit	RN REGULAR RN SUPPLEMENTARY VERSIONS ANA DRAFT FIRST SHIFT CLERKS DEMO	test activations First Shift description for demo	14 14 7 7 7 7 7 7 7 14	04/24/2017 04/24/2017 07/03/2017 06/05/2017 05/28/2017 07/03/2017 07/24/2017	8 3 2 2 10 4 5	CARDIO ICU ANAESTHETICS ANAESTHETICS CARDIO ICU ICU	PUBLISHED PROCESS REQUIR UNPROCESSED UNPROCESSED UNPROCESSED PUBLISHED UNPROCESSED	ED		
Edit Edit Edit Edit Edit Edit Edit Edit	RN REGULAR RN SUPPLEMENTARY VERSIONS ANA DRAFT FIRST SHIFT CLERKS DEMO TEST	test activations First Shift description for demo	14 14 7 7 7 7 7 7 7 7 14 14	04/24/2017 04/24/2017 07/03/2017 06/05/2017 05/28/2017 07/03/2017 07/24/2017	8 3 2 2 10 4 5 8	CARDIO ICU ANAESTHETICS ANAESTHETICS CARDIO ICU ICU CARDIO	PUBLISHED PROCESS REQUIR UNPROCESSED UNPROCESSED UNPROCESSED UNPROCESSED UNPROCESSED	RED		

Related Links

Master Rotation - Plot Shifts, Edit Row Details, Create New version

	Workbrain Support
Off Approval	\$?

Notes A UI Follows Soho 10x patterns consistently Create new CTA is too small compared to the rest of the screen. 1 It also appears above what might be the title of the page "Master Rotation – Create New Rotation" 2 The search field is separated from the list of existing rotations by a divider line so it doesn't really look like it's associated with the list its searching though. Also, this search field in in-line with the page title which what ends with "Create New Rotation" making it look like using the field is part of how a new rotation is created. Other notes Some of the nav items sound like they can be grouped together (ie: My Approval and Supervisor Approval). Related Links don't look like links or that they are clickable.

🗎 0 🛕 418 🛣 0 🕒 0 🎁 0

New Rotation Details Form

Desktop



Related Links

Master Rotation - Plot Shifts, Edit Row Details, Create New version

	Workbrain Support
Off Approval	¢ ?

Notes 1 No explanation of certain fields for clarification 2 Save button should appear on the right side of the form. Grey background for these CTAs is unnecessary.

"Details" and "Create New".

does it discard this record?

Other notes

3

The title and the breadcrumb display 2 different page names;

On creation it seems like new rotations are already assigned a publish status (UNPROCESSED). Does clicking "Return to form listing" save any of the information entered in the form fields or

New Rotation – Initial View

Desktop

Row Job	Calc Grp	S	ICU 1 SC Group	Start Date: Effective Date: No. Rows Docket		Dept	07/31/2017 07/31/2017 5 Project	B Week 1 Mon Day-1	Tue Day-2
Row Job	Calc Grp	S	SC Group	Docket		Dept	Project	B Week 1 Mon Day-1	Tue Day-2
erage Info									3
Coverage Shif									
splay Ef bel*	ective-dated Changes		Description	Star	t Time	End Time Act	lvity Name		
be!*									
copy	Shift Labels to Rotatic	on							
	erage Info Coverage Shift py On play Eff bel* Eff	erage Info Coverage Shift py On play Effective-dated Changes bel* el Copy Shift Labels to Rotation	erage Info Coverage Shift py On play Effective-dated Changes bel* el Copy Shift Labels to Rotation	erage Info Coverage Shift py On play Effective-dated Changes Description	el Copy Shift Labels to Rotation	el Copy Shift Labeis to Rotation	el Copy Shift Labels to Rotation	el Copy Shift Labels to Rotation	el Copy Shift Labels to Rotation

					Workbrain Su	pport 🕞	Not	es
îme Off Approval						\$?	A	Color is helpf weeks, etc)
Length (days): End Date: Status:			14 01/01/3000 A DRAFT				1	No page title.
Wed Day-3	Thu Day-4	Fri Day-5	Sat Day-6		Sun Day-7	Week 2 Mon Day		last page's tit language
							2	Data is some [.]
							3	Lack of conte
							4	The initial vie
								Other notes This page stru- hierarchy.
Edit Copy	Add Save V	alidate Activate	Copy Rotation	Print				
		a		-				
			418 🛕 0	(L) 0	10	2		

Color is helpful in diferentiating days in table (weekends, new

No page title. Now the breadcrumbs says "Details" whereas the last page's title said "Details" (new rotation form). Inconsistent

Data is sometimes unreadable because of inconsistent spacing.

Lack of context to row of CTAs do other than their labels.

The initial view of this panel has the 3rd tab open by default.

This page struggle with appropriate grouping and visual

Shift Label Lookup Popup

Desktop

Init: Iersion: Iersion Desc: Imit: Imi	UX-DEMO (de ww Job 1 2 3 4 5	emo of ux) Calc Grp	ICU 1	Start Date: Effective Date No. Rows	Docket	Dept	07/31/2017 07/31/2017 5	D Week 1 Non Day-1	Lu E S Tue Day-2
Init: Version: Version Desc: Ro 1 1 ↔ 0 1 1 ↔ 0 3 1 ↔ 0 4 1 ↔ 0 5	ww Job 1 2 3 4 5	Calc Grp	ICU 1	Start Date: Effective Date No. Rows	Docket	Dept	07/31/2017 07/31/2017 5	© Week 1 Non Day-1	L E S Tue Day-2
	w Job 1 2 3 4 5	Calc Grp		SC Group	Docket	Dept		© Week 1 Non Day-1	Tue Day-2
	1 2. 3 5								Dayrz
	2								
	3								
	5								
	5								
	15 Dr. 1. 1. 1. 1.								
Sh Find Sh Clear	nift Display Label	Esshift Desc	Team	Esshift Start Time	Esshift End Time	Activity Name			Edit
Sh Find Sh Clear 1 Da	hifi Display Label ay	Esshift Desc	Team	Esshift Start Time	Esshift End Time	Activity Name			Edit
Sh Find St Clear 1 O Da 0 Ev	hift Display Label ay /e	Esshift Desc 0900-1700 1700-0100	Team ICU ICU	Esshift Start Time 09:00a 05:00p	Esshift End Time 05:00p 01:00a	Activity Name WRK WRK			Edit
Sh Find Sr Clear Da Da D Ev	hift Display Label ay ve ght	Esshift Desc 0900-1700 1700-0100 0100-0900	Team ICU ICU ICU	Esshift Start Time 09:00a 05:00p 01:00a	Esshift End Time 05:00p 01:00a 09:00a	Activity Name WRK WRK WRK	Activity Nar	me	Edit
Sh Find Sr Ciear Da Da Da Da Nig D 7D	hift Display Label ay /e ght D8	Esshift Desc 0900-1700 1700-0100 0100-0900 0700-1530	Team ICU ICU ICU ICU	Esshift Start Time 09:00a 05:00p 01:00a 07:00a	Esshift End Time 05:00p 01:00a 09:00a 03:30p	Activity Name WRK WRK WRK WRK	Activity Nar WRK	me	Edit
Sh Find Sh Cisar 1 Da 0 Ev 0 Nit 0 7D 0 15	hift Display Label ay ve ght 58	Esshift Desc 0900-1700 1700-0100 0100-0900 0700-1530 1500-2300	Team ICU ICU ICU ICU ICU ICU	Esshift Start Time 09:00a 05:00p 01:00a 07:00a 03:00p	Esshift End Time 05:00p 01:00a 09:00a 03:30p 11:00p	Activity Name WRK WRK WRK WRK WRK	Activity Nar WRK WRK	me	Edit
Sh Find Sh Clear Da Da D Ev D Nit D 7D D 15 D 23	hift Display Label ay /e ght 558 558	Esshift Desc 0900-1700 1700-0100 0100-0900 0700-1530 1500-2300 2300-0730	Team ICU ICU ICU ICU ICU ICU	Esshift Start Time 09:00a 05:00p 01:00a 07:00a 03:00p 11:00p	Esshift End Time 05:00p 01:00a 09:00a 03:30p 11:00p 07:30a	Activity Name WRK WRK WRK WRK WRK	Activity Nar WRK WRK	me	Edit
Find Sir 2 Dia 3 Dia 0 Ev 0 Nis 0 70 0 15 0 23 0 73	hift Display Label ay /e ght D8 5E8 5N8 50D	Esshift Desc 0900-1700 1700-0100 0100-0900 0700-1530 1500-2300 2300-0730 0730-1930	Team ICU ICU ICU ICU ICU ICU ICU	Esshift Start Time 09:00a 05:00p 01:00a 07:00a 03:00p 11:00p 07:30a	Esshift End Time 05:00p 01:00a 09:00a 03:30p 11:00p 07:30a 07:30p	Activity Name WRK WRK WRK WRK WRK WRK WRK	Activity Nar WRK WRK	me	Edit
Find Sir 1 Ciear 1 Da 1 Da 1 Ev 1 Nie 1 Nie 1 15 1 23 1 73 1 19	hift Display Label ay ght 58 58 58 50 50 50 50 50 50 50 50 50 50 50 50 50	Esshift Desc 0900-1700 1700-0100 0100-0900 0700-1530 1500-2300 2300-0730 0730-1930 1930-0730	Team ICU ICU ICU ICU ICU ICU ICU ICU	Esshift Start Time 09:00a 05:00p 01:00a 07:00a 03:00p 11:00p 07:30a 07:30p	Esshift End Time 05:00p 01:00a 09:00a 09:00a 03:30p 11:00p 07:30a 07:30a 07:30a	Activity Name WRK WRK WRK WRK WRK WRK WRK WRK	Activity Nar WRK WRK	me	Edit
Find Sir 1 Dia 1 Dia </td <td>hift Display Label ay /e ght 558 808 800 800 830N</td> <td>Esshift Desc 0900-1700 1700-0100 0100-0900 0700-1530 1500-2300 2300-0730 2300-0730 0730-1930 1930-0730 0800-1500</td> <td>Team ICU ICU ICU ICU ICU ICU ICU ICU ICU</td> <td>Esshift Start Time 09:00a 05:00p 01:00a 07:00a 03:00p 11:00p 07:30a 07:30p 08:00a</td> <td>Esshift End Time 05:00p 01:00a 09:00a 09:00a 03:30p 11:00p 07:30a 07:30a 07:30a 07:30a</td> <td>Activity Name WRK WRK WRK WRK WRK WRK WRK WRK WRK</td> <td>Activity Nar WRK WRK</td> <td>me</td> <td>Edit</td>	hift Display Label ay /e ght 558 808 800 800 830N	Esshift Desc 0900-1700 1700-0100 0100-0900 0700-1530 1500-2300 2300-0730 2300-0730 0730-1930 1930-0730 0800-1500	Team ICU ICU ICU ICU ICU ICU ICU ICU ICU	Esshift Start Time 09:00a 05:00p 01:00a 07:00a 03:00p 11:00p 07:30a 07:30p 08:00a	Esshift End Time 05:00p 01:00a 09:00a 09:00a 03:30p 11:00p 07:30a 07:30a 07:30a 07:30a	Activity Name WRK WRK WRK WRK WRK WRK WRK WRK WRK	Activity Nar WRK WRK	me	Edit

				٧	Vorkbrain Suppo	rt [])
se Wizard	Time Off	Approval			+	¢?
gth (days): Date: us:			14 01 DI	/01/3000 RAFT		
W	led Iy-3	Thu Day-4	Fri Day-5	Sa Day	it /-6	Sun Day-7
]
Copy A	Add Save	Validate	ivate Copy Rot	ation Print		
			418 📩		(ě) 0	

Notes

1 Add Shift Label popup is cramped and placed in the bottom corner of the screen.

2 Breadcrumbs disapears after opening "Add Shift Label" popup.

Copy Shift Label

Desktop

	info	n Infor W	Vorkforce Mana	agement																	٨	Vorkbrain Supp	oort 🕞
	Home	Messages(428)	Timesheet	Maintenance	My Reports	Scheduling	g My Appro	val Supervisor Ap	proval Weekly Tir	mesheet Payroll	Close Wizard Tim	e Off Approval											\$₹?
	Master Ro	tation UX-DEMO (demo of ux)																				1
No. Add. Catolog Riggs 1 Tag Yang Page 1 Tag Yang Page 1 Tag Yang Page 1 P	Unit: Version: Version D	esc:			ICU 1		Start Date: Effective Date No. Rows	:		07/ 07/ 5	31/2017 31/2017			Length (d End Date: Status:	ays): :				14 01/01 DRAF	1/3000 FT			
		Row Job	Calc Grp		SC Group	B Week 1 Mon Day-1	Ti Da	ue Wed y-2 Day-3	Thu Day-4	Fri Day-5	Sat Day-6	Sun Day-7	Mo	Week 2 on Day-8	Tue Day-9	Wed Day-1	0	Thu Day-11	Fri Day-	12	Sat Day-13	Sun Day-1	4
	i +					D	D	D	D				D		D	D					1		
	<u>∎</u>	0 ²								D	D	D						D	D		D	D	
]		_
		0 *													1 Int		_	L					_
Construction Sint Construction Sint Construction Construlinition Construlinition	Shift / (Coverage Info													FdR	Conv	Save	Validate	Activate Copy R	otation P	ŕnt		
Low Display Effective-detaid Dianges Description Start Time Activity ferme 0 050 0700-1900 7:00 AM 7:00 AM Vinc 1 050 0700-1900 7:00 AM 7:00 AM Vinc 1 050 0700-1900 7:00 AM Vinc Vinc 1 050 0700-1900 7:00 AM Vinc 1 050 0700-1900 7:00 AM Vinc	-	Chill Courses Chill																			-		
Linds Cody Carl Cody Carl Description Start Time End Time Activity Name B Co C700-1300 7:00 AH 7:00 AH WRK B O 200-0700 7:00 AH WRK		in a lorr	ITE																				
Image OP00-1900 7:00 AM 7:00 PM WRK Image Image Image Image Image Image Image Image Image Image	<u>Turn Sh</u>	Display El Label*	ffective-dated Changes	5	Description		Start Time	End Time	Activity Name														
Image: Market Sector Copy Shift Labels to Rotation Image: Market Sector Image: Market Sector Image: Market Sector Image: Market Sector	Ŵ	™ D			0700-1900		7:00 AM	7:00 PM	WRK														
	Add Shi	ft Label Cop	by Shift Labels to Rotat	don FQ	Сору		7:00 PM	7:00 AM	WRK														

Notes



1 The split screen tables don't look resizeable until the cursor is hovered over a particular pixel on the draggable bar

Other notes

The Shift display label that is copied to each of the rows does not show any other information in the table such as the description, start time, end time or activity name.

The shift D shows that it only covers a shift from 7am – 7pm yet fills a whole day in the weekly table. Does this mean that a new row has to be used for the remaining hours not covered on a particular day? How to I know how many hours are left that need to be covered? Is there any way easy way to tell if there are shifts that overlap?

Various icons in the platform are too small (ie: delete "trash can", copy "page stack").

The fields in the right table are editable and display a text cursor when focused on but cannot be typed into. Why is an input field used here if it doesn't allow for typable text to be inputted?

Edit Row(s) Popup

Desktop

infor	Infor Wo	orkforce Man	agement										
Home M	essages(428)	Timesheet	Maintenance	My Reports	Scheduling	My Approval	Supervisor A	pproval V	Veekly Timest	heet I	Payroll Close V	Nizard	Т
Master Rotatio	m UX-DEMO (d	emo of ux) 🚽 🌾	ur changes have l	been saved.									
Unit: Version: Version Desc:			IC 1	U	Start Date: Effective Date: No. Rows			0 0 5	7/31/2017 7/31/2017				Leng End I Statu
1	Row Job	Calc Grp) S	C Group	Docket		Dept	F	Project	B Week 1	т	IR.	
₩± 0 ⊘								E	DIT LABOR ME	TRICS			
₩± ₽ 🕑	Row	Job	Calc G	irp	SC G	iroup		Docket			Dept		-
	2	=0, [=q.) [q]					FQ.	_		<u>=9</u>		1
					<u></u>	27	-1						
Shift / Cove	erage Info												Edil
Job Shift	Coverage Shift												
Turn Shift Co	py On	ortive-dated Channe	at	Description	Cta	rt Time	End Time	Arriview 3	lame				
La	bel*	cerve acces energy	11 0	0700-1900	7-1	00 AM	7:00 PM	WPL	, and				
	3N N			1900-0700	7:	00 PM	7:00 PM	WR	53 C				
Add Shift Lab	el Copy	Shift Labels to Rota	ation	opy									

							Workbrain S	Support (€
Time Off Ap	proval							¢	?
5.7	24							1	
gth (days): Date: us:					14 01/01/3000 DRAFT	5			
Wed		Thu		Fri	Sa	ut.	Sun	-	И
									D
	Project		Pin FTE	🗅 Prj H	rs Off	Days	Stat Days		-
	10.			0.0	7		0		Ì.
				0.0			0		
it Copy	Add	Save Va	alidate Ac	tivate Copy	Rotation	Print			
					-				
			0	418		• 0			

Notes

1 To edit any of the fields in the labor details table user must check off 1 or more items in the list and click the edit button in the middle-right portion of the screen. A popup appears with all the same fields visible from the labor details table but in an editable state.

Other notes

The column labels are center aligned to the width of the column yet the field widths in each column are not of the same width.

Why is the word group sometimes abreviated and sometimes spelled out?

Copy Row Popup

Desktop

in	for Infor	Workforce Man	agement														١	Vorkbrain Sup	port 🕞
Home	Messages(428) Timesheet	Maintenance	My Reports	Scheduling	My Approval	Supervisor Ap	proval Weel	kly Timesheet	Payroll (Close Wizard	Time Off Appr	oval						¢?
Master	Rotation UX-DEMO	(demo of ux)																	
Unit: Version Version	: Desc:	And definition white At	IC 1	U	Start Date: Effective Date: No. Rows			07/31/ 07/31/ 5	/2017 /2017			Length (days): End Date: Status:			(1	14 01/01/3000 DRAFT			
1	Row Job	Calc Gr	5 5	SC Group	Docket	t	Dept	Proje	ect D Week Mon Day	1 -1	Tue Day-2	Wed Day-3	Thu Day-4	F Da	ri y-5	Sat Day-6		Sun Day-7	W Mor
tin 🛨	O ¹ LPN				HCEMPDOCKA	DEPT A	t.	PROJECT A	D	C)	D	D						D
	0 ² LPN													D		D		D	
in ⊡										-]				-				_
±	0 5														-1	<u> </u>			1-
Shift / Job	Coverage Info Shift Coverage S	hift					Copy Row Source Row: Position: Target Row: Type: Offset: Copy Car	ncel	1 ¢ Into ¢ ✓ Entire Row Labor Metrics Shift Cells On	Only ly	2	Edit	Add Save	Validate	vate Copy F	Rotation	Print		
	Display Label*	Effective-dated Chang	85	Description	Sta	irt Time	End Time	Activity Name	2										
Î	10 D			0700-1900	7:	00 AM	7:00 PM	WRK											
Add :	ihift Label C	opy Shift Labels to Rot	ation																
														0	418	0	(L) 0	10 T	
-	11. 11																		

Time Off Approval	?
gth (days): 14 Date: 01/01/3000	
us: DRAFT	
WedThuFriSatSunDay-3Day-4Day-5Day-6Day-7	W Mor
D D	D
D D D	

Notes

1 Columns that have been filled in with data can be cut off by the split screen tables.

2 Both the left and right tables lack proper labeling and the only way the user knows which is which is on the copy popup in the type dropdown. The left is the "Labor Metrics" table and the right is the "Shift Cells" table.

Other notes

The copy button is located very far from what is being copied (which is the rows in the Labor Metrics table)

Popups shouldn't be draggable.

Add Row Popup

Desktop

in	ifor		Infor Wo	orkforce Mana	igement													Workbrain St	upport (₽
Home	e N	Nessag	ges(<mark>428</mark>)	Timesheet	Maintenance	My Reports	Scheduling	My Approv	val Superviso	r Approval	Weekly 1	līmesheet l	Payroll Close Wizard	Time (Off Approva	d			ф	?
Master	Rotati	on UX-	DEMO (d	lemo of ux)																
Unit: Version Version	n: n Desc	:			ICU 1	Start Date: Effective D No. Rows	eate:		07/3 07/3 5	31/2017 31/2017		Lei En Str	ngth (days): id Date: atus:			14 01/0 DR/	01/3000 AFT			
		Row	Job	Calc Grp		SC Group	Doc	ket	Dept	B V Mon	/eek 1 Day-1	Tue Day-2	Wed Day-3		Thu Day-4	Fr	i -5	Sat Day-6		t D
1 🛨	0	1 L	PN				HCEMPDOCKA	D	EPT A	D	}	D	D	D		II.E.				1
1 🛨	Ο	2 L	PN				HCEMPDOCKA	D	EPT A				D	D		D		D		
• +	0	3 L	PN				HCEMPDOCKA	D	EPT A				D	D		D		D		
T	0	4]									
TH.	0	5																		
								Add Row					0							
								0		Add New Row	1									
								0												
								0		Insert New Ro	ow Into Posi	tion								
								Position:		Before \$	2									
Shift	/ Cov	orano	Info					Target Row:		(w Add Save	Validate	Activate	Conv. Potati	on Print			
Shire	000	ciage		-				Add	ancel						Activate	Copy Rotati				
Job	Shift	Covera	ge Shift	t									1							
Turn	Shift C	opy On	-		0.4	-		12072 March 1921	and the many Courts											
	D L	abel*	En	fective-dated Change	10	Description		start Time	End Time	Activi	ty Name									
Ē		ΦD				0700-1900		7:00 AM	7:00 PM	1	VRK									
illi Add 1	Shift La	В N ibel	Сору	Shift Labels to Rotat	Ion	1900-0700		7:00 PM	7:00 AM	1	VRK									
a server			442			Come														
- 2	πQ,	A	ou.		EQ.)	Сору														
20														0	A 418	0	(L) 0	្តែរំ ០		

Notes

1 Too much space between form controls and form labels makes the content in this popup menu hard to read.

2 There doesn't seem to be a difference between the 2 options of "Add New Row" and "Insert New Row Into Position" since the "Position" and "Target Row" dropdowns are still visible regardless.

Other notes

Not sure popup is necessary. This feature could be accomplished with a much simplier flow such as a CTA or dropdown.

Error in Row – Shift Overlap

Desktop

Home		r Workforce Managen	nent								Workbrain Support
TIONIC	Messages(4	128) Timesheet Mair	ntenance My Reports	Scheduling My Approv	val Supervisor A	Approval Weekly Tim	esheet Payroll Close Wizard	Time Off Approval			\$?
Master R Unit: Version: Version D	otation UX-DEM	O (demo of ux) - Your cha	inges have been saved. ICU 1	Start Date: Effective Date: No. Rows		07/31/201 07/31/201 4	7	Length (days): End Date: Status:		14 01/01/3000 DRAFT	
	Row Jo	b Calc Grp	SC Group	Docket	Dept	Project	D Week 1 Tue	Wed	Thu Davi 4	Fri Sat	Sun Week
₩ 🕀	1 LPN		1	HCEMPDOCKA D	EPT A	PROJECT A	D D	Day-3	Day-4	Day-o Day-o	Day-7 Mon Da
İ	0 ² LPN			HCEMPDOCKA D	EPT A	PROJECT A		D	DD	D	
1	O ³ LPN			HCEMPDOCKA D	EPT A	PROJECT A	2		D	D	D
						4					
Shift /	Coverage Inf	o						EditCopy	Add Save Validat	te Activate Copy Rotation Print	
Shift /	Coverage Inf Shift Coverage	O Shift						Edit Copy	Add Save Validat	te Activate Copy Rotation Print	
Shift / (Job	Coverage Inf Shift Coverage hift Copy On	Shift						Edit Copy	Add Save Validat	te Activate Copy Rotation Print	
Shift / (Job	Coverage Inf Shift Coverage hift Copy On Display Label*	O Shift Effective-dated Changes	Description	Start Time	End Time	Activity Name		Edit Copy	Add Save Validat	te Activate Copy Rotation Print	
Shift / G	Coverage Inf Shift Coverage hift Copy On Display Label* Ta D	O Shift Effective-dated Changes	Description 0700-1900	Start Time 7:00 AM	End Time 7:00 PM	Activity Name WRK		Edit Copy	Add Save Validat	te Activate Copy Rotation Print	
Shift / O Job Turn St Turn St Turn St	Coverage Inf Shift Coverage hift Copy On Display Label* DD DN DN D1930N	O Shift Effective-dated Changes	Description 0700-1900 1900-0700 1930-0730	Start Time 7:00 AM 7:00 PM 7:30 PM	End Time 7:00 PM 7:00 AM 7:30 AM	Activity Name WRK WRK WRK		Edit Copy	Add Save Validat	te Activate Copy Rotation Print	

Not	es
A	Confirmation message is displayed after us actions.
1	When master rotation is in "Draft" mode us directly (no input field displayed).
2	Shift labels don't display enough information table to prevent errors (such as shift overla
3	Text fields don't allow users to text into the fields, only paste labels into.
4	As user fills in each row there is data that g columns that require the user to scroll hori other columns that don't have any data at portions of the table.
	Other notes The system doesn't alert the user to this en save the Master Rotation by clicking the "S other error prevention before or during act error.

iser takes certain

ser cannot edit rows

ion to user in shifts ap).

em like normal text

t gets cut off in other prizontally yet there are t all taking up large

error unless they try to Save" CTA. There is no ction that caused the

Master Rotation – Active State

Desktop

inf	or Infor V	/orkforce Managem	ient											Workbrain	Support
Home	Messages(428)	Timesheet Main	tenance My Reports	Scheduling M	My Approval	Supervisor Approval	Weekly Tim	esheet Payroll C	Close Wizard	Time Off Approval					¢?
Master R	otation UX-DEMO (demo of ux) - The Mash	ar Rotation is now Activated	1.											
Unit: Version: Version D	lesc:		ICU 1	Start Date: Effective Date: No. Rows			07/31/20 07/31/20 4	7		Length (days): End Date: Status:			14 01/01/3000 ACTIVE		
1	Row Job	Calc Grp	SC Group	Docket		Dept	Project	© Week 1 Mon Day-1	Tue Day-2	Wed Day-3	Thu Day-4	Fri Day-5	Sat Day-6	Sun Day-7	Week Mon Da
	1 LPN			HCEMPDOCKA	DEPT A	PROJE	ECT A	D	D	D	D				D
	2 LPN			HCEMPDOCKA	DEPT A	PROJE	ECT A			D	D	D	D		
	3 LPN			HCEMPDOCKA	DEPT A	PROJE	ECT A					D	D	D	D
Shift /	Coverage Info			HLEMPDOCKA						D	D	Create New Version	Copy Rotation	Print	
Job	Shift Coverage Sh	ft													
	Display E Label*	ffective-dated Changes	Description	Start T	lime	End Time Ad	ctivity Name								
Ê	10 D		0700-1900	7:00	AM	7:00 PM	WRK								
Ť	ID N		1900-0700	7:00	PM	7:00 AM	WRK								
Copy S	hift Labels to Rotation	EQ Copy		7.30											
-													418 🛕 0	C 0 (ĝ) 0	

Notes

1 Minimal visual difference between "Active" mode and "Draft" mode. "Active" mode makes all editable fields in right table readonly while all the data in the left table remained read-only in both modes.

Other notes

Is there any way to get back to "Draft" mode?

Master Rotation – Assignment

Desktop



				1	Workbrain S	upport 🕞	Note	es
e Off Approval						¢?	1	"Rotation Assignment" label (under bre page header? If so, then this is the first header like this.
							2	The labels for these input fields are eith from the element or don't have a label and No. of weeks field).
							3	"Start date" is required regardless of w does not need to be repeated in the fo
								Other notes There is a lot of empty space on this sc
	0	A 0	0	(L) 0	(*** 0			

eadcrumbs) —> is this a t screen to display a page

ther displayed too far away I at all (ie: end date field

vhich option is chosen so it orm.

creen.

Master Rotation – Assignment

Desktop

Schedurg -> Multi-levie Schedurg -> Muster Rolation -> Muster Rol	Hom	e	Messages	(6) 7	ïmesheet	Maintenance	My Reports	Scheduling	My Approva	al Supervisor A	pproval	Weekly T	imesheet
Retard UN-UP UN-UP Unit: 14 Unit: Start Date: PUP Unit: PUP Unit: Start Date: PUP Unit: PUP	Schedu Master	ling > r Rot	Multi-view Setion - Assig	cheduler nment	> Master Rot	ation > Master Rot	tation - Assignment						
No. 1 Date P Implying Employee SMARASTART DATE ES MARASTART DATE P/T Leave Reason Diff Diff <thdiff< th=""> <thdif< th=""> <thdif< th=""></thdif<></thdif<></thdiff<>	Rotatio	on Na h (da	ame: ys):			UX-0	DEMO		Unit: Start Da	te:			ICU 08/04/2017
I IMM Innasigned 07/31/2017 01/01/3000 Image	VOI. OL	Row	Job	Pin FTE	3	Employee	ES MRA START DATE	ES MRA END DATE	P/T	Leave Reason	Thu 08/24		Fri 08/25
2 LPM Unassigned 07/31/2017 01/01/3000 D D 2* 4 LPM Unassigned 07/31/2017 01/01/3000 D D	P	1	LPN		Unassigned		07/31/2017	01/01/3000					
3 UN Unassigned 07/31/2017 01/01/3000 D A UN Unassigned 07/31/2017 01/01/3000 D D	0	2	LPN		Unassigned		07/31/2017	01/01/3000			D		D
Image: Normal control in the set of the set	P	3	LPN		Unassigned		07/31/2017	01/01/3000					D
	0	4	LPN		Unassigned		07/31/2017	01/01/3000			D		D

Support 🕞	Workbrain				
\$?			Approval	ard Time Off	oll Close Wiz
	08/31/2017		End Date:		
Thu 08/31	Wed 08/30	Tue 08/29	Mon 08/28	Sun 08/27	Sat 18/26
D	D	D	D		
D	D				
				D	D

Notes

1 Not much difference in design or layout that it could be mistaken the New Master Rotation screen at first glance.

2 CTA labels are inconsistent in font style. Some are in all caps while others are in camel-case.

	80	6	0	(L) 0	(e) 0
--	----	---	---	-------	-------

Edit Row Assignment

Desktop

	info	r Info	or Workfor	ce Ma	anagement							
Ho	me	Messages(5) Times	heet	Maintenance	My Reports	Scheduling	My A	pproval	Supervisor Approva	Weekly T	imesheet
Sched Mas	duling > ter Rot	Multi-view So tation - Assign	1 m			N	Aaster Rotation -	Assian	ment			
Rota Leng Ver.	ation N gth (da & Eff.)	ame: ys): Dates:	2 Unit N ICU	lame		Rotation Name UX-DEMO		, is using the	Row 1	Org. Start Date 07/31/2017	Org. End Date 01/01/3000	e SED
no-sees	Row	Job	Edit Ty	/pe Una:	ssigned	Assign Employee	Employee				Ę	Sat
0	1	LPN	F Start D	Date		07/31/2017 📺	End Date			01/01/3000		08/0:
0	2	LPN	Assign	ment Ty	/pe	(Override Labor M	Netrics		3		D
1	3	LPN	Comm	ents								D
1	4	LPN										D
							Submit	Cancel	A			1000
			4									ţ.
	Book	Offs	Relief Cells				R	ELIEF	RNN	QUEUE Process	Export To PDF	REFRESH



Note	es
A	Organization of content and buttons follows standard mod patterns.
1	Popup appears in a random position on the screen and no center. Size of popups don't follow consistent sizing patter throughout the site. The sizes range fitting inside content w little-to-no extra space for padding to being much bigger the inside content with extra blank space left either on the right or bottom.
2	The content at the top of this popup is displayed in data list format with the label bolded and stacked on top of associat content in a horizontal layout separated by light gray border only contains 1 row of actual data.
3	The labels in the right column of this form are not aligned

ws standard modal

ne screen and not the tent sizing patterns g inside content with ng much bigger than either on the right side

played in data list on top of associated y light gray borders but

properly and therefore make it difficult to read and/or fill out.

Employee Details Tooltip

Desktop

Home Scheduling >	Messages(6)	Timesheet <u>r > Master Rota</u>	Maintenance tion > Master Rota	My Reports tion - Assignment	Scheduling	My Approva	l Supervisor Appro	oval Weekly T	imesheet
Rotation Na Length (day	me: /s): lates:		UX-DE/ 14 1 - 07/3	MO 1/2017		Unit: Start Date: Publish Stat	tus:	ICU 08/0	4/2017 PROCESSED
Row	Job Pin FTE	E	mployee	ES MRA START DATE	ES MRA END DATE	P/T	Leave Reason	Fri 08/04	Sat 08/05
2 2 3 2 4	LPN LPN	Elks, Basil Unassigne Unass 2	Elks, Basil Employee 3052 Status Active Pay Group 1 Calc Group HOUR Jobs Na LP Skills Na CL TR	The INICAL RECORDS	Start Date 01/01/2005 Start Date 01/01/2003 01/01/2003	End Date 01/01/3000 01/01/3000 01/01/3000	Preferred Job	D	D
Book	Offs Relief	Cells			RE	LIEF	QUEUE Process	Export To PDF	REFRESH



Notes

3

1 CTAs are styled the same as non-CTA text (ie: Employee name & start/end date columns). No way of knowing what is interactive and what isn't.

In this section the labels are styled the same as the associated text and in the last line of content the "Calc Group" label almost runs into the "HOURLY" text.
 Note: There's 2 different ways the labels and associated text is style in the same popup. In this section its side-by-side and in the section below it's stacked (with bolded labels). This makes the content look disorganized and sloppy.

Tooltips that appear on hover should not contain additional controls because popups like this are supposed to disappear once the mouse moves away form the element.

0	6	0	(L) 0	(*) 0
the second se		()	<u> </u>	

Re-edit Row Assignment

Desktop

iter Rotation - Assignmation Name: gth (days): & Eff. Dates: Row Job IPN IPN 3 LPN 4 LPN	Unit Name ICU Edit Type Assign Employee Elks, Basil	ned 2 U Start Date 07/31/2017	Mar otation Name X-DEMO Update Assignmen End Date 01/01/3000 (*)	t + Leave Re	Assignment Row 2 eason Override C	Org. Start Date 07/31/2017 Labor Metrics	Org. End Date 01/01/3000
ation Name: gth (days): & Eff. Dates: Row Job LPN 3 LPN 4 LPN	Unit Name ICU Edit Type Assign Employee Elks, Basil	Ro ned 2 U Start Date 07/31/2017	Arbein Name X-DEMO Update Assignmen End Date 01/01/3000	t 🛊 Leave Re	Row 2 eason Override Cancel	Org. Start Date 07/31/2017 Labor Metrics	Org. End Date 01/01/3000
& Eff. Dates: Row Job LPN 3 LPN 4 LPN	ICU Edit Type Assign Employee S Elks, Basil	ned 2 U	X-DEMO Update Assignmen End Date 01/01/3000	t 🛊 Leave Re	2 eason Override	07/31/2017 Labor Metrics	01/01/3000
Row Job LPN 3 LPN 4 LPN	Edit Type Assign	ned Start Date 07/31/2017	Update Assignmen End Date 01/01/3000 (*	Leave Re ubmit Rever	eason Override	Labor Metrics	
LPN 3 LPN 4 LPN	3 Elks, Basil	Start Date	End Date 01/01/3000	ubmit Rever	eason Override	Labor Metrics	
2 LPN 3 LPN 4 LPN	3	07/31/2017	01/01/3000	ubmit Rever	1 Cancel		
3 LPN 4 LPN	3		S	ubmit Rever	1 Cancel		
4 LPN			S	ubmit Rever	1 Cancel		
			S	ubmit Rever	1 Cancel		
			S	ubmit Rever	t Cancel		
			S	ubmit Rever	t Cancel		
			S	ubmit Rever	t Cancel	12.	
			S	ubmit Rever	1 Cancel		
	2						
							T



Notes

1 The popup that is displayed when clicking the "edit" CTA (pencil icon) shows different content depending on whether the targetted row is filled in or not. Because the same icon is being used for both cases the expected behavior is to display consistent content. The icon should change somehow to differentiate the differing behaviors.

2 The "Edit Type Assigned" dropdown is displayed as if it were the 2 row of data in relation to the content directly above it. Because of this the text "Edit Type Assigned" looks like it's data for the "Unit Name" column and the dropdown looks like it belongs to the "Rotation Name" column.

3 No appearant reason why this particular section of content is in it's own bordered container since there are editable fields inside and outside of the container. It also it takes up more space than necessary and pushes the primary CTA buttons even further down the screen.

0	A 6	0	(L) 0	(*) 0
the second se	And a second second			a second second
Re-edit Row Assignment – Error

Desktop

eduling > ster Rot ation N	Multi-view Sched							
ation N	SETTLEMENT # SAMENETTING	Unit Name		Rotation Name		Row	Org. Start Date	Org. End Date
	ame:	ICU		UX-DEMO		2	07/31/2017	01/01/3000
gth (da	ys):	Edit Type Assig	gned	Update Assignm	ent 🛊			
& Eff. I	Dates:	Employee	Start Date	End Date	Leave R	leason Override I	abor Metrics	
1101	E	Elks, Basil	08/07/2017	01/01/3000	· ***			
1	LPN							
2	LPN							
3	LPN							
4	LPN							
	Ч							
		Warning						
		Unassigned su	ub-row(s) will be cro	eated for the gaps t	etween submitted	date ranges. Conti	nue?	1
	A	07/31/2017 an	d 08/06/2017					
			ancel					
			2					
		3			Submit Reve	rt Cancel		
				1.0				

				Workbra	ain Support 🕞
Payroll	Close Wizard	Time Off Approv	al		\$?
		End Date:	:	08/31/2017	
6	Sun 08/06	Mon 08/07	Tue 08/08	Wed 08/09	Thu 08/10
		D	D	D	
				D	D
	D	D			
				D	D

Not	es
A	Accurate error messaging
1	When an error appears it's displayed under bordered content container, pushing the b causing the entire popup window to scroll
2	The contextual CTAs for the error are in th main popup CTAs.

	80	6	0	0 ()	191 (
--	----	---	---	------	-------

der the oversized bottom CTAs down and oll.

the same style as the

Additional Generated Rows

Desktop

ini	for	Inf	or Wor	kforce Ma	anagement													Workbrain	Support 🕞
Home	М	essages	(6) T	imesheet	Maintenance	My Reports	Scheduling	My Approv	al Supervisor	Approval	Weekly Ti	imesheet	Payroll Close Wizard	Time Off Appro	oval				\$?
Schedulin	g > <u>Mu</u>	ilti-view S	cheduler :	Master Rota	ation > Master Rota	tion - Assignment													
Master F	Name	n - Assig	nment		LIX-DEI	10		Unit			ICU								
Length (days):				14			Start Date:			08/0	4/2017		End Dat	te:		08/31/2	2017	
Ver. & Ef	f. Date	:9:			1 - 07/3	1/2017		Publish St	atus:		UNP	ROCESSED							
R	w	Job	FTE	E	mployee	ES MRA START DATE	ES MRA END DATE	P/T	Leave Reason		08/04	Sat 08/05	08/06	Mon 08/07	0	ue 8/08	08/0	9	08/10
0	L LP	N		Helmut, Zem	0	07/31/2017	01/01/3000	ρ		rc				D		D	D		
0	2 LP	N		Elks, Basil		07/31/2017	08/05/2017				D	D							
0	LP	N	1	Elks, Basil		08/06/2017	01/01/3000		SICK								D		D
0	LP	N		Unassigned		08/06/2017	01/01/3000										D		D
0	B LP	N		Unassigned		07/31/2017	01/01/3000				D	D	D	D					
0	\$ LP	N		Unassigned		07/31/2017	01/01/3000				D	D					D		D
Bo	ok Off	s	Relief Co	elis			REL	IEF RNI	QUEUE	Process	Export To PDF	REFRESH							
4														0	6	0	(L) 0	(i) 0	



Notes

1

Additional rows are generated under certain conditions (ie: when an employee has sick leave during a rotation). The additional rows are not numbered and the first generated row will duplicate all the date from the row above it (the original numbered row) with the addtion of filling in the "Leave Reason" column. This duplicated row is unnecessary since it could be represented in the original row and have the "Leave Reason" filled in instead of blank.

Re-edit Row Assignment – Put Employee on LTA

Desktop

info	Infor W	/orkforce Ma	inagement	M. Deset	Ophadultar	AA. A	Ourses from A	Minute	mashari
Home	Messages(6)	Timesheet	Maintenance	My Reports	Scheduling	My Approval	Supervisor Approva	Weekly II	mesheet
Master Rot	tation - Assignme	Unit Name		Rotation Name		Row	Org. Start Date	Org. End Date	
Rotation N	lame:	ICU		UX-DEMO		2	07/31/2017	01/01/3000	
Length (da	iys):	Edit Type Assig	gned	Put Employee or	LTA \$				
Ver. & Eff.	Dates:	Start Date		08/07/2017 📺	End Date		01/01/3000 📺		Set
Row	2	Leave Reason		SICK		TQ			08/05
Ø 1	LPN	Comments							
Ø 2	LPN								D
Ø 3	LPN				Submit	Cancel			D
0 4	LPN								D
Book	c Offs Relie	f Cells			R	ELJEF RNN	QUEUE Process	Export To PDF	REFRESH

				Workbra	in Support 🕞	
Payro	Il Close Wizard	Time Off Approva	d		\$?	
		End Date:		08/31/2017		
	Sun 08/06	Mon 08/07	Tue 08/08	Wed 08/09	Thu 08/10	
		D	D	D		
				D	D	
11	D	D				
				D	D	

Notes

1 Popup scrolling bug when the content is updated and isn't necessary for scrolling the top header bar gets cut off and the popup gets stuck in this state.

2 The content displayed for different selections in the "Edit Type Assignment" dropdown isn't displayed in a bordered container like the default option. Lack contistant layout design.

🗐 o 🗛 6 🛗 0	(L) 0	10
-------------	-------	----

One Time Schedule – Edit Template

Desktop

info	Infor	Workforce M	anagement						
Home	Messages <mark>(6)</mark>	Timesheet	Maintenance	My Reports	Scheduling	My Approval	Supervisor Approval	Weekly Timesheet	Pay
Scheduling	s > Multi-view Sch	neduler > One-time	s Schedule > OTS -	Plot Shifts, Edit Bo	w Details, Assign	ment			
One Tim	e Schedule				in Doland, Hoolgin				
Template	PERF_OT	S01	EQ.						
OTS Per	iod		iii.						
Edit	Cancel								

Workbrain Support \$? roll Close Wizard Time Off Approval

Notes



1 Form is positioned in the upper left corner while the rest of the page is mostly unused and blank.



OTS – Edit Template

Desktop

ome Messages aduling > <u>Multi-view S</u> Time Schedule S Name: plate: t Date: Row Q 1 4 Q 2 4	s <mark>(6) Timeshee</mark> <u>Scheduler > One-tim</u> Job	eet Maintenance me Schedule > OTS - F LPN 12HR-07/31/20 1 - 07/31/2017	My Reports Plot Shifts, Edit Row	Scheduling	My Approval	Supervisor Approval	Weekly Timeshee	t Pavro	I Close Wizard	Time Off Ap	proval				ö 2
eduling > <u>Multi-view S</u> Time Schedule S Name: plate: t Date: Row Q 1 4 Q 2 4	<u>Scheduler > One-tim</u> Job	ime Schedule > OTS - F LPN 12HR-07/31/20 1 - 07/31/2017	Plot Shifts, Edit Row		my ruppiorai	CONTRACTOR STORES	ricolay milloonoc		NATES TO STATISTICS AND						where I
Time Schedule	Job	LPN 12HR-07/31/20		Details, Assignment	t										
Implate: Row Implate: Implate: Implate: </td <td>Job</td> <td>1 - 07/31/2017</td> <td>017</td> <td></td> <td></td> <td>Description:</td> <td></td> <td>1.0</td> <td></td> <td></td> <td>Unit:</td> <td></td> <td>CARDI</td> <td>10</td> <td></td>	Job	1 - 07/31/2017	017			Description:		1.0			Unit:		CARDI	10	
Row 1 4	Job	07/31/2017				# Hows: End Date:		8 08/27/2	2017		Status:		READ	Y	
		Pin. I	Employee	Start Date	End Date	P/T Leave Reason	Mon 07/31	Tue)8/01	Wed 08/02	Thu 08/03	Fri 08/04		Sat 08/05	Sun 08/06	Mon 08/0
0 ² ¹¹	.PN	1.000 Frost, Emma		07/31/2017	01/01/3000		730D	730D	730D	730D					1930
	.PN	1.000 Frost, Jack		07/31/2017	01/01/3000						1930N	1	1930N	1930N	
O 3 U	.PN	1.000 St.Croix, Mariu	IS	07/31/2017	01/01/3000						730D		730D	730D	-
0 4 4	.PN	1.000 Power, Katie		07/31/2017	01/01/3000		1930N 1	930N	1930N	1930N					730D
_ 5 U	.PN	1.000 Paris, Bennet (du	07/31/2017	01/01/3000				730D	730D	730D		730D		
0 6 1	.PN	1.000 Rolfson, Autur	nn	07/31/2017	01/01/3000		1930N 1	930N						730D	730D
074	.PN	1.000 Callasantos, M	aria	07/31/2017	01/01/3000				1930N	1930N	1930N	1	1930N		-
 8_LI	.PN	1.000 Ramirez, Tom	IS	07/31/2017	01/01/3000		730D	730D						10200	10200
														19304	1930
Book Offs	Relief Cells	3 Add Row Copy Row	Edit LM Edit	Shifts Validate	Save	ocess Queue Print	Refresh							19304	1930
Book Offs	Relief Cells	3 Add Row Copy Row	Edit LM Edit	Shifts Validate	Save	ocess Queue Print	Refresh							19304	
Book Offs ob Shift Coverage Display Labe	Relief Cells	3 Add Row Copy Row	Edit LM Edit Desc	Shifts Validate	Save Pro Start Time	ocess Queue Print End Time	Refresh Activity Name							19304	
Book Offs Ob Shift Coverage Display Labe	Relief Cells	3 Add Row Copy Row	Edit LM Edit Desc 0730	Shifts Validate	Save Pro Start Time 7:30 AM	OCCESS Queue Print End Time 7:30 PM	Refresh Activity Name WRK							19304	

Notes

1 Breadcrumbs is visible but isn't on New Master Rotation screen even though both pages are similar in design and layout.

2 Delete and Split CTAs (trash and plus icons) are displayed once at the top of the list instead of repeated in each row like in the New Master Rotation screen.

3 CTAs are displayed in a different position compared to New Master Rotation screen even though several of the CTAs displayed in both.

OTS – Edit Row Assignment

Desktop

OTS Name: LPN 12HR-07/31/2017 Description: Template: 1 - 07/31/2017 # Rows: Start Date: 07/31/2017 End Date: Nob Pin. Employee Start Date End Date Image: 1 LPN With the start Date End Date P/T Leave Reason Image: 1 LPN Image: Image: <th< th=""><th>Mon 07/31 rmView=1 mView=t Date</th><th>8 08/2 Tue 08/01 730D</th></th<>	Mon 07/31 rmView=1 mView=t Date	8 08/2 Tue 08/01 730D
Row Job Pin. FTE Employee Start Date End Date P/T Leave Reason 1 1 LPN Image: Constraint of the cons	Mon 07/31 rmView=1 mView=t Date	Tue 08/01 730D 1930N
1 1 LPN Image: start Date Image: start Da	rmView=1 mView=t Date	730D 1930N
Image: Constraint of the second se	mView=t Date	1930N
O 3 LPN O 4 LPN O 5 LPN OTS Name Row Original Start Date Original End O 6 LPN OTS Name Row Original Start Date Original End O 6 LPN OTS Name Row Original Start Date Original End O 6 LPN Edit Type Assigned Update Assignment \$ Image: Carbon Coverride Labor Metrics Image: Carbon Coverride Labor Metrics Ø 8 LPN Employee Start Date End Date Leave Reason Override Labor Metrics Frost, Jack 07/31/2017 01/01/3000 Image: Carbon Coverride Labor Metrics Image: Carbon Coverride Labor Metrics	Date	1930N
Image: A LPN Image: A LPN Unit Name OTS Name Row Original Start Date Original End Image: D S LPN Image: B LPN Image: B LPN Image: D D LPN 12HR-07/31/2017 2 07/31/2017 01/01/3000 Image: D D D D D D D D D D D D D D D D D D D	Date	1930N
CARDIO LPN 12HR-07/31/2017 2 07/31/2017 01/01/3000 CARDIO LPN 12HR-07/31/2017 2 07/31/2017 01/01/3000 Edit Type Assigned Update Assignment \$ Employee Start Date End Date Leave Reason Override Labor Metrics Frost, Jack 07/31/2017 1 01/01/3000		
C 7 LPN Edit Type Assigned Update Assignment C 8 Employee Start Date Employee Start Date Frost, Jack 07/31/2017 01/01/3000		1930N
B LPN Employee Start Date End Date Leave Reason Override Labor Metrics Frost, Jack 07/31/2017 01/01/3000 Image: Complex comp		10001
Frost, Jack 07/31/2017		730D
Book Offs Relief		
Display Label* Effective-dated Changes Description Start Time End Time	Activity Name	
10 730D 0730-1930 7:30 AM 7:30 PM	WRK	
1930N 1930-0730 7:30 PM 7:30 AM	WRK	

				Workbrain Suj	oport 🕞
oll Close Wizard	Time Off A	pproval			¢?
		Unit	CARD	10	
/2017		Status:	READ	Y	
Wed 08/02	Thu 08/03	Fri 08/04	Sat 08/05	Sun 08/06	Mon 08/07
730D	730D				1930N
		1930N	1930N	1930N	
		730D	730D	730D	
1930N	1930N			v.	730D
730D	730D	730D	730D		
				730D	730D
1930N	1930N	1930N	1930N		
				1930N	1930N

Notes

1 Clicking the edit CTA (pencil icon) opens the Edit Row Assignment popup in a new browser window instead of a popup element even though the content is the same compared to the edit popup in New Master Rotation.

1 0	A 6	0	(L) 0	(6) 0	
2 March 2 12	10.00	(<u> </u>		

Create New One Time Schedule

Desktop



Workbrain Support ₿?

Notes

1 Form is positioned in the upper left corner while the rest of the page is mostly unused and blank.

Whenever the system asks the user how long a rotation or 2 schedule they want displayed it's either in number of days or number of weeks. For New Master Rotation its "Length in days", for Rotation Assignment (in Master Rotation) it's Number of Weeks and in One Time Schedule it's "# days in OTS". The unit of measurement used throughout the tool should be consistent (exceptions when necessary) and the language used to label these fields should be consistent as well.

80	A 6		(L) 0	(*) 0
----	-----	--	-------	-------

OTS – Plot Shifts + Edit

Desktop

inf	or	Infor	Workford	ce Mana	agement												Workbrain Su	oport 🕞
Home	Messag	ges <mark>(6</mark>)	Times	neet N	laintenance	My Report	s Scheduling	My Approval	Supervisor Approval	Weekly T	īmesheet	Payroll Close Wizard	Time Off App	oroval				\$?
Scheduling	> <u>Multi-viev</u> Schedule	w Sche	duler > One	time Sche	dule > OTS - P	lot Shifts, Edit R	ow Details, Assignmer	t										
OTS Nam	e:			LPN 12HF	R-08/28/2017			De	scription:			Unit	:	CARDIO	5			
Template: Start Date				1 - 07/31/	2017			# R	ows:	8	2/24/2017	Stat	110.	LINPRO	CESSED			
A	Row	r	Job	Pin.	E	Employee	Start Date	End Date	P/T Leave Reason	Fri	Sat	Sun	Mon	Tue	000000	Wed	Thu	Fri
<u>ش</u> اط	0 1	I PN		FTE	Frost Emma		07/31/2017	01/01/3000		08/25	08/20	6 08/27	7300	7300		08/30 730D	7300	09/01
0	0 4	LPN		1.000	Frost Jack		07/31/2017	01/01/3000	U	7300	7300	7300	7500	1500		1500	7500	1930N
2	0 - 3	LPN		1.000	St.Croix, Mariu	s	07/31/2017	01/01/3000		WRK 1930N	WRK 1930N	WRK 1930N						730D
2	0 4	LPN		1.000	Power, Katie		07/31/2017	01/01/3000		WRK	WRK	WRK	1930N	1930N		1930N	1930N	
2	0 5	LPN		1.000	Paris, Bennet d	u	07/31/2017	01/01/3000		1930N						730D	730D	730D
2	0 6	LPN		1.000	Rolfson, Autum	n.	07/31/2017	01/01/3000		WRK	- 1930N	N 1930N	1930N	1930N				
2		LPN		1.000	Callasantos, Ma	aria	07/31/2017	01/01/3000		7300	WRK	WRK				1930N	1930N	1930N
2	0 8	LPN		1.000	Ramirez, Toma	s -	07/31/2017	01/01/3000		WRK	7300	7300	730D	730D				
Bo	ok Offs	R	elief Cells	Add Row	Copy Row	Edit LM	dit Shifts Validate	Save	ocess Queue Print	Delete	Refresh							
Job	Shift Coverag	ge S	hift															
	Display L	.abel*	Eff	ective-date	d Changes	C	escription	Start Time	End Time	Activity	/ Name							
	10 73	0D				C	730-1930	7:30 AM	7:30 PM	W	RK							
-	D 193	30N				1	930-0730	7:30 PM	7:30 AM	W	RK							
Add Shi	ft Label	sd																
e:													0	A 6	0	(L) 0	(*) O	

Notes

1 The Shift table on the right now displays 2 sets of data in certain cells (highlighted yellow). The cell not only displays the "Display Label" but the "Activity Name" as well.

APPENDIX B:

Competitive Analysis





	Infor Nurse Scheduling							
	Tool	Humanity	NurseGrid	Deputy	Homebase	Shiftboard	TrackSmart	When I Work
		Direct Competito	ors	Indirect Competi	tors			
Core Features								
Attendance Monitoring		v						v
Automated Scheduling		v			 ✓ 	v	~	 ✓
Calendar Integration (Google Cal, iCal, Outlook, Exchange)								~
Calendar Management			 ✓ 		~	 ✓ 		
Cloud Platform			 ✓ 		~	 ✓ 	~	 ✓
Desktop App								
Drag-and-Drop				 ✓ 	 ✓ 			 ✓
Email integration (Gmail, Outlook, Exchange, Yahoo)								
Employee Database			 ✓ 		✓	 ✓ 		 ✓
Event Planning			 ✓ 					
GPS	 ✓ 							 ✓
In-App Messaging		v	~	~	 ✓ 			
Leave / Vacation Tracking				v	 ✓ 	 ✓ 		 ✓
Mobile Application		v	~	~	 ✓ 	 ✓ 		 ✓
Report Builder		v		 ✓ 	 ✓ 			
Report Viewing				 ✓ 	 ✓ 			
Responsive UI								
Schedule Templates								
Shift Scheduling	 ✓ 	 ✓ 	 ✓ 	v	 ✓ 	 ✓ 	~	 ✓
Third-Party Integrations		Address Book, Facebook, Google Apps		POS/Payroll providers, live weather feed		Payroll and HR Systems Integration		
Time Clock					~			
Time Tracking/Timesheets		v		 ✓ 	 ✓ 	v	~	 ✓
Web-based App	~					V		
Voice-to-Text								

MVS Competitive Analysis

Direct Competitors:

- Humanity
- NurseGrid

Indirect Competitors:

- Deputy
- Homebase
- Shiftboard
- TrackSmart
- When I Work

Direct Competitors



"Embrace Your Potential"

Website: http://www.humanity.com Founded: 2014 (Crunchbase) / 2010 (LinkedIn Page) Headquarters: San Francisco, California Employees: 51 - 200 Social: Facebook: https://www.facebook.com/humanityapp Instagram: https://www.instagram.com/humanityapp/ LinkedIn: https://www.instagram.com/humanityapp/ LinkedIn: https://www.linkedin.com/company-beta/3798316/ Twitter: https://twitter.com/HumanityApp YouTube: https://www.youtube.com/channel/UCT1yjbpgPhA4znXIHBIZykA

Overview:

The company launched its original shift scheduling platform in 2010 under the name "ShiftPlanning" and then rebranded as "Humanity," debuting it as a new platform in January 2016. With a starting price of \$49 per month for up to 20 employees, Humanity is among the more expensive shift scheduling softwares in the market.



"Nurse scheduling for the 21st century." "Scheduling and communication | For Nurses, By Nurses"

Website: http://www.nursegrid.com

Headquarters: Portland, Oregon Founded: 2013 Employees: 11 - 50 Social: Facebook: <u>https://www.facebook.com/NurseGrid</u> Instagram: <u>https://www.instagram.com/nursegrid/</u> LinkedIn: <u>https://www.linkedin.com/company-beta/3319590/</u> Twitter: https://twitter.com/nursegrid

Overview:

Founded by nurse and physician technology entrepreneurs, NurseGrid set out to build a better way to manage time-consuming administrative tasks, giving nurses and nurse managers more time to focus on achieving work-life balance and delivering excellent patient care.

NurseGrid Mobile is a free mobile app used by over 240,000 nurses in thousands of hospitals to connect with their colleagues and manage their busy schedules on a calendar made just for them.

NurseGrid Manager is a web application that seamlessly integrates with NurseGrid Mobile and allows managers to simplify team communication, staffing, and schedule management, saving time and money and making their departments happier and more productive.

Indirect Competitors



"Love your business again."

Website: https://www.deputy.com Headquarters: Surry Hills, New South Wales Founded: 2008 Employees: 51 - 100 Social: Facebook: https://www.facebook.com/deputyapp/ Google+: https://plus.google.com/+DeputyApp LinkedIn: https://plus.google.com/+DeputyApp LinkedIn: https://www.linkedin.com/company-beta/2451628/ Twitter: https://twitter.com/deputyapp Vimeo: https://vimeo.com/deputy

Overview:

Deputy is a cloud-based workforce management solution that streamlines scheduling and modernizes the relationship with their employees.

homebase

Website: https://joinhomebase.com/ Headquarters: San Francisco, California Founded: 2014 Employees: 11 - 50 Social: Facebook: https://www.facebook.com/HomebaseHQ LinkedIn: https://www.linkedin.com/company-beta/6464539/ Twitter: https://twitter.com/joinhomebase

Overview:

Homebase helps to reduce the administrative burden of hourly work by automating scheduling, timesheets, and communication between employees. The basic tools are free, with tiered pricing options for additional features.



"The Dynamic Scheduling System for staffing the best teams"

Website: http://www.shiftboard.com

Headquarters: Seattle, Washington Founded: 2002 (Crunchbase) / 2005 (LinkedIn) Employees: 11 - 50 Social: Facebook: <u>https://www.facebook.com/Shiftboard/</u> LinkedIn: <u>https://www.linkedin.com/company-beta/235879/</u> Twitter: <u>https://twitter.com/shiftboard</u>

Overview:

Shiftboard provides online scheduling software (SaaS) to a broad range of business services and staffing companies, municipal governments, educational institutions, and non-profits. Shiftboard's customers conduct scheduling and people management operations around the globe. Shiftboard's software is web-based, can be launched on short timelines, serves from 25 to 100,000 users and is easy for workers to use.

Shiftboard's workforce management platform includes a robust, developer-ready API for interfaces to existing systems and content. Partners including ISVs, technology resellers, content providers and others

can leverage the Shiftboard platform for rapid expansion of product offerings, market footprint, and other business objectives.



Website: http://wheniwork.com Headquarters: Minneapolis, Minnesota Founded: 2010 Employees: 101 - 250 Social: Facebook: https://www.facebook.com/wheniwork Twitter: https://twitter.com/wheniwork LinkedIn: https://www.linkedin.com/company-beta/1106813/

Overview:

When I Work is an employee scheduling and communication app using the web, mobile apps, text messaging, social media, and email. The program provides a powerful tool for employers to communicate with employees and ensure schedules are properly communicated.

APPENDIX C:

User Interview Script / Moderator's Guide



Multi-View Scheduler (MVS) Interview Guide

August 7- August 11, 2017 | Round 1 August 14 - August 17, 2017 | Round 2

MVS Team

Brian Chui, MVS Business Analyst Mary Curren, H&L UX Researcher Angela Fagg, H&L UX Designer Lenya King, H&L Senior UX Designer Alexander Kress, MVS Lead Developer Isha Shukla, H&L UX Team Lead

Overview:

Infor MVS (Multi-View Scheduler) is a platform for Scheduling Managers and other staff with similar responsibilities.

As a first step in the design process, Hook & Loop is conducting a usability study of MVS, primarily to learn the process of creating master rotation schedules and assigning staff to shifts. We will be observing end-users complete tasks on the application, while capturing time-on-task, task completion rate, error rate and ease-of-use metrics.

The insights from this study will help expose user pain points and challenges, fueling an informed design process.

Testing Plan

The usability session will be a one-hour Webex session conducted on the live application with Scheduling Managers in the healthcare space.

FEATURES COVERED IN TESTING:

- Master Rotation Scheduling
 - Plotting Shifts
 - Changing Shifts
- Assigning staff members to a shift
- One-time scheduling

KEY GOALS OF TESTING:

QUALITATIVE

- Preliminary interview questions to learn about roles, responsibilities and process.
- Observations of user pathways through each task
- Think-aloud feedback on tasks

Moderator's Guide:

INTRODUCTION

Thank you for participating in our feedback session for Workforce Management. To kick things off, I'd first like to ask you a few questions about your job and the scheduling process for the State of South Dakota. Then for the last 30 minutes, we were hoping you could share your screen to show us how you use Workforce Management for your scheduling needs. Essentially, we want to understand how the system is currently used, and look for areas of improvement.

We would also like to record this session if that is okay with you. The recording is only for our own internal note-taking purposes and won't be shared outside of our small team.

Do you have any questions before we get started?

PARTICIPANT INFORMATION

- Tell us a bit about what you do at your organization?
- How long have you been using MVS?
- What do you use MVS for?
- *Who* are you scheduling?
- Are you responsible for creating new shift rotations?

IF YES,

- How often do schedule shifts at your organization?
- What is the standard length of a rotation in your organization?
- How do you go about creating a shift rotations in your organization?
 - What information do you need to create shift rotations?
- What are the different types of issues you encounter when scheduling staff, if any?
- Is a master rotation created for the entire organization or do different **units** have their own rotations?

TESTING SCRIPT

Now we're going to shift gears a bit and have you open up MVS and share your screen [Quick Start tab > Share Screen icon]

We would love for you the think-aloud to the best of your ability while showing us some the system. Since this project aims to improve the usability of MVS hearing your honest reactions will be a big help to us, so please know you're in a safe space to be as candid as you would like.

Task Scenario 1 | Creating a new master rotation

• How do you create a new master rotation?

Task Scenario 2 | Plotting Shift Patterns

- How do you plot shift patterns in your rotation?
 - How would you look-up a shift from the available shifts for your department?

Task Scenario 3 | Assigning Shifts

• How do you assign staff to a shift?

Task Scenario 4 | Making Changes to Shift Rotation

- How do you make changes to a shift rotation?
- What are the reasons you would need to make a change to a rotation?
 - How do you communicate to the scheduled staff if there is a shift change?
- How do nurses *drop or pick-up a shift*?
 - Would that happen in WFM? Where?

CLOSING QUESTIONS

- What are some of the challenges you currently face scheduling staff at your organization?
- Would you be open to participating in another usability session with some MVS re-designs in the near future?

APPENDIX D:

Affinity Diagram





Load Time	Communications – Taxonomy	Communications – Notifications	User Role – Nurses	MANAGER: Information Needed to Schedule
Slow load time	Naming conventions not readable – lack of details shown in list views	special days off = word of mouth	No access for individual employees	Need to see level of employee to schedule
Reports take too long to run	Nomenclature is confusing	error notifications are not clear	QH wants nurses to self- schedule	Need to see how many people in what position need to be scheduled
Slow System	Job coverage vs. shift count	No confirmation notifications	Nurses still refer to printed schedules & don't have a way of accessing MVS platform	Need to know who is available (isn't working/enough time lapses)
Publishing/editing rotations can take up to a day	Various ways of measuring time – # of weeks vs. # of days	No system notifications		Schedulers need to see labor metrics clearly when plotting shifts
Opening multiple tabs in same session can cause a system error. Users need to open a new window and login again.	Name shift based on location, time	System doesn't keep log of last changes made by user or other users – hard to tell where you last left off		Can't see more than one rotation at once
Long lists are slow to load	Each org has own method of naming shifts			Employees scheduled based on contract
System times out before data can run				Color code shifts to indication location of shift
				Have to copy & paste labor metrics for each line, even if same for all employees
				Number of people in shift changes week to week
				Typically needs to schedule four weeks at a time/want to see four weeks

Manager Responsibilities	Usability Observations	Inefficient Workflows – Navigation	Inefficient Workflows	Inefficient Workflows – Different Methods of Backfill Shifts
Manager schedule shifts daily	One user got confused, someone else took over	Must leave MR to assign shift then return	Lots of clicks to do certain things (ex. "turn on shift plotting" link, click tiny icon, etc.	Varied methods of scheduling employees to shifts
QH negotiations with nurses to fill unwanted shifts	Lots of background whispering to help participant		Too many steps to complete each (some) task	PHSA "Employee Pool"
Schedule needs to be accurate (it affects pay)			Lots of repetitive tasks (c&p labor metrics)	QH "Relief Queue"
			Creating, assigning, booking off and selecting from relief queue flows are broken up	S of S.D. "Needs List"
			Must go outside system to find nurse to pick up shift – can be lengthly process	PHSA "Employee Pool" QH "Relief Queue" S of S.D. "Needs List"

Inefficient Workflows – Inefficient Dropping/Picking-up	Excel Dependency	Misc. Usability Issues	Usability Issues – Sizing	Heuristic Evaluation – Master Rotation
Employees call/email to drop shift	Users have to rely on Excel to view all schedules because MVS doesn't support need; can view multiple units in Excel, not MVS	Too many modal windows	Icons are too small	MR shift table doesn't display enough info about shift to prevent errors like overlap.
Nurses call/text each other to pick up / drop shifts	Often department will create schedule then IT will input into system	System doesn't update shift need counts in real-time. User has to click save.	Some text is too hard to read (too small)	In MVS, can't view 24 hr schedule at once
Manager has to update if people drop or pick up shifts	Excel spreadsheets are still widely used in shift scheduling process	Need to keep all rotations open shifts up and refresh to remain accurate.	Hard to read	Screen real estate in MR screens
Look at relief queue to schedule open shifts	Excel document used to view staff member's schedule	Struggled with team lookup		Lots of scrolling
Call list 100's of items long – time consuming		Not optimized for laptop sized screens even though some users work from home on laptops		Multiple panels in MR view is jarring UX
		Unable to view entire shift on full screen		
		Not enough relevant content visible on screen		

Heuristic Evaluation – Shift Creation	Heuristic Evaluation – Plotting Shifts
Shift labels can't be created by users; JIRA ticketing = slow turnaround	Assigning & plotting shifts is time consuming
Can't edit/delete shift after creation	No easy (if any) ability to make changes on multiple shifts.
It's rare for schedulers to make changes to Master Rotation once created	Plotting shifts requires"turning off" shifts and selecting icon first.
Shift creation doesn't happen often	
Once Master Rotation template has been saved, it can't be deleted or edited	

APPENDIX E:

Insights & Recommendations

Copyright © 2017. Infor. All Rights Reserved. www.infor.com

Key Insight	Recommendation			
USABILITY ISSUES				
Too many modal windows	Simple tasks can be reworked to be inline components that are displayed when certain conditions are met (ie: editable fields in shift rows and copying shifts for rows)			
System doesn't update shift need counts in real time. User hase to click 'Save' in order for system to update	Need counts should be recalculated whenever there's an update to a table cell being counted			
Need to keep all rotations open shifts up and refresh to remain accurate.	System should display updated information in real-time without needing to refresh page			
Interface is not optimized for laptop sized screens even though some users work from their laptops at home.	Interface should be responsive for a wide range of screen sizes including mobile, tablet, laptop, desktop and large displays			
Unable to view entire shift at full screen	Interface should be responsive for a wide range of screen sizes including mobile, tablet, laptop, desktop and large displays			
Not enough relevant content visible on screen	Evaluate what information is the most important to display to the user in each scenario			
Icons are too small	Icons that are used as CTAs need to be big enough for user to be able to interact with them. Icons should also scale in size relative to the screen's size.			
Some text is too small and hard to read	Provide a setting for the user to adjust the font size.			
MASTER ROTATION				
Shift table doesn't display enough info about shift to prevent errors (ie: overlap)	Displaying the start and end times of the shift in each cell will let the user know when shifts are covered and therefore will minimize overlap			
Can't view 24 hr schedule at once	Provide an Hour View for users when plotting shifts			
Screen real estate in master rotation screens causes excessive scrolling	Determine which fields are most important for each row and minimize how much horizontal real estate each row takes up			
Having multiple panels displayed on the same screen makes the experience very jarring	Consolidate information so user doesn't have to manage multiple views at the same time and have to multitask.			
SHIFT CREATION				
Shift labels can't be created by users and instead have to use the JIRA ticketing system.	Provide a user role with permissions that allow for shift creation OR let users manually plot shifts using custom time ranges			
	It was mentioned that the ability to delete ACTIVE master rotations could be a payroll/HR issue so providing a way to archive non-ACTIVE master rotations could solve this; keeping the data in the system but removing it from the list			
Can't edit/delete a master rotation shift after creation	of other master rotations and reducing clutter in the UI			
It's rare for schedulers to make changes to Master Rotation once created	Reordering how this item is displayed in global nav based on how often it's utilized by the user.			
Shift creation doesn't happen often	Some organizations don't create shifts too often and may benefit from a way to quickly access shifts they used the most			
Once Master Rotation template has been saved, it can't be deleted or edited PLOTTING SHIFTS	It was mentioned that the ability to delete ACTIVE master rotations could be a payroll/HR issue so providing a way to archive non-ACTIVE master rotations could solve this; keeping the data in the system but removing it from the list of other master rotations and reducing clutter in the UI			

Key Insight	Recommendation
Assigning & plotting shifts is time consuming	Optimize the UI so it's more of a seamless experience will speed up the amount of time the user spends on each tasks; minimizing number of modals, consolidating tables and panels, system messaging and communication, etc
No easy (if any) ability to make changes on multiple shifts.	
Plotting shifts requires"turning off" shifts and selecting icon first.	Toggle components should not be styled as hypelinks. Refer to Soho guidelines for proper use of toggles

APPENDIX F:

Personas

Copyright © 2017. Infor. All Rights Reserved. www.infor.com



Rachel Williams



Bio

Rachel's primary objective at work is to maintain shift schedules for the 8 rotations she is responsible for. She generally schedules the bulk of shifts monthly for four weeks at a time, but everyday there is someone dropping a shift for personal reasons. This requires Rachel to stay up to day and quickly find nurses to pick up available shifts. Not being able to keep up with her job has implications on finances and patient care.

"A quotation that captures this user's personality."

Goals

- Main accurate scheduling so it does not affect nurse pay
- Schedule shifts quickly and efficiently
- Fill unwanted shifts with successful negotiations with nurses

Age: 40 Work: Nurse Manager Location: South Dakota

Frequency of Tools Used

(Low to High)

Infor Workforce Management

Excel	
Text	
Phone calls	
Email	

Frustrations

- Challenges in finding nurses to fill open shifts
- Duplicating work
- Having to spend additional time on a task because of technology

Information Needed

For Scheduling Shifts

- 1. Level of Employee (Position/Rank)
- 2. How many people need to be scheduled for given shift and in which roles (position)
- 3. Who is available to work (Hasn't worked recently and enough time has lapsed between last shift)
- 4. Labor metrics for each employee or contract hours
- 5. Need to see multiple rotations at once
- 6. Need to be able to identify location of shifts
- 7. Open shifts (nearest to furthest)
- 8. Shifts for up to four weeks at a time

HOOK ∞ LOOP

Delivering Experiences People Love

As Infor's internal creative agency we help design its software products and envision the future of the Infor brand itself.

Our mission: change the way people work and think about work. To do that, we craft a new generation of enterprise-level user experiences that disrupt preconceived notions of business software. And along the way, we find ways to surprise and delight.



