# **New Monthly Schedule – Roles option**

Initial view

### Desktop

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#### Notes



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#### View Range Options

Toggle between viewing the set range of dates by Daily (individual days), Weekly or Monthly.

#### View staff column options

Dropdown that changes how the staff column is displayed in the schedule. These options are taken from the "Assign Staff" options in the Create New modal: Role, Team, and Employees. (For this example "By Role" has been selected)



4

#### Unassigned Staff Cell

If the schedule is displayed 'By Role': Each cell in the staff column will display the row number, a badge with the abbreviated role type (ie: RN = registered nurese) and say "Not yet assigned". Clicking on an unassigned cell will open the Assign Role modal.

#### **Blank Row**

Whenever a schedule is being created or edited a blank row will be shown at the very bottom and will display an add button "+" and say "Add [role type]". The role type will be determined by the roles the user chose to include in the Create New modal. Clicking on an empty cell within the blank row will do one of the follow:

• If the user clicked the cell in the staff column it will open the Assign Role modal.

• If the user clicked on an empty shift cell the add shift tooltip will be displayed (refer to page 4).

• If the user drags the blank row to a higher row in the schedule.

If the user performs any of the actions listed above the blank row will then become an unassigned row (assigned if the Assign Role modal appeared). Once this happens a new blank row will appear at the bottom of the schedule.

#### **Right Panel – Inactive State**

The initial inactive state of a schedule screen will display a calendar view in the right panel as well as a stats widget and a list of shift types. The user may use the calendar to view which days of the month the current schedule is affecting.

#### 6 Stats

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Stats will update in real time as the user completes the schedule.

#### All Shifts 7

List of all shift types the user can plot within the schedule.

# New Monthly Schedule – Teams & Individual Employee option

Without 'view by' dropdown – with Assigned Staff

### Desktop

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	5 RN Jessica Gutierrez	+	+	+	+	+	+	+	+	+	+	+	+	+	+	+	+	+	+	+	+
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#### Notes



#### No View Staff option dropdown

Alternate layout of schedule without a "view by" dropdown. In this version the "All" button will be displayed all the way to the left above the schedule.

2 Assigned Staff Cell

> If the "Assign Staff" option was set to either 'Team' or 'Individual Employees': Each cell in the staff column will be assigned to an employee and display the row number, a badge with the employee's initials and their first and last name. Clicking on an assigned cell will open the Rassign Role modal.

# Add Shift

# Plotting a shift to an unassigned row (role)

### Desktop

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### Notes



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#### Add Shift tooltip

Clicking on an empty shift cell will display an "Add Shift" tooltip. The user will be able to select from a list of shifts to plot.

#### Shift Cell Details Panel

Displays when the user clicks on a shift cell. Depending on if the shift cell is in a row that is currently assigned or unassigned the details panels will display either "Not Yet Assigned" or the employee's first and last name as well as the role type. If unassigned an "Assign" button will be displayed and if assigned an "Unassign" button will be displayed instead.

#### **3** Available Shifts list

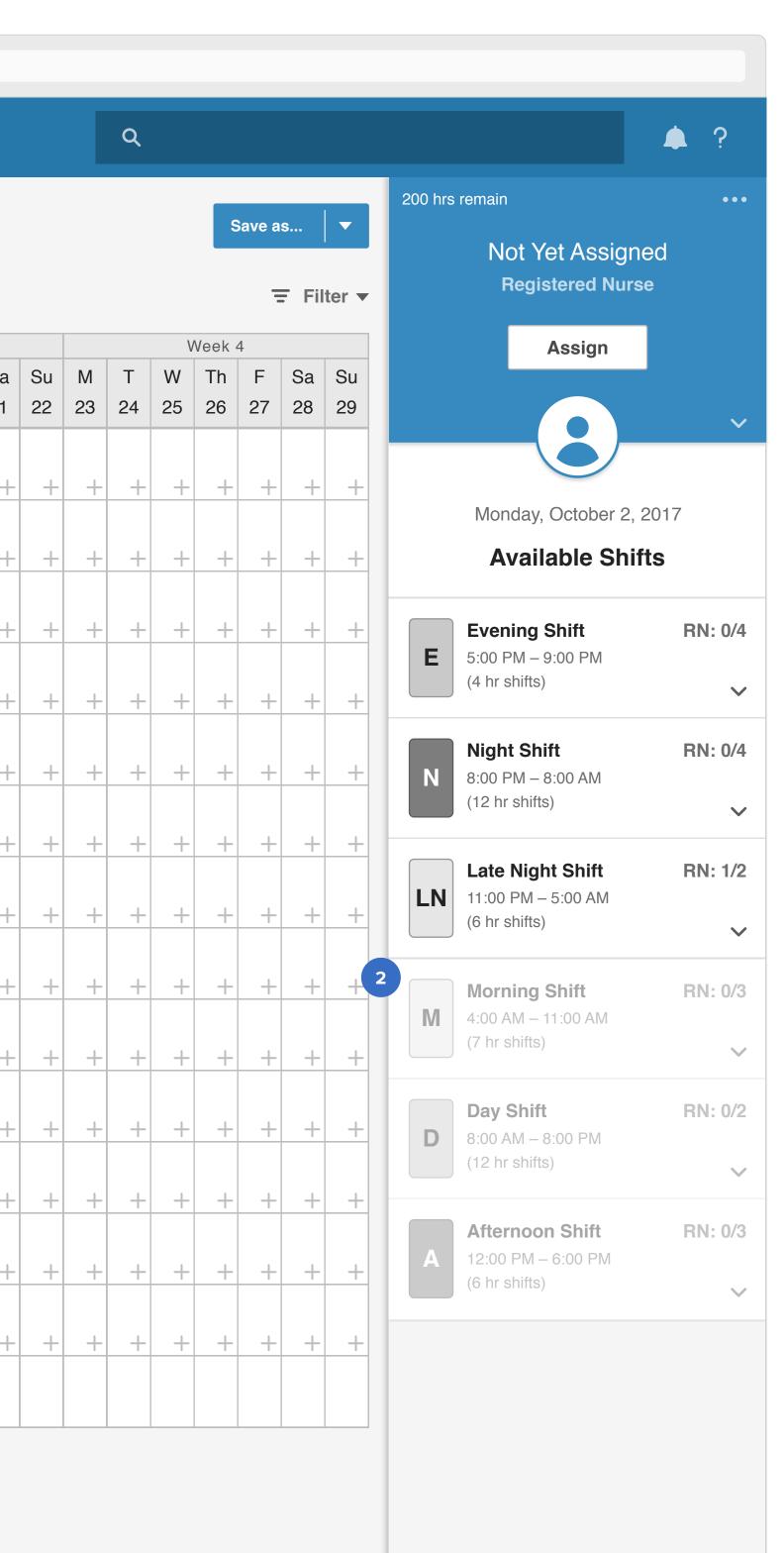
Lists all shifts that can be plotted into the schedule.

# Add Next Available Shift

Plotting additional shifts based on availability (calculating start/end times, contractual needs, department needs, etc)

### Desktop

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### Notes



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#### Adding additional shifts

As the user plots shifts within the schedule MVS will calculate which shifts are displayed in the "Add Shift" tooltip. The tooltip will only display shifts that are able to be plotted within the cell and will be determined by the following parameters: • Start time does not overlap with previous day's End time • Department need for the shift type has not reach the maximum

number for that day

• )If Assigned) Shift's hours does not cause the employee's total hours to go into overtime or conflict with existing contractual aggreements

Conflict with any other organizational configuration settings

#### Unavailable shifts

All unavailable shifts that can not be plotted in the select cell will be displayed at the bottom of the shifts list inthe details panel in a deactivated state. Unavailable shifts will not be displayed in the "Add Shift" tooltip.

# **Schedule with Plotted Shifts**

Initial view

## Desktop

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#### Other ways to plot shifts

Other ways shifts can be plotted:

- Moving shifts: clicking and dragging a shift to a different cell
- Duplicating plotted shifts: Select a shift > Command + C > select
- an empty cell > Command + V
- Duplicating plotted shifts: Holding down Option key while
- clicking and dragging a shift
- Removing a shift: Select a shift and press the Delete key



#### **Blocked Off Dates**

If there are certain days that an employee cannot be scheduled to work the cell will greyed out and unable to be selected to Add Shift.



Stats in the right panel will update in real time as shifts are plotted in the schedule.

# Week 1 Selected

Initial view

## Desktop

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1 RN Not yet assigned	LN	N	N	+	+	+	+	Α	М	+	Α	D	+	+	D	N	Ν	+	+	+	+	Α	M	+	Α	D	+	+	M	Morning Shift 4:00 AM – 11:00 AM (7 hr shifts)	100/12 1,200 hr
2 RN Not yet assigned	+	+	D	D	D	+	+	+	+	+	E	÷	E	+	+	LN	+	+	+	+	LN	LN	+	+	+	+	+	+		Day Shift	75/9
3 RN Not yet assigned	+	+	+	+	A	D	+	+	+	A	M	+	+	A	D	+	+	+	+	+	+	+	LN	+	+	+	+	+	D	8:00 AM – 8:00 PM (12 hr shifts)	900 hr:
4 RN Not yet assigned	E	E	+	+	+	D	N	Ν	+	+	M	M	+	+	+	+	+	E	+	+	+	+	+	+	+	D	N	Ν	A	Afternoon Shift 12:00 PM – 6:00 PM	65/6 390 hr
5 RN Not yet assigned	+	LN	LN	+	+	LN	LN	D	Ν	Ν	+	D	N	N	+	LN	LN	+	+	LN	LN	D	N	Ν	+	D	N	Ν		(6 hr shifts)	
6 RN Not yet assigned	+	+	+	+	A	D	+	+	+	Α	M	+	+	Α	D	+	+	+	+	+	+	+	LN	+	+	+	+	+	E	<b>Evening Shift</b> 5:00 PM – 9:00 PM (4 hr shifts)	130/14 910 hr
7 RN Not yet assigned	E	E	+	+	+	D	N	Ν	+	+	M	+	М	+	+	+	+	E	+	+	+	+	+	+	+	D	Ν	Ν		Night Shift	110/12
8 RN Not yet assigned	+	LN	LN	+	+	LN	LN	+	+	+	+	D	Ν	Ν	+	LN	LN	+	+	LN	LN	D	N	Ν	+	D	Ν	Ν	N	8:00 PM – 8:00 AM (12 hr shifts)	440 hr:
9 RN Not yet assigned	+	+	+	D	N	N	+	+	+	D	+	+	D	+	Μ	+	+	+	E	E	+	+	+	+	Α	D	+	+	LN	<b>Late Night Shift</b> 11:00 PM – 5:00 AM	85/9 510 hrs
10 RN Not yet assigned	+	+	+	+	+	+	Α	D	+	+	+	+	+	+	+	+	+	+	+	+	+	+	+	+	+	+	+	+		(6 hr shifts)	<b>`</b>
11 <b>RN</b> Not yet assigned	+	+	E	E	+	+	+	+	+	+	+	+	+	+	+	+	+	D	Ν	Ν	+	+	+	+	+	+	+	+	Total		565/63 4,350/4990 hrs
12 RN Not yet assigned	+	+	+	LN	LN	+	+	LN	LN	+	+	+	LN	LN	+	+	+	+	+	+	+	+	LN	LN	+	+	+	+			
13 RN Not yet assigned	+	+	+	+	+	+	+	+	+	+	D	N	N	+	+	+	+	+	+	+	+	M	+	+	+	+	+	+			
14 + Add RN																															

#### Notes



### Selected Weeks or Days

Users have the ability to select and view details of a particular week or day by clicking on the Week or Day header in the schedule. Clicking on a Week or Day will highlight it and grey out all other days that are not associated.



#### 2 Week or Day details panel

When the user has selected a Week or Day the right details panel will display the particular day or range of days and the list of shift types that have been plotted along with the totals hours included in the selection.

# **Assigned Row Selected**

Initial view

## Desktop

			2						Q																					Seren	Son	mr (	rics Shi	Galati	
	hrs remain	6.00 hi		-	S	ave a	S							7 >	201	29, 1	ber	Octo	7 –	201	ər 2,	ctobe		•		/	onthly	Мс		kly	Wee		y	Daily	
	Parker Pandaey Registered Nurs		-	ter 🔻	F Fil	-									ing	nflict	Со	1		า	Oper			ed	ssign	A			All			•		Role	Ву
	Unassign					1	/eek 4	V					3	Veek (	V					2	Veek 2	V					1	/eek 1	V			]	ed Nurse	gistere	Re
				Su 29	Sa 28	F 27	Th 26	W 25	T 24	M 23	Su 22	Sa 21	F 20	Th 19	W 18	T 17	M 16	Su 15	Sa 14	F 13	Th 12	W 11	Т 10	M 9	Su 8	Sa 7	F 6	Th 5	W 4	Т З	M 2			al: 13	
			1			D	Α		М	A					N	N	D			D	Α		М	Α					N			y	Parker Pandaey.	1 8	
9, 2017	October 2 – October 29	(	3		+	+	+	-		LN	LN	-	-	-		LN			E		Е	-					D	D	D				Lynda Dotcom	2 RN	:
14 h	<b>Morning Shift</b> 4:00 AM – 11:00 AM	Μ			+				LN	+	+			-		+	D	A	+		M	Α		-		D	A	+	+	+		d	Not yet assigned	3 RN	
	(7 hr shifts)			N	N	D	+	+	+		+		+	E			+	+	+	M	M	+	 _+	N	N	D	+		+	E	E	d	Not yet assigned	4 RN	
<b>()</b> 36 hi	<b>Day Shift</b> 8:00 AM – 8:00 PM (12 hr shifts)	D		N	N	D	+	N	N	D	LN	LN	+	+	LN	LN		N	N	D	+	N	N	D	LN	LN	+	+	LN	LN	+	d	Not yet assigned	5 RN	
24 h	Afternoon Shift			+	+	+	+	+	LN	+	+	+	+	+	+	+	D	A	+	+	M	A	+	+	+	D	A	+	+	+	+		Not yet assigned		
	12:00 PM – 6:00 PM (6 hr shifts)	Α		N	N	D	+	+	+	+	+	+	+	E	+	+	+	+	M	+	M	+	+	N	N	D	+	+	+	E	E	d	Not yet assigned	7 RN	
<b>48 h</b>	<b>Night Shift</b> 8:00 PM – 8:00 AM	Ν		N	N	D	+	N	N	D	LN	LN	+	+	LN	LN	+	N	N	D	+	+	+	+	LN	LN	+	+	LN	LN	+				
0.1	(12 hr shifts)			+	+	D	A	+	+	+	+	E	E	+	+	+	M	+	D	+	+	D	+	+	+	N	N	D	+	+	+	d	Not yet assigned	9 RN	
6 h	Late Night Shift 11:00 PM – 5:00 AM (6 hr shifts)	LN	_	+	+	+	+	+	+	+	+	+	+	+	+	+	+	+	+	+	+	+	+	D	Α	+	+	+	+	+	+	d	Not yet assigned	0 <b>RN</b>	
0 h	Evening Shift			+	+	+	+	+	+	+	+		N	D	+	+	+	+	+	+	+	+	+	+	+	+	+	E	E	+	+		Not yet assigned	1 RN	0 0 0
	5:00 PM – 9:00 PM (4 hr shifts)	E		+	+	+	+	LN	LN	+	+	+	+	+	+	+	+	LN	LN	+	+	+	LN	LN	+	+	LN	LN	+	+	+		Not yet assigned		0
								+	+	Μ						+	+	+	N	N	D	+	+	+	+	+	+	+	+			d	Not yet assigned	3 RN	
																																	Add RN	4 +	

#### Notes



#### Selecting a Row

Users have the ability to select and view details of a row by clicking on the assigned or unassigned role cell. Clicking on this cell will automatically open the "Assign/Reassign Role" modal but can be closed out by clicking cancel. After closing the modal the row will still be selected and will be highlighted (similar to how a Week or Day is selected).

#### 2 Row Details Panel

Displays when the user clicks on a row to select it. Depending on if the row is currently assigned or unassigned the details panels will display either "Not Yet Assigned" or the employee's first and last name as well as the role type. If unassigned an "Assign" button will be displayed and if assigned an "Unassign" button will be displayed instead.

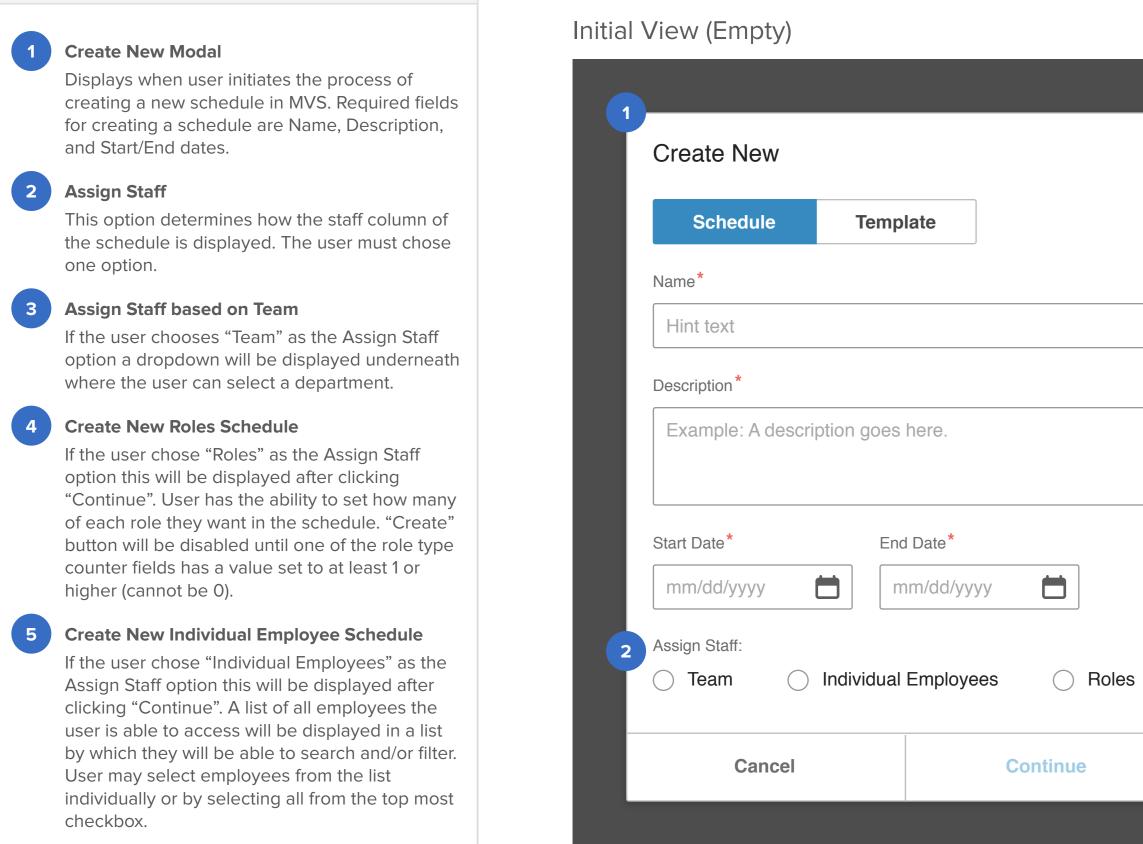
#### **3** List of plotted shifts in row

List of all shift types that have been plotted in the selected row and the total hours for each type.

# Modals & Side Panels

Desktop

Annotations



# **Create New Schedule – Roles**

Create New Schedule – Number of Roles

Create New	
Number of Roles:	
Registered Nurses	- 0 +
Licensed Professional Nurses	- 0 +
Managers	- 0 +
Cancel	Create

Continue

Create New Schedule – Individual Employees

# Create New – Select Individual Employees (v1)

Cre	eate New		
Q	Search by Employee Name	or ID	Ţ Filter ▼
13 E	Employees Selected		
	Name	Department	Role
	Parker Pandaeyes	Pediatrics	RN
	Sarah Simpson	Cardiology	LPN
	Evelyn Myers	Cardiology	RN
	Thomas Stanley	Neurology	RN
	Eric Foreman	Diagnostics	LPN
	Jessie Pena	Diagnostics	LPN
	Chris Harvey	Cardiology	RN
	Cancel		Create

# Create New Schedule – Team

Create New – Select Team Employees (v1)

Create New					
Q	Search by Employee Name	or ID	∓ Filter		
6 Ei	mployees Selected				
	Name	Department	Role		
	Parker Pandaeyes	Pediatrics	RN		
	Sarah Simpson	Pediatrics	LPN		
	Evelyn Myers	Pediatrics	RN		
	Thomas Stanley	Pediatrics	RN		
	Eric Foreman	Pediatrics	LPN		
	Jessie Pena	Pediatrics	LPN		
	Cancel		Create		

## style versus a scroll. 6 Create New Team Schedule

5 Alternative Layout

If the user chose "Team" as the Assign Staff option this will be displayed after clicking "Continue". A list of all employees within the department they selected in the previous modal will be displayed in a list by which they will be able to search and/or filter. All employees in the list will be selected by default.

This is an alternative design option for the

Schedule modal that more aligns with the

current Soho Lookup Modal component. This has all the same functionality as the first option other than using a pagination

Create New Individual Employee

### 6 Alternative Layout

This is an alternative design option for the Create New Team Schedule modal that more aligns with the current Soho Lookup Modal component. This has all the same functionality as the first option other than using a pagination style versus a scroll.

# Create New Modal

Create New Schedule – Team Selected

Create New						
Schedule	Temp	late				
Name*						
Pediatrics Shift Sc	hedule					
Description*						-
Text area input tex	t goes here	e lorem ip	osum lo	ng ex	ample	
Start Date	Enc	l Date <sup>*</sup>				
10/01/2017		1/01/2017	7			
Assign Staff: Team Department*	Individual	Employe	es	$\bigcirc$	Roles	
Pediatrics						
L						
Cancel			Con	tinue	)	
Cancel			Con	itinue	•	

Create New Schedule – Number of Roles

Create New				
Number of Roles:				
Registered Nurses	_	13	+	
Licensed Professional Nurses	_	0	+	
Managers	_	0	+	
				_
Cancel		Cre	ate	4

# Create New – Select Individual Employees (v2)

QS	Search by Employee Nar	me or ID			Ţ Filter ▼
	Employee ID	Name	Department	Role	Costing
	Parker Pandaeyes	158472049	Pediatrics	RN	Department
	Sarah Simpson	209871212	Cardiology	LPN	Department
	Evelyn Myers	317122214	Cardiology	RN	Department
	Thomas Stanley	192120212	Neurology	RN	Grant
	Eric Foreman	264122232	Diagnostics	LPN	Grant
	Jessie Pena	132098193	Diagnostics	LPN	Grant
	Chris Harvey	52319283	Cardiology	RN	Department
13 E	mployees Selected		I    ■ Page 12 of 23 ■ ■		
	Са	ncel		Subm	it

# Create New – Select Team Employees (v2)

o Crea	Create New						
Q	Q Search by Employee Name or ID						
	Employee ID	Name	Department	Role	Costing		
	Parker Pandaeyes	158472049	Pediatrics	RN	Department		
	Sarah Simpson	209871212	Cardiology	LPN	Department		
	Evelyn Myers	317122214	Cardiology	RN	Department		
	Thomas Stanley	192120212	Neurology	RN	Grant		
	Eric Foreman	264122232	Diagnostics	LPN	Grant		
	Jessie Pena	132098193	Diagnostics	LPN	Grant		
6 E	6 Employees Selected						
	Ca	ncel		Subm	it		

### Annotations 1 Assign Role Modal Displays when user clicks on an unassigned role cell labeled "Not yet assigned". The type of role the user is trying to assign will be displayed in the modal's header (ie: Assign Registered Nurse) and will include a list of employees of that role that the user will be able to select from. 2 Include Conflicts Option This option allows the list to include employees with potential availability conflicts that would occur if assigned to the target role and it's associated shifts. This option is selected by default. 3 Conflict Icon Employees with conflicts will have a yellow alert icon displayed on the right of their name. 4 Selected Employee Selected state of an employee. 5 Reassign Role Modal

Displays when user clicks on a role's cell that has already been assigned to an employee. The type of role the user is trying to reassign will be displayed in the modal's header (ie: Reassign Registered Nurse) and will include a list of employees of that role that the user will be able to select from.

#### 6 Currently Assigned to role The employee that is current assigned to the

selected role will be shown above the list of available employees and will display the label "Currently Assigned" to the right of their name. This individual will not be included in the list of available employees (to prevent user from reassigning it to the same person accidentally)

# Assigning & Reassigning Role

Assign Role – Initial view

1			
	Assi		
	Q	Search by Employee Name or ID	)
	Availa	able Employees (24)	Incl
	8	Parker Pandaeyes	
	8	Sarah Simpson	
	EM	Evelyn Myers	
	TS	Thomas Stanley	
	8	Donald Jackson	
	JP	Jessie Pena	
		Chris Harvey	
		Cancel	Submit

# Reassign Role – Selected Employee

5								
	Reas	Reassign Registered Nurse						
	Q	Q Search by Employee Name or ID						
	Availa	able Employees (23)	Inc					
6	8	Scott Arnold	Curre					
	8	Sarah Simpson						
	EM	EM Evelyn Myers						
	TS	TS Thomas Stanley						
	8	Donald Jackson						
	JP	Jessie Pena						
		Chris Harvey						
		Cancel	Submit					

# Assigned Role Side Panel

Expanded Details – Costing Options

# 26.00 hrs remain Parker Pandaeyes **Registered Nurse** Unassign Costing Center: 1 C Employee-based Shift-based October 2 – October 29, 2017

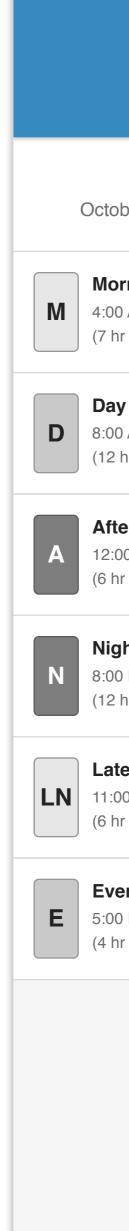
Morning Shift **M** 4:00 AM – 11:00 AM (7 hr shifts)

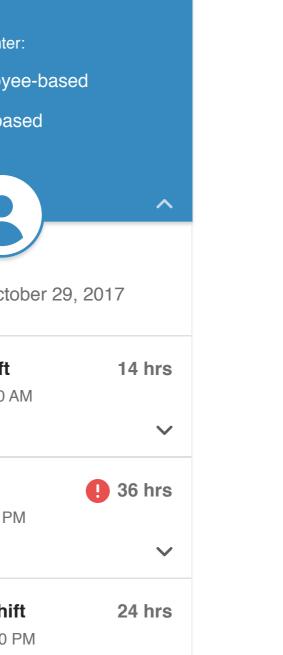
Day Shift **D** 8:00 AM – 8:00 PM (12 hr shifts) Afternoon Shift

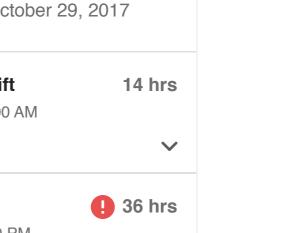
**Night Shift** 8:00 PM – 8:00 AM (12 hr shifts)

Late Night Shift LN 11:00 PM – 5:00 AM (6 hr shifts)

Evening Shift **E** 5:00 PM – 9:00 PM (4 hr shifts)







 $\sim$ 

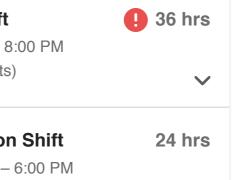
 $\sim$ 

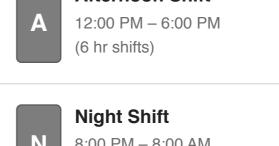
 $\sim$ 

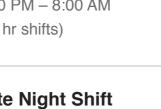
48 hrs

6 hrs

0 hrs









**1** Costing Center options User can expand the details section of the assigned role side panel by clicking on the

Annotations

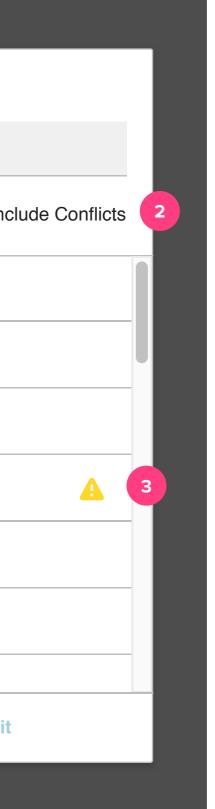
expand arrow to the right of the user's profile image (or initials if no image). When expanded the costing center options will be displayed and the user will be able to choose to between "Employee-based" costing or "Shift-based" costing. The default selection will be based on the organization's configuration setup.

2 Role Options dropdown

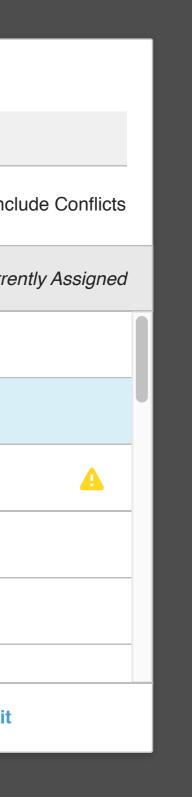
Clicking on the more options ". . ." icon in the top right corner of the panel will display an options dropdown with the following actions: Edit – change the set role type Duplicate – Copy the selected role type and all plotted shifts for row and paste them into a new row right below the current one. The new duplicated role will be unassigned be default and will be carry over any employee that may have been assigned to the original role (an employee can only be assigned to 1 role at any given time).

Delete – Remove the selected role from the schedule and all plotted shifts in that row.

Assign Role (w/o conflicts) – Selected Employee



Assign Registered Nurse					
Q Search by Employee Name or ID					
Available Employees (24)	Include Conflicts				
Parker Pandaeyes					
Sarah Simpson					
EM Evelyn Myers					
Donald Jackson					
JP Jessie Pena					
Chris Harvey					
Scott Arnold					
Cancel	Submit				



# Options Dropdown

emain			
Parker P	0_	Edit	
		Duplicate	վիդ
. United		Delete	Ϋ́.
Una	~		
			$\checkmark$
		)	
ober 2 – Oc	tobe	er 29, 2017	
orning Shif	+	1	4 hrs
00 AM – 11:00			1110
hr shifts)			$\checkmark$
ay Shift		<b>(</b> ) 3	6 hrs
00 AM – 8:00	PM		
2 hr shifts)			$\sim$
fternoon Sh	nift	2	4 hrs
::00 PM – 6:00	) PM		
hr shifts)			$\checkmark$
ight Shift		4	8 hrs
00 PM – 8:00	AM		
2 hr shifts)			$\checkmark$
ate Night SI	nift		6 hrs
:00 PM – 5:00	) AM		
hr shifts)			$\checkmark$
vening Shif	t		0 hrs
00 PM – 9:00	РМ		
hr shifts)			$\checkmark$

# Hompage

Initial view

# Desktop

≡	Welcome, Elvis!				C	۹	¢?
<b>•</b>							
≞							
				<section-header></section-header>			
		Graph Widget	•••	Chart Widget	•••	Analytics Widget •••	
		Graph Widget	•••	Chart Widget	•••	Analytics Widget •••	

### Notes



1 Dashboard Concept

POC of a dashboard with "Create New Schedule" button

•	Analytics Widget	•••
•	Analytics Widget	•••