ProAct

Operating Guide

Version 2024

1 LOGIN

Logging in to ProAct is usually done by way of a shortcut icon set up on individual PCs. ProAct User IDs are not case-sensitive; passwords are case-sensitive. Users can choose which ProAct database they would like to log into from the dropdown list. If an incorrect password is entered, **Login Failed** will be displayed and how many (pre-set) log in attempts remain before ProAct shuts down. User accounts that have been disabled will not be allowed to log in to ProAct.

In the event of forgotten passwords or disabled accounts, contact the System Administrator. Users may be required to change passwords when logging in for the first time, and on a periodic basis.

When clients have Windows Authentication activated ProAct will automatically populate the User ID if matched to the Windows account name, the password field will be greyed out and the User clicks on the Sign In button. Windows Authentication can be overridden by entering their ProAct User ID and password.

1.1 CHANGE PASSWORD

From **Main Menu > Help > Change Password**, users can open the **Change Password** form to update their password. Before a new password can be entered, the old password must be entered correctly first.

If the user enters an incorrect password and clicks **Save**, the message **Password Incorrect** displays, and the user will not be allowed to enter a new password until they enter the old password correctly.

1.2 RESET USER PASSWORDS

Non System Administrators (with the appropriate level of security access) can be given rights to reset passwords for user accounts on ProAct. To reset password for another ProAct user account:

1. Click **Security** and select **ProAct - Change Passwords**.
2. Search Select Users; select and highlight the user account to be changed.
3. Click **Set Password**; Enter and Confirm a New Password.
4. The user account will be forced to change the password when they next log in, if this option is checked.

2 STANDARD BUTTONS AND MOVE LISTS

ProAct has a variety of buttons that appear in forms throughout the program.

2.1 STANDARD BUTTONS

COMMONLY USED ICONS

Icon	Functionality
Add	Add a new item/record
Audit	Audit Roster code changes
Back	Move back to the previous record
Close	Close the open form
Delete	Delete an item/record
Edit	Edit a record
Find	Find a record
Forward	Move forward to the next record
Lookup	Open Lookup lists
Period	Change Period
Print	Print
Revert	Undo functionality back to the last time the data was saved
Save	Save updated data
Staff	Open Personnel/Staff Database

View	Change the existing screen view to an alternate screen view

OTHER ICONS

Icon	Functionality
	Access topic help
Order	Reorder the records
Accruals	Open Employee Accrual balance
Activate	Activate a deactivated record
Adjust	Open the Adjustment form
Blank	Blank out existing record(s)
Sign-Off Requests	Open form to sign-off employee Requests (BOSS)
View Requests	View employee Requests (BOSS)
Publish	Publish Roster to be viewed in BOSS
Calc Average	Calculate average HPPD (Target setting)
Calc Hours	Calculate shift Hours
Calc Time	Calculate shift Start/End time
Calc Total FTE	Calculate total FTE with options to calculate the total paid hours or total paid and unpaid hours
H/UoS	Calculates Hours per Unit of Service
Recalc	Recalculate days for average UoS or End Time in Adjustment Box
Checks	Perform violation checks
Comments	Add a Unit Comment
Copy	Copy Unit Comments to other units and days
Copy	Copy a record
Copy Across	Copy a record across many records
Copy Down	Copies the number of staff from one UoS level to another UoS level
Copy Day	Copies the plan from one day to other days
Copy Times	Copies the number of staff from one shift segment to other shift segments
Copy Adj	Copy adjusted shift code to many days
Cost	Cost the Roster and calculate hours
Date/Time	Review Date and Time of Employee Note in Staff Database
Day	Change day
Deactivate	Deactivate a user
Activate	Activate a previously deactivated user
Export	Export selected items from the Staff Database
Filter	Filter by criteria
Finalize	Finalise a Roster
Gaps	Open Staffing Gaps form
Guidelines	Open Staffing Guidelines form
Hold	Place/view status of timesheet On Hold
	Display the Home Screen
Insert	Insert a second line (in Rosters, Roster Plans and Work Patterns)
Leave	Show/Hide HR Booked leave entries
Message	Retrieve and create messages
Messages	SMS, BOSS, Email or Phone employee(s)
Note Pad	View employee Note Pad
Options	Change screen view options

Icon	Functionality
Password	Edit password
Photo	Display employee photo
QE A6 ...	Quick Entry of a single roster code with the use of the mouse in Draft and Actual rosters
QE Unit	Quick Entry of a single Unit with the use of the mouse in Term Assignments
Refresh	Refresh screen
Replace	Replace record(s)
Roster	Open Employee's Full Roster
Sign-Off	Place/view status of timesheet as approved
Staff Info	Open Staff Info form
Targets	Display Hour and Dollar targets
Timesheet	Access Timesheet
TS Edits	Display Timesheet Edits
TS Status	View the Timesheet Status for the fortnight
Unapprove	Place/view status of timesheet as unapproved
U.S	Enter Units of Service (UoS)
View Notes: ...	Highlight grid with selected Staffing Notes
Up	Move record up
Down	Move record down
	Identifies an Adjustment has occurred since the Timesheet was previously approved.
Download	Import memorised reports into the ProAct database
Upload	Export memorised reports out of the ProAct database

2.2 Copy Buttons

There are several different methods of copying codes in ProAct.

2.2.1 Copy Button in Rosters

In Future Requests, Requests, Draft Roster, and Actual Roster, the **Copy** button allows users to copy codes in three different ways:

Copy 1 person's days to the remainder of his/her roster: Allows users to copy codes across a certain number of days, to avoid having to enter codes for each day in a period.

Copy 1 person's roster to other staff: Allows users to copy an employee's roster to other employees. This method saves time if there are several employees working the same days in a roster.

Copy an adjusted Position to multiple days. (Actual Roster Only): Allows users to copy an adjusted position for multiple days in the Actual Roster, for the selected employee.

Copy 1 person's days to the remainder of his/her roster:

1. Open any of the relevant rostering forms.
2. Select the employee record to be copied.
3. Click on the **Copy** button.
4. Ensure that the **Copy 1 person's days to the remainder of his/her roster** is selected (It should be selected by default). Click **OK**.
5. A **Copy** form opens, displaying the employee name, position, FTE, and roster codes.
6. In the **Copy From** and **Copy To** fields, select the day(s) to be copied.
7. In the **To** date range, select the days to copy the roster code to. For example, to copy the first week of codes to the second and third weeks of the roster, the user would select days 1-7 in the **From** date range, and days 8 - 21 in the **To** range. Click **OK**.

Copy 1 person's roster to other staff:
1. Open any of the relevant rostering forms.
2. Select the employee record to be copied.
3. Click on the **Copy** button.
4. Select the **Copy 1 person's roster to other staff** option.
5. Click **OK**.
6. A Select Staff move list opens. Click **Search**, and select the employee(s) to copy the currently selected employee record to.
7. Click **OK** and edit as necessary.

Copy an adjusted Position to multiple days (Actual Roster Only):
1. Open the **Actual Roster** form.
2. Select the employee record to be copied.
3. Click on the **Copy** button.
4. Select the **Copy an adjusted Position to multiple days (Actual Roster Only)** option. Click **OK.**
5. A **Copy Position** form opens. From the drop-down menu, select the position to adjust to.
6. Place check marks under the desired days to copy this adjustment to. Click **OK**.

Note for Actual Rosters: When copying an adjusted code using the **Copy** button, ProAct will copy the default values (from the Codes and Reference Tables) for that code, and **NOT** the adjusted values.
For copying Adjustments in **Actual Rosters**, see section 6.2.

2.3 Move and Find Lists

Move lists allow a selection of multiple items at once. Find lists allow only one item or person to be selected.

These forms allow the user to search based on specific criteria. Most Move/Find lists have the option to filter by **All**, or by specific Facilities and Divisions, Clusters or Consolidation Sets. Others filter by Position, Unit and/or Group. The Staff Move/Find lists also allow users to find people by typing a few letters for first and/or last name, or a few (or all) numbers of their Employee ID or description in Roster code lists. A block of items may be highlighted by using the SHIFT-key in Move Lists. Lists may be sorted using the headers.

At the bottom of the form, checkboxes offer additional filter options for the user (for example, to **See Deactivated Data** or to **See Terminated Staff**). Clicking the **Clear Filter** button clears the filter criteria.

Move/Find Lists that show deactivated data will display a red **X** in the **Deactivated** column on the very left of the form (also marked by a red **X** in the column heading). Clicking the **Search** button populates the list with items that meet the selected criteria.

Move Lists: To select items, click on the **Select** or **Select All** buttons, double-click on individual records, or use the Shift + Enter or Enter keys, and **Select**. Click **OK**.

Find Lists: Click on one item and click **OK,** or double-click on the item.

When accessing large datasets, the time difference between pulling up **Selected** records and **All** records can be significant. Therefore, users may want to filter by specific criteria to reduce data loading time.

2.3.1 Staff Move/Find Lists

Both Staff Move and Find Lists display the employee Last Name, First Name (or Usually Called), Employee ID, Identifier (when checked), Position, Unit, and Facility. The **See Future Hires** box is checked by default. The Position and Unit fields display the current history from the employee's Primary Employment. If the units are filtered to include units where employees have multiple employments, the move list shows these other employments. For **History – Multiple Employments**, see section 5.1.2.8.3.

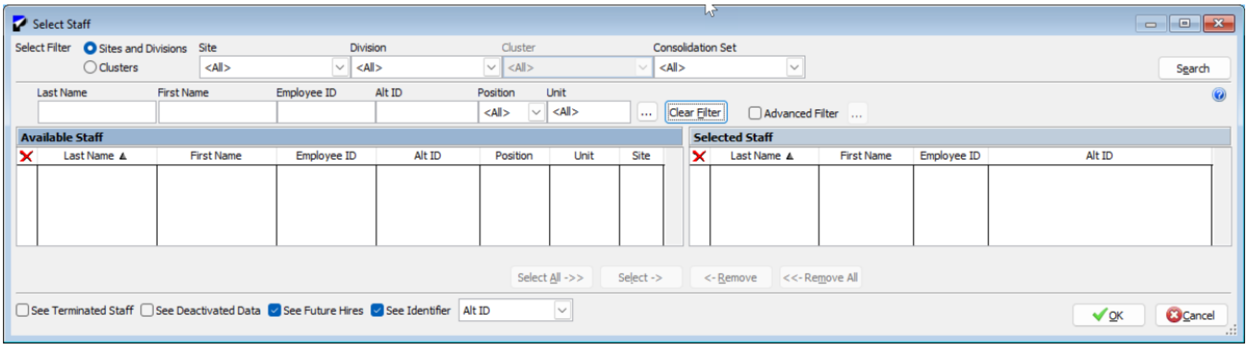
Users can also choose to see Terminated Staff, Deactivated Data, Future Hires and Identifier by placing a check in one of the boxes on the bottom left of the **Select Staff** Move List form. When selecting the Identifier, click on the drop down list to select which one.

2.3.2 Advanced Filter

The Advanced Filter on the Staff Move List allows users to filter staff by specific Skills, Hired Status, SDB 4 Types, and/or SDB 5 Types.

2.3.2.1 To Create an Advanced Filter:

1. Check the **Advanced Filter** box to the right of the **Clear Filter** button.
2. Click on the **[…]** button to the right of **Advanced Filter**. An **Advanced Filter Setup** window opens, where a user is able to select an existing filter or create a new custom filter by specifying the desired Skills, Hired Status, SDB 4 Types or SDB 5 Types.
3. Click **OK** to select staff according to the filter criteria.
4. Enter a name for the filter and **Save** the custom filter.



2.4 Screen Standards

Multiple forms/windows may be opened simultaneously, and can be resized to suit the user's preference.

Opening multiple displays of exactly the same screen can lead to confusion for the user. PolyOptimum recommends that users avoid opening duplicates of screens, and save and close all forms/windows as soon as tasks are completed.

When multiple forms are opened, users can organise the screen by selecting the **Window > Cascade** option from the **Main Menu**. This will align all of the open forms with visible headers.

3 Main Menu

The Menu bar is used to navigate the various features of ProAct, and to accomplish particular tasks. Each menu expands to show the various options grouped within it. These options can sometimes also be expanded. To expand a menu, click the menu name, such as **Reports**, and any related sub-menu items.

3.1 Home Screen and Tool Bar

Home Screen and Main Tool Bar have a variety of buttons that allow easy access to frequently used forms.

3.2 Main Tool Bar Icons

 Calls up the Home Screen with active icons.

My Units: Allows selection of the desired unit. ProAct users can see only those units to which they have been assigned security access.

Period: Brings up the **Select Date Range** form. Automatically defaults to a period that includes the current system date. In this form, the user can enter their desired rostering period.

Message: Brings up the **Message Bank** form, where a user can send and receive messages from other ProAct users.

Staff: Brings up the Staff Move List for the Staff Database.

Maintenance Notice: If there is a rostered maintenance date/time, a note with this information may appear in the Tool Bar.

3.3 HOME SCREEN

The Home Screen displays Units, Groups, or Reports in a typical collapse/expand tree view. It also allows the user to pull up common functions by clicking on a button. If a rostering group in either the Units or Groups list has been selected, and Requests, Draft or Actual Rosters have been created for the selected period, there will be a check mark in the relevant buttons.

Close the Home Screen by clicking on the **Close Home Screen** button, and reopen it by clicking on the **Home Screen** icon in the **Main Menu**.

3.4 MY UNITS/GROUPS AND MY REPORTS

ProAct allows the user to organise the display of units and groups on their Home Screen.

3.4.1 MY UNITS/GROUPS

The My Units/Groups form displays in a collapse/expand format, and can be filtered by the drop-down list in the header. Users can select to view **All Units**, **Rostering Groups** or **Viewing Groups**. Users can select to search for a Unit to locate in the list by clicking on the **Search** button on the Home Screen.

1. Select Units from My Units/Groups.
2. Click Favourites on the Home Screen.
3. Select **Pick My Favourites** from the Home Screen; the Select Units move list will open.
4. All **Available Units** will be on the left side of the list and select **Favourite Units** by using the **Select** buttons.
5. Click **OK**; **Favourite** Units will now open in the **Units** view in the Home Screen.

3.4.2 MY REPORTS

Users can select Reports from the drop-down list, and can filter that list by selecting **All**, or **Favourite** reports, using the radio buttons at the bottom of the window. Changes to Favourites will be reflected only after closing and reopening the Home Screen.

All displays all ProAct reports, and can also be accessed via Reports in the **Main Menu** drop-down.
Favourites will display selected favourite reports. For **Selecting Favourite Reports**, see section 3.4.2.1.

ProAct memorised Reports will display a **+** sign next to the ProAct report name. Click the **+** to see the list of saved/memorised reports. Click the **-** sign to collapse the list of saved/memorised reports.
Double-click on a report name to pull up the **Setup Options** form, and run the selected report.

3.4.2.1 Selecting Favourite Reports

1. Select **Pick My Favourites** from the **Main Menu > Reports**; the Reports move list will open.
2. All **Available Reports** will be on the left side of the list. ProAct reports with memorised reports will have a **+** button next to the name. Click the button to expand the list of memorised reports, and select **Favourite Reports** by using the **Select** buttons.
3. Click **OK**; **Favourite** reports will now open in the **Reports** view in the Home Screen.

3.4.3 MY FAVOURITES

Users can select their favourite reports, and Units/Groups to display on their Home Screen.

4 FILE

4.1 EXPORT STAFF DATABASE TO EXCEL

Access from **Main Menu: File > Export Staff Database Fields**, or from **Personnel > Staff Export** icon.

4.1.1 RUN EXPORT - SECTION 1 – WHAT

Add a New Export

1. Type a name for the export into the **Name** field.
2. In the **Export File Name and Path** field, use the browse **[…]** button to make sure to select a valid path and file name for the export.
3. When export is complete, it can be found in the selected location.

Select an Existing Export

1. Click on the export name under **Select Export**.
2. All of the selected export's criteria will be displayed. Adjust as necessary before exporting.

4.1.2 RUN EXPORT - SECTION 2 – WHEN

1. Enter a date into the **History As of** date field (the default is the current date). Employees who have been hired after the **History As of Date** will not appear in the report.
2. Change the date by typing it manually, or click on the arrow to select the desired date from the calendar.

4.1.3 RUN EXPORT - SECTION 3 – WHICH

1. Select the Units, Staff and Positions for the export. Only these selected staff will be shown in the report.
2. If a user does not wish to select entire units, they may select Individual Staff. The Staff Move List allows the selection of terminated staff by checking the **See Terminated Staff** checkbox at the bottom of the move list.

4.1.4 SETUP OPTIONS – SECTION 1 – WHEN

The date filter allows users to view a selected date range for Screen 5 types once they are selected.

4.1.5 SETUP OPTIONS - SECTION 2 - HOW

One Type per Row is automatically selected for SDB 4 and 5, but can also be selected for Accruals, Skills and SDB 3 Miscellaneous.

4.1.6 SETUP OPTIONS - SECTION 3 - WHICH STAFF DATABASE FIELDS

1. Select the desired fields using the standard Move List functionality. In the Excel spreadsheet, the fields selected on the right hand side (**Selected Staff Database Fields**) of the move list will be shown as columns in a user determined order, unless One Type per Row is chosen in Section 2.
2. To order selected fields in the **Selected Staff Database Fields** section, drag up or down to the desired order.

4.1.7 RUNNING THE EXPORT

1. Click on the **Export** button; **Staff Database Export to Excel Setup Options** will close.
2. The data can take several minutes to export; a window at the top right corner of the screen will show the export process progress.
3. When the export is completed, navigate to the same location chosen as **Export File Name and Path** to find the saved export.
4. Edit/sort Excel data using standard Excel options.

4.2 EXIT/ CLOSE PROACT

Close the application by selecting **Exit** or **Close ProAct and return to Login screen** from the **Main Menu > File**. As an alternative to using the menu option, click the **Close** button (**X**) in the upper-right corner of the window. All ProAct function windows (e.g. Rosters) have a **Close** button (**X**), so screens can be exited in the standard Windows method. The user will be prompted to save changes before exiting, where required.

ProAct users over a remote application suite (e.g. Citrix) must close their ProAct sessions by clicking on **File**, then **Exit**. This method ensures that the remote access suite terminates an active session on ProAct, and eliminates any ambiguity of a user's ProAct session status over the network.

5 PERSONNEL

5.1 STAFF DATABASE

Access from the **Main Menu > Personnel**; or click the **Personnel** button in the Home Screen. Users can also click on the **Staff** icon on many screens throughout ProAct.

Staff Database records can also be accessed via the **Staff Database** icon/button in Future Requests, Requests, Annual Planner, Draft Roster, Full Roster, Home Screen, and from the ProAct **Main Menu**.

After selecting staff in the Staff Move List, the user will automatically be brought to Screen 1.
To navigate between screens in the Staff Database, click on the screen tabs at the top of the window. The name and the position of the currently selected individual will be shown in the bar at the top of the window. To navigate between staff, use the Back and Forward buttons or the Find button.

5.1.1 STAFF DATABASE – FUNCTIONS ACCESSED FROM ANY SCREEN TAB

5.1.1.1 Adding New Staff to the Staff Database

The **Add** button can be used in any tab of the Staff Database.

1. In Staff Database, click the **Add +** button.
2. A blank Staff Database record will open.
3. Enter the new employee’s data. Required fields will prompt user for entry if left blank.
4. To begin the employee’s History record, select the **Add** icon in the right side of the History box.
5. Enter the required history data and click **OK**, and **Save**.

5.1.1.2 Annual Planner

Access to the Annual Planner form.

5.1.1.3 Note Pad

Note pad allows entry of specific notes for employees, and access to the information from rostering and staffing forms. Two Check boxes, DS and Ros, allow the user to select whether these Notes are viewed in ProAct-Lite Daily Staffing (DS) and ProAct-Lite Rosters (Ros). Notes are stored individually by entry, and display the User Name, Date and Time entered. Notes are listed in chronological order, with the most recent note at the top.

5.1.1.4 Staff Photo

ProAct can display staff photos; file location must be set up by the System Administrator.

5.1.1.5 Export

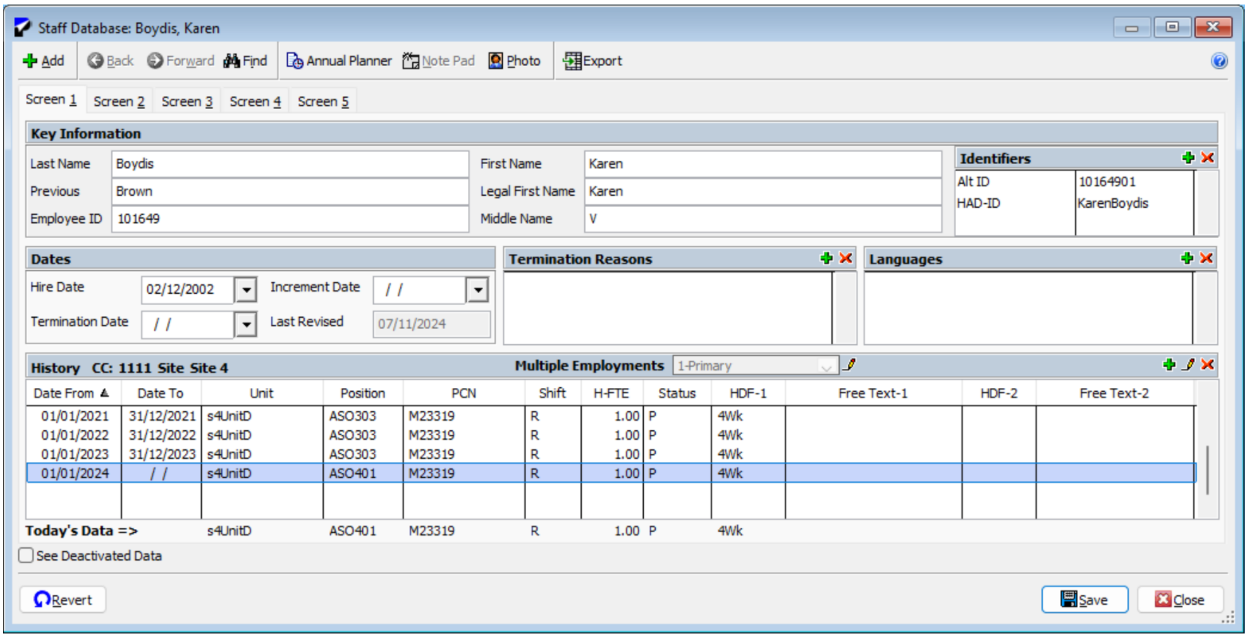
ProAct users can export employee data from the staff database (Screen 1 to 5 inclusive) directly to Excel. Users can click the Export icon on the top of the staff database screen. This will bring up the **Export** screen, where users can select the data fields to be exported from Screen 1 to Screen 5. The export selection can be filtered by unit, position, or by individual.

5.1.1.6 History – See Deactivated Data

The checkbox **See Deactivated Data** allows viewing of deactivated Units and Positions when adding or editing History data on Screen 1, and the ability to view deactivated data (such as Skills) on Screens 3, 4 and 5.

5.1.2 Staff Database - Screen 1 - Key Information

Getting here from the **Main Menu: Personnel > Staff Database**



Screen 1 contains key information including Name, Employee ID and Hire Date and History.

5.1.2.1 Staff Database Entry Fields for Screen 1

All staff database field names are defined by the System Administrator. Common field names are as follows:

5.1.2.2 Key Information:

Last Name: The staff member's last name.
First Name: Staff member's first name, which will appear on Rosters.
MI: Staff member's middle initial.
Previous: Staff member's previous or maiden name.
Legal First Name: Legal first name, if it differs from the preferred name.
Employee ID: The staff member's unique facility-specific employee identification number.
Identifier: Alternative employee identifiers.
Increment Date (Hired to Ward): Date staff member was hired to the ward.
Last Revised: Date when this person's record was last updated. This field is updated automatically.

5.1.2.3 Dates

Hire Date: Staff member's date of hire to the facility.

Termination Date: When a staff member's employment is ended, a termination date must be entered in this field. After the termination date is entered, it is checked against the latest history **Date To**. Following the entry of new termination dates, ProAct automatically supplies the corresponding **Date To** field info. Should a staff member move to a new Unit, a new line in Staff History must be added containing the new Unit start date. Following the addition of this new line, the **Date To** field values for the previous Unit will be updated in Staff History automatically. If a user enters a Hire Date that is later than the Termination Date, then ProAct will return a warning message.

5.1.2.4 Termination Reasons

When an employee is terminated, a reason can be provided in the Termination Reason field(s). Termination Reasons are defined in the Termination Reasons form located under **System > Code and Reference Tables > Termination Reasons**. In this field, users can add and delete reasons for termination using standard **Add** and **Delete** icon functionality.

5.1.2.5 Languages
Any languages that an employee speaks can be added to their profile. In this field, the user can add or delete languages that a staff member speaks using standard **Add** and **Delete** icon functionality.

Available languages are configured by the System Administrator in the **Languages Code and Reference Table**.

5.1.2.6 History
Allows tracking of any changes to a staff member's employment: Unit, Position, Shift, FTE, Hired Status or Hourly Rate. The current information (**Today's Data**) always appears at the bottom of Screen 1.

5.1.2.7 Column Headings and Data in the History Block:
Date From/Date To: The effective period for the Unit, Title, PCN, Shift, FTE, Status, and Hourly Rate.
Unit: The unit the staff member is assigned to, for the period designated by **Date From** and **Date To**.
Position: The position (or employment classification) for the staff member.
PCN: The unique position control number assigned to the staff member.
Shift: The shift that the staff member is hired to work.
FTE: A number up to 1.99 as the fraction of a Full-Time Equivalent the staff member was hired to work.
Status: Designation of employment status (i.e. Full-time, Part-time, Agency, Casual).
Rate: The base pay rate.
HDF-1: The History Defined Field-1 is user defined. Sometimes contains Pay information.
Free Text-1: User defined. Data will vary.
HDF-2: The History Defined Field-2 is user defined. Data will vary.
Free Text-2: User defined. Data will vary.

5.1.2.8 History - Add
1. Access employee's Staff Database record.
2. Click **Add** in the History block at the bottom of Screen 1. The Enter New History Data form will open.
3. Enter the effective date into the **Date From** field. The day before will be automatically entered in the Date To field of the prior History record.
4. Select the unit using the drop down list.
5. Select a position using the drop down list.
6. Enter a Position Control Number, if applicable.
7. Select a shift using the drop down list.
8. Enter the FTE.
9. Select the hired status using the drop down list.
10. Enter an hourly rate, or, accept the default.
11. Add any user-defined field information. Click **OK,** and **Save** the new History information.

Note: When a user adds a new History line for a new staff member, the Position and corresponding Hourly Rate are populated with the first Position Code and the accompanying Hourly Rate that comes up on the position drop-down list (in the event that no other Position Code is added).
When a user who has rights to edit the history line (but does not have the access to view the hourly rate), adds a new history line, ProAct displays the previous hourly rate (from the previous history line), if the position has remained unchanged. If the Position has been changed, then ProAct displays the rate as set up in CaRTs.

5.1.2.8.1 History - Edit
1. Access employee's Staff Database record.
2. In the History block, select the history line that needs editing.
3. Click **Edit** in the top right hand side of the History block.
4. **History** form will open. Edit data where necessary. Click **OK** and **Save**.

Note: Edit the history line **ONLY** if any values in that line have been entered incorrectly. If there are changes to the History, add a new History line with the applicable changes. If a position has been changed, a message appears **Do you want to override the current pay rate with the rate from the Positions table?** Click **Yes** to confirm, or **No** for the pay rate not to be overwritten.

5.1.2.8.2 History - Delete

1. Highlight the history line to be deleted and select **Delete** (located on the right side of the history box).
2. Verify that the correct history record is being deleted, and then **Save**.

Note: Delete information in staff history **ONLY** if the history line has been entered in error.

5.1.2.8.3 History - Multiple Employments

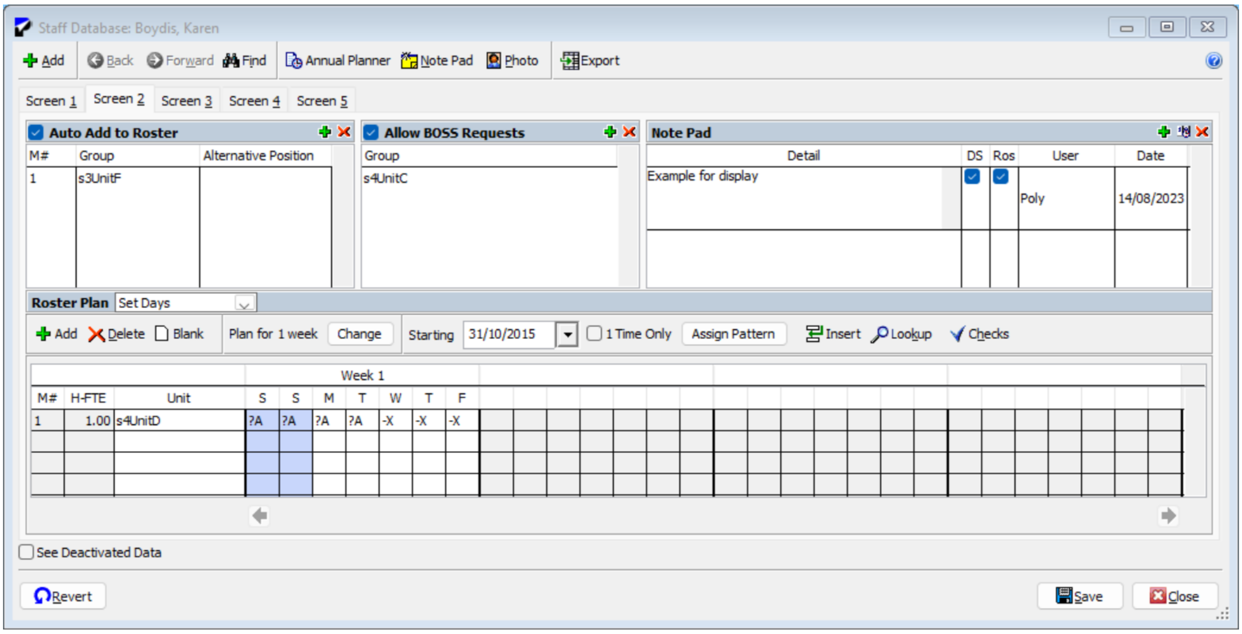
1. In the History header, there is a label called **Multiple Employments**.
2. The Multiple Employments label and list box will be greyed out for employees that do not have multiple employments, and enabled for employees that do.
3. To add another Employment, click on the **Edit** icon located beside the Multiple Employments list box. The **Multiple Employment** form will open where the user can **Add** and **Delete** Multiple Employment Numbers (M#).
4. To see the Multiple Employment History, select the Multiple Employment Number from the list box, and the data in the History block will display the relevant History.
5. Closed Multiple Employments will be denoted in the list by a red **X**.

5.1.2.9 Staff - Terminate

1. Find the terminating employee.
2. Enter the last working day in the Termination Date field.
3. When asked to verify, click on **OK**.
4. Add a Termination Reason, if desired, by clicking on the **Add** icon. Click **Save**.

5.1.3 Staff Database - Screen 2 - Rostering Information

Getting here from the **Main Menu: Personnel > Staff Database, Click Screen 2 Tab**.



Screen 2 contains information needed to perform the rostering functions of ProAct. To enter data into this screen, move the cursor to the desired field. Listed below are descriptions of each data entry field.

5.1.3.1 Staff Database Entry Fields for Screen 2

5.1.3.2 Auto Add to Roster

The **Auto Add to Roster** feature enables employees to automatically appear in the Request screen of a rostering group other than their predefined home group. This section also provides the option to select employee's Multiple Employment number (M#). Employees may be added to one or multiple other groups and an alternative position can be selected for each allocation to other groups.

The employee's Roster Plan belongs to their home group, and is therefore not displayed when the employee is loaded into the other rostering groups.

To Auto Add to Roster:
1. Insert a check beside **Auto Add to Roster**.
2. On the highlighted line, select the Multiple Employment number, default being the Primary Employment number.
3. Select a group from the drop-down list.
4. If desired, select an alternative position from the Alternative Position drop-down list.
5. To add the employee to another rostering group, click on the **Add** icon and repeat the above steps.
6. An employee cannot be auto added to the same group twice.

5.1.3.3 Allow BOSS Requests
Employees with access to ProAct's Browser Operated Self-Service (BOSS) can enter request codes in their home unit automatically. Managers can give staff access to enter requests into other rostering groups in the section **Allow BOSS Requests**.

To add a group to which employees can add BOSS requests:
1. Click on the **Add** icon.
2. Use the drop-down list to select the group.

To delete a group, highlight the group, and click on the **X** button.

5.1.3.4 Annual Planner
Displays the Annual Planner for the selected person. Updates can be done manually or automatically. If Rotation is used and follows a regular pattern, such as Nights every third week, use the **Rotate** button to enter the rotation interval. In other cases, such as those where a staff member might be rostered for two weeks of nights during the year, manual entry of the rotation will be more convenient.

5.1.3.5 Note Pad
Note pad allows the entry of specific notes for employees, and access to the information from rostering and staffing forms. Two Check boxes, DS and Ros, allow the user to select whether these Notes are viewed in ProAct-Lite Daily Staffing (DS) and ProAct-Lite Rosters (Ros). Notes are stored by entry and display User Name, Date and Time entered. Notes are listed in chronological order, with the most recent note at the top.

5.1.3.6 Roster Plan
Roster Plan stores the standing requests (or set Rosters). It saves a pattern of shifts, agreed upon between each staff member and management, which stays more or less constant from one rostering period to the next (for all of the employee's Hired-To Units). Any active Roster code can be used in the Roster Plan.

There are four different options to set up a Roster Plan, which can be selected from the drop-down list:
None: No Roster Plan.
Set Days: A Roster Plan that repeats every 1 to 52 weeks.
Cyclical Roster: A fixed rotating Roster that can be assigned to a staff member.
Optimised Roster: Identifies that Optimiser Plus will attempt to assign a roster to the person.

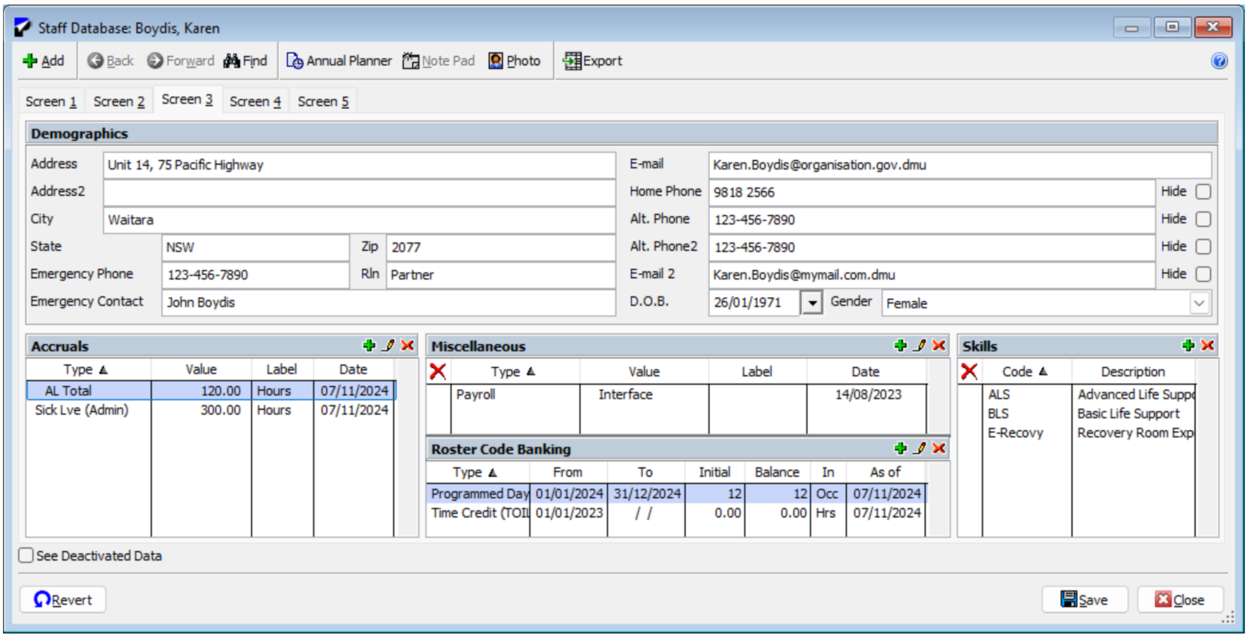
5.1.3.6.1 Set Up a Roster Plan for a Staff Member:
1. Select one of the above Roster Plan Options from the drop-down list.
2. Click the **Change** button to enter the number of weeks from 1 to 52 for the Roster plan if the user has selected **Set Days**. Enter the minimum pattern length necessary - an employee who works Monday to Friday with every weekend off should have a 1-week Roster Plan. One who works every other weekend should have a two week Roster plan. If the pattern begins to repeat after two weeks, then only a two week pattern is necessary. The length of Roster Plan can be changed at any time, using the **Change** button.

3. ProAct will create the Roster Plan according to the user-defined number of weeks. If a Roster plan of greater than 4 weeks has been selected, click on the arrows at the bottom of the Roster Plan section to move to weeks 5-52.
4. Enter any Roster Codes into the Roster Plan, or use the **Lookup** button to select any active Roster Code. In the Lookup screen, the Sort by Special Order checkbox refers to an order defined by your System Administrator during the ProAct setup process.
5. By default, the Starting Date is the first day of the Roster period. Users can change the Starting Date of the Roster Plan in order to allow it to start from any other week, BUT the day of week is always the default ProAct Roster start day of week.
6. ProAct creates the Roster Plan for the Unit where the employee has his primary employment in the current History record.
7. The **Add** button allows the addition of a different Roster Plan for the staff member who has Multiple Employments in different Units. The starting date and number of weeks will be the same for each employment line.
8. The Roster Plan will repeat indefinitely unless the **1 Time Only** box is checked. **1 Time Only** is a commonly used for term rosters for junior medical staff, who will move to a different roster in the next term.
9. The **Insert** button allows insertion of a second code line by clicking on the desired Unit in the Roster Plan, and then on the **Insert** button.
10. If the current SDB History record is deleted, a Roster Plan will be reassigned to the Unit of the previous history line.
11. The **Blank** button will delete all Roster Codes from the selected Roster Plan.
12. The **Assign Pattern** button allows users to assign a pattern from the Flexible Pattern Library as the employee's Roster Plan. For example, if an employee works or is off every 3rd weekend, create a Roster Plan of 3 weeks and assign the appropriate pattern for every 3rd weekend.
13. The **Checks** button runs a violation check for the Roster Plan. Click **Save.**

For assigning patterns in **Cyclical Roster**, see section 6.7.3.1.

5.1.4 Staff Database - Screen 3 - Demographics, Accruals, Miscellaneous Fields and Skills

Getting here from the **Main Menu: Personnel > Staff Database, Click Screen 3 Tab**.



Screen 3 contains employee demographics, accrual balances, miscellaneous information (such as payroll data), and skills. Phone numbers entered here will appear in rostering and staffing screens.

5.1.4.1 STAFF DATABASE ENTRY FIELDS FOR SCREEN 3

5.1.4.2 Demographic Information

Contains employee contact data (e.g. home phone, mobile, address), birth date, and gender. If **Hide** is checked, the phone number will not be seen in Reports and Global Staffing.

Note: If using the Communications module, it is recommended that the Country Code is entered in the Communications Setup. Otherwise, mobile phone numbers should be entered in the following format, for SMS messaging: **+ <country code> <10-digit phone number>**. Check with your System Administrator for details.

5.1.4.3 Accruals

Displays leave accrual balances (if imported from the payroll system).

5.1.4.4 Miscellaneous Information such as Payroll Data

Displays user-definable information for the selected individual. Information may relate to employment contracts and/or data to assist with payroll/award interpretation.

5.1.4.5 Roster Code Banking

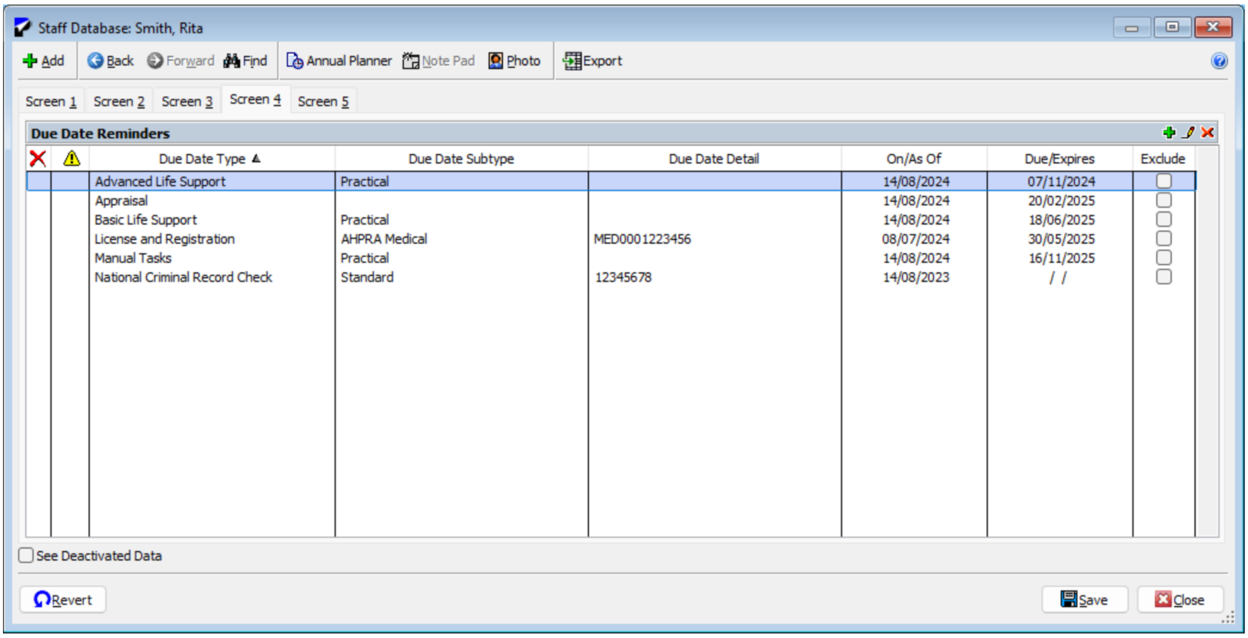
Allows users to track Roster Codes that increase or decrease a balance (e.g. Sick leave without Certificate or Time in Lieu codes). Negative values can be entered in for the initial balance.

5.1.4.6 Skills

Allows user to enter, add, or delete skills to display in staffing forms, in order to help to fill staffing needs.

5.1.5 STAFF DATABASE - SCREEN 4 - DUE DATE REMINDERS

Access from the **Main Menu: Personnel > Staff Database, Click Screen 4 Tab**.



Screen 4 allows the user to track an unlimited number of Due Dates, and to create reports via specific date periods and Due Date categories, or of only expired/overdue items. An SDB 4 Type is not considered expired if there is no date in the second date field.

5.1.5.1 Add Due Dates
1. Click on the **Add** icon in the upper right corner of the form.
2. There are two options for entering data. Select either the **Add Record** or **Add Template** radio button.

Add Record
1. Select the Due Date Type and Subtype; and add Detail.
2. Enter dates in the **On/As Of** field and/or the **Due/Expires** date field. Click **OK** and **Save.**

Add Template
1. Select a Template from the drop-down list.
2. Enter date in the **On/As Of** field and/or the **Due/Expires** date field. Click **OK** and **Save.**

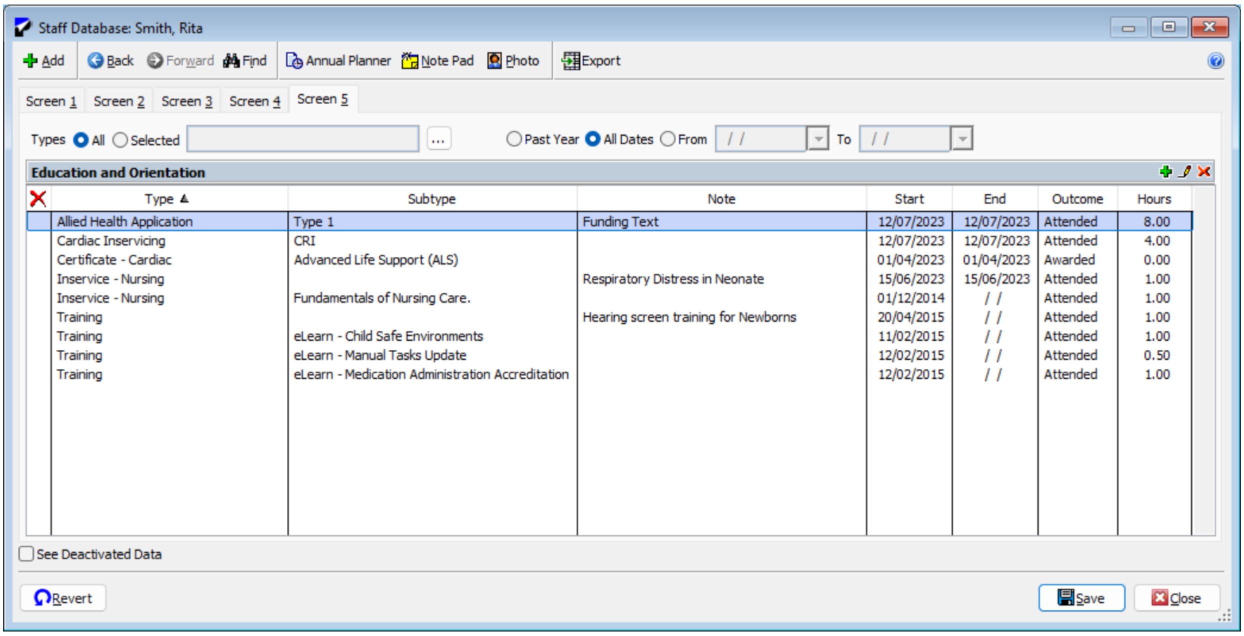
Notes: All items in the selected Template will appear as per the Template dates.

Users who do not have **Write** access to Screen 4 will not be able to see the **Delete** button and will not be able to delete any Due Date items.

When staff have a Staff Database Screen 4 (SDB4) record that has expired, the background cell of their name field in Draft and Actual rosters will be highlighted in gold, to notify the user of the expired item. The change applies only to SDB4 types that are defined to show a warning (i.e. have a character in the Warn column) in the SDB4 CaRT.

To exclude staff from counting in compliance reporting (e.g. when staff are on extended leave), then check the Exclude column.

5.1.6 Staff Database - Screen 5 - Education and Orientation
Access from the **Main Menu: Personnel > Staff Database, Click Screen 5 Tab**.



Screen 5 provides the ability to track a history of performance records, such as orientation and education, along with start and finish dates, outcome, and the number of hours or days involved.

5.1.6.1 Add Education and Orientation
1. Click on the **Add** icon in the upper right corner of the form.
2. There are two options for entering data. Select either the **Add Record** or **Add Template** radio button.

Add Record

1. Select the Type of Training, Module Description and add Note.
2. Enter the Start and/or End dates, Outcome, and Hours. Click **OK** and **Save**.

Add Template
1. Select a Template from the drop-down list.
2. Enter Start and/or End date as desired. Click **OK** and **Save**.

Note: All items in the selected Template will appear as per the Template Dates.
Users can filter data on Screen 5 by selected types and sub types. The screen also has a date filter that allows users to view selected types and subtypes over a selected period range.

5.2 GLOBAL UPDATE – AUTO ADD TO ROSTERS

Access from the **Main Menu: Personnel > Global Update > Auto Add to Rosters.**
This provides a quick way to add employees to Roster groups beyond their home units.

5.2.1 GLOBAL UPDATE – AUTO ADD TO ROSTERS

1. Click on **Global Update > Auto Add to Rosters.** Select employees from the move list and click **OK**.
2. Select the groups to which the selected employees will be auto added.
3. ProAct will display the selected employees and groups.
4. To add an employee to a Roster group, click in the corresponding checkbox in the group column. To delete a check, click again.
5. To add more staff to the screen, click on the **More Staff** button.
6. To add more groups on the screen, click on the **More Groups** button.
7. The **Select All** checks all the checkboxes. **Note**: Once **Select All** has been checked, the user cannot deselect all checkboxes at once.
8. Once all required boxes have been checked, click **Save** and **Close.**

The new Auto Add to Roster groups will be added into Staff Database Screen 2 for these Employees, after updating. The next time Requests are created for any of these Auto Add groups, the employees will be automatically added into the Roster.

5.3 GLOBAL UPDATE – ALLOW BOSS REQUESTS

Access from the **Main Menu: Personnel > Global Update > Allow BOSS Requests.**
This option provides a quick way to assign multiple groups to multiple employees, to which they can add BOSS requests.

5.3.1 GLOBAL UPDATE – ALLOW BOSS REQUESTS

1. Click on **Global Update > Allow BOSS Requests**. Select staff from the move list and click **OK**.
2. Select the groups to which to give access to the ability to add BOSS Requests.
3. ProAct will display the list of selected employees and groups.
4. To assign the appropriate group to an employee, place a check in the corresponding checkbox in the group column. To remove the check, click again in the same box.
5. To add more staff to the screen, click on the **More Staff** button.
6. To add more groups on the screen, click on the **More Groups** button.
7. The **Select All** checks all the boxes. The user cannot deselect all checkboxes at once. Click **Save.**

Note: Groups previously assigned to an employee will appear with a check mark and green background in the corresponding Group column.

5.4 GLOBAL UPDATE – SKILLS

Access from the **Main Menu > Personnel > Global Update > Skills.**
Skill Update provides a way to assign multiple skills to multiple employees in one go.

Available Options:

More Skills	Add or modify the list of skills selected from the **Skills** move list.
Select All	Checks all selected employee records with the selected skills.

5.4.1 GLOBAL UPDATE - SKILLS

1. Click on **Global Update > Skills**. Select desired staff from the move list.
2. Select the skill(s) to be updated from the Skills move list. Click on the **Favourite Skills** button to select your favourite Skills for future reuse.
3. The **Update Skills** form will open with the people and skills selected.
4. Check the corresponding checkbox. To delete a check, click again.

5. To add more staff to the screen, click on the **More Staff** button.
6. To add more skills to the screen, click on the **More Skills** button.
7. The **Select All** button selects all the checkboxes (all skills for all staff). The user cannot deselect all checkboxes in one go. To select all of only one Skill type for all staff, click on the Skill name in the column heading, and then click **Select All**.
8. Click on the column header for one skill and the **Select All** button will check all staff for that one skill only.
9. Click **Save** button to update the skills in the selected employee's Staff Database.

Note: Skills previously assigned to an employee will appear with a check mark and green background in the corresponding skill column.

5.5 GLOBAL UPDATE – ROSTER CODE BANKING

Access from the **Main Menu: Personnel > Global Update > Roster Code Banking.**

1. Click on **Global Update > Roster Code Banking**.
2. Select the RCB Type to be updated from the list.
3. Select the desired Units and/or Staff.
4. Filter for Hired FTE or From and To dates for the selected Type. Click **Run**.
5. The **Global Update - Roster Code Banking** form will open.
6. The columns in grey are for reference only with position, Unit, M# and H-FTE from the Primary Employment. Enter or edit dates and Initial value in the form manually, or using the Date button, active on the selected row. If the selected Type does not exist for a Staff member, the From, To and Initial fields will be blank. Negative values can be entered in for the initial balance.
7. **Copy Initial Value** – The user can enter or update a value for a person and click this button to copy the Initial value of the highlighted person to all other staff in the form.
8. **Copy Dates** – The user can enter dates for a person and click this button to copy the dates from the highlighted person to all other staff in the form.
9. **Update Dates by 1 Year** – The user can select one person and click this button to update the From and To Dates by one year. If the user wants to update multiple staff by one year, the user must do it one staff at a time.
10. **Update from Hire Date** – The user can highlight one person and click this button to update the From Date with the Hire Date month and day but for the current year and the To Date to one year later.
11. Click **Save** button to update the RCB in the selected employees Staff Database.

5.6 GLOBAL UPDATE – STAFF DATABASE SCREEN 4 UPDATE

Access from the **Main Menu: Personnel > Global Update > Screen 4 Update.**
Global Update can be used to update a number of due date reminder fields at one time.

1. Click on **Global Update > Screen 4 Update**.
2. Select one Screen 4 Type to be updated from the DDL.
3. Select the desired Units and/or Staff. Click to Include Staff who are MISSING the Type.
4. Filter for All Dates, Past Year or From and To dates for the selected Type. Click **Run**.
5. The **Global Update – Staff Database 4; Type** form will open.
6. The columns in grey are for reference only with Name, Position, Unit, M#, H-FTE and Due Date Type for the Primary Employment. Enter or edit Subtypes, Due Date Detail and Dates on the selected row. If the selected Type does not exist for a Staff member, editable fields will be blank.
7. **Due Date Subtype** – The user can leave this blank or select a Subtype.
8. **Due Date Detail** – The user can leave this blank or enter Detail.
9. **On/As Of** – Enter the On/As Of (start) date for this record.
10. **Due/Expires** – Enter the Due/Expires (end) date for this record.
11. Check delete to remove the record.
11. Click **Save** button to update the SDB 4 in the selected employees Staff Database.

5.7 GLOBAL UPDATE – STAFF DATABASE SCREENS 4 AND 5 ENTRY

Access from the **Main Menu: Personnel > Global Update > Screens 4 and 5 Entry.**
Global Entry can be used to enter a number of education, orientation, and due date reminder fields at one time.

5.7.1 Global Entry – Staff Database Screens 4 and 5

1. Select the desired staff and click OK.
2. In **Global Entry -Staff Database Screens 4 and 5 Entry**, click the **Add** icon in the upper right corner of the Screen 4 block.
3. There are two options for entering data. Select either the **Add Record** or **Add Template** radio button.
4. Click **OK** or **Cancel** to close the form.

Add Record

1. Select the Due Date Type and Subtype; and add Details.
2. Enter dates in the **On/As Of** field and/or the **Due/Expires** date field.
3. Click **OK.**

Add Template

1. Select a Template from the drop-down list.
2. Enter date in the **On/As Of** field and/or the **Due/Expires** date field.

Note: All items in the selected Template will appear with the dates entered in the Template Dates section.

5.7.2 Global Entry - Screen 5

1. In **Global Entry - Staff Database Screens 4 and 5**, click the **Add** icon in the upper right corner of the Screen 5 block.
2. There are two options for entering data. Select either the **Add Record** or **Add Template** radio button.
3. Click **OK** or **Cancel** to close the form.

Add Record

1. Select the Type of Training, Module Description; and add Note.
2. Enter Start and/or End dates, Outcome, and Hours. Click **OK.**

Add Template

1. Select a Template from the drop-down list.
2. Enter Start and/or End date as desired. Click **OK.**

Note: All items in the selected Template will appear with the dates entered in the Template Dates section.

5.8 Global Update – Cyclical Roster Plan

Access from the **Main Menu: Personnel > Global Update > Cyclical Roster Plan.**
Global Entry can be used to update the type of Roster Plan to multiple staff records at one time.

1. Click on **Global Update > Cyclical Roster Plan**.
2. Select the desired Staff.
3. A message ‘To assign patterns for staff on Cyclical Rosters, go to the Roster Creation Form.’ Click **OK**, then go to the Roster Creation form to assign patterns to the Staff.

5.9 Global Update – Optimised Roster Plan

Access from the **Main Menu: Personnel > Global Update > Optimised Roster Plan.**
Global Entry can be used to update the type of Optimised Roster to multiple staff records at one time.

1. Click on **Global Update > Optimised Roster Plan**.
2. Select the desired Staff.
3. A message ‘Staff with multiple employments cannot use Optimised Rosters.’ Click **OK**.
4. The Roster Plan will be changed to Optimised Roster in the staff database for all the selected staff.

5.10 Term Assignments

Access from **Main Menu: Personnel > Term Assignment**. This form allows ProAct users with the appropriate security rights to configure roster terms. Assignment to a Term brings staff into a Unit’s roster for the dates of the term even though their Staff History shows they are hired to another unit. For example, Interns hired to an Intern cost centre but working in different units throughout the year; New Graduate Nurses hired to a New Grad Education unit but work in multiple units over their training program.

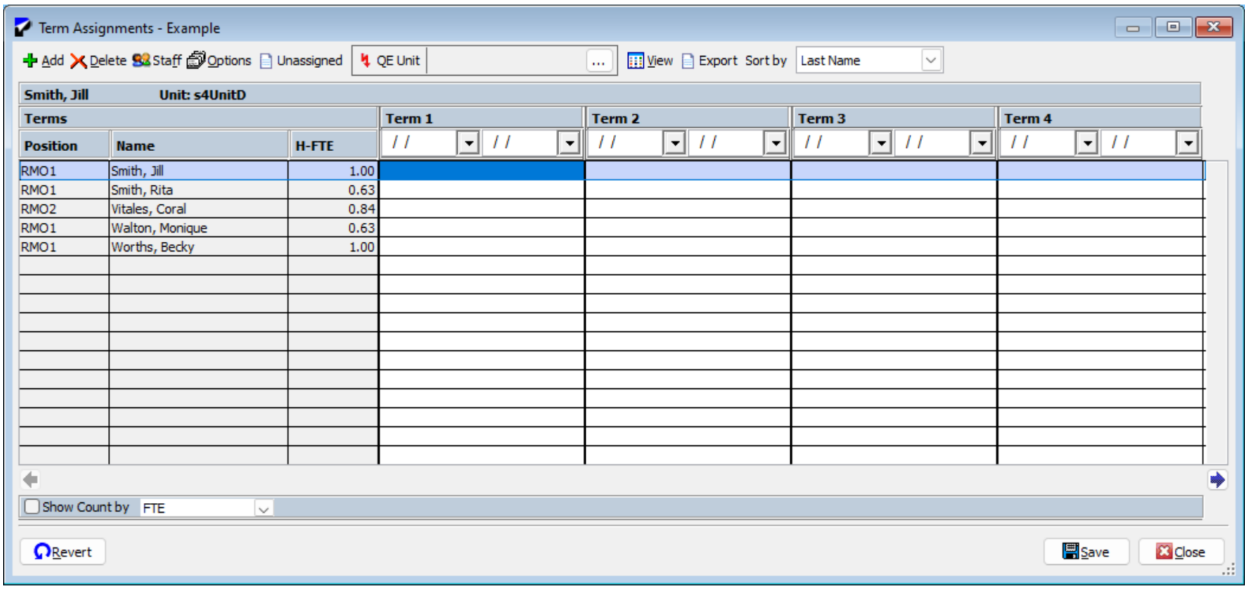
5.10.1 Adding new Terms

1. Click on **Personnel > Term Assignment**.
2. 1 What - Name the Term.
3. 2 – Which – Select which staff are to be included for assigning to the Terms by clicking on the **[…]** button.
4. 2 – Which - Select which Units are to be included for assigning staff to in the Term by clicking on the **[…]** button.
5. Once selections are made click **Save**.
6. Click the **Run** button to view .

5.10.2 Term Assignments Screen

The system displays four terms as a default, and each Term date range needs to be defined.

1. Enter in the Term dates for each Term.
2. Click on the ‘ ’ to add a Term.
3. When okay with the Term dates click ‘Save’.

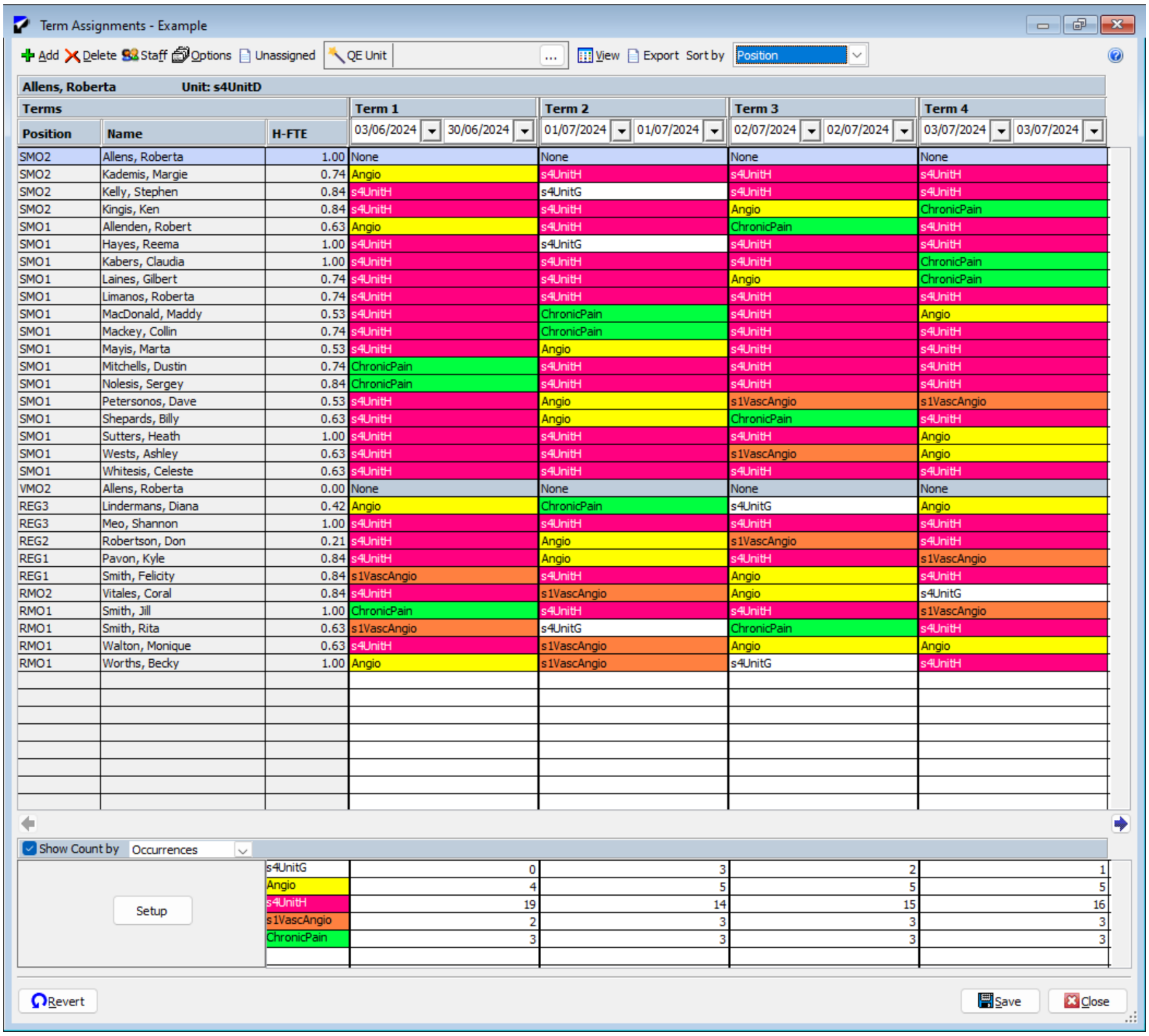


5.10.3 Accessing Memorised Term Assignments

1. Click on **Personnel > Term Assignment**.
2. Select the Term.
3. Click the **Run** button to view .

5.10.4 NAVIGATING THE TERM ASSIGNMENTS VIEW

The Term Assignments screen will show the names of staff, their key information and the terms assigned and not assigned.



5.10.4.1 Term Assignments Icons

Use the icons at the top of the form to:

Add staff to the Term Assignments.
Delete staff from the Term Assignment.
Open selected employee's **Staff Database**.
Open the Term Assignments **Options** form.
Make the term **Unassigned** for the staff member.
Automatically enter a Unit with the mouse by selecting a **Quick Entry Unit**.
View Toggle between Term Assignments by Unit Assignment or by Staff.
Export the Term Assignment to MS Excel.
Sort Staff by Lastname or Position.

5.10.4.2 Key Information:

Position: The staff member's Position.
Name: The staff member's last name, first name.
H-FTE: The staff member's hired FTE.
Term #: Term dates From and To with Unit assignment.

5.10.4.3 Show Count

To view totals in the Term Assignments form, click on the **Show Count by** checkbox below the assignments.

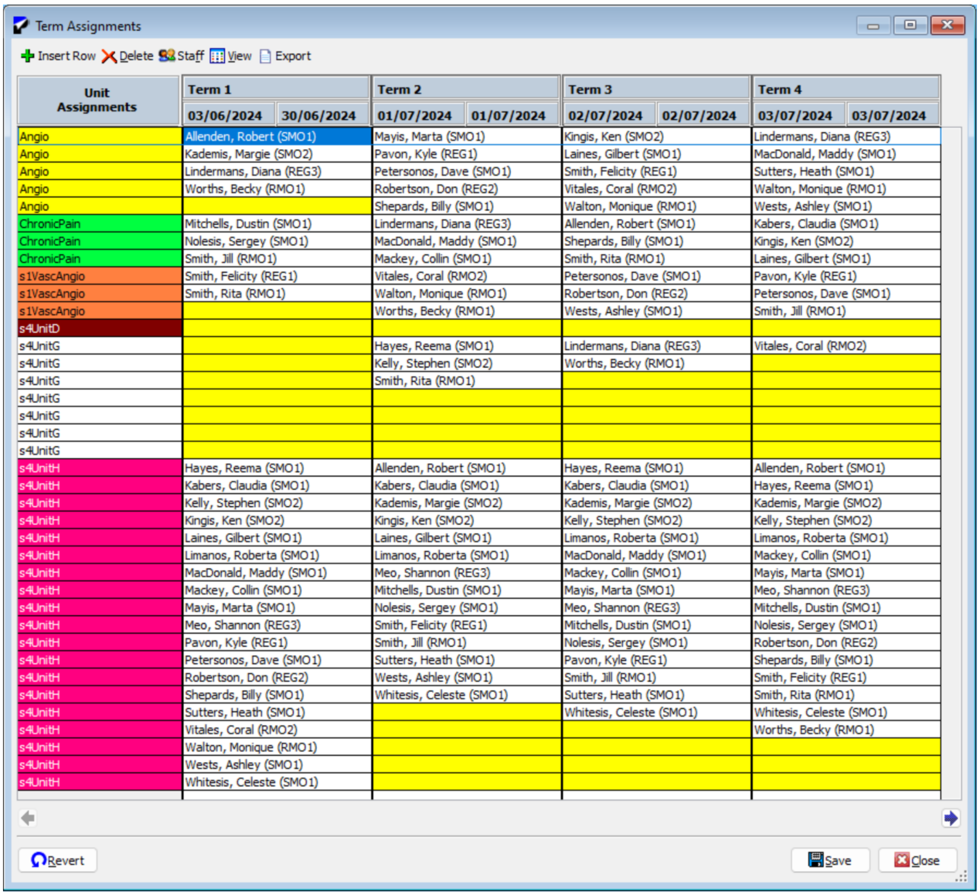
On the **Show Count by** line, the **Option** drop-down lists any predefined Totals that have been set up by the System Administrator. Selection of one of these options will override the other Show Count selection. Choose to show count by one of the following:

FTE: Click on the **Setup** button to select the Units to display in the count by FTE.

Occurrences: Click on the **Setup** button to select the Units to display in the count by occurrences.

5.10.5 Term Assignments View by Unit

The Term Assignments Unit view will show the names of the Unit Assignments by Term with staff assigned and their Position in brackets. Units that do not have staff assigned within a Term will highlight in yellow.



Term Assignments

Insert Row Delete Staff View Export

Unit Assignments	Term 1	Term 2	Term 3	Term 4
	03/06/2024 30/06/2024	01/07/2024 01/07/2024	02/07/2024 02/07/2024	03/07/2024 03/07/2024
Angio	Allenden, Robert (SMO1)	Mayis, Marta (SMO1)	Kingis, Ken (SMO2)	Lindermans, Diana (REG3)
Angio	Kademis, Margie (SMO2)	Pavon, Kyle (REG1)	Laines, Gilbert (SMO1)	MacDonald, Maddy (SMO1)
Angio	Lindermans, Diana (REG3)	Petersonos, Dave (SMO1)	Smith, Felicity (REG1)	Sutters, Heath (SMO1)
Angio	Worths, Becky (RMO1)	Robertson, Don (REG2)	Vitales, Coral (RMO2)	Walton, Monique (RMO1)
Angio		Shepards, Billy (SMO1)	Walton, Monique (RMO1)	Wests, Ashley (SMO1)
ChronicPain	Mitchells, Dustin (SMO1)	Lindermans, Diana (REG3)	Allenden, Robert (SMO1)	Kabers, Claudia (SMO1)
ChronicPain	Nolesis, Sergey (SMO1)	MacDonald, Maddy (SMO1)	Shepards, Billy (SMO1)	Kingis, Ken (SMO2)
ChronicPain	Smith, Jill (RMO1)	Mackey, Collin (SMO1)	Smith, Rita (RMO1)	Laines, Gilbert (SMO1)
s1VascAngio	Smith, Felicity (REG1)	Vitales, Coral (RMO2)	Petersonos, Dave (SMO1)	Pavon, Kyle (REG1)
s1VascAngio	Smith, Rita (RMO1)	Walton, Monique (RMO1)	Robertson, Don (REG2)	Petersonos, Dave (SMO1)
s1VascAngio		Worths, Becky (RMO1)	Wests, Ashley (SMO1)	Smith, Jill (RMO1)
s4UnitD				
s4UnitG		Hayes, Reema (SMO1)	Lindermans, Diana (REG3)	Vitales, Coral (RMO2)
s4UnitG		Kelly, Stephen (SMO2)	Worths, Becky (RMO1)	
s4UnitG		Smith, Rita (RMO1)		
s4UnitG				
s4UnitG				
s4UnitG				
s4UnitG				
s4UnitH	Hayes, Reema (SMO1)	Allenden, Robert (SMO1)	Hayes, Reema (SMO1)	Allenden, Robert (SMO1)
s4UnitH	Kabers, Claudia (SMO1)	Kabers, Claudia (SMO1)	Kabers, Claudia (SMO1)	Hayes, Reema (SMO1)
s4UnitH	Kelly, Stephen (SMO2)	Kademis, Margie (SMO2)	Kademis, Margie (SMO2)	Kademis, Margie (SMO2)
s4UnitH	Kingis, Ken (SMO2)	Kingis, Ken (SMO2)	Kelly, Stephen (SMO2)	Kelly, Stephen (SMO2)
s4UnitH	Laines, Gilbert (SMO1)	Laines, Gilbert (SMO1)	Limanos, Roberta (SMO1)	Limanos, Roberta (SMO1)
s4UnitH	Limanos, Roberta (SMO1)	Limanos, Roberta (SMO1)	MacDonald, Maddy (SMO1)	Mackey, Collin (SMO1)
s4UnitH	MacDonald, Maddy (SMO1)	Meo, Shannon (REG3)	Mackey, Collin (SMO1)	Mayis, Marta (SMO1)
s4UnitH	Mackey, Collin (SMO1)	Mitchells, Dustin (SMO1)	Mayis, Marta (SMO1)	Meo, Shannon (REG3)
s4UnitH	Mayis, Marta (SMO1)	Nolesis, Sergey (SMO1)	Meo, Shannon (REG3)	Mitchells, Dustin (SMO1)
s4UnitH	Meo, Shannon (REG3)	Smith, Felicity (REG1)	Mitchells, Dustin (SMO1)	Nolesis, Sergey (SMO1)
s4UnitH	Pavon, Kyle (REG1)	Smith, Jill (RMO1)	Nolesis, Sergey (SMO1)	Robertson, Don (REG2)
s4UnitH	Petersonos, Dave (SMO1)	Sutters, Heath (SMO1)	Pavon, Kyle (REG1)	Shepards, Billy (SMO1)
s4UnitH	Robertson, Don (REG2)	Wests, Ashley (SMO1)	Smith, Jill (RMO1)	Smith, Felicity (REG1)
s4UnitH	Shepards, Billy (SMO1)	Whitesis, Celeste (SMO1)	Sutters, Heath (SMO1)	Smith, Rita (RMO1)
s4UnitH	Sutters, Heath (SMO1)		Whitesis, Celeste (SMO1)	Whitesis, Celeste (SMO1)
s4UnitH	Vitales, Coral (RMO2)			Worths, Becky (RMO1)
s4UnitH	Walton, Monique (RMO1)			
s4UnitH	Wests, Ashley (SMO1)			
s4UnitH	Whitesis, Celeste (SMO1)			

Revert Save Close

1. Click in the Term for the Unit to assign staff
2. Click **Insert Row** to add more rows for a Unit.

5.11 Message Bank

Access from **Main Menu: Personnel > Message Bank**; or click on the **Message** icon in the tool bar. This form allows ProAct users with the appropriate security rights to send messages to other ProAct users, and allows all users to view messages sent to them. ProAct also displays a window alerting the recipient of a new message. The **Message Bank** form shows all of the received messages that have not yet expired. The Text section on the right side of the form displays the content of the selected message. (Emojis are not shown).

5.11.1 Sending Messages

1. In the Message Bank, click on the green + icon to open the **Send Message** form.

2. Click on **[…]** button to select the users to whom the message is to be sent. Select **Show BOSS Users** to send those users messages.
3. Manually type the message.
4. Select an Expiration Date and time for the message, or leave the fields blank.
5. Click **OK** to send the message to selected users.

5.11.2 Replying to a Received Message

1. To reply, first highlight the received message.
2. Click the **Reply** icon in the top right corner of the Text section.
3. Select the user(s) to be replied to by clicking the **[…]** button.
4. Type in the reply message, and click **OK**.

5.11.3 Deleting Messages

1. Select the message from the list of received messages. Hold the Shift or Ctrl key to select multiple messages.
2. Click the red **X** icon to delete the message(s).

5.12 View Employee Timesheet

Access from the **Main Menu: Personnel > View Employee Timesheets**.

The View Employee Timesheet form will display ALL codes that the individual has worked regardless of Hired-To or Worked-In Units. This form allows users to view timesheets and make adjustments if necessary.

5.12.1 Viewing and Adjusting Employee Timesheets

1. Select **View Employee Timesheet**; **Select Staff** move list will open.
2. Select staff members from the move list and click **OK**; timesheets will be displayed in alphabetical order by employee name.

5.12.2 Navigating the Timesheet Form

1. Pay Period end date displays in the top left corner of the form. To change the Pay Period either type a date in manually, or use the **Previous**/**Next** buttons.
2. To access the previous/next employee's timesheet, use the **Back**/**Forward** buttons.
3. Use the **Find** icon to look up an individual employee's timesheet.
4. The **Adjust** icon pulls up the Adjustment box for the selected day/shift, and allows the User to make changes to that day. If the employee has multiple employments the ME button will highlight yellow. For **Adjustments in Actual Roster**, see section 6.2.7.
5. To view additional employee information, use the **Staff** icon to pull up the Staff Database for the current employee, or the **Accruals** icon to check the employee's accruals.
6. Checkboxes in the top of the form allow inclusion of NN Codes and/or Blank Days in the Timesheet.
7. The **View** button allows the user the choice of whether or not to display the Cost Centre, or Unit description, in the first column of the timesheet.

6 Rosters

Access from the **Main Menu** with the following submenu:

Actual Roster: To make adjustments to a finalised Roster.
Annual Planner: For weekly rotations, and leave/vacations for the upcoming year or longer periods.
Future Requests: To enter daily requests for future periods.
Bulk Options: To use a variety of functions in a bulk process for multiple groups at once.
Requests: To work with staff requests.
Roster Creation: To use a variety of Roster creation methods, to suit the needs of each group.
Draft Roster: To edit and balance the Roster.
Finalisation: To finalise a Roster for posting.
Publish Roster: To allow an edited Roster to be viewed by staff in BOSS.
Posted Roster: For a read only copy of the Roster at the moment it was posted.

Users can also click on the desired Roster stage (Future Requests, Draft Roster, Actual Roster) on the Home Screen.

Users can select which Violation checks to run in Roster forms using the Checks button. The user may choose All or Selected Violations in the DDL, and specify in the Select Violation Types form which Violations to check.

6.1 Rostering Forms

Note: If staff have Roster Plans, a BOSS code will not automatically overwrite the plan – the code must be reviewed and accepted.

Add/Replace codes from BOSS users can flow into Draft and Actual Rosters without BOSS Signoff where there isn't already an existing code or where there are existing unpaid time off codes.

Where Roster codes have been selected to alter a BOSS code to change the start/end times and hours of the code that existed prior to accepting the BOSS code, then this correction of S/E Times and Hours occurs in finalisation. When in Future Requests, review the Roster Plan on the first row prior to accepting the BOSS request to confirm the hours for these types of codes. Check with your System Administrator for more information.

Roster codes adjusted in BOSS Timesheet can be highlighted turquoise by clicking on the TS Edits button. The fields edited will automatically highlight turquoise in the Adjustments section.

Staff with leave codes imported from the HR/Payroll system will display additional leave lines shaded pink background on the roster. These can be hidden/shown by clicking on the Leave button.

6.1.1 Select Period

The date range can be changed in any of the rostering forms by editing the dates in the **To**/**From** fields, or by using the **Forward**/**Back** arrows. The Period can also be selected in the Home Screen by selecting the **Period** button, and then selecting a date range. If the user selects a date range in the Home Screen, that date will be the default when opening any staffing or rostering form.

6.1.2 Select Groups/Units

Access a Group from the Tool Bar menu using the **My Units** drop-down list, or by clicking on a Group in the Home Screen list, and then on a Rostering button. Cells will be highlighted green for holidays selectively by facility.

6.1.3 Show Count

To view totals in the rostering forms, check the **Show Count by** checkbox below the Roster.

On the **Show Count by** line, the **Option** drop-down lists any predefined Totals that have been set up by the System Administrator. Selection of one of these options will override the other Show Count selection. Choose to show count by one of the following:
Shift Segment: Check the time segment boxes to see the number of staff with direct Roster codes.

Note Type: Click on the **Setup** button. The Options form allows you to select multiple Note Types which can be dragged up/down in the move list, to achieve the order you desire. A Position Consolidation set can be selected from the drop-down list, and its available Subsets can be selected in the move list below. To see the position consolidation subset even if there are no staff in those positions, check Show Consolidation Subset even if the value is zero for the period. Choose to **Sort Total By** Shift Segment first, or by Note Type first, by using the drop-down list.

Staffing Gaps: (Draft and Actual Only) Click on the **Setup** button, select the saved Staffing Gaps from the drop-down, and select the desired Position Consolidation Subsets in the move list; click **OK**. Check the time segment boxes to see the Staffing Gaps.

Paid Time Off: (Requests Only) Check the time segment boxes to see the number of staff with leave/non-productive Roster codes.

Over/Under Demand: Check the time segment boxes to see the number of staff rostered over or under the defined Demand for this group.

Position: Click on the **Setup** button, select the Position Consolidation Set from the drop-down, and select the desired Subsets in the move list; click **OK**. Check the time segment boxes to see the number of staff in each position with direct Roster codes.

Roster Code – Used: Shows all Roster codes used in this Roster.

Roster Code – Selected: Click on the **Setup** button, and then on the **A/Z Setup** icon in the **Options** form; select the Roster codes. To group the codes into a subset (so all the codes in the subset are counted together), click on the **Add** icon in the top of the **Ordered Roster Codes** section; name the subset, and then move the selected codes into each subset. Click **OK** to save. Click in one of the radio buttons to see the Hours, Occurrences, or FTE for each code on each day.

Skill: Click on the **Setup** button, select the desired skills in the move list; click on **OK**. Check the time segment boxes to see the number of staff with the selected skills who have direct Roster codes. Note that a person with multiple skills will be counted multiple times, once for each skill they possess.

Custom Times: Allows time segments other than the standard 4-hour blocks (e.g. 07:00-11:00). Click on the **Setup** button. Click the **Add** icon and enter a Start and End time. Repeat process to add multiple time segments (e.g. 06:00-07:00, 07:00-09:00, etc.); click **Save**, and then **Close**. The number displayed includes all staff, with direct Roster codes, who are working at least half of the custom defined time segment.

Gender: Click on the **Setup** button, select **Female**, **Male**, or **Unspecified** and click on **OK**. Check the time segment boxes to see the number of staff, by gender, who have direct Roster codes.

Hired Status: Click on the **Setup** button to select one or more Hired Statuses and the desired shift segments to show count for casual staff, for example.

User-Defined Sort: Displays the count for all the staff based on the user-defined subsets that were created under the Sort option **User-Defined**, using the **Setup** button located on the second row of the **Roster** form menu. All those not sorted to a specific subset will be counted in a subset titled **Not in Subset**. The User can choose which subsets are viewed in the Totals, using the **Setup** button in Totals.

6.1.4 Sort By

Users can sort employees on their Rosters by:
Hired Shift & Position
Last Name
Position & Hired Shift
User-Defined: Allows users to define a custom order to display employees on the Roster. This option is available in Future Requests, Request, Draft, Posted, and Actual Rosters.
Total FTE – Highest: Employees with the highest FTE total are on top.
Total FTE – Lowest: Employees with the lowest FTE total are on top.

6.1.4.1 Set Up The User-Defined Sort:

1. Click on the **Setup** button next to the **Sort** drop-down; ProAct will display a move list of all employees on the Roster.
2. Click on the **Select** button, or, double-click some or all staff to move them to the right, and then click on the individual employee to drag them up or down in the list.
3. To group several staff together, click on the **Add** icon and enter the name for the subset (e.g. Seniors, Juniors).
4. Click on the subset name to move staff to the selected subset. To edit the subset label, click on the **Edit** icon.
5. Staff can be moved into or out of a subset, and/or within a subset, by dragging them to the desired order. Subsets can be moved in a similar manner.
6. To delete an entire subset, select the label and click the **Delete** (**X**) icon. All staff in the deleted subset will move back to the left.
7. Staff who remain on the left will show at the bottom of the Roster in alphabetical order.

8. If the **Save order as default** box (located at the bottom left of the form) is checked, the user-defined order is set as the default sort order every time the user opens the Roster screen.
9. When satisfied with the sort order, click **OK** to save.

6.1.5 ROSTER MESSAGES

ProAct will warn users who open a Roster (Request, Draft or Actual) for a group in a period that has already been opened by another ProAct user. ProAct will prompt all users (those that already have the form open, and those attempting to open the Roster form) that the Roster form is being accessed by a new user.

ProAct users can also view the Roster warning messages in their Message Bank (via the **Message** button located in the Home Screen Tool Bar).

Note: Messages informing staff of others who are working within the same Roster will expire after **ten** minutes, rather than accumulating in the Message Bank.

6.1.6 ROSTER RECORD LOCKING

If two or more ProAct users are in the same Roster and try to edit the same Roster line, ProAct will lock the Roster line for the first user, and prompt all subsequent users with a message stating that the Roster line has been locked by another user. However, if a user has opened the Roster form and it is then in an idle state while having exclusive access to the Roster line, the lock may be terminated after an extended period of no activity, making the locked line available to other ProAct users.

Please **Save** and **Refresh** frequently during the Rostering process. Clicking **Refresh** will bring changes any other users have made into the Roster, in the event that two users are editing the same Roster.

6.2 ACTUAL ROSTER

The user can access the Actual Roster by clicking on the **Actual Roster** button on the Home Screen. The default period of the Actual Roster is the period that includes the current system date. If there are no Rosters finalised for the current date, the user will be shown a message stating that there is no Actual Roster for the selected period.

If the Restricted Staffing Period has been set up in ProAct, only users that have rights to edit in the Restricted Staffing Period will be able to make changes to an Actual Roster.

The Actual Roster reflects any changes made after a Roster is posted (finalised). Changes made in Global Staffing are reflected in the Actual Roster and vice versa.

Quick Entry (QE on the top tool bar) allows the user to select codes to write or overwrite with one click in the roster. To activate, select a code and click the QE button (button turns yellow) - the highlighted code displays to the right of QE. Click the QE button again to deactivate the feature.

When working in an Actual Roster, users should click on the **Refresh** button periodically, to ensure they are viewing up-to-date information. After signing off the BOSS request, the screen will auto refresh the roster to bring in the BOSS request.

The Roster can be sorted by Total FTE in the 2 week view using the Calc Total FTE button.

6.2.1 ADDING AN EMPLOYEE TO THE ACTUAL ROSTER

1. Click on the **Add** button in the main Actual Roster menu.
2. Select the employee(s) from the Staff move list and click on **OK**.
3. The **Add Staff** form opens; displaying employee Skills, the Unit, and Group they are assigned to, and Staff Database History Information.
4. Click on **OK** to add the employee to the selected Roster.

Note: Users can select the Multiple Employment Number (M#) from the History Information, the default being the Primary Employment number.

6.2.2 DELETING AN EMPLOYEE FROM AN ACTUAL ROSTER

1. Select the employee to remove from Actual Roster.

2. Click on the **Delete** button.
3. A message appears: **Are you sure you want to delete Roster for <last name>, <first name> for group <Group ID>?** Click **Yes**.
4. The employee is removed from this period and group in Actual Roster (but not from the staff database).

6.2.3 Cut-off Dates and Adding/Deleting Employees

If the Cut-Off date is set as **Read-Only** for a portion of the Roster (e.g. the first or second week), users are still able to work in the Actual Roster for the open period.

Users can **Add** employees to the Roster if the Cut-Off date is set for a portion of the Roster period, but any change made in the Cut-Off period will be audited as Post Cut-Off Overrides.

Users cannot **Delete** employees from the Actual Roster if a Cut-Off date is set for a portion of the period; a warning message appears if the user tries to do so.

6.2.4 Changing the Selected Group in Actual Roster

1. Click on the **Group** button; the Group find list opens.
2. Click on **Search**.
3. A list of available groups is displayed. Choose the desired group and click **OK**.
4. If a Roster has been finalised for the selected group, it will be displayed in the Actual Roster.

6.2.5 Changing the Period in Actual Roster

1. The rostering period can be changed by using the **Back**/**Forward** arrows located at the top of the form, or by manually entering the desired **From**/**To** dates.
2. The new period is displayed for the selected group. The previously selected Roster period remains open, allowing the two periods to be viewed as needed.
3. Edit within the form as necessary. Take care when editing if there are two open Roster periods.

6.2.6 Shift and Leave Applications in Actual Roster

If Roster-Link is enabled then Shift and **Leave Applications** will be imported into ProAct from an external system on a separate read only line coloured pink. These lines can be hidden/shown by clicking on the Leave button. To view the approval status and history right click with mouse on the leave code. Pending shift and leave will display as read only on the Shift Application line. Approved leave will display in the Actual roster line. Cancelled or declined shifts will be removed from both lines and the days coloured pink on the Actual roster line. If you try to change or delete the Actual roster line a warning message 'You are editing a booked and approved leave code.' will display.

6.2.7 Adjustments in Actual Roster

The **Adjustments** form can be accessed from Actual Rosters, Full Roster, Global Staffing, and Timesheets.
Users can make the following adjustments in the **Actual Roster** form:

1. For simple changes (like changing an A code to S code), enter codes directly into the Roster grid.
2. Insert a second code line by clicking on the **Insert** icon, and then enter the desired codes (such as on-call or in charge) on the second line.
3. Click on the **Adjustments** checkbox to adjust the Unit, Group, Shift code, Hours, Start and End times, Position, or to add a Note.

Note: If Automatic Recoding is activated, roster codes that are manually adjusted and saved may be changed including the start and end times and hours, depending on the rule. The Audit will show the user as 'Auto Recode'.

6.2.7.1 Adding an Adjustment

1. Click on the **Adjustments** checkbox to open the Adjustments section at the bottom of the form.
2. Select a day in the appropriate employee's Roster.
3. The Adjustments section displays the Multiple Employment Number, Unit, Group, Roster Code, Shift length, Start and End time, Roster Code Description and Position.
4. Enter Adjustments as necessary.
5. Select a Note from the drop-down list and enter details.

6. If multiple Notes are necessary, click on the **Add** icon in the top right to add extra note lines. To delete a Note, click on the **Delete** icon in the top right of the **Adjustments** form.
7. If the employee is a BOSS user then select the **BOSS** checkbox to send a system message confirming the adjustment, and if you want to include a Note Type and Note Detail then select the Note+ checkbox for the Note type/s that you wish to send. These may be inactive if BOSS is not enabled or the employee is not a BOSS user. These may be automatically selected if the system is configured to automatically send BOSS users messages.
8. Click **Save**.

6.2.7.2 Using the Calc Buttons

1. Click on the **Adjustments** checkbox to open the Adjustments section at the bottom of the form.
2. Select a day in the appropriate employee's Roster.
3. The Adjustments section displays the Roster Code, Shift Length, Start and End Time and Position.
4. Change the hours, and click on the **Calc Time** button.
5. The End Time is automatically adjusted based on the new shift length and existing Start Time.
6. Change the Start Time and click on the **Calc Hours** button.
7. The shift length (in Hours) is automatically adjusted based on the adjusted Start Time.

6.2.7.3 Deleting an Adjustment

1. Click on the **Adjustments** checkbox to open the Adjustments section at the bottom of the form.
2. Select a day in the appropriate employee's Roster.
3. In the Adjustments section, select the line that needs to be deleted. Click on the **Delete** icon (located in the top centre of the Adjustments section).
4. The message 'Are you sure you want to delete this adjustment?' will be displayed.
5. Click **Yes** and **Save**.

6.2.7.4 Adding a Second Code Line

There are two ways to add a second code line:

6.2.7.4.1 Using the Insert Button

1. Click on a day in the appropriate employees Roster.
2. Click on the **Insert** button.
3. A second code line will open. Enter the Roster codes in the second line for the desired days.
4. If the Adjustments box is open, the Hours and Position for the entered Roster code will display.
5. Click **Save**.

6.2.7.4.2 Entering a Second Code Line in the Adjustments Form

1. Click on the **Adjustments** checkbox to open the Adjustments section.
2. Select an employee, as well as the day in their Roster to which to add a second code line.
3. Within the Adjustments section, click on the **Add** icon (located in on the top centre).
4. Adjust the shift line as necessary and place a check in the box located in the column labelled **2nd**.
5. Click **Save**.

6.2.7.5 Copying Adjustments

The **Copy Adj** button allows users to copy one adjusted shift code to many days over a rostering period. The **Copy Adjustment** form in Actual Roster shows the copying day in Pink and holidays in Green.

6.2.7.5.1 To Copy Adjustments:

1. Click on the appropriate employee's Roster code.
2. Click on the **Adjustments** checkbox to open the Adjustments section.
3. The code will appear in the Adjustments section. Adjust the shift code, length, and add any relevant notes if necessary.
4. Click the **Copy Adj** button.
5. The **Copy Adjustments** form **for <selected staff member>** opens.
6. The form displays the full 28-day rostering period. Place a check below the days to copy the adjustment to.
7. Click **OK**, and **Save**.

Note: The **Copy** button in the Actual Roster form functions differently than the **Copy Adj** button in the Adjustment box. For **Copy Button in Rosters**, see section 2.2.1.

Before saving any Adjustments, ProAct will check for violations. If ProAct detects a Red Violation, users will be warned of the adjustment causing the violation. ProAct will not save any rostering adjustment that triggers a Red Violation.

6.2.7.6 Automatic Recoding

If the system has been configured for **Automatic Recoding,** roster codes that are manually adjusted and saved may be changed including start and end times and hours, depending on the rule. The Audit will show the user as Auto Recode.

6.2.7.7 Audit Roster Codes

1. Click the Audit icon.
2. The Audit Roster Codes form will appear for a selected employee and roster date showing the history of roster codes changes.

6.2.7.8 Using the Timesheet Button

Users can sign-off on timesheets from the Actual Roster form, using the **Timesheet** button. For **Sign-Off: Timesheets,** see section 9.1.1.

6.2.8 Employee (BOSS) Requests

There are two ways in which managers can view and sign-off requests entered by employees through BOSS - View Requests and Sign-Off Requests. This can be done from Requests, Draft Rosters, and Actual Rosters (as well as from Global Staffing and from the main menu – Sign-Off -> BOSS Requests).

6.2.8.1 View Requests

When users click on the **View Requests** button (located in the top right of the Roster screen), they will be asked whether they would like to: see **Requests in a Separate Form;** or to **Highlight Cells in the Grid**.

If **Highlight Cells in the Grid** is chosen, any cell with a Request associated will be highlighted, and the user can right-click on it to **Accept** (Add or Replace 1st Code), **Reject** or put the Request on **Hold** without leaving the Roster screen.

If **Requests in a Separate Form** is chosen, a Requests form displays the selected Group's employee requests entered for the 28 day Roster period.

6.2.8.2 Sign-Off Requests

Users can also review multiple employee BOSS requests by clicking on the **Sign-Off Requests** button and filtering for specific Requests.

For **Sign-Off: BOSS Requests,** see section 9.3.

6.2.9 Note Pad

If the selected employee has a Note Pad entry in their Staff Database record, then the button **See Note Pad** will open in the top right corner of the Roster screen. If there is no entry for the selected employee, the **Note Pad** button can still be accessed from the top menu, where a new note can be added.

6.2.10 Unit Comments

If there is a Unit Comment on any day in the selected Unit and period, the date at the top of the grid will be highlighted in yellow. Clicking on the highlighted cell will open the Comments form for the specific date and Unit. To copy a Unit Comment from one day to another, and to other Units click on the Copy Unit Comments button. Select the date, Unit and shift (All, AM, PM, Night) to copy from, then which units and days to copy to.

6.3 Annual Planner

Access from **Main Menu: Rosters > Annual Planner**.

The Annual Planner considers both primary and multiple employments. It is designed to help plan rotations and leave for the upcoming year, or for other periods in the future. It serves as a method of global entry for rotations and leave. Weeks are read-only in the period where the Request roster is already is created.

6.3.1 Roster Codes In Annual Planner

Any Roster codes entered into the Annual Planner can be brought into Future Requests, or Requests, when the Rosters are created.

1. Select **Annual Planner** from the **Main Menu**. The Setup Options for the **Annual Planner** form will open.
2. Select any date range by typing in the **From** and **To** fields, or use the calendar to select the date (click the down arrow next to the date field to pull up the calendar). Use the blue arrows to change period.
3. In the **View By** section, choose either Group or Unit. Then, select the appropriate Group or Unit from the drop-down list.
4. **Include Auto Added Staff** by checking that box.
5. In the **Display** section, choose the code types to be displayed in the **Annual Planner** form.
6. To display specific Accruals, check the box and select an accrual type from the drop-down list.
7. Click **OK**; the Annual Planner form will open.
8. Use the icons at the top of the form to:
   Pull up the selected employee's **Staff Database**.
   Check the employee's **Accruals**.
   Set a shift rotation.
   Pull up the **Annual Planner Options** form.
   Refresh the screen.
   Lookup Roster codes.
   Print Annual Planner or export to another format.
   View/Edit employee notes.
   Run a **Violations** check to identify use of restricted codes.
9. Use **Sort by** drop-down list to sort employees by:
   Hired Shift & Position
   Last Name
   Position & Hired Shift
   User Defined Sort
10. Choose to **Show Count by** one of the following:
    Shift Segment Check the time segment boxes to see the number of staff with direct Roster codes.
    Position Click on the **Setup** button, select the Position Consolidation Set from the drop-down, and select the desired Subsets in the move list; click **OK**. Check the time segment boxes to see the number of staff of each position with direct Roster codes.
    Roster Code – Used Shows all Roster codes used in this Roster.
    Roster Code – Selected Click on the **Setup** button, and then on the **A/Z Setup** icon in the Options form; select the Roster Codes. To group the codes into a subset (so all the codes in the subset are counted together), click on the **Add** icon in the top of the **Ordered Roster Codes** section. Name the subset and move selected codes into each subset. Click **OK** to save. These statistics are calculated in FTEs only.
11. To change which Statistics are displayed under the **Shift Segment** option, select the desired option on the left and numbers will be recalculated for the selection.
12. Enter or edit codes directly in the Annual Planner grid.

6.3.2 Tab 2 – PTO Targets

The PTO Targets form allows set up of the **Paid Time Off** targets for the selected Unit, and its individual Rostering Groups, for each selected week.

1. Both the Unit and Rostering Group sections display the name of the month, and are broken down into columns labelled with the first numerical date of each week.
2. Both sections display the Weekly FTE of PTO in each grid.
3. Type the desired FTE for PTO directly into the grid for either the Unit or the Rostering Group, and click **Save**.

Use the icons at the top of the form to:
Copy the value across the same row for the entire selected period.
Copy the value to all cells in the column below.
Print Annual Planner PTO Targets or export to another format.

6.4 FUTURE REQUESTS

Access from the **Main Menu: Rosters > Future Requests**.
Note: Codes are stored in Future Requests in the following order: Annual Planner codes (displayed if this option is checked), Roster Plan NN codes (displayed if this option is checked), and Roster Plan codes from days that have no Annual Planner codes and, finally, BOSS codes that have been approved manually. Any code manually entered by the user in Future Requests overwrites the aforementioned codes.

6.4.1 EDITING FUTURE REQUESTS

In Future Requests, users can view, enter, edit, or delete requests for any period in the future.

1. Select **Future Requests** from the **Main Menu**. **Setup Options for Future Requests** form will open.
2. Select any date range by typing in the **From** and **To** fields, or use a calendar to select the date (click the down arrow next to the date field to pull up a calendar). This range can be for any length of time and any time in the future.
3. Select to view either Group or Unit. Check to include Auto Added Staff.
4. In the **Display** section use the checkboxes to choose whether to view:

   Accruals: If checked, select which Accrual Type to display.
   Annual Planner for leave and shifts with rotations: If checked, select which Code Types to display. If the user elects to bring in codes from AP, only the selected code types will be displayed. However, a manager or System Administrator can enter any code type into FR and it will continue to display. Code types are:
   WP - Direct Productive
   IP - Indirect Productive
   OI - Overtime Indirect
   OP - Overtime Paid
   NP - Paid Time Off
   NN - Unpaid Time Off
   X$ - Extra Dollars
   Roster Plan: If checked, FR will display all employees' Roster Plans from Staff Database.
   Imports from another system: When Roster-Link is activated, it will be automatically checked to display **shift and leave applications** imported into ProAct from an external system on a separate read only line coloured pink. To view the approval status and history right click with mouse on the shift code. Pending shifts will display as read only on the Roster Import line. Approved shifts will display in the Future Request line and be coloured pink. Cancelled or declined shifts will be removed from both lines and the days coloured pink on the Future Request line. If you try to change or delete the Future Requests line a warning message 'You are editing a booked and approved leave code.' will display.
   BOSS Requests: If checked, FR will show all BOSS Requests (in blue font) with status of Accepted, Pending, or On Hold for the selected group/unit, on a secondary row. Information such as the date, group, code, note, and detail of entry will be displayed beneath the user's name when their code is selected. BOSS codes (with notes) will be shown in bold blue font. Accepted BOSS codes will be shown in the Future Requests form in black font, and will be considered an FR code. Accepting an Altered Code from the BOSS line to replace an existing code (Altered codes designated in the Roster Code CaRT) will be altered to the Start and End time and Hours of the code it is replacing upon finalisation.
   Only Staff with ROSTER Codes: If checked, FR will display staff who only have the selected roster code or roster code consolidation subset/s.
   Roster-Link
5. If viewing by Unit, clicking **OK** will open a Positions move list.
6. Select Positions and click **OK**; Future Requests Roster will open.
7. Enter or edit codes directly in the Future Requests grid.
8. Click **Save** often, to ensure no data is lost.

If the **Setup Options** form for Future Requests is checked to bring in Annual Planner (AP) codes, those codes will be displayed on the Future Requests form. However, if the Roster Plan has NN (not worked, not paid) codes and the Roster Plan box is checked, these NN codes will overwrite the Annual Planner codes – allowing an employee's set days off (ex. Weekends) to take precedence over their Annual Planner codes.

If any BOSS codes were approved in the **Sign-Off BOSS Requests** form, then these approved codes should be entered automatically into Future Requests (FR). Approved BOSS codes are displayed in the BOSS row, allowing the manager to see those codes that were requested (the BOSS row), and those that managers have approved or changed (the FR row).

The BOSS requests row is not editable by the manager, but the manager can select a code in the BOSS row, and the user can right-click on it to **Accept** (Add or Replace 1st Code), **Reject** or put the Request on **Hold** without leaving the Roster screen. The accepted code is moved into the FR row, and the rejected code disappears from the BOSS row on the **Future Requests** form.

If Future Requests is opened for a Read-Only period (where Requests, Drafts, or Actual Roster are created), it is impossible to accept BOSS codes for that period from the FR form.

6.4.1.1 Future Request Icons
Use the icons at the top of the form to:

Open selected employee's **Staff Database**.
Check employee **Accruals**.
Open employee's **Annual Planner**.
Open the **Future Request Setup Options** form.
Change the **View** between 2-week and 4-week.
Lookup Roster codes.
Run the Future Requests report (Setup Options called by **Print** button).
View Notes by highlighting cells in the roster grid for shifts with specific Staffing Notes by selecting the ellipse button and select the Staffing Note/s.
Insert a second code line (for **Adding a Second Rostering Line**, see section 6.5.5.1).
Copy codes from employee to employee(s).
Copy codes across particular days.
Run a **Violations** check to identify use of restricted codes.
View/Edit employee **Note Pad** entries.
View/Hide employee **(BOSS)** Requests.
Sign-Off (BOSS) Requests.
Send a **Message** (SMS, email or BOSS) to individual or groups of employees.
View the **Cost** of the future requests.
Show/hide **Leave** request lines.

Note: **Show Count by** counts only those codes in the FR rows, and not those in the secondary or BOSS rows.

6.5 REQUESTS
Access from **Main Menu: Rosters > Requests**, or click on the **Requests** icon on the Home Screen.

6.5.1 OVERVIEW
Request Rosters can be created for rostering groups and, once created, can be edited in a rostering or viewing group. Requests can be edited in a viewing group even if some of its rostering groups have Requests created, and other groups do not.

6.5.2 BRINGING IN CODES FROM ANNUAL PLANNER AND FUTURE REQUESTS
1. Select **Rosters > Requests** from the **Main Menu**.
2. **Select Group** form opens.
3. Populate list and select Group.

The Request Roster will display codes from each employee's Roster Plan, Annual Planner, and Future Requests in grey. Roster codes pulled in from BOSS display in blue (BOSS codes with notes will be shown in bold blue font), and all other codes are in black font.

Codes from Annual Planner come in for a seven day period; users can edit these codes on a daily basis.
Codes from Future Request come in on a day-by-day basis.
The Request Roster draws in codes from Annual Planner, Roster Plan NN codes (if there is an Annual Planner code, but, if not, then all codes from the Roster Plan), Future Request codes, and BOSS codes (if the group is set up to allow BOSS codes to automatically flow into the Requests Roster).

Note: BOSS codes will not automatically flow into the Requests Roster if there is an entered (and manager accepted) FR code for that day.
Accepting an Altered Code from BOSS to replace an existing code (Altered codes designated in the Roster Code CaRT) will alter the Start and End time and Hours of the code it is replacing upon finalisation.

6.5.3 VIEWING GROUPS IN REQUESTS

6.5.3.1 Viewing Groups Defined by Rostering Groups
If a user tries to open the Request screen for a Viewing Group that is defined by Rostering Groups, and if none of the Rostering Groups have their Requests created, ProAct will prompt the user that there are no Requests for the selected Viewing Groups.

Cells are highlighted selectively where holidays occur for staff of only one facility.

6.5.3.2 Viewing Groups Defined by Units
If a Viewing Group is defined by Units, and if these Units have Requests created for their respective Rostering Groups (which are defined by Units), then a user will be able to open the Requests for that Viewing Group.

6.5.3.3 Requests for Viewing Groups with Rostering Groups
If a user tries to open Requests for a Viewing Group that contains Rostering Groups, and not all the Rostering Groups have request Rosters, then ProAct will warn the user of the Rostering Groups that do not have requests, and will display only the staff from the Rostering Groups that have a request Roster.

If a user opens a Viewing Group where one or more Rostering Groups have a Draft Roster, ProAct will warn users of the groups that have a Draft Roster.
Users will be able to see the Request Rosters for all the groups, but will not be able to edit those staff that belong in Rostering Groups that have a Draft Roster.

6.5.4 Changing Multiple Employment Position for the Duration of the Period
1. Select **Rosters > Requests**.
2. Select an employee.
3. Select the **Staff Info** button.
4. Click on the **[…]** button for Adjusted Position and select from the list. Click **OK**.
5. A check will be placed in the Adjusted checkbox, indicating that the selected employee will have an adjusted position for this rostering period.
6. Click **OK** to exit **Staff Info** form.

Note: Users can change positions via the **Staff Info** button in the Rostering screens as well.

6.5.5 Adding an Employee to Requests/Rosters
To add staff to Request, Draft and Actual Rosters:

1. Click on the **Add** icon.
2. A Staff Move List opens, where users can select one or more staff members.
3. All staff selected in the Move list will appear in the **Add Staff** form. The **Add Staff** form displays employee Skills, the Unit and Group they are assigned to, and Staff Database History Information.
4. Select the Multiple Employment Number (M#) from the History Information if applicable. Default is the Primary Employment number.
5. Once all desired staff are selected, click **OK**.

Note: If the user adds an employee to the Unit/Group Roster using this function, the Staff Database History Record will not be changed. If an employee is moving to a new Unit permanently, the History file in the Staff Database must be changed.

6.5.5.1 Adding a Second Rostering Line
To add a second Roster line, highlight the employee and click the **Insert** button. ProAct will add a second line of Roster code for that employee.

If a staff member appears in Request Rosters for two or more groups, the Request Roster will show multiple lines of Roster codes. The Roster lines in other groups are highlighted in yellow. Users can choose to expand or collapse these multiple Roster lines by clicking on the **+** or **-** signs.

Note: In viewing groups, the multiple request Roster lines are not differentiated by highlighting in yellow.

6.5.6 Deleting an Employee from Requests/Rosters

1. In the **Requests** (or **Rosters**) form, click on the employees to be removed and click on the **Delete** button.
2. Confirm the wish to remove the Roster for the selected employee. Click on **Yes**.
3. This process removes the employee from that period's Requests/Roster **ONLY,** and does **NOT** remove them from the Staff Database.
4. If an employee has a Roster in another group that has been finalised, users will not be able to edit that Roster line from the Request Roster screen.

Note: Employees can have two code lines in the Roster. In this case, if the cursor is on the second code line when the **Delete** button is clicked, only this line will be removed. However, if the cursor is on the first code line when the **Delete** button is clicked (and there is a second code line), both lines will be removed from the Roster.

6.6 Bulk Request

ProAct has the functionality to create requests for several rostering groups and viewing groups at one time. To access Bulk Request, click on **Rosters > Bulk Options > Bulk Request**.

6.6.1 Creating Requests Using Bulk Request

To create Requests using Bulk Request:

1. Click on **Rosters > Bulk Options > Bulk Request** and select the period.
2. Select the groups for which Requests are to be created, and click **OK**.

Note: ProAct will open the standard move list to allow the user to select groups for which requests are to be created. The move list can be filtered to see Rostering Groups and/or Viewing Groups.
When a user selects a Viewing group from the left side, ProAct will populate the right side of the move list with all the Rostering Groups that are defined within the selected Viewing Group. When users create requests for a Viewing Group, ProAct actually creates the requests for all the Rostering Groups defined within the Viewing Group.

The Bulk Request option is not available for Viewing Groups that are not defined by Rostering Groups.

6.7 Roster Creation

ProAct offers multiple methods of Roster creation. The following table will help determine which method is right for each group.

6.7.1 Roster Creation Menu Buttons

6.7.1.1 Select Method:

Template: Used for self-rostering and computer assisted Roster creation.
Cyclical Roster: For fixed rotating Rosters.
Copy: Copies a prior draft roster to create a draft for this period. No adjustments from the prior roster are copied.
Optimiser Plus: Screens the work patterns to consider staff requests and creates an Optimised roster within the given constraints.

6.7.1.2 Roster Creation Parameters

Demand: Allows users to edit period and default demand.
Work Patterns: Accesses the default work patterns for a rostering group.
Optimisation Criteria: Sets advanced parameters for the Optimiser Plus process.
Batch File: Allows users to run rostering solutions previously batched for Optimiser Plus.

6.7.2 Demand

Demand is used for statistics in Roster reports, and for Over/Under staffing in Draft and Actual Rosters.

6.7.2.1 To Set up Demand:

1. From the **Main Menu** select **Rosters > Roster Creation**.

2. Click the **Setup** button in the Demand section of the form.
3. Two different types of demand are stored - Default and Period.
4. Enter staffing demand for each selected day and shift segment.

Note: When the Default Demand is selected, the screen will display the sequential number of days in the 28 day Period. When the Period Demand is selected, the screen will display the letter for the day of the week, and the actual dates within the selected Period.

6.7.2.1.1 Default Demand
One Default Demand can be entered for each Rostering Group (and can be adjusted as needed). It displays the normal staffing requirements. This should reflect the budgeted staffing for the Group. Default Demand should change only as a result of a management-level staffing decision.

6.7.2.1.2 Period Demand
Period Demand is optional and may be used on a period-to-period basis. If there is no Period Demand, ProAct will use the Default Demand.

Period Demand may be edited to reflect higher or lower than anticipated staffing requirements (such as during holiday periods or seasonal fluctuations in patient activity).

6.7.2.1.3 Using the Copy Option in Demand
The **Copy** function allows users to copy Demand figures **From** and **To** specific days.

1. Click the **Copy** button.
2. A form will open where users can enter the days **From** which to copy and the days **To** which to copy.
3. Click **Save** regularly.

If the demand varies across the days of the week, but each week is the same, the user may manually enter the demand for each day of the first week, and then copy the first week to the rest of the weeks. In each Roster creation method, the default demand is automatically copied to the period. Users are encouraged to review each period to ensure that their staffing requirements are adequate.

6.7.2.1.4 Group and Unit Staff Demand Summary
Hired Staff reflects the staff available, in terms of FTEs, for the selected Period. This figure is the sum of the Hired FTEs for all staff in the Request Screen, for the selected Rostering Group or the entire Unit. If Requests have not yet been entered and saved, no information will be displayed here.
Target H/UoS is calculated from staff FTE levels in requests, separated into direct and indirect based on hired shift. Projected H/UoS is filled in automatically based on the data entered in Units and Targets.

6.7.3 WORK PATTERNS
Access from the Main Menu: Rosters > Roster Creation.

6.7.3.1 Cyclical Roster
This method uses fixed rotating Rosters of up to 52 weeks in length. Employees belonging to a group that uses this Roster creation method should have Cyclical Roster saved in their Roster Plan in Staff Database Screen 2.

6.7.3.1.1 Setting up Work Patterns for Cyclical Rosters
Only staff with Cyclical Roster saved in SDB will be displayed in the Select Staff list.

1. In the **Roster Creation Method** form, click the **Assign** button under Work Patterns.
2. In the **Assign Patterns** form, click the **Add** icon in the Blocks section to select a Work Pattern Block from the Flexible Pattern Library.
3. The Assign Patterns section will be populated with the rotation pattern for the selected Block.
4. Use the **[…]** buttons to assign staff to specific patterns.
5. When all staff have been selected, click **Save**. **Close** to exit form.

With the Cyclical Roster method selected, the Roster will be created by assigning the corresponding Work Pattern to the staff members. Employee’s pattern assignment will be rotated in the selected Work Pattern Block for every subsequent Roster Period.

Note: The **Staff Check** button allows users to see a list of staff, from the selected group, that have Cyclical Roster assigned in their SDB Screen 2 Roster Plan, but do not have any pattern assigned in the **Assign Pattern** form.

6.7.3.2 Optimisation

See the Optimiser Plus Workbook for the setup for this roster creation method.

6.8 BULK ROSTER CREATION

Bulk Roster Creation offers a convenient method of creating Rosters for multiple groups. Users can create Rosters for multiple Rostering and Viewing Groups in one single creation process.

Rosters created by this method use the default Roster creation method for each Rostering group. Users can create Rosters for Viewing Groups as well, as long as these Viewing Groups are defined by Rostering Groups.

6.8.1 CREATING ROSTERS USING BULK CREATION:

1. Click on **Rosters > Bulk Options > Bulk Roster Creation**, and select the period.
2. Select the rostering groups for which Rosters are to be created, and click **OK**.

Note: When selecting groups, ProAct will open the standard move list. The move list can be filtered to see Rostering Groups and/or Viewing Groups. When a user selects a Viewing group from the left side, ProAct will populate the right side of the move list with all the Rostering Groups that are defined within the selected Viewing Group. When users create Rosters for a Viewing Group, ProAct creates the Rosters for all the Rostering Groups defined within that Viewing Group.

Bulk Roster Creation is not available for Viewing Groups that are not defined by Rostering Groups.
If a user tries to create a Roster for Rostering Groups that do not have Requests, ProAct will warn the user of the Rostering Groups that do not have requests. ProAct will give the user an option to either cancel the Roster creation process, or to continue with the selected groups.

If the user continues with the Roster creation process, ProAct will create request Rosters for the groups that do not have a Request Roster, and then it will create the Draft Rosters using the template method of Roster creation.

6.8.2 CREATING ROSTERS BY VIEWING GROUPS

This method is useful for users who manage multiple units and wish to create multiple Rosters at one time. Viewing groups can be set up (by the System Administrator) in such a way that they consist of the Rostering groups for which the user needs to create the Rosters.

6.8.2.1 To Create Rosters by Viewing Group

1. Click on **Rosters > Bulk Options > Bulk Roster Creation**, and select the period.
2. Check the **Show Viewing Groups** option and select the viewing groups for those Rosters which are to be created. The right side of the move list will be populated with the Rostering Groups included in the selected Viewing Group(s).
3. Click **OK**.

Users can create Rosters for only those Viewing groups that are defined by Rostering Groups. If a user wants to create a Draft Roster for a Viewing Group that has one or more Rostering Groups when a Draft or Actual Roster already exists, ProAct will prompt the user with the remaining groups that do not have Requests and/or Rosters created. The user has the option to cancel the Roster creation process by clicking **No**; otherwise ProAct will create a Draft Roster for all the remaining groups.

6.9 DRAFT ROSTER

Rosters can be edited and balanced in Draft Rosters using the standard functions for all Roster screens. A Roster can be created even if Requests do not yet exist.

ProAct will prompt the user if a Draft Roster does not exist for the selected group, and ask if the user would like to create one using the default method for the group. Clicking **Yes** creates a Request Roster, and a Draft Roster that the user can access via the **Draft Roster** button on the Home Screen, or via the Rosters drop-down in the **Main Menu**.

If a Viewing Group is defined by Units that have had Draft Rosters created for their respective Rostering Groups, then users will be able to open the Draft Roster for that Viewing Group.

Note: When a user opens the Draft Roster for a Viewing Group that has one or more Rostering Groups with an Actual Roster created, ProAct will not allow the user to make any changes to the Draft Roster lines of staff members who have a Finalised Roster.

If Roster-Link is enabled then **Leave Applications** will be imported into ProAct from an external system on a separate read only line coloured pink. To view the approval status and history right click with mouse on the leave code. Pending leave will display as read only on the Leave Application line. Approved leave will display in the Draft roster line and be coloured pink. Cancelled or declined leave will be removed from both lines and the days coloured pink on the Draft roster line. If you try to change or delete the Draft roster line a warning message 'You are editing a booked and approved leave code.' will display.

Quick Entry (QE on the top tool bar) allows the user to select codes to write or overwrite with one click in the roster. To activate, select a code and click the QE button (button turns yellow) - the highlighted code displays to the right of QE. Click the QE button again to deactivate the feature.

6.10 FINALISE ROSTER

The **Finalise** function converts a Draft Roster into an Actual Roster.

1. Click the **Finalise** button in the Draft Roster. **Would you like to create the Actual Roster for <Period> for <Group>?** is displayed. Click **Yes**. Would you like to Approve the Timesheets for <Period> for <Group>? is displayed. Click Yes or No. Or,
2. Select **Rosters > Finalisation.**
3. Choose a Roster period. Select the date (using the **Back** and **Forward** buttons).
4. Select whether or not to Print a list of groups being finalised.
5. Select whether or not to **Sign-Off Timesheets** for the Groups being finalised.
6. A Group move list will open. Select a group, or groups, using standard move list functionality.
7. Click on **Print** to print a report, or click on **Export** to save in another file application.

6.11 POSTED ROSTER

Once a Roster is finalised it becomes a Posted Roster. The Posted Roster is a snapshot of the Roster when finalised. The Posted Roster is Read-Only and can be selected from the Rosters menu (**Posted Roster**).

A Posted Roster report can be printed from the **Posted Roster** form via the **Print** button, or from the Reports menu (**Rosters – Posted**).

6.12 PUBLISH ROSTER

The **Publish** function allows a Roster at any stage (Request, Draft, or Actual) to be viewed by staff in BOSS.

1. Select **Rosters > Publish Roster**.
2. Choose a Roster period. Select the date (using the **Back** and **Forward** buttons).
3. A Group move list will open. Select a group, or groups, using standard move list functionality.

The menu item **Publish Roster** will have a check beside it, signifying that the Roster is now available for employees.

Users can also use the **Publish** button, while in Draft or Actual Roster, to publish that selected roster for the specified period in which the button selection was made.

Users who wish to print a list of published Groups can do so using the **Review Roster Status** form, found under **Main Menu > System > Maintenance > Review Roster Status**.

7 STAFFING

7.1 GLOBAL STAFFING

Access from the **Main Menu > Staffing**, or from the Home Screen.
The default date for Global Staffing is today's date. Users can choose a past or future date by entering it manually, or by using the **Back/Forward** arrows. An error message will be displayed if there are no Actual rosters on the selected date.

An interactive screen shows available staff in the Filtered Staff section on the left, and Unit Staff (all units with finalised Rosters) on the right. You may select multiple staff from the Filtered Staff list using CTRL/Shift.

7.1.1 FILTERED STAFF FIELD

All staff listed under Filtered Staff have their assigned Roster code for the selected day displayed in the **Shift** column. If the hours, start or end times of the Roster code were adjusted, the **Shift** column displays the Roster code and **'->>'** in the column to its right. A blank in the **Shift** column means no code was assigned.

The **Position** (or **Classification**) column always reflects the employee's **Primary Employment** (taken from Staff Database Screen 1). Users can click on the column heading to sort staff by Position, Name of Shift.

7.1.1.1 Setting up a Staff Filter

Staff can be selected and sorted via the filter icon next to the Filter drop down list.

1. On the **Setup** tab click the Filter icon to bring up **Setup Staff Filter** form.
2. Setup a new filter by clicking the **Add** icon in the **Select Filter** section.
3. Enter a name for the filter.
4. Choose **Pool**, **All** or selected Units by clicking the **[…]** button.
5. Choose **All** or selected Positions by clicking the **[…]** button, or select the Position **Consolidation** and Position Consolidation **Subsets** using the drop down lists.
6. Choose **All** or selected Hired Shift by clicking the **[…]** button.
7. Choose **All** or selected Hired Status by clicking the **[…]** button.
8. To filter by gender click on the **Gender** checkbox and select from the drop down list.
9. To filter by roster codes click on the **Codes - Show staff who have ANY of the selected codes or code types** checkbox and select from the following options, **Selected Codes** by clicking the **[…]** button, **Available** for staff who are not working, **Paid Time Off (NP)**, **Extra Cost (X$)** (e.g. allowances), **Days Off (NN)**, **Blanks/No Codes**, **Overtime (OP)**, **Overtime (OI)**, **Working-Direct (WP)**, **Working - Indirect (IP)**.
10. To filter by FTE select the checkbox and select from the drop down list from the following options, **Hired FTE**, **Worked FTE**, **Working Above H-FTE** or **Working Below H-FTE**. Select the FTE range **from** and **to**.
11. Choose between **Replace Existing Filter** and **Add to Existing Filter**.
12. Select **Run** to view the results in the Global Staffing screen.
13. **Save** and **Close**.

Additional filters are available.

1. Click on the **Additional** tab on the **Setup Staff Filter** form.
2. To filter by Skills select the **Skills** checkbox and select the Skills by clicking on the **[…]** button. Choose from the options **Staff with ANY of the selected Skills**, **Staff with All of the selected Skills** or **Staff with NONE of the selected Skills**. To exclude staff with specific Skills click on the checkbox **Exclude Staff with ANY of these Skills** and select by clicking the **[…]** button.
3. To filter by Staff Database Screen 4 types/subtypes select the **Due Date Reminders** checkbox and select the Subtype/s. Choose from the options **Staff with ANY of the selected Types/Subtypes**, **Staff with All of the selected Types/Subtypes** or **Staff with NONE of the selected Types/Subtypes**. Select the **Include staff if they have the SDB4 record even if it is Expired** to view staff with expired records.

7.1.2 UNIT STAFF FIELD

The Unit Staff grid shows units with a finalised Roster for the selected day/Rostering period. Users can pull staff members from the **Filtered Staff** list into the **Unit Staff** list, in order to assign them to a unit. The default staff selection is either **All Staff** or **On Duty**, depending on the user's last selection.

Selecting the **+** or **-** next to the unit name will expand or collapse the list. The expanded list will show the staff assigned to that unit, as well as their assigned Roster code and the length of their assigned shift. Users can set up multiple filters for Units in the Unit Staff section. This allows users to work with specific units for staffing changes. To create a filter, the user must have appropriate Security rights. Once set up, a user can switch between Unit filters by using the filter drop-down list (located to the right of Staff drop-down).
Note: If a user selects a filter that includes Units to which they do not have access, then those Units (as well as the employees working in those Units) will not be displayed under **Unit Staff**.

7.1.2.1 Setting up a Units Filter

Units can be selected and sorted via the **Order** icon located next to the Unit drop-down list.

1. Click the **Order** icon to bring up **Select and Order Units** form.
2. Set up new filter by clicking the **Add** icon in the **Select Option** section.
3. Enter a name for the filter.
4. Choose **All** or selected Facilities, Divisions, and Units by clicking on the **[…]** button.
5. Select Facilities, Divisions, and Units by moving them from the left side of the move list to the right side.
6. Selected Units can be ordered in the (right) **Ordered Units** section. Click and hold on Unit names to drag the units up or down in the desired custom order.
7. **Save** and **Close**.
8. Select the desired filter from the Order drop-down list. Units in the **Unit Staff** section will display in user's custom order.

7.1.3 SORT ORDER IN GLOBAL STAFFING

The **Sort By** option in the **Global Staffing** form allows users to sort Filtered Staff by the following options:

Hired Shift & Position
Last Name
Position & Hired Shift
Position & Roster Code
Roster Code & Position
Roster Code

7.1.3.1 Making Adjustments in Global Staffing

1. Select a staff member from Unit Staff or the Filtered Staff section.
2. Double click on the employee or click the **Adjust** button to pull up the adjustment form.
3. Make the necessary staffing adjustments. The adjustment window enables users to change the Unit, Group, Shift, Hours, Start and End times, Position, Note Type, and Note Detail.
4. Click on **Save**.

7.1.3.2 Floating Staff within the Unit Staff Field

1. Expand the units in Unit Staff by selecting the **+** icon to the left of the unit name.
2. Select the staff member to be floated.
3. Drag and drop the staff member into the receiving unit in the list of units in Unit Staff.
4. The adjustment window will open. Edit shift details and click **Save**.
5. Staff are then displayed in the Floated To unit.

7.1.3.3 Floating Staff from Filtered Staff into Unit Staff

1. Select a staff member listed in the Filtered Staff field.
2. Drag and drop this staff member into the receiving unit in Unit Staff.
3. The adjustment window will open. Enter the correct shift details and click **Save**.
4. The staff member is now visible in the unit that he or she has been floated to.

7.1.3.4 Staffing Gaps
The **+/- Gaps** button opens the Staffing Gaps module for the selected day, and allows users to compare Units' desired staffing plan with the number and skill mix of staff on duty, and displays the identified gaps (Over/Under staffing). For **Staffing Gaps**, see section 7.3.

7.1.3.5 Note Pad
A **Note Pad** button will open in the bottom left of the Global Staffing screen **only** if the selected employee has a note in their Staff Database record.

7.1.4 Using the Timesheet Button
Users can sign-off on timesheets from the Global Staffing form, using the **Timesheet** button.

In the **Global Staffing** form, if the user clicks on the **Timesheet** button, it will:

1. Open the **Timesheet View** form for selected staff, if the roster in the selected period is not finalised (or if the user has rights to view but not Sign-Off Timesheets).
2. Open the **Timesheet Sign-Off** form for selected staff if the roster in selected period is finalised, and the user has rights to Sign-Off Timesheet.

For **Sign-Off: Timesheets**, see section 9.1.1.

7.2 Communications Module (Global Staffing)
The Communications Module in Global Staffing provides managers with several methods by which they can contact staff.

7.2.1 Contacting One Person – Communication Form
Click on the hyperlink **Phone**, in the **Global Staffing** form, to open the **Communication** form. The form displays contact information from the Staff Database. The data displayed is set up by the System Administrator via the **Communications Setup** form.

The **Communication** form gives the ability to select which phone number to use, from the Staff Database, and which method of contact to use for the selected employee. Users may choose to use SMS to contact some employees and use Email or BOSS Messages for others, depending on individual circumstances.

If any of the connection methods are not activated, they will be greyed out, and users will not be able to use them.

7.2.2 Message for SMS and Email

7.2.2.1 Individual Message for SMS and Email
To Send a Text Message:
1. In the **Global Staffing** form, select the desired employee and click the **Phone** hyperlink (located in the bottom left corner).
2. The **Communication** form for the selected employee will open.
3. In Section 1 of the form, select the phone number to be used for text messaging (The number could be a mobile number, a number specially identified for SMS/text messaging, or a number marked with a check mark in the SMS box in Staff Database).
4. In Section 2, select relevant communication method – SMS or email.
5. Type in the desired message, or, select a template message saved previously via the **Select Message** button (See the Default Messages section for more information regarding templates).
6. For SMS, users can select the 'Add Date Tag' checkbox and select a identify the roster date for the message. This is an optional date field that can be used to filter for messages sent and the replies by the date entered.
7. Click the **Send** button, after finishing the typing and editing of the message.
8. ProAct has a character counter that counts the number of characters in the composed Text message. The message may be up to 160 characters.

7.2.2.2 Group Messages for SMS, Email, and BOSS:

To send a group SMS, email, or BOSS message from Global Staffing:

1. In the **Global Staffing** form, click on a staff member in the Unit Staff field within the unit to send an SMS message to, or, select the Unit name, and then click on the **Messages** button.
2. The **Group Message** form for the selected Unit will open. Select the appropriate phone/communication type.
3. In Section 2, select the relevant communication method – SMS, Email with replies to or BOSS.
4. Type in the desired message, or select a template message saved previously via the **Select Message** button (for **Default Messages,** see section 7.2.2.3).
5. Click on the **Staff** button to select the staff members in the group to which to send messages to.
6. For SMS, users can select the 'Add Date Tag' checkbox and select a identify the roster date for the message. This is an optional date field that can be used to filter for messages sent and the replies by the date entered.
7. Once recipients are selected and the message has been typed, click the **Send** button.
8. ProAct will provide a list of recipients who do not have e-mail addresses after the message has been sent.
9. If **Home Phone** is selected in Group Messages, a form will list those employees with empty or invalid phone numbers.
10. ProAct will display a warning message if more than 30 employees were selected to send text messages to.
11. ProAct will also display a progress bar when sending text messages.

Note: If the user selects **Email with replies to** as the communication method, email replies will go to the **Default** address (set up by the System Administrator). To direct replies to another email address, click on the **Alternate** radio button and enter the email address and/or subject line in the 2nd section of the **Group Messages** form. ProAct will remember the Alternate email address and subject line for each user. To return to the default email address and subject line, click on the **Default** radio button.

7.2.2.3 Unit and After Hours Cover Messages for:

To send a Unit SMS from Global Staffing:

1. In the **Global Staffing** form, click on the Unit in the Unit Staff field then click on the **Messages** button.
2. The **Group Message** form for the selected Unit will open.
3. In Section 2, SMS/Text Message will be automatically selected.
4. Type in the desired message, or select a template message saved previously via the **Select Message** button (for **Default Messages,** see section 7.2.2.3).
5. For SMS, users can select the 'Add Date Tag' checkbox and select a identify the roster date for the message. This is an optional date field that can be used to filter for messages sent and the replies by the date entered.
6. ProAct will display a progress bar when sending text messages.

To send an After Hours Cover SMS from Global Staffing:

1. In the **Global Staffing** form, click on the Unit in the Unit Staff field then click on the **Messages** button.
2. The **Group Message** form for the selected Unit will open. In Section 1, select the Unit for the After Hours Cover option.
3. In Section 2, SMS/Text Message will be automatically selected.
4. Type in the desired message, or select a template message saved previously via the **Select Message** button (for **Default Messages,** see section 7.2.2.3).
5. For SMS, users can select the 'Add Date Tag' checkbox and select a identify the roster date for the message. This is an optional date field that can be used to filter for messages sent and the replies by the date entered.
6. ProAct will display a progress bar when sending text messages.

Note: A Unit needs to have a mobile phone number assigned to it for this feature to work. Please contact your System Administrator to discuss the configuration.

7.2.2.4 Default Messages

The Default Messages are called up via the **Select Message** button in the **Communication and Group Messages** forms. This function allows users to add and edit default messages in the SMS/Email/BOSS text box. For **Default Messages Setup**, see section 7.7.

7.2.3 USING DEFAULT MESSAGES

7.2.3.1 Default Messages in the Adjustments Form

The **Messages** button is used to bring up the Communication module via Adjustments. The Default message will automatically replace default values with the values from the selected adjustment line. Once the message is displayed in the Message text box, users can edit it before sending.

Note: The default messages have a 160 character limit. The number of characters typed are counted and displayed below the message in the **Communication** form text box.

7.2.3.1.1 Step-by-Step

1. Select **Staffing > Global Staffing**.
2. Double-click on an employee's name to call up the employee's adjustments form.
3. If an Adjustment form has more than one line, click on the line to be used for text messaging.
4. Click on the **Messages** button.
5. The **Communication** form opens. Choose the SMS option, and click **Select Message**.
6. Select a default message template and click **OK**. The relevant default values (for example, Unit and Hours) will be automatically filled in with the values from the selected Adjustment line.
7. Edit the message as necessary in the Message text box.
8. Click **Send** when finished.

7.2.3.2 Default Messages in the Global Staffing Main Screen

7.2.3.2.1 Step-by-Step

1. In the **Global Staffing** form (in either the Filtered Staff or Unit Staff fields), select the desired employee and click on the **Phone** hyperlink, located in the bottom left corner.
2. The **Communication** form for the selected employee will open.
3. In Section 1 of the form, select the phone number to be used for text messaging.
4. In Group Box 2 select relevant communication method - SMS or Email.
5. Click on the **Select Message** button to select a template message.
6. Any default values in the template need to be filled in manually.

   Example: General Hospital confirming **Mary Jones** for **Monday 10/03/2011**, shift **A2** starting **0700**.

   In the above example, the data that is in bold text is manually entered by the Rostering staff, and the text that is not in bold is generated by default.
7. Click **Send** when the typing/editing of the message is complete.

7.2.4 PULLING STAFF INTO FILTERED STAFF USING THE FILTER OPTION

To display staff in the Pool Staff window, select the **Filter** icon located in the Filtered Staff field. Before a filter is created, the drop-down list will display <No Staff>.Users can set up multiple filters to display employees in the Filtered Staff section. Staff displayed in the Filtered Staff field are determined by the selected Filter criteria.
To switch between filters, click on the Filter drop-down list and select the desired filter.

Setting up a Filter:

1. Click on the **Filter** icon located in the Filtered Staff field.
2. Select the following in **Section 2 Which**:
3. **Units: Pool** - Displays all staff members that belong to a Pool Unit (a unit with **Pool** option checked in the Units Code and Reference Table). OR **All** or **Selected** – Displays all employees hired to All or Selected Units.
4. **Positions: All** or **Selected Positions OR Consolidations:** Displays employees that have Positions that are defined in the selected Position Consolidations and Subsets.
5. **Hired Shift:** Displays **All** or **Selected** employees with the Hired Shift code.

6. **Hired Status:** Displays **All** or **Selected** employees with the Hired Status code.
7. Select the following in **Section 3 How - FILTER For**:
8. **Gender:** Allows filtration of staff by gender. To select, check the **Gender** box and select **Male** or **Female** from the drop-down list.
9. **Skills:** Allows selection of a skill or set of skills. Staff appear in the Filtered Staff field if they have the selected skills in their Staff Database. Select radio button to **Show staff with ANY of the selected skills**, or to **Show staff with ALL selected skills**.
10. **Filter By Codes:** Set up the filter to display only staff that have the selected code types. Check box to **Filter for Codes**, and select the types that will appear in the filter.
11. **Filter By FTE:** Allows a choice between Hired FTE, Worked FTE, Working Below H-FTE and Working Above H-FTE, with a user-definable range.
12. Choose **Replace Existing Filter** (with staff falling under new criteria), or to **Add to Existing Filter**. Click **Save** to save new filter.

7.2.5 REPORTS IN GLOBAL STAFFING

The **Print** button allows user to run several reports from within the **Global Staffing** form.
Unit Comments: Comments entered for a day, or shift, that relate to staffing for individual units.
Audit: Roster Changes: Shows Roster changes made in ProAct for a day or date range.
Sign-In Sheet for Staff Movements: Shows where pool staff are assigned.
Communications: Shows the messages sent via the different modes and replies for SMS.
Whose Turn: Shows whose turn it is to be rostered for a particular shift (e.g. to work an **on-call** shift).

7.3 STAFFING GAPS

Access from the **Main Menu: Staffing**, or, click on the **Staffing Gaps** icon on the Home Screen.

The Staffing Gap module compares the Unit's desired staffing plan with the number and skill mix of staff on duty, and displays the identified gaps (Over/Under staffing).

7.3.1 TO VIEW A UNIT'S GAPS IN STAFFING SKILL MIX:

1. Open Staffing Gaps, and select either a saved setup or create a new setup.
2. Select the Roster period and Unit(s). Select units that have Staffing Guidelines set up.
3. Select the available position consolidation, and select the shifts for which to track the staffing levels.
4. Choose any of the three options below:

Staffing Gaps: This will display the **Gaps** in the staffing levels between what is on the Actual/Draft Roster, and what has been planned on the Staffing Guideline. A negative value (displayed in bold red) on a given day indicates that the staffing mix of the Actual Roster does not meet the Staffing Guideline setup for the selected unit, and, conversely, a positive value indicates over-staffing. A blank value indicates that the staffing mix on the Actual Roster has met the planned staffing mix.

Staffing Plan: This will display the default Staffing Guideline setup for the selected Unit (for the selected position consolidations), over the selected period of time, across the selected shift segments.

Staffing Detail: This will display the Actual Staffing, Staffing Gaps and Staffing Plan for the selected Unit (for the selected position consolidations), over the selected period of time, across the selected shift segments.

Select **Shifts** or **Custom Times**.

5. Check **Use Draft if there is no Actual Roster** to use the Draft Roster for Groups which have not yet finalised their Roster. Click **Run**.
   Note: If a period is selected where no Draft roster has been created and there is no saved Staffing Plan, the Position Consolidation Set and Subsets from the default Staffing Guidelines will be shown and can be changed on the Options form. The user can change the Staffing Plan (manually or use the Update button) for that period. When the draft roster is created, it will not override the saved changes. If the Staffing Plan is not saved for this future period and the user later pulls up these dates, the current default Staffing Plan will be displayed.

7.4 FULL ROSTER

Access from the **Main Menu: Staffing > Full Roster**, or click the **Roster** icon in Global Staffing.
If accessing Full Roster from Global Staffing, click the **Roster** icon to view the employee's **Full Roster** in the selected period.

1. Click on **Full Roster** in the **Main Menu** Staffing drop-down; Staff Move List will open.
2. Selected desired staff and click **OK**.
3. **Full Roster** will display rosters for the selected employees for the current period.
4. Type Roster codes directly into the Roster grid, or click the **Adjustments** checkbox to make adjustments.
5. Click in the checkbox to **Show Staff information on the First Day of the Roster Period**. Data displayed includes: Employees Hired-to Unit and Position, Employee ID, M#, Hired Shift, Rotation (if set up), Phone and Skills.
6. Use icons in the **Full Roster** form to:
   View employee's **Previous** or next roster

Open **Staff Database**
Check employee **Accruals**
View employee's **Timesheet**
Print a **Violations report**
Filter staff
Lookup Roster codes

7. Click **Save** and **Close** after making changes.

7.4.1 FULL ROSTER FROM GLOBAL STAFFING

If accessing Full Roster in Global Staffing, the Roster will display for the selected employee only.

1. Select an employee from either Filtered Staff or Unit Staff field.
2. Click the **Roster** icon to view the employee's Full Roster in the selected period.
3. Click **Save** and **Close** after making changes.

In **Full Roster**, if the user clicks the **Timesheet** button, it will:
Open the **Timesheet View** form for selected staff if the user only has rights to view Timesheets but not Sign-Off Timesheets).
Open the **Timesheet Sign-Off** form for selected staff, if the roster in selected period is finalised and the user has rights to Sign-Off Timesheet.

7.5 UNIT COMMENTS

Access from **Main Menu: Staffing > Unit Comments**.

7.5.1 Creating a Comment that Relates to a Unit for a Day or Shift

1. Click on the **Comments** button in the toolbar of Global Staffing, or open it from the **Main Menu: Staffing > Unit Comments**.
2. Select the unit and click **OK**.
3. Click on the tab for All, AM, PM or Night shifts, depending on when the comment applies.
4. Type the desired comment.
5. Unit Comments are displayed in the field below the Unit Staff section. The Shift which has a Unit Comment will appear in bold font.
6. To add a Staffing Note, click on the **Add** icon and select a note from the drop-down list. Enter additional text into the Detail field if desired. To delete a note, click the **Delete** button.
7. Click **Save**, and **Close**.

7.6 UOS ENTRY

Access from the **Main Menu: Staffing > UoS Entry**, or click the **UoS** icon in Global Staffing.

7.6.1 OVERVIEW - UNITS OF SERVICE (UOS)

Unit of Service is the generic term for patient activity or service levels, which can vary across units and departments (e.g. patient days, emergency visits, sessions, deliveries, and procedures).
UoS functionality consists of three components:

1. **Defining** UoS in the UoS Code and Reference Table.
2. **Assigning** UoS to be tracked for each unit in the Units Code and Reference Table.
3. **Reporting** UoS in a variety of reports.

7.6.2 UOS ENTRY SETUP OPTIONS

7.6.2.1 One Unit – Multiple Days

1. Select UoS Entry from the **Main Menu**, or click the **UoS** button in Global Staffing; the **UoS Entry Setup Options** form will open.
2. Select **One Unit – Multiple Days**.
3. Select a unit from the drop down list.
4. Date range will display today's date by default. If called from Global Staffing – current Global Staffing date will be used as the default date. Change dates to the desired range.
5. Click **OK** to open **UoS Entry** form.

7.6.2.2 Multiple Units – One Day

1. Select UoS Entry from the **Main Menu**, or click the **UoS** button in Global Staffing; the **UoS Entry Setup Option** form will open.
2. Select **Multiple Units - One Day.**
3. Date will display today's date by default. If called from Global Staffing, current Global Staffing date will be used as default. Change the date as required.
4. To select and save multiple unit setups, click **Options** next to the drop-down list.
5. The **Select and Order Units** form opens.
6. Click the **+** icon in the left section of the form to save a new set of units, or go to step 8 to run the UoS without saving the unit setup.
7. Enter desired set name in the Name field.
8. Choose to include either **All** or **Selected** Units in setup.
9. Open the Ordering Units move list using the **[…]** button
10. Select Units from the left side (**Available Units**) - double-click them, or use the **Select** button.
11. On the right side of the move list (**Ordered Units**), sort selected units as desired; click and hold the selected unit to drag it up or down. This is the order the units will appear in the **UoS Entry** form. Click **OK** when finished.
12. Click to **Save** the new Units setup, or click **Run** to open the **UoS Entry** form without saving.
13. Click **Close** to return to the **Setup Options** form, choose a unit set from the drop-down list, and click **OK** to open the **UoS Entry** form.

7.6.3 UOS DATA ENTRY

7.6.3.1 One Unit - Multiple Days

1. The **UoS Entry** form displays the selected Unit in the form header and the drop-down list at the top of the form. Use the drop-down list to select a different Unit directly from the **UoS Entry** form. The form columns display:

   Date: The selected dates.
   DoW: The corresponding day of the week.
   Calc: The UoS calculation method, either sum or average, for the selected unit (set up in **Codes and Reference Tables -> Units**).
   Primary UoS: The first UoS column is in bold, and is the Primary UoS used in calculating HPPD.
   UoS Columns: All UoS columns are set up by unit in the Codes and Reference Tables.

2. Enter the patient activity for each day.
3. To delete a UoS entry, click in the cell and click the **X Delete** icon. Click **Yes** in the **Are you sure you want to delete UoS Data?** message.
4. Click **Recalculate** to Calculate the entered UoS for the **Selected** row (day), or for **All** rows (days).
5. Click **Save** to recalculate and save data.

7.6.3.1.1 Other UOS Entry Form Functions

Change the date range: Click the **Period** icon. The form will display the new date selection.
See Deactivated UoS: Check the box in the bottom left of the form.
Revert: This button will revert any changed data to the last time the form was saved.

7.6.3.2 Multiple Units – One Day

1. The **UoS Entry** form displays selected Units in rows, based on the chosen order.
2. The **UoS entry** columns will display for UoS based on the Units UoS set up in the **Codes and Reference Tables > Units**. The first UoS column is in bold, and is the Primary UoS used in calculating HPPD.
3. Enter the patient activity for each unit.
4. To delete a UoS entry, click in the cell and click the **X Delete** icon. Click **Yes** in the **Are you sure you want to delete UoS Data?** message.
5. Click **Recalculate** to calculate the entered UoS for a **Selected** row (Unit), or for **All** rows (Units).
6. The **Calc** displays the calculation method set up for each unit in CaRT – either Sum or Average.
7. Click **Save** to recalculate and save data.

7.6.3.2.1 Other UOS Entry Form Functions

Change the date: click the **Day** icon.
Select from sets of other pre-saved Units: Use the drop-down list in the top right of the form.
Create a new list of Units: Click the **Options** icon. Refer to set up steps above.
See Deactivated UoS: Check the box in the bottom left of the form.
Revert: This button will revert any changed data to the last time the form was saved.

7.6.3.3 Recalculate

Units may be set up to calculate either the sum or the average of UoS data. For example, Emergency Departments may track the number of visits on each shift. The primary UoS would be the total of the shifts. Other departments may average the number of patients for each shift. The **Calc** column displays the calculation method - Sum or Average – for each unit's UoS. Clicking the **Recalculate** icon will calculate the Primary UoS based on the calculation method. The Primary UoS is calculated automatically if the **UoS** form is saved or closed without entering the primary UoS value.

7.6.3.4 Closed Units

1. Click on the appropriate Unit or date, and then click on the **Closed** icon.
2. **<closed>** will show in all the UoS fields for the selected row, to indicate that the unit is not open, and that there have been no patients all day.
3. To change a cell back from closed to open, place the cursor in the appropriate cell and press the **Delete** key on the keyboard, or click the **Delete** button.

7.7 Default Messages Setup

Access from **Main Menu: Staffing > Default Messages Setup**.

Setting up default messages allows users to save message templates that can then be used to Email, SMS or BOSS message employees, in order to assist management in filling staffing needs.

The **Setup** form is divided into three sections; **Group Messages** (on the left), **Templates** (top right) and **Messages** (bottom right).

7.7.1 Setting up Default Messages

7.7.1.1 Group Messages

1. The **Group Messages** section saves default messages that users can use for group SMS or group Email in Global Staffing.
   For example, Maternity needs Night shift tomorrow, if interested please call 12223333.
2. To add a default message, click on the **+** icon in the right corner of the Group Messages header.
3. The text box at the very bottom will be blank. Type in message and click **Save**. The message will appear in the Group Messages list, and can be used to message staff.

7.7.1.2 Messages Using Templates

1. The **Messages** section saves default messages that can be used for individual employees as well as for a group.

2. The **Templates** section uses the following **default values** that then get replaced with the selected values in staffing Adjustments:

   [A] - Last Name
   [B] - First Name
   [C] - Day of Week
   [D] - Date
   [E] - Shift Code
   [F] - Start Time
   [G] - End Time
   [H] - Hours
   [I] - Unit

3. To add a default message using templates, click on the **+** icon in the **Messages** header. The text box below will appear blank.
4. Type in message, and double-click on the appropriate default value in the **Templates** section to insert it into the message.
5. A default message might look like this: **Shift [E] needs to be filled for [C], [D], from [F] to [G]**.
6. Click **Save**; the default message will be saved in the list of **Messages**, and can be used to message staff.
7. When using this message in Global Staffing Adjustments, the message default values will be filled in by the selected values.

For example: Shift **D** needs to be filled for **Monday**, **14 February**, from **7:00** to **11:00**. See section 7.2.3, (**Global Staffing**) **Using Default Messages**, for more information.

7.8 Review Staff Replies

Access from **Main Menu: Staffing > Review Staff Replies**.

Review Staff Replies is a module used with SMS group messaging. It allows users with security rights to view staff replies to SMS messages sent from Staffing. The form will show <Unknown Character> when an emoji is sent.

7.8.1 Setup Options

1. Select **Review Staff Replie**s from the **Main Menu > Staffing**; **Staff Replies to SMS/Text Options** form will open.
2. **Replies Received** specifies a date range to view staff replies for. Select the 'Date Tag' checkbox to filter replies by the date tag entered when the message was sent.
3. Filter to **View by** either **All** or **Selected** Units, Staff, and Positions.
4. Click **OK**; **Review Staff Replies** form will open for selected options.

7.8.2 Reviewing Replies

1. Staff replies will display with: Name, Hired Unit and Position, Date Tag, Date/Time Sent, Message Sent, Date/Time Reply, Staff Reply, and Comments.
2. To leave a Comment, select the Reply to be commented on, and type in the **Comments** text box at the bottom of the form.

For example, if an employee replied, Yes, I can come in at 7:00 for a 4-hr shift, the Staff Comment might be, Confirmed for D shift from 700-1100.

3. To delete a staff reply, select the appropriate row, and click the **X Delete** icon in the top left of the form. Click **Yes** to the **Are you sure you want to delete Message?** warning.
4. The **Call** icon allows users to contact the employee via a **Communications** form.
   For **Communications Module in Global Staffing,** see section 7.2.
5. Use the **Print** icon to print the full list of Staff Replies, or to **Export** the list to excel.

8 REPORTS

Access from **Main Menu: Reports**.
ProAct stores a wealth of data that can be organised in user-definable reports and memorised for ongoing reporting. All reports are listed under categories (such as **Rostering**) in the Reports menu. The submenus display the reports in alphabetical order.
Select **All Reports** to view the list of all available reports in alphabetical order.

8.1 SECURITY

Each report is security-protected to determine which users have rights to run it. Some reports also restrict who can save or delete memorised reports. Buttons are greyed out (deactivated) for users who do not have the necessary security rights.

In order to view or print a report, individual users or User Groups must be given rights to access reports. Each report is listed separately under the Reports section of Security.

When users view **All** reports, they see only the reports for which they have security access.

Users who have rights to access a report can change the criteria, as well as run, preview, and print the report, but they may be prohibited from saving or deleting memorised reports (based on security settings).

Some reports display **Hourly Rate** and **Dollars**. If users are security restricted from seeing hourly pay rates, they will be unable to view or print reports that display individual pay rates. Other reports may display data that is security protected, such as Note Pad entries, or specific Staff Database 4 and 5 Types. Users who are security restricted from seeing such data cannot run reports on the restricted data.

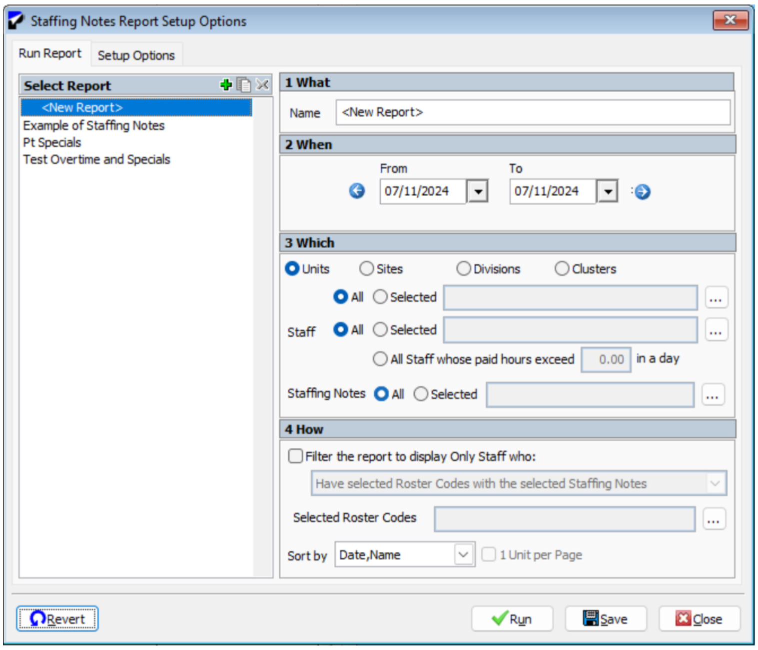
8.2 DESIGNING REPORTS

Although reports may contain different criteria and data elements, there is a pattern to the way reports are created. Reports may have one or more tabs to set up, and can be configured to run memorised reports. Reports with the most configurations have up to 3 or 4 tabs. Below are common set up options to select the report criteria.

8.2.1 NAMING MEMORISED REPORTS

Access via **Main Menu: Reports > All Reports > Run Report**. On the left side of the form is a list of memorised reports with three icons in the **Select Report** header. The icons are greyed out if a user does not have rights to **Save** or **Delete** memorised reports.

Add: To add a new report, click on the green **+** icon, and type the name of the report in the section labelled **1 What**.
Copy: To copy existing report criteria, click to highlight the desired report and then on the **Copy** icon. Enter or edit to create a new report name.
Delete: To delete a memorised report, select the desired report and then click on the red **X** icon.



8.2.2 Dates

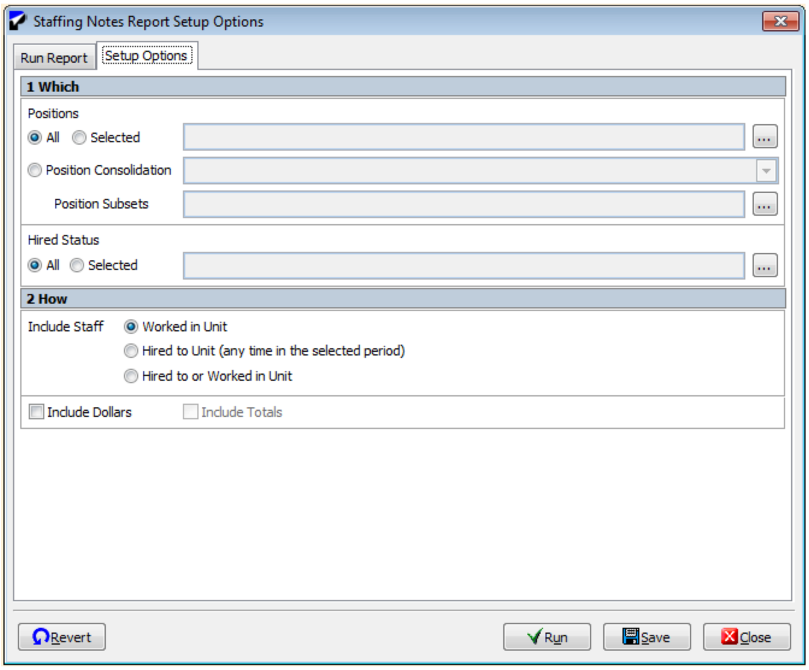
Most reports have a section labelled **2 When** where users can select a date or date range that ProAct will use to pull the desired data. Clicking on the down arrow on the right of the date entry box pulls up a calendar to select a date. Many reports also have blue arrows to the left and right of date entry boxes that move the dates to previous or future Roster periods.

8.2.3 Data Elements

In section **3 Which**, users can select and filter the report for data elements that are relevant to it; such as Units, Groups, Positions, Position Consolidations, Staff, Roster Codes, Hired Status, and other criteria (such as Staffing Notes, in the case shown above).
The **All** radio button is active by default, and users can select the unit or staff when the user runs the report. This eliminates the need to create a report for every unit, which would lead to a long list of reports.

In most reports, **All** will pull all active data, such as all hired staff or all active units. To show terminated staff or deactivated units, click on the **Selected** radio button; on the Staff or Unit move list, click on the box to **See Terminated Staff** or **Deactivated Units**, and then move all staff to the right.

Some reports have a second tab with additional criteria that is not normally changed by the average user, and may require a more advanced understanding of ProAct. For example, a memorised report on Medical Staff overtime would be filtered for Medical Staff positions who **Worked in Unit**. A report on Nursing Sick leave would be filtered for Nursing positions in the **Hired to Unit**, because sick leave is usually charged to the home/hired unit.

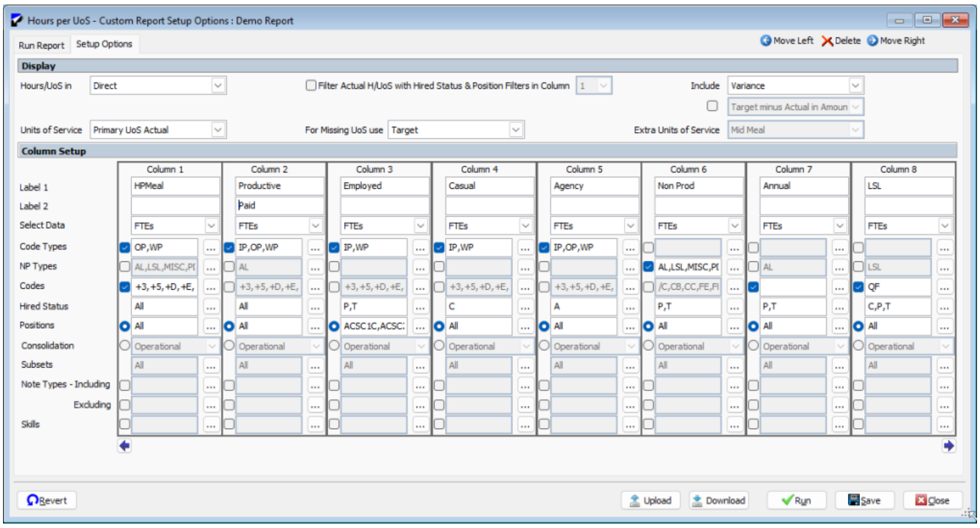


8.2.4 Choosing How Reports Display

Many reports include a **How** section that allows users to change how the data is sorted on the report; whether to include additional data in footers, blank lines, and a variety of options that are specific to the selected report.

A few reports allow users to determine what data is shown in each column. The setup for these reports can be more complicated. As a result, such reports are usually set up by the System Administrator.

The **Hours per UoS - Custom Report** is an example of a report where the column header and data in each column is defined by the user, from the available options.



8.2.5 Creating Memorised Reports

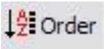
PolyOptimum strongly recommends that users create and save memorised templates for reports, and **NOT** reports that are unique to each unit.

Report names can be generic, serving to explain each reports purpose, such as **Absentee Monitoring**. Rosters can be memorised, with template names such as **Draft Rosters** and **Draft Rosters + Start/End Times**.

When memorising templates, multiple users can run the same report after selecting the unit, dates, and whether they want totals or codes shown in the footer, etc.

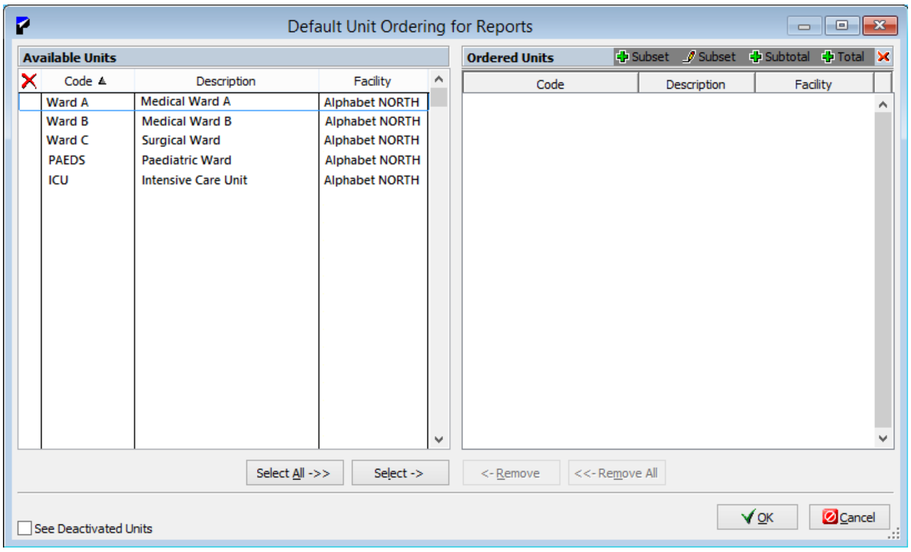
8.3 Unit Ordering and Totalling

Access from the **Main Menu: Reports > Manage ProAct Reports > Default Unit Ordering for Reports**
System Administrators can set up default unit ordering to be used by all reports.



Some reports display the **Order** icon. This allows unit ordering that is specific to the memorised Report; otherwise the Default Unit Ordering for Reports will be used.

8.3.1 Default Unit Ordering for Reports Setup Options



1. All units are listed on the left side (**Available Units**), and can be moved to the right (**Ordered Units**) using the **Select** buttons.
2. In the **Ordered Units** section, each unit can be moved by clicking and holding to drag up or down to the desired location.
3. There are 5 icons in the Ordered Units Header:

: Click to add a Subset of units with a custom name.

: Click to edit Subset name.

: Click to add a subtotal of the above units (up to the previous Subtotal or Total).

: Click to add a Total of all units above (up to the previous Total).


: Click to delete highlighted Subset, Subtotal, or Total.

Note: Subtotals and Totals can be moved by dragging up or down.

8.4 Exporting Reports to PDF or Excel

All ProAct reports can be exported to PDF or Excel for further manipulation. A few reports can only be exported to Excel because the volume of data exceeds the constraints of the report layout. When selecting to **Run** the report, a **Print** form will open.

1. In the **Export** section select either **PDF** or **Excel**. Select to **Fit All Columns on One Page** for Excel, this will be automatically selected for **PDF**.
2. Click the **Export** button in the lower left of the form. Data will export to the selected format.
3. Browse to a designated directory for reports.
4. **Save** the export file.

8.5 Staff Database Export

Access from **Main Menu: File > Export Staff Database Fields**, or click **Export** icon in any SDB screen.

In addition to a variety of reports that pull and filter data from the Staff Database (SDB), ProAct provides the ability to select SDB data, and to determine the ordering of columns when exporting to Excel.

For instructions on running **Export Staff Database to Excel**, see section 4.1.

8.6 Report Highlights

8.6.1 Code and Reference Tables (CaRTs) and Code Lists

All of the Code and Reference Tables have reports that list Codes and other relevant details.

Simple CaRTs may have only a Code List report. More complex CaRTs may have both a simple Code List report (designed for standard users), and a CaRT report that includes setup criteria (for System Administrators).

CaRT	Code List	CaRT Report
Accrual Types	X	
Clusters	X	
Divisions		X
Facilities	X	
Favourite Codes	X	
Groups	X	X
Hired Status	X	
History Definable Fields		X
Holidays		X
Languages	X	
Non-Productive Types		X
Note Types	X	X
Pay Groups		X
Positions	X	X
Roster Codes	X	X
Skills	X	
SDB 3 Types	X	
SDB 4 Types		X
SDB 5 Types		X
Team Roles	X	
Termination Reasons	X	
Units	X	X
Units of Service	X	
UoS Assignments		X
Violations		X

8.6.2 General ProAct Reports

Accruals
Leave Accrual balances for individual staff.

Actual Hours
Actual Roster codes, hours and start/end times for individual staff.

Annual Planner PTO Targets
Paid Time Off (PTO) targets (if they have been created for a group's Annual Planner).

Associated Codes
Track any roster codes that exist in conjunction with other codes.

Attendance Patterns
Employee work record with the option of seeing requests and actual rosters highlighting overtime, sick leave, or other absenteeism; comparison of requests and worked shifts on holidays or other selected dates over several years.

Audit Annual Planner Changes
Audit of changes to Annual Planner, along with a record of the user who entered the changes, and date/time of entry.

Audit BOSS Adjustment Messages
Audit of Adjustments for which messages were sent to BOSS users. A record of the BOSS user, the user who sent the message, the date/time of entry and the details of the code in the Adjustment line.

Audit CaRT Changes
Audit trail of changes to the Code and Reference Tables (CaRT), along with a record of the user who entered the changes, and date/time of entry.

Audit Codes
Audit trail of selected codes, along with a record of the user who entered the codes, and date/time of entry.

Audit Deleted Rosters
Audit trail of users who erased and deleted specific Rosters.

Audit History Changes
Audit trail of changes made to the Staff Database History file, with the user and date/time of change.

Audit Roster Changes
Audit trail of changes made to Rosters (including erased rosters), with the user and date/time of change, including filters for post cut-off changes, and staff making changes to their own Roster.

Audit SDB 1 and 3
Audit trail of changes made to the Staff Database Screen 1 (Key Information) and Screen 3 (Contact Information).

Audit SDB 2
Audit trail of changes made to the Staff Database Screen 2 (Roster setup data).

Audit SDB 3
Audit trail of changes made to the Staff Database Screen 3 (Contact Information).

Audit SDB 4 and 5
Audit trail of changes made to the Staff Database Screen 4 (Due Dates), and Screen 5 (Education, Orientation).

Audit Staff History Integrity
Data inconsistencies in the Staff Database History file.

Audit Staffing Plan Changes
Tracks users making changes to the staffing requirements for individual days in the Staffing Plan after the Draft or Actual roster is created. (Does not include changes to Staffing Guidelines that serves as the default Staffing Plan).

Audit Timesheet Sign-Off
Audit trail of timesheets sign-off, with the status, user, date/time of signoff, BOSS confirmation detail and checkbox to include Unit Description in the export.

Audit Trail
Audit trail of login/logout to ProAct, and access to specific modules, Roster groups, and Roster periods.

Breakdown by Day of Week
Breakdown of codes and their use by day of week.

Breakdown by Position
Data and graphs of selected Roster codes in hours, FTEs, and/or dollars broken down by position or position consolidation (for periods or trends).

Breakdown by Time of Day
Breakdown of actual hours into twenty four one-hour segments.

Code Analysis
Hours, FTEs, and/or dollars for specific codes.

Communications
SMS/Text Messages sent to staff from ProAct users, as well as their replies, emails and BOSS (including BOSS to BOSS) messages.

Cost and Hours
Allows the user (usually the System Administrator) to define columns in the report, filter the data, and display it in dollars, hours, or FTE.

Cost by Individual
Cost for individual staff members based on ProAct costing differentials (not payroll payments).

Daily Code Occurrences
An alert for daily monitoring of practices such as overtime codes across all units, or absenteeism in a department.

Demand
The number of staff required when creating Rosters.

Duplicated Roster Entries
Allows the user to review duplications of roster codes in the first line of Actual Rosters, to edit/remove the duplications if necessary.

Finalisation Status
List of Rostering groups and whether the Roster has been created, finalised/posted, and published for the selected period.

FTE - Actual
An extract of FTE and working hours by Position/Position Consolidation (for specific Roster Code Types, Hired Status, and Non-Productive Types), that is exported in a CSV or Excel format.

FTE – Detail by Cost Centre
Hours and dollars per Unit of Service, along with FTE and/or Hours, broken down by Hired Status and Non-Productive Types, compared to budget.

FTE - Detail by Status
FTEs of rostered staff, broken out by Hired Status (employment type).

FTE – Detail for Non-Productive
FTEs of non-productive time (leave hours taken).

FTE – Hired vs. Actual
Comparison of a unit’s Hired FTE with the FTE rostered and actually worked for each M#, for each employee, to identify if staff are working to their contracted FTE.

FTE – Summary
A summary of FTE broken into productive, non-productive, overtime, and extra hours, with a percentage variance, compared with budget targets.

FTE - Variable
Similar to the Custom Hours/UoS report, but with FTE instead of HPPD; also allows users to count FTEs based on the Hours per FTE in the Pay Groups CaRT when they differ from the system setting (e.g. 38 hours for nurses, 40 hours for doctors). Variance is available when Target is selected.

FTE and Dollars by Position
FTE and cost broken out by position or position consolidation.

Hired Positions
List of Positions hired during the selected time period.

Hours by Mixed UoS
New report - Hours per Unit of Service for mixed UoS, with user-definable data columns.

Hours per UoS Variance
The daily Hours per Unit of Service, compared to budget targets, with the percentage of variance.

Hours per UoS – Custom
Hours per Unit of Service, with user-definable columns of additional data, in hours or FTE.

Hours per UoS – Graphs and Trends
Trended data and graphs, displaying the Hours per Unit of Service compared to budget targets.

Integrity Check
Report shows the results of running Regular Maintenance – Check Integrity. Units and Errors may be filtered.

Movement Detail: Receiving Unit
Staff who float INTO a unit; including the codes, hours, start\end times, and staffing notes.

Movement Detail: Sending Unit
Staff who float OUT OF a unit; including the codes, hours, start\end times, and staffing notes.

Movement Journal
List of staff who floated to other units, along with the hours, start\end times and costs allocated to the unit.

Movement Summary: Receiving Units
Total hours, FTEs and/or dollars for staff who floated INTO a unit.

Movement Summary: Sending Units
Total hours, FTEs and/or dollars for staff who floated OUT OF a unit.

Nursing Workload Monitoring System
A staffing and monitoring tool to report on reasonable workload(s) for nurses.

Optimiser Plus
Available Patterns, Patterns Selected by Person and Pattern Totals.

Pattern Library - Flexible
Details the selected Blocks and Patterns from the Flexible Pattern Library, with options to print by Shift Segment, Roster Code, or Custom Times.

Pattern Library - General
Work Pattern Blocks (and the Patterns in those Blocks), for use with Optimiser Plus Roster creation.

Payroll-Talk
A report available after running the Payroll-Talk interface which includes rostered hours and allowances, as well as their translations to payroll codes.

PEAR
A report available after running the PEAR interface which details staff members' differences from the same payroll period - when Payroll-Talk is run prior to the end of the pay period.

Phone Numbers
The Contact Details report for demographic information, such as address and phone numbers for staff.

Position Adjustments
Employees with changes from their Hired Position to an Adjusted Position, along with the cost centre where the Adjusted Position occurred, and the hours and cost of each change.

Practice Analysis
Analysis of Roster codes, Code Types, NP Types or Staffing Notes, reported in occurrences, hours, FTEs, headcount or dollars by unit or individual.

Ratios
Staff to patient ratios compared to Ratio Targets.

Report List
List of ProAct reports, their assigned report category and when the report was last run or saved.

Roster Code Banking
Roster Codes that increase or decrease a balance (e.g. Sick leave without Certificate or Time in Lieu codes).

Roster Code Counter
List of Roster codes with the number of times used in the various Roster forms, SDB, pattern library, and the last time each code was used. Designed for system clean-up and elimination of unused, or infrequently used, codes.

Roster Code Summary
Total hours or occurrences of Roster codes, by day of week.

Roster Status and Cost
Roster status by date for Request, Draft, Finalised and Published Rosters (for designated groups, per period).

Roster Totals
Multiple roster totals on 1 page and comparison of roster totals in various stages (e.g. draft vs actual).

Rosters – Actual
Rosters, including changes and adjustments made after the Roster was posted.

Rosters – Annual Planner
Planned Rosters and leave for future periods, displayed on a weekly basis.

Rosters – Draft
Rosters, during the stage of editing and balancing, prior to finalisation and posting.

Rosters – Future Requests
Planned Rosters and leave for future periods, displayed on a daily basis.

Rosters – Posted
Rosters, at the moment of finalisation, prior to adjustments that can be made in the Actual Roster.

Rosters – Requests
Roster of staff requests, including BOSS (Browser Operated Self-Service) requests accepted into ProAct, along with any set days, or assigned weekends.

SDB 1 Language
List of staff who speak a selected language. Can be filtered by Roster Codes to find staff on duty.
SDB 2 Add to Rosters and BOSS Requests
List of staff who are auto-added to Rostering groups (with their adjusted positions), and staff who can enter BOSS requests into groups outside their home/hired unit.

SDB 2 Note Pad
Note Pad data, and the user who entered the Note, along with the date/time entered.

SDB 2 Roster Plan
Staff with Roster Plans, and the set days in those Plans.

SDB 3 Miscellaneous Data
Staff with the data recorded in their Staff Database Screen 3 Miscellaneous/Payroll fields.

SDB 3 Skills
Staff with the data recorded in their Staff Database Screen 3 Skills field, along with who is on duty by shift with the Skills.

SDB 4
Staff Database Screen 4 data, with filters for expiration dates, overdue or missing requirements.

SDB 4 and 5 Tracking
Compliance and last date for mandatory requirements, competencies, educational programs, etc. by person, and the percentage compliance for units.

SDB 5
Staff Database Screen 5 data, with filters for specific outcomes and missing requirements.

SDB Dates
List of staff, along with key date fields in their Staff Database (e.g. Hired Date, Termination Date, Date of Birth).

Security Groups and Users
List of ProAct Users and Security Groups, showing the last date and time of login.

Security Rights
Security rights assigned to each user or Security Group.

Sign-in Sheet
List of all staff, or only those who are on duty, with columns for staff to sign in and out.

Sign-in Sheet for Staff Movements
List of staff that floated OUT OF units, with columns for staff to sign in and out.

Sign-Off BOSS Requests
BOSS requests by person, and the status of those requests.

Staff History
Staff employment history from the SDB History file; including past, current, and any foreseen future changes that exist.

Staff List
List of staff, with their Hired Status, FTE, Position, Shift or Photo (available), Employee ID, other Identifier, Unit with Description or Cost Centre number and Hourly Rate.

Staff without Rosters
List of staff that do not have a Draft or Actual Roster in a specific period, or have a Roster with no codes.

Staffing Gaps
Comparison of a unit's Staffing Plan to the Roster, along with Over/Under staffing for the unit, and totals of Over/Under staffing for multiple units. Negative numbers are displayed in bold red.

Staffing Guidelines
A list of memorised Staffing Plans which can be run for selected days and/or shifts.

Staffing Holes
Comparison of a group's Demand and their Roster in either 4 hour shift segments (or 8, or 12 hour shifts), to identify Over/Under staffing for a group, along with total Over/Under staffing for multiple groups.

Staffing Notes
Staffing Notes and Details attached to individuals' Roster Codes, as well as the associated cost.

Targets
Budget Targets defined for each Unit.

Timesheet
Hours, Position and Cost Centre by day of week, in a Timesheet format, along with total hours. Employee confirmation is included for facilities using BOSS Timesheet Confirm.

Unit Comments
Comments entered for a day, or shift, that relate to staffing for individual units.

UoS Activity Statistics
Units of Service for each unit; including trends, averages for a period (or by day of week), and days with missing UoS data.

Violation
A list of Violations to the Roster rules by Unit, per Employee, for selected Violation Types, with option to show Note Type and Detail. If **All** is selected, the report will show violations for the employees from all defined Pay Cycles. This is the default option. If the **Selected** option is chosen, it will allow the user to open a move list to select the defined Pay Cycles to run the report with. The report will filter the data by the selected Pay Cycles, and will show the employees from these Pay Cycles only.

Whose Turn
Identifies which employees are due to float, be on-call, work on a Public Holiday, etc., based on past occurrences for the staff on duty.

Worksheet - Assignment
List of staff rostered for the day, with user-defined columns for additional information.

Worksheet - Daily
List of staff rostered for the day, and shifts across multiple units.

Worksheet – Special Assignment
A user-defined list of on duty staff that pulls up staff in specific units and positions, and displays other data (such as phone numbers and Staffing Notes). Designed for on-call Rosters, and for medical staff in a variety of units.

Worksheet - Weekly
List of staff rostered in a Unit or Group, for a period of 1 to 7 days.

8.6.3 Finding Specific Data

The following section provides a quick reference for common data elements. In the table below:

- **X** Indicates that the data element is displayed on the report.
- **F** Indicates that the data element can be used to filter the report.

Contact PolyOptimum's Helpdesk for assistance in selecting the best options to meet your reporting needs.

Report Name	Facility	Unit	Group	Cost Centre	Staff Name	Employee ID	Position	Pos Consolidation	Hired Status	Pay Group	FTE	Hours	Dollars	Roster Code	CaRT	User
Accruals		X F			X F		X				X					
Actual Hours		X F	F		X F		X F	F				X		X F		
Annual Planner PTO Targets		F	F													
Associated Codes	X	X F		X	F	X	X F	F			X	X		X F		
Attendance Patterns		X F		X	X F		X F	F			X	X		X F		
Audit Annual Planner Changes		X F	F		X F	X	X					X		X		X
Audit BOSS Adjustment Messages		X F	F		X F	X	X					X		X		X F
Audit CaRT Changes															X F	X F
Audit Codes		X			X	X	X F	F	X F	F	X	X	X	X F		X F
Audit Deleted Rosters		X	X F		X F	X	X									X F
Audit History Changes		X F		X	X F	X	X				X					X F
Audit Roster Changes		X F	X	X	X F	X	X					X		X		X F
Audit SDB 1 and 3		X F		X	X F	X										X F
Audit SDB 2		X F			X F	X								X		X F
Audit SDB 3		X F		X	X F	X										X F
Audit SDB 4 and 5		X F			X F	X	X									X F
Audit Staff History Integrity		X			X		X		X		X					
Audit Staffing Plan Changes		X F			X F	X	X									X F
Audit Timesheet Sign-Off	X	X F		X	X F	X				F						X F
Audit Trail			X F			X										X F
Breakdown by Day of Week	X	X F	X F	X	X F	X	X F	F			X	X		X F		
Breakdown by Position		X F		X			X F	X F			X	X	X	X F		
Breakdown by Time of Day		X F					F	F				X		X F		
Code Analysis		X					F	F			X	X	X			

Report Name	Facility	Unit	Group	Cost Centre	Staff Name	Employee ID	Position	Pos Consolidation	Hired Status	Pay Group	FTE	Hours	Dollars	Roster Code	CaRT	User
		F														
Communications	X	X				X F	X F	F								X F
Cost and Hours		X F					F	F	F			X	X	F		
Cost by Individual		X F	F		X F	X	X F	F	X F			X	X	F		
Daily Code Occurrences		X F			X	X	X				X	X		X		
Demand		X F	X								X					
Duplicated Roster Entries		X F	X F		X F	X	X							X		
Finalisation Status		X	X F													
FTE – Actual		F					X F	X F	X F		X			F		
FTE – Detail by Cost Centre		X F					F	F	X F		X	X				
FTE - Detail By Status		X F		X					X F		X	X				
FTE - Detail for Non-Productive		X F		X			F	F			X	X				
FTE - Hired vs. Actual		X F			X	X	X		X		X					
FTE – Summary		X F		X			F	F			X	X				
FTE – Variable		X F		X			F	F	F		X			F		
FTE and Dollars by Position		X F		X			X F	X F			X		X			
Hired Positions		X F		X	X		X F				X					
Hours by Mixed UoS		X F					F	F	F			X		F		
Hours per UoS Variance		X F		X								X				
Hours per UoS - Custom		X F		X			F	F	F		X	X		F		
Hours per UoS - Graphs and Trends		X		X												
Integrity Check																
Movement Detail: Receiving Unit		X F		X	X	X	X F	F				X	X	X F		
Movement Detail: Sending Unit		X F		X	X	X	X F	F				X	X	X F		
Movement Journal		X F		X	X	X	X F	F				X	X	X F		
Movement Summary: Receiving Units		X F		X			F	F			X	X	X	F		
Movement Summary: Sending Units		X F					F	F			X	X	X	F		
Nursing Workload Monitoring System		X F									X			F		

Report Name	Facility	Unit	Group	Cost Centre	Staff Name	Employee ID	Position	Pos Consolidation	Hired Status	Pay Group	FTE	Hours	Dollars	Roster Code	CaRT	User
Optimiser Plus			X F													
Pattern Library - Flexible		F												X		
Pattern Library - General										X F	X					
Payroll-Talk	X	X F		X	X F	X	X			X	X	X		X		
PEAR		F		X	F		X							X F		
Phone Numbers	X	X F			X		X									
Position Adjustments		X F		X	X	X	X F					X	X	X F		
Practice Analysis		X F		X	X F	X	X F	F	F		X	X	X	X F		
Ratios		X F					X F	X				X				
Report List																
Roster Code Counter		F												X F		
Roster Code Summary		X F	F									X		X F		
Rosters – Actual		X F	X F		X F		X				X			X		
Rosters – Annual Planner		X	X		X	X										
Rosters – Draft		X F	X F		X F		X				X			X		
Rosters – Future Requests		X F	X F		X F		X				X			X		
Rosters – Posted		X F	X F		X F		X				X			X		
Rosters – Requests		X F	F		X F	X								X		
Roster Totals		X F	F				X F				X	X		X F		
SDB 1 Language		X F			X F		X							F		
SDB 2 Add to Rosters and BOSS Requests		X F	X		X F	X	X F	F								
SDB 2 Note Pad		X F			X F	X	X									X
SDB 2 Roster Plan		X F			X F		X				X			X		
SDB 3 Miscellaneous Data		X F			X F	X	X				X					
SDB3 Skills		X F			X F		X F	F								
SDB 4		X F			X F	X	X F	F								
SDB 4 and 5 Tracking		X F			X F		X F	F								
SDB 5		X F			X F		X									

Report Name	Facility	Unit	Group	Cost Centre	Staff Name	Employee ID	Position	Pos Consolidation	Hired Status	Pay Group	FTE	Hours	Dollars	Roster Code	CaRT	User
SDB Dates	X	X F		X	X F	X	X F	F			X					
Security Groups and Users	X	X			X	X	X									X F
Security Rights		X			X	X	X									X F
Sign-in Sheet		X F	F		X F	X	X F	F						X		
Sign-in Sheet for Staff Movements		X F		X	X	X	X F	F				X		X F		
Sign-Off BOSS Requests		F	X F		X F		X F	F				X		X F		
Skill Search		X			X F		X		X					X		
Staff History	X	X		X	X F	X	X		X		X					
Staff List		X F		X	X	X	X F		X		X					
Staff without Rosters		X F			X F	X	X F	F			X					
Staffing Gaps		X F						X F								
Staffing Guidelines							X									
Staffing Holes		X F					X F	F								
Staffing Notes		X F			X F	X	X F	F	F			X	X	X		
Targets		X F									X	X	X	X		
Timesheet	X	X F		X	X F	X	X			X F	X	X		X		
Unit Comments		X F														
UoS Activity Statistics		X F														
Violation		X F	X		X	X								X		
Whose Turn		X F		X	X F	X	X F	X F			X	X		X F		
Worksheet - Assignment		X F	X F		X	X	X F	F						X F		
Worksheet – Daily		X F	X F		X		F							X F		
Worksheet – Special Assignment		X F			X		X F							X		
Worksheet – Weekly		X F	X F		X		X							X		

8.7 BATCH REPORTS

Access from **Main Menu: Reports > Batch Reports**.
Batching Reports allows users to run multiple ProAct reports, with the same parameters, together.

8.7.1 BATCH REPORT SETUP

1. Select **Reports > Batch Reports**. The setup form will open.
2. The left side of the form (**Select Batch**) will have a list of memorised Batches.
3. To create a new Batch, click the **+** icon in the **Select Batch** header.
4. Enter a Batch Name in the **1 What** field.
5. Now, select a date range that will be used to pull the data for all the reports in the batch. Date range always displays current period by default; use the **Back/Forward** arrows to move to a different period, or, type in the **From** and **To** dates manually.
6. In the **3 Which** section, click the Reports browse **[…]** button to open the memorised reports move list.
7. The left side of the list is populated with all of the ProAct reports that have memorised reports.
8. Click the **+** button, located at the left of each report name, to view its memorised reports.
9. Use the **Select** buttons, or double-click on the reports to select them for batching. When finished click **OK**.
10. All selected reports will be listed in the **3 Which** section.
11. Double-click on any memorised report to open its **Setup** form. This can be used to check if the correct report was selected, or to see what outcome the current setup produces.
12. In the **4 How** section, select whether the Batch (all reports) should be printed, or exported and saved in a specified location.
13. Click **Save**, to save Batch. The selected **Print** or **Export** option will be saved for the batch.

8.7.2 RUNNING BATCH REPORTS

1. Select Batch criteria or a memorised Batch, and select the **From** and **To** dates for running reports.
2. Click **Run**; all reports in the batch will **Print** or **Export** one-by-one.

8.8 PROACT-LITE REPORTS

Access from **Main Menu: Reports > Manage ProAct Reports > Publish ProAct-Lite Reports**.
ProAct users with security rights can publish reports through ProAct to be accessed from ProAct-Lite.

8.8.1 PUBLISHING REPORTS TO PROACT-LITE

1. Select **Publish ProAct-Lite Reports** from the **Main Menu > Reports > Manage ProAct Reports.** Move list will open with activated ProAct-Lite reports.
2. The left side of the list (**Available Reports**) will be populated with all of the ProAct reports that have memorised reports.
3. Click the **+** icon next to the report name to expand the list of memorised reports.
4. Select the reports to be accessed in ProAct-Lite, and click the **Select** button.
5. Selected reports will appear on the right side of the list, and will be accessible by ProAct-Lite users.

The ProAct-Lite user will select the report name from the list of published reports, and select to run for desired unit and date range.
Note: Memorised report criteria must be changed in ProAct, and cannot be changed in ProAct-Lite.

8.9 KPI DASHBOARD

The Key Performance Indicators (KPI) Dashboard displays data and graphs highlighting workforce performance and trends – retrospective, real-time and prospective reporting. It includes user-defined targets and stoplights that alert users to problem areas, along with online drill-down to investigate the source and reason for problems.

8.10 IMPORTING AND EXPORTING REPORTS

System Administrators have access to the following functionality. If you have a report that you have created in a test database and would like it copied into your live database then use the Upload and Download buttons found at the bottom of each report setup form. The Upload button will export the selected KPI reports in the database and prompt you to save to an export file. The Download button will allow you to import a KPI report from a saved export file, prompting you to select which report to import.

9 SIGN-OFF

9.1 TIMESHEETS

Access from **Main Menu: Sign-Off > Timesheets**, click **Sign-Off Timesheets** button in the Home Screen, or utilise the **Timesheet** button from one of the Actual Roster, Full Roster, and Global Staffing forms.

9.1.1 SIGN-OFF: TIMESHEETS

Allows managers to view and sign off Roster data, prior to export to payroll.
Allows payroll/PIE Operator to see and screen Sign-Off status before creating a file to export, and to export only Signed-Off records, if desired.
Keeps a record and audit of the person who signed off the Timesheet.
Allows setting Checking In/Out warning options, if this module is activated.

PIE allows processing with or without Sign-Off. ProAct stores the user who signed off the record. If changes are made in Unit or Global Staffing after a record is signed-off, the record reverts to **Unapproved**.

9.1.2 SIGN-OFF TIMESHEET OPTIONS

Selected Sign-Off Timesheet options are always saved as a default for the user. Users may create and save memorised criteria filters.

9.1.2.1 2 When - Pay Period Including

By default, the Period displays the last day of the current two-week period. However, any date can be entered and ProAct will automatically change the date to the end of the pay period that the selected date falls within.

9.1.2.2 2 When - Multiple Pay Cycles (if activated)

ProAct allows managers to approve (**Sign-Off**) timesheets for staff filtered by pay cycle. This function allows managers an added filter to choose the pay cycle end date (driven by the pay cycle code defined on ProAct), and to only display timesheets for staff for the current pay period end date.

9.1.2.3 3 Which - Timesheets

All: Brings up selected staff regardless of timesheet status (**Approved**, **Verified, Unapproved** or **On Hold**).
Approved: Brings up timesheets with **Approved** status.
Verified: Brings up timesheets with **Verified** status.
Unapproved: Brings up timesheets with **Unapproved** status.
On Hold: Brings up timesheets flagged as **On Hold**.

9.1.2.4 3 Which - With Employee Confirmation

All: Brings up all selected staff regardless of Employee Confirmation.
Agree: Brings up timesheets with **Agreed** employee confirmation.
Disagree: Brings up timesheets **Disagreed** employee confirmation.
Pending: Brings up timesheets **Pending** employee confirmation.
Edited: Brings up timesheets **Edited** by employees.

9.1.2.5 3 Which - Select Units

Allows viewing of timesheets for staff (for one or more units).
Choose either **All** units, or click on **[…]** button to select specific units.
Select Hired to Unit or Worked in Unit. The Worked In Unit will display the signoff status of each shift across different Units.

9.1.2.6 3 Which - Select Groups

Allows filtration of timesheets by Group.
Users can select a range of units and select to only view specific Groups from those units.

9.1.2.7 3 Which - Select Staff
Allows users to select **All** staff by selected units, or to select individual staff from any units.

9.1.2.8 3 Which - Select Pay Groups
Allows filtration of timesheets by Pay Group.
Users can select a range of units and select to only view specific Pay Groups from those units.

9.1.2.9 3 Which - Select Positions
Allows users to select **All or Selected Positions** or only Adjusted Positions.

9.1.2.10 3 Which - Select Roster Codes
Allows users to select **All or Selected** Roster Codes.

9.1.2.11 3 Which - Timesheets that meet the above criteria and exceed Running Totals Sum*
Allows users to select Timesheets that have exceeded the Running Totals Sum* if enabled. **All or Selected** Roster Codes.

9.1.2.11 4 How - Display Days Off (NN Codes) and Blank Days
Check box to include **Days Off** (NN codes) and **Blank Days** (days with no codes at all).

9.1.2.12 4 How - Show Rows In
Roster Code Order: Multiple codes for one day will appear as per the system order for Roster codes.
Adjustment Box Order: Multiple codes for one day will appear in the order they have in Adjustments.

9.1.2.13 4 How - Sort Timesheets By
Name: Timesheets will open sorted alphabetically by employee last name.
Employee ID: Timesheet will open sorted sequentially by employee ID number.

9.1.3 RUNNING TOTALS
When selected, a running total of hours will show as a separate column on the Timesheet.

9.1.3.1 Display Sum* Running Total
Select the **Running Total** checkbox to activate selection options.

9.1.3.2 Code Types
Select from the different **Code Types** (WP, IP, OP, OI, CO, NN, X$ and NP) that are to count in the **Running Total**. For each Code Type the following options are available:

All Except: All or select any Roster code to be excluded or
None: Code Type not to be include.
Selected: Selected Roster codes to be included.

NP Codes from the Selected NP Types
Select which NP Types are to be included:
All Except: All or select any NP Type code to be excluded or
Selected: Selected NP Types codes to be included.

9.1.3.3 Highlight when Running Total Sum* Exceeds
When the checkbox is selected nominate the number if hours to highlight in the Running Total if it exceeds per 2 weeks or 2 Weeks Adjusted FTE. Select the highlight colour.

9.1.4 IN AND OUT TIMES

Shown only if 'BOSS Checking In' module is activated and/or the PIE Clocking-Link is used. Used for setting up warnings for BOSS Check In and Check Out and/or the PIE Clocking-Link interface. Warn if:

9.1.4.1 Check or Clock In/Out is Missing or Incomplete
A Check In is missing when there is no recorded timestamp In/Out for days with a WP, IP, OP or OI code type. Codes types NP, NN and X$ are ignored. Incomplete means that the Check In was done, but

there is no Check Out. A warning icon will be shown in the I/O column of the Timesheet form when the Check In/Out is missing or incomplete.

9.1.4.2 First Check or Clock In Differs From Start Time by More Than [ ] Minutes
For each roster day the earliest Start Time of any roster code on the day with WP, IP, OP or OI code types will be compared to the first Submitted Check In time for the same day. If it is earlier or later by more than the selected number of minutes, a warning icon will be shown in the I/O column of the Timesheet form. This applies only to the first Check In for a roster day and not any later Check In, i.e. after meal breaks.

9.1.4.3 Last Check or Clock Out Differs From End Time by More Than [ ] Minutes
For each roster day, the latest End Time of any roster code on the day with WP, IP, OP or OI code types will be compared to the last Submitted Check Out time. If it is earlier or later by more than the selected number of minutes, a warning icon will be shown in the I/O column of Timesheet form.
NOTE: Codes in one roster day may have Check Out time on the next calendar date when codes cross midnight. Continuous shifts will be checked according the time interval setting System-Wide defaults.

9.1.4 TIMESHEET FORM

9.1.4.1 Tool Bar Icons

Back: Moves to the previous timesheet (if multiple staff are selected).
Forward: Moves to the next timesheet (if multiple staff selected).
Find: Pulls up the standard Find list to select employee.
View: Changes first column to display either **Cost Centre** or **Unit Description**.
Staff: Opens Staff Database for selected employee.
In/Out: Shown only if the **BOSS/Checking In** module is activated. Opens a read-only **In and Out** Times form for the selected employee for the full Timesheet period.
Accruals: Displays the accrual balance for selected employee.
Sign-Off: Approves employee's timesheet and then moves to next employee.
Verify: Verifies employee's timesheet and then moves to next employee. Used when timesheets need to be reviewed and verified before manager approval.
Unapprove: Marks employees timesheet as **Unapproved** (overrides **Approved** and **On Hold** status), and moves to the next employee.
Hold: Flags timesheet as **On-Hold** and moves to the next employee.
Options: Pulls up the **Options** form to change the setup.
Print: Allows user to print the current employee's timesheet, including Note Detail.
Message: Allows the user to send a message to the employee.
Staff Replies: Allows the user to view message replies.
Sign-Off Requests: Allows the user to review and sign-off **BOSS requests**.
Note: Column in the **Timesheet** form. Clicking on Note hyperlink pulls up the Note and Note detail in a separate window. To add, delete or edit a note, click on the **Adjustments checkbox** to display the Adjustments section.
S/O: Displays the sign-off status icon for the shift. The sign-off status will change to Unapproved when shift adjustments occur. When the Timesheet is approved, verified or put on hold the corresponding sign-off status icon will display.
I/O: Shown only if 'BOSS Checking In' module is activated. Shows warning triangle for a row which does not comply with settings made on the Checking In/Out tab. The triangle pulls up the Checking In and Out with the cursor highlighting the code that caused the warning and the day before and after.
Adj: Shows a hand icon for a row which has been adjusted since the Timesheet was approved.

9.1.4.2 Payroll Information
Breakdown of Hours for selected period:
Regular Hours
Overtime Hours
Non-Productive/Leave Hours
Total Paid Hours
Total Unpaid Hours
Total Hours

9.1.4.3 Employment Information:
Cost Centre
Hired FTE
Unit
Actual FTE
Facility
Employee ID
Position (or Classification)
Running Total Sum*

Note: When managers make Adjustments to Timesheets, ProAct automatically checks for Violations. If a Red Violation is detected, ProAct will prompt the manager and will not save the Adjustment.

Note: When BOSS users edit their Timesheet, the changes will be highlighted turquoise on the timesheet and in the Adjustments section.

Note: The **Running Total Sum** value will highlight yellow when selected with the exceeding the value in the **Running Totals** options tab.

9.1.4.4 Checking In / Out:
Checking In and Out for selected employee from 1 day prior to the pay period to one day after the pay period.
Date: The submitted date of the first Check In for each continuous shift.
DoW: The abbreviation for day of week, based on the Date.
'+/-' – The collapse/expand icon. When collapsed, only one, white, line is visible and it shows the Submitted Times. When expanded, one more, pale yellow, line with clock icon shows Actual Check In and Out Times.
If Actual Check In date differs from the Submitted date, the cell with proper date/time shown with bright pink background. When mouse cursor is navigated on the highlighted bright pink cell, show the Actual Date in the tool-tip.

9.1.4.5 To Sign-Off
Click the **Sign-Off** button for the selected employee. A green icon will be placed on the employee's timesheet, and the next employee is automatically displayed. ProAct records the name of the user and timestamps when he/she Signed-Off the timesheet.

9.1.4.6 To Verify a Timesheet
Click the **Verify** button. An orange icon will be placed on the employee's timesheet and the next employee is automatically displayed.

9.1.4.7 To Unapprove a Timesheet
Click the **Unapprove** button. A red icon will be placed on the employee's timesheet and the next employee is automatically displayed.

9.1.4.8 To Hold a Timesheet
Click on the **Hold** button to skip an employee, without marking the Timesheet as **Approved, Verified** or **Unapproved**. A yellow icon will be placed on the employee's Timesheet and the next employee is automatically displayed.

9.1.4.9 To Adjust a Timesheet
Select to display the Adjustments section.

9.1.4.10 Employee Confirmation
The Timesheet will display the BOSS Timesheet confirmation status, Pending, Agreed and Disagree (with notes) in the bottom left hand corner of the screen.

9.2 VIOLATION CORRECTIONS

Access from **Main Menu: Sign-Off > Violation Corrections**

Violation Corrections allows efficient management of violations, including prospectively identifying and correcting bad rostering practices.

9.2.1 SETTING UP VIOLATIONS CRITERIA

Users can save multiple setups in the **Violation Corrections** Setup form, and run them for any period.

1. Select the period for which to run Violations.
2. Choose either **All** or **Selected Units**.
3. Choose **All** or **Selected Violation Types**.
4. Enter name for new setup and click **Save**, or click **Run** to open the **Violations** form.

9.2.2 CORRECTING VIOLATIONS

1. Click **Run**, and the following two (separate) forms will open:

Violations form: Shows the list of staff with Violations.
Full Roster: Shows the Full Roster of the staff with Violations.

Note: Both forms are sorted by Last Name.

2. Clicking on the staff name and date in the **Violation** Form automatically directs the user to the selected Violation in the Full Roster.
3. To correct the Violations, either type into the Full Roster grid, or click on the **Adjust** button to adjust/correct hours. Click **Save**.
4. Click **Refresh** in the **Violations** form to update the list of violations.
5. The **Print** button in the **Violations** form allows users to print the Violations report, or to export to a different format.

9.3 BOSS REQUESTS

Access from **Main Menu: Sign-Off > BOSS Request**

BOSS Requests allow users to review, accept, reject, or place employee requests **On Hold** in Requests, Draft, and Actual Rosters. Add/Replace codes from BOSS users can flow into Draft and Actual Rosters without BOSS Signoff where there isn't already an existing code or where there are existing unpaid time off codes. The **BOSS Requests Setup** form allows users to filter the BOSS requests.

9.3.1 VIEWING EMPLOYEE BOSS REQUESTS

Sign-Off: BOSS Request Options can be opened from:

Main Menu > Sign-Off > BOSS Request.
Rostering forms, by clicking the **Sign-Off BOSS** button.
Global Staffing, by clicking the **BOSS** button.

1. Select the period for employee requests.
2. Select to view **All** requests, or requests with the following status:

Pending: When no action has been taken on the employee request code.
On Hold: A request placed on hold for later consideration.
Accepted: A request accepted for inclusion in the Request, Draft or Actual Roster.
Rejected: A request that was rejected.

3. Check the **Submitted** box to filter requests by **before** or **after** a specific date. Type directly into the date field, or click the down arrow to select a date from the calendar.
4. Select the **Pending and On Hold Requests Entered for Past Dates** to view BOSS requests for past roster periods.
5. Other filter options include:

Notes: Note Types (**All** or **Selected**)
Codes: Request/Roster Codes (**All** or **Selected**)
Units: All or **Selected**
Groups: Rostering or Viewing Groups (**All** or **Selected**)
Staff: All or **Selected**

Positions: All or **Selected**
Position Consolidation: Can filter further by selecting Position Subsets
Skills: All or **Selected**

6. To save New Filter criteria, enter a setup name in the **1 What** field, and click **Save**.
7. Click **OK,** to view employee requests for the selected period and options.

9.3.2 SIGN-OFF BOSS REQUESTS

This screen displays the request codes and notes entered by employees through BOSS. Employees can enter requests before a Request Roster is created (**Early Requests**), after a Roster has been created (**Late Requests**), or after the Roster has been finalised and published for the current period (**Post Requests**).

Change to a different saved filter from the **BOSS Requests** form using the Filter drop-down list, or return to the **Setup** form by clicking the **Options** icon.

The **View Request History** icon opens a window with the request history for the selected employee. The history will include snapshots of what the employee's requests looked like at the moment of Roster creation, and the moment of finalisation. Data displayed in Request History form:

Date & Time: Date and time the request was submitted.
Group: The group the employee belongs to.
Code: The request code the employee submitted.
Stage: The Rostering stage at the time the request was submitted.
Note: The Request Note Type.
Detail: Employee entered note detail.
Outcome: The outcome of the request (Added, Rejected, On Hold) and User ID.

Note: If at the moment of Draft/Actual Roster creation staff didn't have submitted codes on a certain day, then **View Requests History** will show nothing for that day.

Checks icon: Checks for award violations. Enter a code in the Checks column below and click **Checks**.
Note field: Displays full note detail for the highlighted employee.
Skills field: Displays all of highlighted employee's Skills.

9.3.3 SIGN-OFF BOSS REQUESTS FORM

Sign-Off BOSS Requests are displayed row-by-row, with details in the following columns:

Day: Day of the request code.
Date: Date of the request code.
Group: The Rostering Group the employee belongs to.
Staff Name: Employee name.
Position: Employee's Hired-To Position.
Shift: Requested code.
Hours: Shift hours for requested code.
Note: Request Note Type.
Detail: Employee entered note detail.
Stage: **Early**, **Late** or **Post** indicate the stage of the Roster at the time the employee entered the request.
Date & Time: Date and Time request was submitted.
Checkboxes: OK: Creates **Accept** status, and enters code into the Roster.
No: Creates **Reject** status, and does not enter code into the Roster.
?: Creates **On Hold** status, for later review.
Check: Allows user to check for award violations. Enter a code in the **Checks** column and click **Checks** button at the top of the form.

Early Requests: Submitted before the Request Roster was created.
Late Requests: Submitted after Rostering was started, but not yet completed.
Post Requests: Submitted after the Roster was finalised and published.

The **Adjustments** checkbox opens the Adjustment box for the day of the request code. If the Roster has been finalised and published, the box allows the user to edit the requested code before updating the Roster. BOSS Timesheet Edits will appear highlighted turquoise where the staff member has made the edits.

9.3.4 Accepting BOSS Requests

From the **Sign-Off: BOSS Requests** form:
1. Check the **OK** column for the requested code.
2. Click on the **Checks** button to check for possible award violations, as a result of adding the request.
3. If the Roster has been finalised, use the Adjustment box to edit Roster code, hours, start and end times, and to add notes.
4. Click **Save** to update Roster with new request codes.

9.3.5 Rejecting and Placing a BOSS Request On Hold

1. Check the **No** column to reject a BOSS request.
2. Check the **?** column to hold the BOSS request for review at a later time.
3. Click **Save**.

Note: The **View BOSS** form in Requests, Draft Roster, and Future Requests also allows users to **Accept** or **Reject** BOSS requests. ProAct will automatically highlight the selected person in both forms. Click on each code, then click **Accept** or **Reject**, OR place a check in the **OK** or **No** checkbox to Accept or Reject **ALL** the BOSS requests in one go. Accepting or Rejecting the request makes the code disappear from the **View BOSS** form. If a request is Accepted, the code will flow into the relevant Roster.

10 Simulation

10.1 Staffing Guidelines

Access from the **Main Menu: Simulation > Staffing Guidelines**

The Staffing Guideline module is a tool for planning and creating a staffing profile, based on a unit's requirement of skill mix, to meet budgeted workload targets. This plan is driven by the Unit of Service (UoS) budgeted values that are set up for units in ProAct.

10.1.1 To set up the Staffing Guideline for a unit:

10.1.1.1 Tab 1 - Setup

1. Select the Unit and enter the name of the **New Guideline**. Users can have multiple guidelines for one unit; however, only the one checked as **Default** will be used to calculate staffing gaps.
2. On the **Select Guideline** form, there is an option to further filter the list. Click on the icon to filter the pre-saved staffing plans by choosing to show **All** or **Default** Staffing Guidelines for selected units. The selected Staffing Guideline, and whether it is the default plan is displayed in the top bar.
3. Select the **Position Consolidation** set and **Position Subsets** to create a skill mix plan.
4. Enter the UoS range (between 0 and 999). This range will display on Tab 2 (Guidelines).
5. Enter a default UoS value.
6. Select the UoS ordering by either **Ascending** or **Descending**.
7. Check the **Targets** box to select H/UoS Target - choose either **Direct** or **Direct and Indirect**.

10.1.1.2 Tab 2 – Guideline

Current Staffing Guideline name is displayed in a drop-down field, with the ability to select a different plan from the list.
1. Unit entry columns display position consolidation Subsets. Enter the staff unit requirement to meet the UoS (set up in Tab 1).
2. The last two columns display Calculations of **H/UoS** (Hours per UoS), and the **Target** for H/UoS (if Targets was checked in Tab 1).
3. Set up the staffing plan across all the six shift segments.

4. The **Copy** buttons (**Copy Down**, **Copy Times**, **and Copy Day**) assist users in data entry.

Copy Down: Copies the number of staff from one UoS level to another UoS level.
Copy Times: Copies the number of staff from one shift segment to other shift segments.
Copy Day: Copies the plan from one day to other days.

5. H/UoS column does not update automatically. Click the **H/UoS** icon to recalculate the UoS.
6. Clicking **Save** recalculates H/UoS, and saves data.

10.2 PATTERN LIBRARY - FLEXIBLE

Access from the **Main Menu: Simulation > Pattern Library – Flexible**.

Flexible Pattern Library allows users to set up Work Patterns from 1-52 weeks. Only patterns from the Flexible Pattern Library can be used for Cyclical Roster creation or copied to an individual's Staff Database as a Roster Plan. Roster Plans are used for Template or Cyclical Roster creation. Quick Entry can be used to easily enter Patterns.

10.2.1 Setting up a Pattern Block:

1. In Tab 1 – **Blocks**, click the **Add** icon at the top of the Flexible Pattern Library form.
2. Enter the Pattern Block ID (for example, **W/E**) under the Code column and Pattern Block name (for example, **Weekend Patterns**) under the Description column. Pattern Block IDs are limited to 12 characters.
3. Click the **Save** button to save the changes.

10.2.2 TO ADD A WORK PATTERN INTO A PATTERN BLOCK:

1. Select Tab 2 – **Patterns**. This tab is greyed-out if no Pattern Block is defined.
2. Select the Pattern Block from the **Block** drop-down list at the top of the form. The grid will appear blank for new Pattern Block.
3. Click the **Add** button at the top of the form to add a new Pattern.
4. An **Add Pattern to Block: <Block Description>** form will open with the new Pattern criteria.
5. Values in the **Pattern** and **Weeks** fields may be pre-entered in the form, but can be modified if necessary.
6. Enter pattern number. The **Pattern** number is the rotation number for the pattern, usually starting with **1**. Enter Description.
7. Enter number of weeks. The **Weeks** determines the length of the pattern, before each rotation moves on to the next. The length of the pattern can be from 1 week to 52 weeks.
8. Once the Pattern numbers and length are created, enter the Roster codes in the form for each Pattern. Any Roster codes defined in the database are permitted to be used.
9. A Pattern is allowed to have a 2nd line. Click the **Insert** icon in the menu bar to insert a 2nd code line for the selected pattern. Enter codes as necessary.
10. Click **Save,** to save the Pattern Block once finished.

10.3 PATTERN LIBRARY - GENERAL

Access from the **Main Menu: Simulation > Pattern Library – General**.

General Pattern Library provides a variety of Roster Work Patterns that can be used for the Optimiser Plus Roster creation process. Quick Entry can be used to easily enter roster codes into Patterns.

10.3.1 SETTING UP A PATTERN BLOCK:

1. From the **Main Menu**, select **Simulation > Pattern Library – General > Pattern Block Headers**.
2. In the General Pattern Library form, Blocks tab, click on the **Add** icon.
3. Enter the Pattern Block ID. The Block Header ID is limited to 8 characters.
4. Enter the Pattern Block Description.
5. Click **Save**.

10.3.2 Adding a Work Pattern into a Pattern Block:

1. From the **Main Menu**, select **Simulation > Pattern Library – General**.
2. Select a predefined Pattern Block from the list.

3. Click the **Add** icon to add a new Work Pattern.
4. **Add Pattern to <Block Description>** entry form will appear.
5. Enter the Pattern Number. The number is pre-entered in the form, but can be modified.
6. Select the Hired Shift from the drop-down list.
7. The 'Opt + Weeks' column can be left blank if the pattern is not used in the Optimiser Plus roster creation process.
8. If the pattern will be used by Optimiser Plus to match this pattern with codes entered in an employee's Annual Planner, select that code in the appropriate week under the header 'Opt + Weeks'. For example, if you are creating a pattern with night rotations in weeks 1 and 2, select the night shift code for the corresponding weeks in 'Opt + Weeks' columns. Only codes that have been configured for Optimiser Plus will be included in the drop down list. See the Optimiser Plus Workbook for details on this roster creation method.
9. Once the Work Pattern is created, enter the Roster codes into the grid to complete the Pattern.
10. Click the **Save**.

10.4 REVIEW ROSTER CRITERIA

Access from the **Main Menu: Simulation > Review Roster Criteria**.

This function is used by Optimiser Plus. See the Optimiser Plus Workbook for details on this roster creation method.

10.5 OPTIMISER PLUS - CHECK PATTERNS FOR CONSIDERATION

Access from the **Main Menu: Simulation > Optimiser Plus-Check Patterns for Consideration**.

See the Optimiser Plus Workbook for details on this roster creation method.

11 HELP

Access the items below are accessed from the **Main Menu > Help**.

11.1 ABOUT PROACT

Displays the ProAct version installed.

11.2 HELP TOPICS

This option pulls up a library of help files that can be referenced by users while working in ProAct. It is organised into topics (such as **Rosters**), and subtopics (such as **Actual Roster**), and provides user information from the ProAct Operating Guide.

11.3 PROACT MANUAL

This option pulls up a soft copy of this manual.

11.4 CHANGE PASSWORD

Allows the user to change their login password. Old password must be entered correctly before a new password will be accepted.

12 LEGAL NOTICE AND COPYRIGHT

12.1 LEGAL NOTICE

PolyOptimum software uses proprietary processes to query multiple database files in order to determine actual rosters. External queries to database tables will not result in accurate reporting of ProAct data. Externally accessing, reporting or manipulating any PolyOptimum database tables will void the contractual warranty and not be covered under any maintenance agreement. This includes, but not limited to ODBC links or Microsoft SQL queries. PolyOptimum reserves the right to charge clients for any support (Helpdesk, Technical Services, Project Management) where system failures and restorations are caused by using such third-party software or third-party services to access the data within the suite of PolyOptimum products.

12.2 COPYRIGHT

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