# Scheduler Release Notes

**February 2021**
**R73**

This document contains detailed descriptions of release notes for the release date/month shown above, as well as explanations of resolved issues.

## Release Information

### Release Dates

There will be a System Release taking place on the following dates and times for the following servers. System downtime for each respective release can be expected during the maintenance windows:

- **EU Server** – February 8, 2021 at 11:00pm - 3:30am GMT

- **POD 60** – February 9, 2021 at 11:30pm - 4:00am EST

- **U.S. Server POD2** – February 10, 2021 at 11:30pm - 4:00am EST

- **U.S. Server POD5** – February 24, 2021 at 11:30pm - 4:00am EST

- **U.S. Server POD4** – February 24, 2021, at 11:30pm - 4:00am EST

- **U.S. Server POD3** – February 25, 2021 at 11:30pm - 4:00am EST

- **U.S. Server POD6** – February 25, 2021 at 11:30pm – 4:00am EST

- **AUS Server** – February 25, 2021 at 12:00am - 4:30am AEDT

### Supported Operating Systems and Browsers

The table below shows currently supported operating systems and browsers.
**NOTE**: The list shown in the table below are operating systems we support, though they may not be actively tested.

| Platform | OS Version | | Browser | Version |
|---|---|---|---|---|
| **Desktop** | | | Internet Explorer | 11 |
| Windows | 10 | | Microsoft Edge | latest |
| Mac | 10.13.4 (High Sierra) | | Google Chrome | latest |
| **Mobile** | | | Mozilla Firefox | latest |
| iOS | 11.4.1 -> latest | | Safari | latest |
| Android | 6.0.1-> latest | | | |

# Enhancements

💡 *We are listening! Enhancements marked with the light bulb icon are a direct result of IDEAS submitted in Community. Visit Community Ideas, upvote the best items, and keep the feedback coming!*

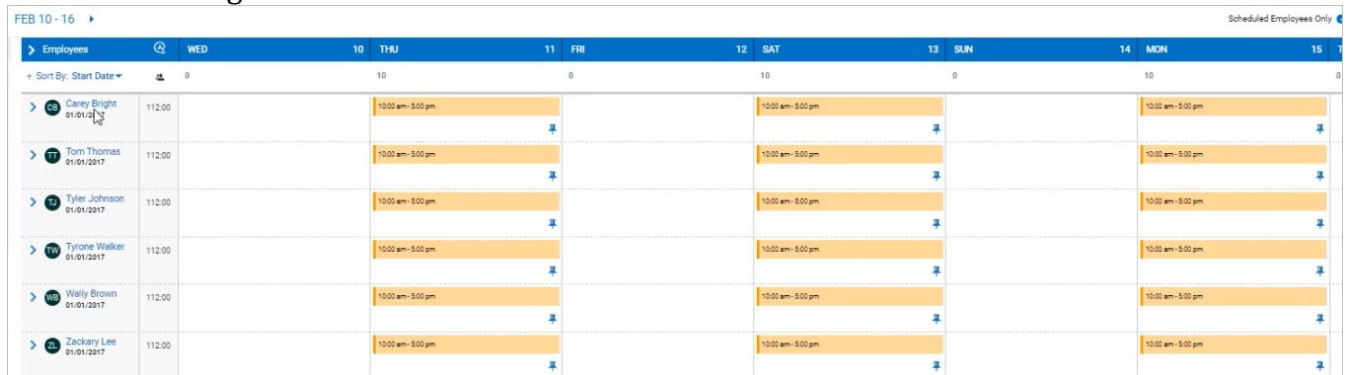The following enhancements have been added to this release.

### ***NEW*** *Work Schedules in Advanced Scheduler*

💡Previously, Work Schedule Profile was only available for TLM Basic Scheduling.

**What's changed:** The Work Schedule Profile is now available for Advanced Scheduling. This is beneficial for employees who have a static schedule or recurring schedule patterns and do not need the engine to auto assign their shifts from week to week. Utilizing Work Schedule Profiles will save time and manual work.

Below is an example of a schedule with shifts automatically assigned on an ongoing basis based on a configured Work Schedule Profile.
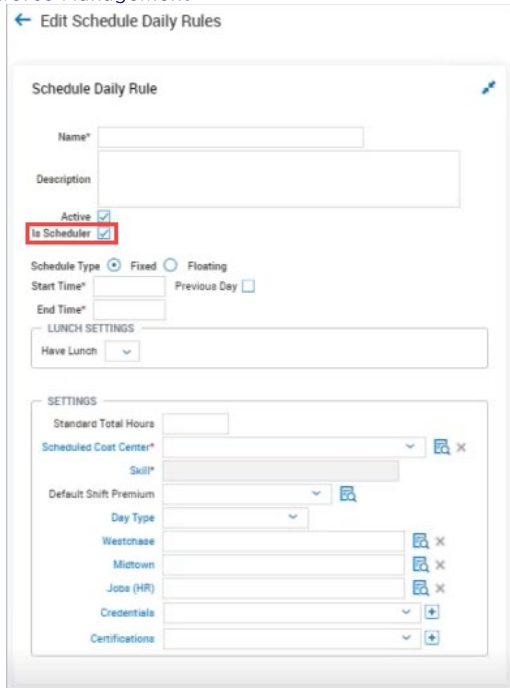


**Added Scheduler Fields to Daily Rules and Work Schedule Profile**

WFR-206408, WFR-210491: To start creating a Work Schedule Profile, you first need to build a Schedule Daily Rule. Navigate to *Edit Schedule Daily Rules*, under *Company Settings > Profiles/Policies > Schedules > Daily Rules*. A checkbox, *Is Scheduler*, has been added to the *Schedule Daily Rule* widget, which will make the Daily Rules and settings only used for Advanced Scheduler scheduling and not TLM Basic Scheduling.

**IMPORTANT NOTE:** Once *Is Scheduler* is enabled and saved, this cannot be undone.

When *Is Scheduler* is enabled, the following Scheduler shift attribute fields will be available in the *Settings* section:

*Standard Total Hours*

*Scheduled Cost Center* (required)

*Skill* (required)

*Default Shift Premium*

*Day Type*

*Jobs (HR)*

*Work Schedule Cost Centers*

*Credentials*

*Certifications*

Next, you will need to create a Work Schedule Profile from *Company Settings > Profiles/Policies > Schedules > Work Schedules*. From *Edit Work Schedule Profile*, the *Is Scheduler* option is available to enable, which will change the columns to match what was configured in the Daily Rules.

You can define shifts for up to 364 days or 52 weeks from *Days In Cycle*. In addition, from the *Type* column, you still have the option to build shifts at any time by choosing *Fixed* or *Floating*, otherwise you will choose from any of the daily rules that were marked as *Is Scheduler*.

**Assigning Scheduler Profile and Work Schedule Profile in Employee Profile**

WFR-206423: Previously, when an employee was assigned a Scheduler Profile and a Work Schedule Profile, a warning message displayed, letting the user know that the Work Schedule Profile would be ignored because TLM Work Schedules Profiles did not work in Scheduler. **What's changed:** Because you can now assign a Scheduler Profile and a Work Schedule Profile to an employee, the warning message will no longer display, and you will be able to successfully assign both if needed.

**Added "Convert Work Schedule To Shifts" Rule in Schedule Settings / Create Scheduler Shifts Based on Work Schedules**

WFR-206421, WFR-206422: In order to control when the system should use Work Schedules to create shifts on schedules, a new shift creation rule has been added to *Schedule Settings* (under *Company Settings > Schedule Setup > Schedule Settings*) called *Convert Work Schedules To Shifts*. Click the *Add Shift Creation Rule* button then select this rule.

When this rule is added, the system will automatically create and assign scheduled shifts to employees based on an assigned Work Schedule Profile so that you will not have to manually assign these shifts.

If a Cost Center from the Daily Rule assigned to a Work Schedule Profile differs from a Cost Center on the Schedule to be created, the shift created based on the Daily Rule will be skipped. **NOTE:** This rule is only available for Scheduler + TLM companies.
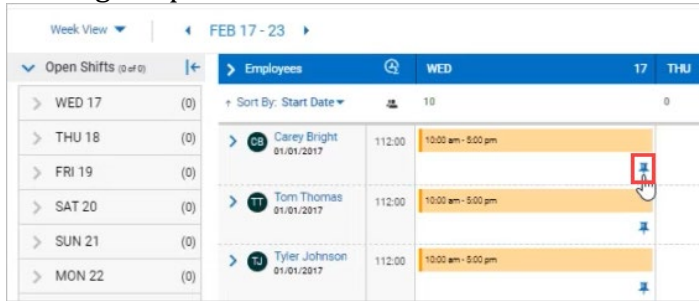
The system will assign shifts to employees based on the cycle date of the work schedule profile and cycle length and start date of the schedule. Shifts will be created and assigned to employees based on daily rules in the work schedule. Shift dates will be based on the work schedule cycle date, schedule cycle length, and start date of the schedule.

When using a Work Schedule Profile, all engine functionality is still available: constraint violations will be triggered when applicable by the engine; if an employee cannot work a shift, the shift can still be posted as an open shift for employees to request; shift swaps and coverage requests can still occur; assigned shifts will be frozen to employees so that they are not considered by the engine for auto assignment.

In the event that you have employees that you need to bring in and use the Workload template and engine for, you can do this and use the open shifts to auto assign without

disturbing any previously assigned shifts that were created in the Work Schedule Profile by clicking the pin frozen icon under the shift.



**Added "Is Scheduler" Column to Daily Rules and Work Schedules Profile Reports**

WFR-210519: For companies with Daily Rules and Work Schedule Profiles defined as *Is Scheduler*, an *Is Scheduler* column has been added to the *Company Daily Work Schedules* and *Company Work Schedule Profiles* reports. The Y (for yes) or N (for no) under this column will allow users to easily identify which rules and profiles are used for Scheduler.

**Updated Schedule Daily Rules Import for Scheduler**

WFR-206888: In order to be able to import Scheduler daily rules, the following fields have been added to the *Schedule Daily Rules* import template:

Is Scheduler

Require Scheduled Cost Center

Skill

Credentials (if the HR subsystem is enabled)

Certifications (if the HR subsystem is enabled)

### *Adjusted Time Off Display in Day View (Bulk Type Only)*

WFR-207335: Previously, Bulk time off on the schedule Day View would only display when the timeframe for the day was between 12a-8a for a full day or partial day (bulk) time off. This could be confusing to managers, as it indicated that the employee was only off during those hours but may be available outside those hours.

**What's changed:** The Bulk type of time off will now display in the Day View for all hours of the day, no matter which hours are filtered on the schedule, so that managers can always see that the employee has a time off.

### *Display and Action Updates to Schedule Views*

**Added Start Time in Sort Option in Week and Month Views**

WFR-187253: In the R68 (May 2020) release, a sort option in the Day View was added, *Shift Start Time*. When selected, the schedule will be chronologically ordered by the earliest shifts to the latest, along with the option to sort ascending or descending.
In this release, this feature has been made available for the Week and Month Views.

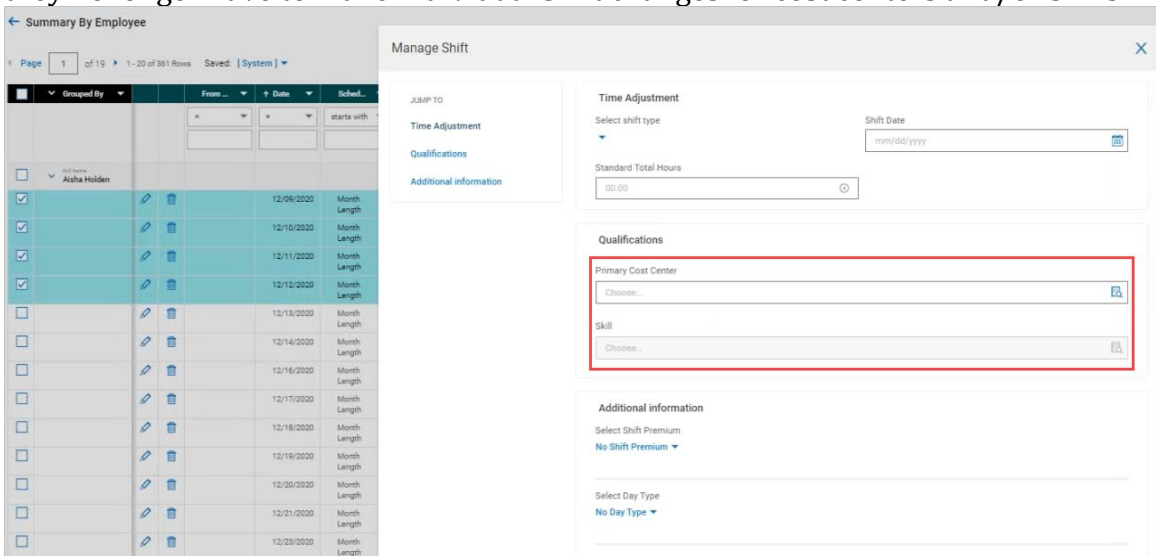**Shift Color Now Displays in Entire Shift Box**

💡WFR-181142: Previously, skill colors displayed on the edge of shifts in schedules.

**What's new:** Skill colors will now fill in the entire shift box in schedules, as well as shift boxes in the *Open Shifts* panel, the employee row, *Employee Schedule Detail* (*Scheduled* and *Qualified Open Shifts* sections) and *Schedule Details*. The filled in color will also apply to print and PDF versions of the schedule.



## *Mass Edit Cost Center and Skills Fields*

WFR-209995: In the *Summary By Employee* report, when managers mass edit shifts, they can now choose a *Primary Cost Center* and *Skill* to mass edit from the *Manage Shift* pop-up so that they no longer have to make individual shift changes for cost centers and/or skills.



## *Mass Edits Pushed to TLM in Real Time*

WFR-209998: Mass edits to shifts on posted schedules will now be sent to TLM automatically so that users do not have to run TLM shift creation rules manually. Changes will be reflected in the employee's timesheet, the employee's schedule, and all TLM reports that contain shift data.

## *Show Time Off Types Name in Weekly Schedule Report*

WFR-197054: Previously, the *Weekly Schedule* report showed that there was time off and the number of hours, but it did not display the name of the time off type.

**What's changed:** The name of the time off type is now available to display on the *Weekly Schedule* report. A new setting has been added in the *Settings* section of Time Off Properties, *Show Name in Weekly Schedules*. This setting will be disabled by default. If you do want the time off name displayed, enable this setting.

## Bug Fixes

*The following issues have been resolved in this release.*

### Constraints: Override Constraints items were not translated

WFR-179101: For users with French and French-Canadian locales, constraint title and group text in the *Override Constraints* dialog box are now translated as expected.

### Schedule: Skill colors were not displaying

WFR-166929: On View By Week schedules and View By Employee schedules, some skills were not displaying their configured color. This is fixed, and these skills now display the color configured for them.

### Schedule: French translation was misspelled

WFR-204279: For French language users, the *Expand Row* option on the Schedule Table View report was misspelled. This is fixed, and *Expand Row* is now translated to *Développer les lignes*.

### Schedule: French translation of report name is improved

WFR-204284: For French language users, the translation of Schedule Table View in the report name is now improved to *Afficher en tableau*.

### Scheduling Engine: Schedule did not respect availability of 12AM

WFR-220674: When users are imported and have an availability set to 12AM, the Schedule now does not assign shifts to them that are outside that availability. Previously, for an availability of 12AM, the users would incorrectly receive shifts that were outside of that availability.

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