

Infor Workforce Management (WFM) Advisory Meeting

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| Date: | 4/17/2024 | Next Meeting: | 7/17/2024 |
| Time: | 09:00 | Time: | 09:00 |
| Location: | Microsoft Teams | Location: | Microsoft Teams |

| Time | Item and Outcomes | Goal Alignment |
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| 9:00am | Introduction and Welcome | People |
| 9:05am | <p>VandyWorks to Infor Workforce Management Cloud Migration Updates Thank you to all of you for a very successful Cloud Migration this weekend! Thank you for preparing your staff, maintaining operations during the downtime, and for your great communication as we've been live in the upgraded system!</p> <ul style="list-style-type: none"> • FAQ from users on rounding and via Pegasus tickets <ul style="list-style-type: none"> ○ How do I access WFM on a Clinical Workstation? The Infor Workforce Management desktop icon is now deployed across all Clinical Workstations! ○ Where are Self Scheduling and Shift Billboard located? In the Self Service Portal, the second item on the Quick Links menu. ○ How do I access Infor WFM from my phone? Video demo sent to users yesterday, 4/16 and attached to this email ○ 7 WFM-Formerly VandyWorks Support Pegasus Tickets <ul style="list-style-type: none"> ▪ <i>6 General Information Solved by User Instruction</i> ▪ <i>1 item added to Issue Tracker</i> ○ 2 open issues with functional impact <ul style="list-style-type: none"> ▪ <i>Employee Schedule Report – reported and fixed 4/16!</i> ▪ <i>Area Assignment Sheet 14-day history</i> • Please ensure all schedule changes from downtime are entered into WFM <ul style="list-style-type: none"> ○ <i>Book Offs and Floats important for Time Off integration to Workday and Kronos reconciliation</i> • Set yourself up for Self-Scheduling success! <ul style="list-style-type: none"> ○ Review how to navigate to Self-Scheduling in Self Service Portal (tip sheet attached) ○ Quick Select default shifts set up <p>We strongly encourage you to set up Employee Default Shifts in their Employees > Employee profile for each job/shift combination they self-schedule.</p> | Innovation |

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| | <ul style="list-style-type: none"> • This will allow users to experience full benefits of the new Quick Select functionality. • Remember that this Employee Default Shift setting is separate from and in addition to their Default Shift in Employee Basic Information – Override, which is used for Leave Requests. • At Go-Live, we were able to do one Mass Upload of each self-scheduling employee’s true default settings according to their Home Team, Default Job, and Default Shift from Employee Basic Information – Override, but additional shift configurations or jobs were not able to be added. <ul style="list-style-type: none"> ○ For example, if the employee is a 9N Day Shift RN who also schedules On Call Shifts, their profile is set up for the VUH 9N, RN, D12 0645 Employee Default Shift, but the VUH 9N, RN, DayOCN Employee Default Shift should be added to their profile. ○ This will allow them to utilize Quick Select for both their RN D12 0645 shifts and their RN DayOCN shifts and easily see availability of each shift option on the calendar without clicking on each day. ○ Additional jobs, such as SL, should also be added. • The attached tip sheet, Employee Default Shift for Self Scheduling – How to Add, will step you through this process. | |
| 9:15am | <p>New and improved WFM HELP website – vumc.org/wfm</p> <p>There are ‘how-to’ documents about recent changes from our user-help site through WFM by selecting Help in the blue toolabr. This site can also be reached by going to www.vumc.org/wfm. The documents about the recent changes can be accessed from the April 2024 Updates tab.</p> <p>The interactive modules for the shift billboard and self-scheduler have been added as individual modules in the Learning Exchange. These can be assigned to new employees or employees that have questions. Also, the 2-hour instructor-led classes for Schedule Admin users have been added to the Learning Exchange and are available for enrollment. The classes currently available are scheduled for May and June. July, August & September classes will be available soon.</p> <p>There is a tab for WFM Training, with collapsible content. Select the topic and links to the modules, classes or materials will display.</p> | Innovation and Service |
| 9:30am | <p>Time Management – Now in Tableau!</p> <p>The Time Management Reports from VandyWorks are now available in Tableau with more options for trending and analyzing this important data!</p> <ul style="list-style-type: none"> • Call Out Report* • Clocked In Early Report • Clocked In Late Report | Innovation |

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| | <ul style="list-style-type: none"> • Clocked Out Early Report • Clocked Out Late Report • In Early/Out Very Late Rollup • Scheduled Employees Missing Clock Punches • Unscheduled Employees With Clock Punches • Kronos-VandyWorks Reconciliation Report – under construction • Daily Time Management Report <p>*FMLA book offs on the Call Out Report are visible only by the employees’ leaders as per the Workday hierarchy and hidden from all others to protect employee privacy</p> <p>To access the reports, scroll to the right on your Schedule Admin blue toolbar in Infor WFM (wfm.app.vumc.org) to find the links for Time Mgmt Reports and Daily Time Mgmt. Permissions to view these reports in Tableau are based on leadership job codes in Workday. If you have questions about access to the dashboard, please let us know.</p> | |
| 9:40am | <p>LMS integration to WFM</p> <ul style="list-style-type: none"> • New integration code only processes changes <ul style="list-style-type: none"> ○ If you cancel a book off, it will not re-book off every day! • If there are new courses in LMS that you would like to show on the schedule as ISV or ISV-WK (inservice time that counts toward the employee’s FTE), please email us at wfm@vumc.org and we’ll add the course! It’s best to notify us before enrollment starts to ensure that all schedules are booked off correctly. <p>Multi-day courses are not booked off automatically in Infor WFM –</p> <p>Situation: Multi-day LMS courses are no longer able to be automatically booked off as ISV shifts on employee schedules in Infor WFM (formerly VandyWorks).</p> <p>Background: Due to a recent LMS update, multi-day courses are no longer able to be defined with individual day start/end times.</p> <p>Assessment: It is important to reflect ISV time on Infor WFM schedules so the employee is not double-booked and for Kronos reconciliation.</p> <p>Recommendation:</p> <ul style="list-style-type: none"> • Upon enrollment in a multi-day course in LMS, employees should enter a Leave Request for ISV time in Infor WFM so that time can be approved by their leader and visible on the schedule. • If you have any questions about LMS courses, please reach out to the LearningExchange@vumc.org. • For questions about ISV shifts in Infor WFM, please reach out to wfm@vumc.org . | Service |
| 9:45am | Bug fix: Incomplete Leave Request Book Off | Innovation |

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| | <ul style="list-style-type: none">• A small subset of teams had the duration of their meal break left on the schedule as WRK for days booked off via Leave Request• Resolved by our technical team and now Leave Requests book off completely as expected• Correct balances will be communicated via Time Off Integration INT263 to Workday | |
| 9:55am | Open question & answer | Service |