Infor Care Workloads Available Hours Interface Guide

Version 4.0.0.0

Contents

Introduction

The Infor Care Workloads Available Hours Import and Worked Hours Export Interface is an optional Add-in for the Infor Care Workloads application. This bi-directional interface can be used to import data to populate the **Actual Hours** field of the Infor Care Workloads **Staffing** screen as well as export the **Required Hours** from the Infor Care Workloads Staffing screen.

This interface is designed to import and export data in a variety of formats to conform to the needs of many other systems that may provide or accept this data. The interface is generally designed to function where each data point is provided on a unique line in the import or export file. The interface has additionally been designed to function with some specific systems that require data in a special format.

This interface can be scheduled to run on a regular basis with no user intervention. Unique schedules can be setup using the same or unique formatting options. Each scheduled action can be further configured to evaluate for all Units and Shifts or for a select number of Units and Shifts. The user may also specify what relative date range is to be exported to ensure accuracy of data.

This guide is intended to provide detailed information on how to setup the Available Hours Import and Worked Hours Export Interface as well as what can be expected when selecting certain options. For further assistance or to clarify information provided please contact Infor Care Workloads Technical Support.

Installation

The Infor Care Workloads Available Hours Import and Worked Hours Export Interface does not require installation of additional files. This interface is an Add-in that can be activated at any time by entering a License Key provided by Infor If your facility has purchased the Available Hours Import and Worked Hours Export Interface, but has not been provided with a Key or the Key has been lost then you may request this information from the Infor Care Workloads Technical Support team. If the Technical Support team does not have your "Organization Key" on record they may request this information. The "Organization Key" for your facility is available on the **Help → About** screen.

The Organization Key should be e-mailed or otherwise electronically provided to the Technical Support team. This information will be used to generate a unique License Key for the Available Hours Import and Worked Hours Export Interface. This new Key will be e-mailed to the organization contact at the facility. This person will enter it into the correct row of the **Add-in Manager**. The **Add-in Manager** is available in the Infor Care Workloads Administration Console from the **Tools → Add-in Manager…** menu item.

The user will enter the Key into the appropriate row of the **Add-in Manager**. The License Key will be evaluated, and if it is not valid the user will be alerted.

If this Key is lost, changed, or otherwise voided the user may contact Infor Care Workloads Technical Support to re-evaluate and re-issue the Key. Any data that was previously entered into the system will not be lost and will be available after the Key is re-applied.

Workspace

The Infor Care Workloads Available Hours Import and Worked Hours Export Interface workspace consists of six tabbed screens. These screens include:

- Profile
- Schedule
- Unit Translations
- Shift Translations
- Skill Translations
- Service Manager

The following sections provide detailed information on each screen.

Profile

The **Profile** screen is used to determine what the import or export file of the Available Hours Import and Worked Hours Export process will look like. The formatting options are generally limited to importing or exporting all data on a single line in the file. However, other specialized formats may be selected as outlined in the **Export File Layout** section.

Adding a New Profile Definition

The user may choose to utilize or edit one of the default Profiles provided with Infor Care Workloads such as "API Import", "ASX Import", or "Loki Import". Alternatively a new Profile may be added by right-clicking on the drop-down box labeled **Profile Definition** and selecting **New** from the context menu.

The user will be immediately able to enter a descriptive name when adding a new **Profile Definition**.

Profile Items

The user can choose to include a variety of data in the import/export file as shown below. Each of these items can be viewed in the data grid on the right-hand side of the **Profile** screen. The descriptions may be viewed by right-clicking the item and selecting **Description** from the context menu or by double-clicking the item.

Name	Description
Unit	Required for both Import and Export. Unit or Ward.
Date	Required for both Import and Export. Date
Skill	Required for both Import and Export. Skill or Occupation Identifier to translated.
Available Hours	Required for Import. The Available Hours value.
Shift	Required if Start and End Times are not used. Shift Identifier to be translated.
Start Time	Required if Shift Translation is not used. Starting time of the shift. On an Import this will be used to determine which shift(s) the Available Hours will be allocated to. On an Export this will display the Starting Time of the Shift(s).
End Time	Required if Shift Translation is not used. Ending time of the shift. On an Import this will be used to determine which shift(s) the Available Hours will be allocated to. On an Export this will display the Ending Time of the Shift(s).
Productive	ESP indicates productive time by placing a "1" in this field. If used, the import program will only read records marked as productive.
Required Staff	Export Only. The Required Staff value.
Required Hours	Export Only. The Required Hours value.
Variance	Export Only. The difference between Actual and Required Hours.
Budget	Export Only. The Budget value.
Actual Cost	Export Only. The Actual Cost value.
Census	Export Only. The Census (number of patients with workload assigned) for the Shift.

Position on Line and Import/Export

To include an item in the file simply enter the desired **Position on Line** value for the item. For example, in the screenshot above the Date will be included as the first item in the input file and the Available Hours will be included as the fifth item. A zero entered into the **Position on Line** cell indicates that the item is not to be included in the file.

Selecting the checkbox in the **Import** column indicates that the item is to be included in the import process. Likewise, selecting the checkbox in the **Export** column indicates that the item is to be

included in the export process. This allows the user to utilize one **Profile** for both import and export of data if desired.

Element Delimiter and Position on Line

When the **Element Delimiter** is set to anything other than Fixed Width and discontinuous values are entered into the **Position on Line** cell then an empty field will be included in the output file for the missing elements. Likewise, the import process will look for data in the specified position, skipping elements when necessary. In the image below note that no items have been selected for positions six and seven. Because this profile is comma-delimited this means that no data will be read from the import file in positions six and seven or included in the export file in positions six or seven.

Unit	1
Skill	2
Date	3
Start Time	4
End Time	5
Productive	8
Available Hours	9

The resulting import process will read the following data from a single line:

[Unit (Translated)],[Skill (Translated)],[Date (YYYYMMDD)],[Start Time],[End Time],[Skipped Element],[Skipped Element],[Productive],[Available Hours]

Note that this data will be read from a single line in the import file, the text above has wrapped for lack of available width in this document. Also note the two [Skipped Element] items in positions six and seven of the import line. When using the Fixed Width **Element Delimiter** the **Position on Line** represents the starting position for that **Item**. For example, in the following screenshot the "Skill" will start at position 16 with length of 1 character.

Item	Position on Line	Column Width	Import
Profile Definition: ANSOS			
Actual Cost	0		☐
Budget	0		☐
Census	0		☐
Element Delimiter: (Fixed Width) Productive	0		☐
Required Hours	0		☐
Required Staff	0		☐
Fixed Column Width: 10 Shift	0		☐
Variance	0		☐
Date	1	8	☑
Unit	10	6	☑
Date Format: MMDDYYYY Skill	16	1	☑
Available Hours	17	6	☑
Start Time	29	4	☑
Date Delimiter: (none) End Time	33	4	☑

Element Delimiters and Fixed Width Formats

A variety of options are available for selection from the **Element Delimiter** drop-down box:

- Backslash → \
- Colon → :
- Comma → ,
- Dash → -
- Pipe → |
- Forward Slash → /
- Space → (Space)
- Tab → (Tab)
- Fixed Width → (Fixed Width)

If Fixed Width is selected and all of the fields in the import/export file are the same width then the user may enter a single value into the **Fixed Column Width** text box and leave the **Column Width** cell for each item zero. Any item with a **Column Width** value of zero will default to use the value entered into the **Fixed Column Width** text box. If Fixed Width is selected and the fields in the import/export file are varying widths then values must be entered into the **Column Width** cell for each item.

Any item with a **Column Width** value of zero will default to use the value entered into the **Fixed Column Width** text box. If most of the columns in the import/export file are to have the same width then the user may enter this width into the **Fixed Column Width** text box and set the **Column Width** value to zero for most items. Only those items with widths that do not equal the value entered into the **Fixed Column Width** text box need to be entered into the **Column Width** cell.

If any other delimiter is selected the values entered into this cell will be ignored. For example, if the delimiter "Comma" is selected then any data entered into the **Fixed Column Width** text box or the **Column Width** cell will be ignored.

Date Formats and Delimiters

Four **Date Formats** are available to be used for any date items in the output file:

- DDMMYYYY
- MMDDYYYY
- YYYYDDMM
- YYYYMMDD

The user may also select the delimiter to be used between the **d**ay, **m**onth, and **y**ear values in the date items. The available date delimiters include:

- Backslash → \
- Colon → :
- Dash → -

- Forward Slash   →   /
- None   →   (none)

For export files, selecting the "(none)" option will place no delimiter between the date elements. Note that if the **Element Delimiter** and **Date Delimiter** values are the same, the receiving system may have difficulty interpreting the data. All exported dates will include a four digit year for Y2K compliance. All day and month values will be two digits with a leading zero for any single digit values.

INFOR recommends that the import file include a four digit year and a leading zero for all Day and Month values where the value is a single digit (i.e., 01 through 09). If the selected **Date Delimiter** is anything other than "(none)" then the values will always be interpreted correctly. A two digit year will be interpreted correctly using any of the available date formats. A single digit Day or Month may be interpreted correctly by Infor Care Workloads when the **Date Delimiter** is set to "(none)" depending on the **Date Format**. If the **Date Format** is either "YYYYMMDD" or "YYYYDDMM" then a single digit Day or Month value will not be able to be interpreted correctly. If the **Date Format** is "MMDDYYYY" then a single digit Month value will be interpreted correctly, but a single digit Day value will not be able to be interpreted correctly. If the **Date Format** is "DDMMYYYY" then a single digit Day value will be interpreted correctly, but a single digit Month value will not be able to be interpreted correctly.

Other Options

Three additional options on the **Profile** screen allow for refined control over the data being imported.

- Group Skills
- Allocate to One Shift
- Sum Hours

Group Skills

The **Group Skills** option can be used when more than one value per Skill is included in the import file for a given Unit, Date, and Shift combination. When this option is checked the **Available Hours** values for these individually imported lines of data will be summed together and added to the Infor Care Workloads Staffing screen as a single value. This is particularly useful if the external system has more than one Skill that translates into a single Infor Care Workloads Skill.

Allocate to One Shift

The **Allocate to One Shift** option is used in conjunction with the **Start Time** and **End Time** elements. If this option is checked then all hours will be allocated to the Infor Care Workloads Shift that encompasses the **Start Time**. If the "Shift" is specified in the import file then **Allocate to One Shift** will not be used.

If the **Allocate to One Shift** option is not checked then the **Available Hours** value will be divided between any overlapping shifts. If the **Start Time** and **End Time** in the import file match the Infor

Care Workloads Shift Start and End times then all hours will be allocated to that single Shift. If the **Start Time** and **End Time** in the import file overlap more than one Infor Care Workloads Shift then the value from the import file will be divided between the overlapping Shifts based on the amount of overlap. For example, if the import file contains the data:

- Date   = 20070413
- Start Time   = 6:00
- End Time   = 18:00

Available Hours   = 100

And the specified Unit has the following Shifts:

- Day Shift   = 8:00 to 20:00
- Night Shift = 20:00 to 8:00

The **Available Hours** would be divided out as:

Date	Shift	Available Hours
12 April 2007	Night	(2 / 12) * 100 = 16.7 Hours
13 April 2007	Day	(10 / 12) * 100 = 83.3 Hours

In the import file the total time specified is 12 hours. Two of those hours (6:00 to 8:00) occur during the Night Shift for 12 April 2007. Ten of those hours (8:00 to 18:00) occur during the Day Shift for 13 April 2007. Therefore $^2/_{12}$ of the **Available Hours** value is to be attributed to the Night Shift for 12 April 2007 and $^{10}/_{12}$ of the **Available Hours** value is to be attributed to the Day Shift for 13 April 2007.

If the times specified in the import file overlap at least one Shift, but also include time during which there is no Shift then a percentage of the hours will be assigned to the overlapping Shift(s) and some hours will not be assigned to any Shift. For example, an Outpatient Unit may have a single "Day" Shift set up for 8:00 to 18:00. If the import file contains the data:

- Date   = 20070413
- Start Time   = 8:00
- End Time   = 20:00

Available Hours   = 100

The **Available Hours** would be divided out as:

Date	Shift	Available Hours
13 April 2007	Day	(10 / 12) * 100 = 83.3 Hours
Unallocated Hours		(2 / 12) * 100 = 16.7 Hours

This situation may be valid as it may include overtime that should not be allocated to this shift. However, the user may wish to use the **Allocate to One Shift** option to assign all 100 Hours on the Day Shift.

Sum Hours

The **Sum Hours** option can be used to specify whether the **Available Hours** in the import file are to overwrite any existing hours or are in addition to any existing hours. If this item is checked then the imported hours will added to the existing value. If this item is not checked then the imported hours will overwrite the existing value.

Export File Layout

Most systems will be able to read data exported from Infor Care Workloads using the "Standard" format. This format places data for each Unit, Shift, and Skill combination on a single line in the exported file. However, some systems read data in a very specific format. Currently Infor Care Workloads supports two of these systems:

- ESP
- ANSOS

The **Export File Layout** may be selected on the Profile screen. When each of these options is selected, the text below changes to reflect the selection. When "Standard" is selected the text reads:

- The standard format utilizes a single line to export data based on the chosen profile settings. To view this layout use the Export Template for this profile.

The "Standard" format can be viewed by right-clicking on the Profile name and selecting **Template**… **Export**. This will display a template of the format to be reviewed and validated.

The "ESP" format can be viewed by right-clicking on the Profile name and selecting **Template**… **Export**. When "ESP" is selected the text reads:

- The ESP Format utilizes multiple lines to export data. This is a fixed format that cannot be edited. To view this layout use the Export Template for this profile.

The "ANSOS" format can be viewed by right-clicking on the Profile name and selecting **Template**… **Export.** When "ANSOS" is selected the text reads:

- The ANSOS format groups all skills into 4 groups and exports a summary value on a single line. This is a fixed format that cannot be edited. To view this layout use the Export Template for this profile.

The "Skill Groups" are determined by using the **Skill Translations** screen. Please refer to the **Skill Translations** section for more information about ANSOS Skill Groups.

Profile Definition Options

Right-clicking on the **Profile Definition** drop-down box will display a context menu with several options related to the currently selected profile. These options include:

- Rename
- Templates
- Import
- Export
- Validate Import
- Delete
- Run…
- New

Rename

Selecting the **Rename** option allows the user to change the name of the currently selected profile.

Templates

Selecting the **Templates** option allows the user to view a template of the profile for either Import or Export purposes. The template will display in a Windows Notepad window. This template can be used to compare against documentation or sample files provided with the target system. Note that if "Fixed Width" is selected as the **Element Delimiter** then some values may appear to be cutoff.

Validate Import

Selecting the **Validate Import** option allows the user to determine if the current profile will import data correctly. A combination of Profile Elements is required for the import process to be successful. If these requirements are not met then a warning message will provided. Additionally, if the import process will be successful a message will be provided.

Delete

Selecting the **Delete** option allows the user to delete an unused profile.

Run…

Selecting the **Run…** option allows the user to execute the Available Hours Import and Worked Hours Export process manually. This process is configured using a wizard. The first step is informational indicating what action this process will perform. Click **Next** to continue to the next step.

The second step of the process allows the user to select which profile is to be used by the manual import or export. Select the appropriate **Profile** and **File Operation** and click **Next** to continue to the next step.

Export

If the selected **File Operation** is to **Export** then the third step of the process allows the user to set the date range and Shift(s) for the data to be exported. After setting the appropriate date range and selecting the Shift(s) click **Next** to continue to the next step.

The final step of the export process allows the user to define the output directory and filename for the results of the process. The user may either enter this information manually or click on the **Browse to File…** (**…**) button to select this information. Note that a unique identifier based on the date and time of execution will be added to the export file name. The user may also select whether a single output file will be created or if multiple output files will be created. If **Multiple Files** is selected then one file will be created for each date included in the export process. Clicking **Finish** will initiate the Worked Hours Export process using the parameters defined in the previous wizard steps.

Import

If the selected **File Operation** is to **Import** then the third step of the process is to select the file(s) to be imported. Click the **Add Files…** button to browse to and select the files that are to be imported. Clicking **Finish** will initiate the Available Hours Import process using the parameters defined in the previous wizard steps.

New

Selecting the **New** option allows the user to create a new, blank profile. This option has been outlined in more detail in the **Adding a New Profile Definition** section.

Schedule

The **Schedule** screen allows the user to set up automated tasks to perform the Available Hours Import and Worked Hours Export process on a regularly scheduled basis.

Scheduled Action

The **Scheduled Action** drop-down box allows the user to select which **Scheduled Action** they are currently editing. Note that multiple **Scheduled Actions** can be set up for a single **Profile**. Right-clicking the **Scheduled Action** drop-down box opens a context menu with the following options:

- Rename　→　Rename the currently selected **Scheduled Action**
- Delete　→　Delete the currently selected **Scheduled Action**

- New → Add a new **Scheduled Action**

Profile

The **Profile** drop-down box allows the user to select which **Profile** this **Scheduled Action** will use.

Operation

The **Operation** drop-down box allows the user to select if the **Scheduled Action** is to import or export data.

When the **Operation** is set to "Import File" Infor Care Workloads implements a "File Watcher". There is no true "schedule" for this activity, rather, whenever a file is placed into the specified import directory and that file matches the **File Type** ,**File Name**, and **File Extension** criteria this file will be immediately imported (for more information on these criteria settings refer to the **File Type** and **Directory, File Name, and File Extension** sections). Additionally, if the **Infor Care Workloads Scheduler Service** has been stopped for any reason the import directory will be immediately surveyed and if any files are present then they will be immediately imported.

When the Operation is set to "Export File" the action will take place according the schedule outlined on this screen.

Export Unit(s) – Shift(s)

The **Export Unit(s) – Shift(s)** field allows the user to select which Units and Shifts will be included in the output file for the **Scheduled Action**.

This is only valid when the **Operation** is set to "Export File". **Export Unit(s) – Shift(s)** can be used to limit the data in the export file to only the desired list of Shifts. For example, the user could select to only include the "5 Center - Day", "5 North – Day", and "5 South – Day" Shifts; this may be important for Prospective Units where the Instrument is designed for 24 Hours even though the Unit has three 8 Hour Shifts. The user may select also "All Units & Shifts" to include information from any Unit & any Shift.

Workstation

The **Workstation** field allows the user to select which Workstations this action should take place on.

The **Infor Care Workloads Scheduler Service** is installed on all Workstations where the Infor Care Workloads Administration Console is installed. This allows individual users to schedule reports and other actions. However, not all actions should be executed on all Workstations.

File Type

The **File Type** drop-down box allows the user to select whether "Multiple Files" or a "Single File" will be used by this activity.

If the **Operation** is set to "Import file" and **File Type** is set to "Multiple Files" then any file in the specified **Directory** with the specified **File Extension** will be imported. If the **Operation** is set to "Export File" and **File Type** is set to "Multiple Files" then a unique identifier based upon the date and time of execution will be appended to the value specified in the **File Name** field.

If the **Operation** is set to "Import File" and **File Type** is set to "Single File" then the import file must match the exact information entered into the **File Name** and **File Extension** fields to be imported. If the **Operation** is set to "Export File" and **File Type** is set to "Single File" then an identifier will be added to the File Name with the date information. However, this may not be unique and may overwrite pre-existing data.

Directory, File Name, and File Extension

The **Directory**, **File Name**, and **File Extension** fields may be filled in manually or the user may browse to the desired output directory be clicking the **Browse to File…** (**…**) button. The user may browse to the desired file location, enter a name for the file and click the **Open** button to populate these fields.

A network share may be selected as the file location. Either mapped drives or Universal Naming Convention (UNC) paths may be used. If a network drive is selected as the file location the **Infor Care Workloads Scheduler** service may need to be modified to run under a network account, for more information about this refer to the **Infor Care Workloads Service Manager** section.

Execution Date

The **Execution Date** field specifies the first date and time for this **Scheduled Action** to be executed. This information is further utilized by the recurrence settings to determine when a recurring action should be executed. For more information refer to the **Recurring and Recurrence Interval** section.

Stop Date

The **Stop Date** field specifies the last date for this **Scheduled Action** to be executed. If this field is not checked then this **Scheduled Action** will continue to execute indefinitely.

Recurring and Recurrence Interval

The **Recurring** field is used to set the type of recurrence for this **Scheduled Action**. The available **Recurring** options include:

- No Recurrence
- Hourly
- Daily
- Weekly
- Monthly
- Yearly

The **Recurrence Interval** is used in conjunction with the **Recurring** setting to determine the frequency of the **Scheduled Action**.

For example, if **Daily** is the recurrence and **1** is the **Recurrence Interval**, then the **Scheduled Action** will take place one time each Day. If the **Recurrence Interval** were set to two then the action would take place one time every two Days. Setting the **Recurrence Interval** to zero has the same effect as setting the **Recurring** field to "No Recurrence", the action will execute one time only on the **Execution Date**.

The date and time of execution are based on these recurrence settings in conjunction with the **Execution Date**. The date and time set in this field will be used to determine the day of the week and time at which events should be executed. In the above example the action would be executed each Day at 8:00 PM. If the **Infor Care Workloads Scheduler** service (refer to the **Infor Care Workloads Scheduler Service** section) is not active at the time of the action then that event will be skipped and the user will need to manually execute the process the necessary data.

Care should be taken when selecting the recurrence settings and the **Execution Date** and Time. For example, if the user selects the **Execution Date** to be August 31 and the **Recurrence** is set to "Monthly" then the action will only execute on the 31st day of the month. Since the month of September has only 30 days this action will not execute in that month.

Coverage Start and Stop

The Coverage Start and Stop settings are used to determine the relative start and stop dates of the data to be included in the output file. For example, a user selects the start date to be two weeks prior to the execution date and the stop date to be eight days prior to the execution date.

For the **Scheduled Action** that will execute on Tuesday, April 15, 2014 the resulting output file will include data from Tuesday, April 1, 2014 through Monday, April 7, 2014. Using a mix of "Weeks" and "Days" allows the user a fine level of control to avoid processing overlapping data.

Unit Translations

The **Unit Translations** are used to translate the Infor Care Workloads Unit names into a value that another system can recognize or from a value that another system utilizes. For example, the Unit "5 Center" would be written into the export file as "5C". Alternatively, the value "5C" would be read from an import value and interpreted as "5 Center".

If the Unit being exported does not have a translation value on this screen then the export file will include the full text of the Unit name. For example, if the Unit "3 West" does not have a translation listed and it is included in the export file then the full text of "3 West" will be written into the export file. The import process requires that the Unit be translated.

Shift Translations

The **Shift Translations** are used to translate the Infor Care Workloads Shift names into a value that another system can recognize or from a value that another system utilizes. For example, the Shift "Evening" would be written into the export file as "2". Alternatively, the value "2" would be read from an import value and interpreted as "Evening".

If the Shift being exported does not have a translation value on this screen then the export file will include the full text of the Shift name. For example, if the Shift "24 Hour" does not have a translation listed and it is included in the export file then the full text of "24 Hour" will be written into the export file. The import process requires that the Shift be translated.

Skill Translations

The **Skill Translations** are used to translate the Infor Care Workloads Skill names into a value that another system can recognize or from a value that another system utilizes. For example, the Skill "Charge Nurse" would be written into the export file as "CN". Alternatively, the value "CN" would be read from an import value and interpreted as "Charge Nurse".

If the Skill being exported does not have a translation value on this screen then the export file will include the full text of the Skill name. For example, if the Skill "Occupational Therapist" does not have a translation listed and it is included in the export file then the full text of "Occupational Therapist" will be written into the export file. The import process requires that the Skill be translated.

The "ANSOS" export format requires that the user set the **ANSOS Group** for each Skill that is to be included in the export file. There are four groups: 1, 2, 3, & 4. The Skill may also be listed with setting of "N/A" if this setting is not applicable for that Skill. If not using the "ANSOS" export format all Skills may be set to "N/A".

Service Manager

The **Service Manager** screen is used to control the **Infor Care Workloads Scheduler** service. The functionality presented on this screen replicates some of the functionality available through the Windows Service Manager and is intended to allow non-technical users to control the service.

If a PC is utilizing activities provided by this service it is recommended that the service be set to "Auto-start" on that PC. This can be accomplished by checking the **Auto-start service when OS starts** checkbox.

At any time the user may check that this service is running by opening the **Service Manager** screen. If the service is not running the user may start the service by clicking the **Start/Continue** button. When the service is running the **Start/Continue** button will be disabled and the **Pause** and **Stop** buttons will be enabled. Note the **Please Note** items at the bottom of this screen which indicate that:

- Automated Import & Export functionality is not supported on Windows 9x or Windows ME.
- and
- For successful execution of automated tasks the Database Connection should be established using "SQL Authentication". Alternatively, the service may be started using the Windows account of an individual authorized to login to the Infor Care Workloads Database. For more information, please contact your System Administrator.

The second note is also pertinent if a **Scheduled Action** is setup to use a network share as the file location. In this case, the Windows account should have write permissions to the network share. Setting the "Service Account" and other advanced options are available via the Windows Services Manager. This functionality is available via the Windows Control Panel. When open you will find the **Infor Care Workloads Scheduler** service listed.

The user may right-click on the item for options including **Properties**. The Properties window has many settings, but of most importance may be the **Log On** tab. Here the user may set the **Log on as** setting which is set to **Local System Account** by default. The user may select **This account** and enter a Windows account or the "NT AUTHORITY\Network Service" account (Note that this account utilizes a blank password).

Regardless of what changes are made to these settings the user should verify that the service starts before completing their work. More information about this service and validation that it is running properly is available in the **Infor Care Workloads Scheduler Service** section.

Infor Care Workloads Scheduler Service

The **Infor Care Workloads Scheduler Service** is utilized to perform scheduled tasks for the:

- Available Hours Import and Worked Hours Export Interface
- Workload Export Interface
- Report Scheduler

This service will communicate with all databases with valid connection files saved in the "database_connections" directory in the Infor Care Workloads application directory. The service has

a "heartbeat" that checks once every hour (and at service startup) for events that are scheduled to occur within the next hour. If the service finds events then it queues them and will execute the associated tasks at the appropriate time.

The **Infor Care Workloads Scheduler** service logs status information to a text log file in the application directory named "MIStroClef_Scheduler.log". If a file by this name is in use or the service cannot access this file for any other reason it will create a new file by the same name with a unique date-based identifier appended to the end of the file name. This log file provides detailed information that can be used to identify:

- if database connections are being correctly established
- if scheduled actions are taking place at the appropriate date and time
- if any errors were encountered during the export process
- etc.

If any issues are encountered with the Scheduled Actions then it is best to examine this log file prior to contacting Infor Care Workloads Technical Support. If the information provided in this log file is not clear to the user then they may be asked to send this file to Infor Care Workloads Technical Support for further analysis.

Import Data Validation

Data that is imported into Infor Care Workloads by using the Available Hours Import process is used to populate the **Actual Hours** field of the Infor Care Workloads **Staffing** workspace.

When data is populated into the **Staffing** workspace by the Available Hours Import process the **Last Modified Date** will display the time that each data point was populated. The user responsible for setting up the import process will be displayed in the **Last Modified By** column, in this case the "Administrator" set up the import process.

The **Available Hours Import** process is one of three ways that data can be populated into this workspace:

- Automatically populate data by using the Available Hours Import process.
- Manually enter data into the **Staffing** workspace in the **Actual Hours** column. Users modifying this data will need to be granted permission to do so. Further a system-wide setting is available to control the availability of this functionality by using the **Infor Care Workloads Administration Console**… **System Options** workspace… **General Options** tab. When this option is available to the user the **Actual Hours** column will be highlighted in yellow as seen above.
- Automatically populate data by using Standard Hours. This functionality is available on the **Infor Care Workloads Administration Console**… **Units** workspace… **Standards** tab… **Standard Hours** sub-tab. If data is entered here this data will be used to automatically populate the **Staffing** workspace. This data can be overwritten by using either of the other two methods.