R&D

HARRIS GOVERN

101-wm-fea-019 Workload Manager

Govern V6

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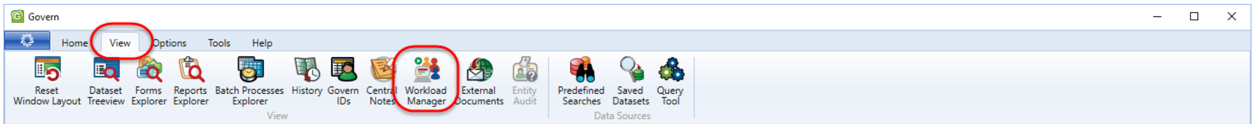
1.0	2017.06.05	Olusegun Olaniyan	6.1	Document creation
1.1	2017.06.22	Olusegun Olaniyan	6.1	Updates
1.2	2017.07.17	Olusegun Olaniyan	6.1	Product code change

Table of Contents

OVERVIEW

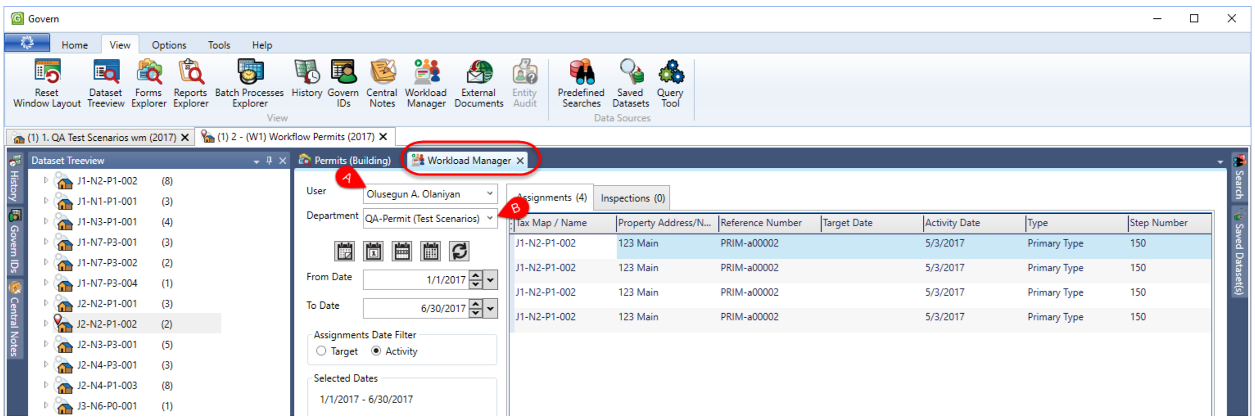


The Govern Workload Manager currently highlights user or department tasks in the following areas:

- Assignments
- Inspections

Users of the Workload task manager are people that may be involved with Permits and Licensing, Activities and Workflows, Complaints/Grievances, and Services Requests.

Functionality



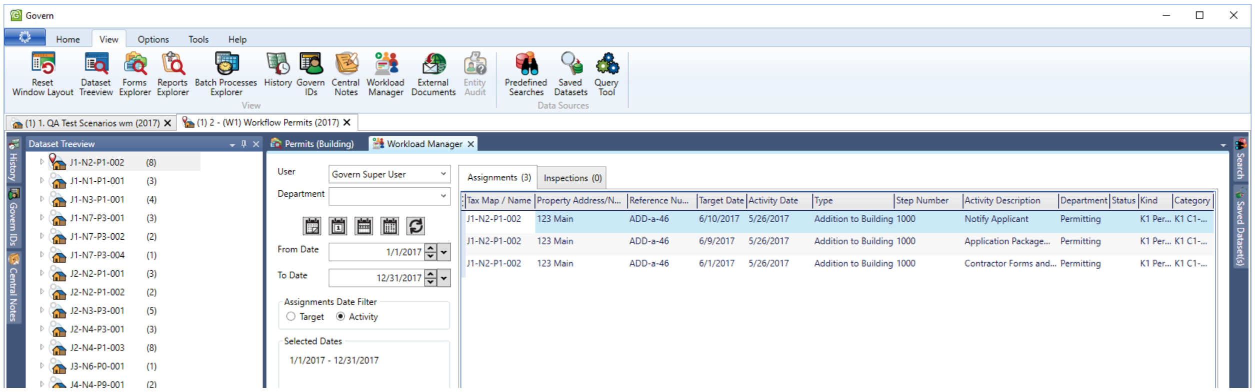
When you select the Workload Manager pane, tabs based upon user login (A) are displayed. The data displayed is filtered according to the Profile/Department (B) and any additional options that are selected. The right hand side displays grids that correspond to the tab selected, i.e. Assignments, Inspections, and so on.

NOTE: The absence of any tabs is an indication that you are not configured by an administrator to view them. It is possible to have access to a profile but not have any tasks displayed.

Governs' Messaging System is used for viewing the messages sent internally. These messages can be linked to an Activity Step.

Activity step related messages are sent to notify you that an activity step has been initiated or completed, and that you are needed to perform some action such as scheduling an inspection, or an approval. Other types of messages include reminders and critical messages. A reminder may be sent at a predefined period like a day or two before you need to perform this action. A critical message is sent when an action must be completed before a specific date.

User Interface (UI)

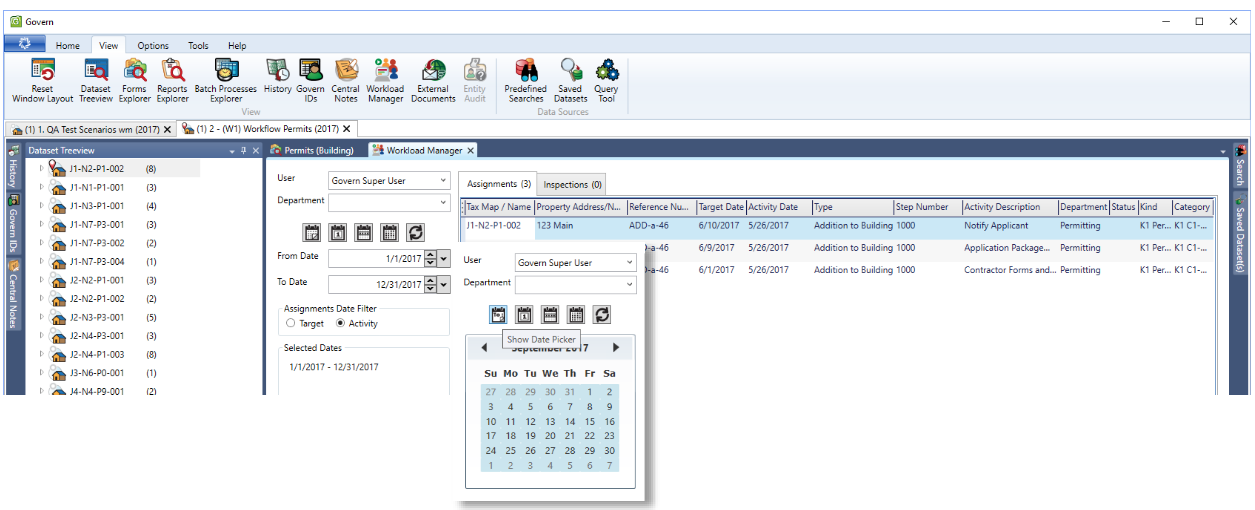


The Workload Manager UI is designed to provide users with an "at a glance" view of all tasks and activity's that may be related to their function. In addition immediate access to their tasks from the perspective of an employee, or as a manager or supervisor when given administrator privileges. Available tabs are:

- Assignments – Tasks assigned to the selected user are displayed under this tab.
- Inspections – This tab displays the list of inspections.

Presentation in Govern

The Layout of the Workload Manager is intended for quick navigation. The OpenForm is divided into two main areas, the **Details Selector** and the **Task Tabs**.

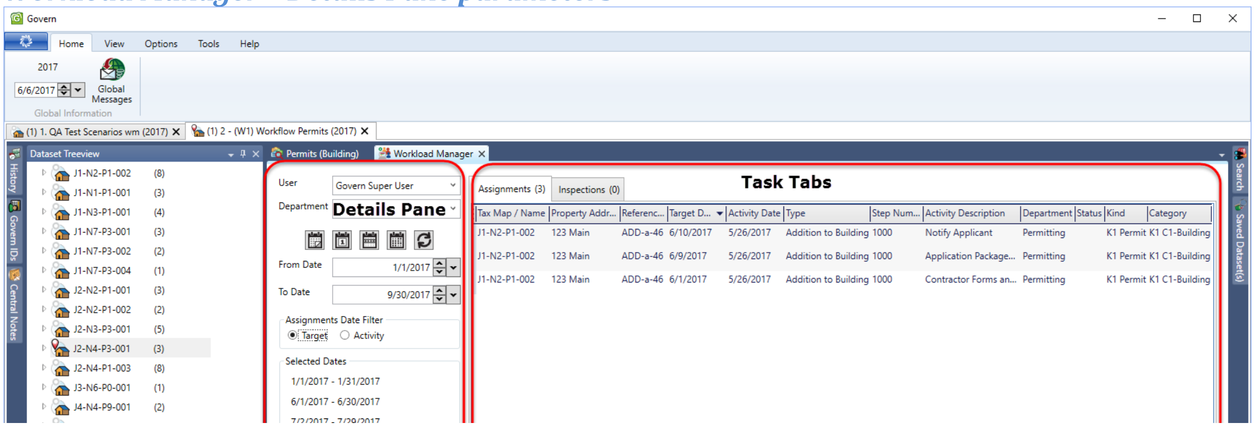


Workload Manager – Details Pane

The parameters set in the **Details Pane** determine what information is used to populate the grid in the Task tabs. Available tabs are as follows:

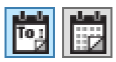
- Assignments
- Inspections

Workload Manager – Details Pane parameters



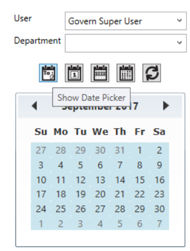
User – This combo-box contains the list of accessible users.

Department – This is the Workflow Department list.

 **Show Date Picker / Show Calendar** – This is a toggle switch that will switch between a calendar and a date range. When Show Date Picker is selected, the pane will display a **From Date** and **To Date** fields. This is the standard Govern date picker that allows for fast selection of dates.

From Date – Click the down arrow [v] of the **From Date** picker to select a starting date range.

To Date – Select an end date for your range, click the down arrow [v] beside this field.



NOTE: When the **From/To** dates are changed, the Assignments and Inspections grid will be reloaded. In addition, if the '**From**' date is greater than the '**To**' date no dates will be selected.

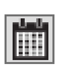
When the Calendar is displayed, users are able to select non-sequential date ranges, e.g. a one week range followed by one or two days, then a month, then a single day, and so on. This is done by using the Ctrl + Click combination, or the Ctrl + Drag, for sequential, or non-sequential ranges.

Date Selection Mode

 **View Current Date** – Click to set the set the Task tabs grid to display the current date. When the calendar is visible, i.e. Show Calendar, the current date will be selected. Any tasks or activities on that date will be displayed.

TIP: This is the equivalent of placing your cursor in the date field and selecting the Ctrl + T combination.

 **View Current Week** – When selected, this will set the Task tabs grid to display tasks of the current week. When the calendar is visible, the current week will be selected, and any tasks or activities within that period will be displayed.

 **View Current Month** – To view all tasks in the current month, click this view option. When the calendar is visible, the current month will be selected. Any tasks or activities within that period will be displayed; tasks or activities within that period will be displayed.

Refresh – The behavior of the assignments list is set to automatic refresh, i.e. when a new assignment is **C**reated/**D**eleted/**U**pdated, and this update will affect the current list of assignments, the list will automatically refresh itself to **A**dd/**R**emove or **U**pdate the assignments displayed in the current list. Such changes may take up to 10 seconds before a refresh of the list is triggered. In situations when a prolonged refresh is observed, click **Refresh** to force an immediate update.

TIP: The Refresh button may be used on the rare situation where another administrator makes a change that will affect the list of current activities from another computer.

Addition of an Assignment
When a new assignment is created, Govern will check to see if the new assignment is listed; if it has been created, it will be appended to the list (grid).

Deletion of an Assignment
When an assignment is has been deleted, the system will verify as to whether it is in the list, if so, it will be removed from the list.

Change of Status for an Assignment
When an assignment's status is changed, i.e. **Assign To** user, **Completion Date**, **Target Date**, or **Activity Date**, the Govern system will verify if the changes affects any entries in the current list, if so, an update is made accordingly.

NOTES: If the workflow form is not linked to the current profile, users will see a form indicating Unauthorized Access.

Workload Manager Tabs
The information displayed under any of the tabs is dependent upon the values displayed in the **User**, **Department**, and the **From** / **To** date range. This information is common to all tabs in the Workload Manager pane. Each tab also has it individual Options group located at the bottom of the tab.

Business Rules
The business rules of the display are as follows:

- The activities must be explicitly assigned to the selected user.
- When selected the activities must also be assigned to the Department.
- There must be a completion date.
- When using the Activity filter, the activity date must be within the specified date range.
- If there is no activity date, then the Target Date will used as the filter.

Assignments Date Filter group
NOTE: This group is only present when the Assignments tab is selected. When the Inspections tab is active, the Filter Inspections group replaces the Assignments Date Filter group. *See Filter Inspections group below.*

The assignment tab, when selected, will display all workflow activities based on a selected filter.

Target Date
Select to view activities by **Target Date** if there is no activity date.

Activity Date
Select **Activity** to filter by activities.

Selected Dates group

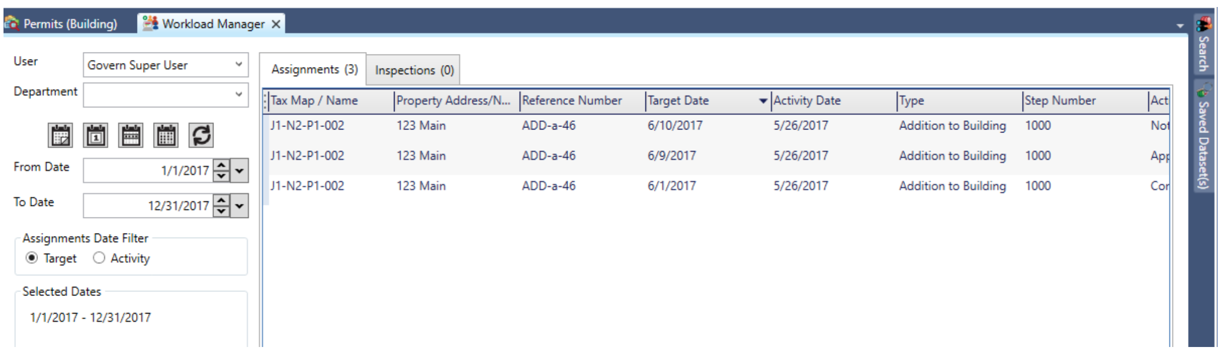
This group will display **Dates** that are selected in the **From/To Date** fields. In addition, when non-continuous date ranges are selected on the calendar, all ranges are displayed in this group. The information displayed in this group is informational, i.e. cannot be changed directly in this group.

Assignments Tab

The assignment tab displays all workflow activities based on Activities that are assigned to the selected user, Activities that associated with a selected department if one has been selected. In addition the Activities must have a completion date. When records are displayed in the grid, users may double click on the record to display its origin, e.g. an Activity form.

Displaying Assignments

To view assignments that are relevant to the selected User and or Department...



1. Select a user.
2. If relevant, select a Department.
3. Click to select a date viewing mode and specify a date range.
4. In the Assignments Date Filter group, specify Target or Activity

The assignments that are relevant to the specified user will be displayed in the grid under the Assignments tab.

Assignments tab – Grid Columns

Displayed Assignment tab columns are as follows:

- **Tax Map / Name** – This is the tax map number or the name of the master reference Parcel/Name for the workflow of the activity
- **Property Address / Name Type** – The Address or name type of the master reference Parcel/Name for the workflow of the activity is displayed in this column
- **Reference Number** – When there is a Certificate Number, Permit Number, or Application Number associated with the record, it will be displayed under this column.
- **Target Date** – This is the Target Completion Date field of (Table: WM_ACTIVITY_STATUS).
- **Activity Date** – This column is populated from the Start Date of (Table: WM_ACTIVITY_STATUS).
- **Type** – The Workflow Type is displayed here.
- **Step Number** – This column displays the Activity Step number.
- **Activity Description** – The Activity Description that was defined in the GNA is displayed here.
- **Department** – This is the department that the activity is related to.
- **Status** – Displays the status of the Workflow.
- **Kind** – Workflow Kind.

- **Category** – This is the Workflow Category.

Assignments Date Filter group

NOTE: This group is only present when the Assignments tab is selected.

The Assignments tab, when selected, will display all workflow activities based on a selected filter. The Assignments Date Filter group will display results ordered according to:

- **Target** – Results are sorted and viewed according to the set target date.
- **Activity** – When selected, results are sorted and viewed based upon an Activity date.

Selected Dates group

This group will display **Dates** that are selected in the **From**/**To Date** fields. In addition, when non-continuous date ranges are selected on the calendar, all ranges are displayed in this group.

Inspections Tab

The inspections tab will display all workflow inspections based on a set of conditions. The inspections must be assigned to the selected User, the inspections are associated with the selected department, when selected, and the inspections must have an inspection date that falls within the specified date range; inspections are viewed based on the status that is selected in Inspections Filter group. When no status is specified, i.e. a blank space, all statuses will be listed.

Filter Inspections group

NOTE: This group is only present when the Inspections tab is selected.

The Inspections tab, when selected, will display all workflow activities based on a selected filter.

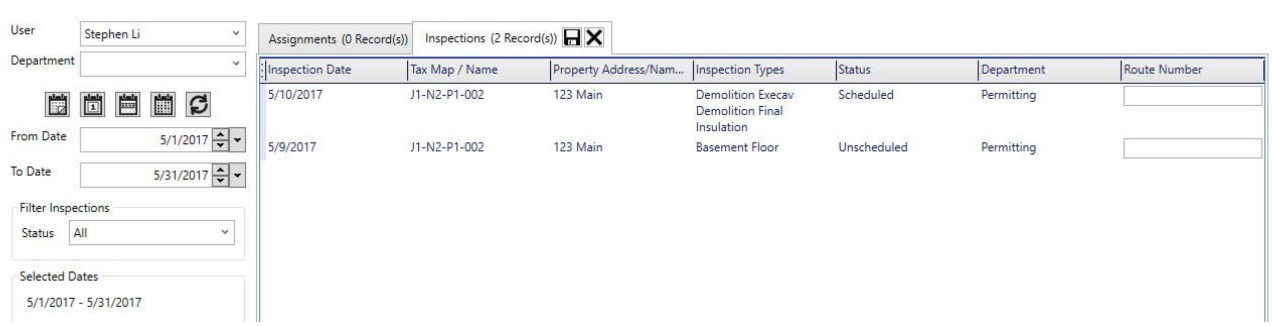
Status

The inspection status filter selected will determine what information is displayed. Available options are the following that correspond to defined inspection statuses:

- All
- Completed
- Scheduled
- Unscheduled
- Voided

Displaying Inspections

To view Inspections that are relevant to the selected User and or Department...



1. Select a User.
2. If relevant, select a Department.

3. Click to select a date viewing mode and specify a date range.
4. In the Inspections Filter group, select a status.

The Inspections that are relevant to the specified user will be displayed in the grid under the Inspections tab.

Inspections tab – Icons

Save – Click Save to save any changes

Cancel – Click to cancel any changes.

Reassign Inspection – When selected will display a modal screen that will allow a user with security access to reassign inspections.

Inspections tab – Grid Columns

The columns displayed in the Inspections tab grid are as follows:

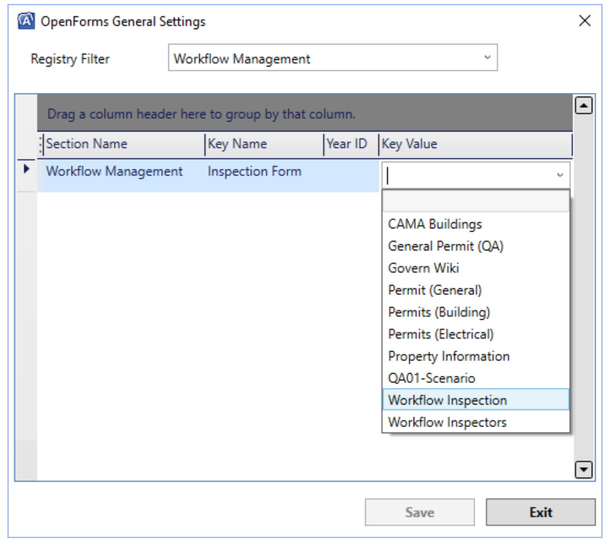
- **Inspection Date** – This is the date of the inspection
- **Tax Map / Name** – The Tax Map number or the name of the Master Reference Parcel/Name for the workflow of the inspection is displayed in this column.
- **Property Address / Name Type** – In this column is the Address or Name Type of the Master Reference Parcel/Name for the workflow for the inspection
- **Inspection Types** – All inspections types that was linked to the inspection will be displayed. When there are multiple Inspection Types, each type is displayed as a separate line item.
- **Status** – This is the status of the inspection.
- **Department** – This columns displays the department that this activity is related to.
- **Route Number** – The route number is the sequence that the inspection has been placed. This information is taken from (Table: WM_INSPECTION).

Displaying Inspections

To view inspections that are relevant to the selected User and or Department…

1. Specify the User and, or Department.
2. Set an applicable date or date range.
3. In the Filter Inspections group, select a Status.
4. Any related inspections will be displayed in the grid.

Inspections tab – Grid Actions



Items that appear in the Inspections Tab grid can be selected by the user. A double click will trigger a "Go To" action that results in the launching of a user definable form. By default, a double click on an Inspection grid line item will launch the corresponding Workflow Inspection form with the focus set to the Activity tab. As an administrator alternate forms can be configured to launch. Whenever an inspection is created, deleted, or updated, if the affected inspection is displayed in the grid, the Govern system will automatically refresh the list and reflect the action.

About Newly Created Inspections

When a new inspection is created, the Govern system will determine if this inspection falls within the search criteria that generated the contents of the current grid, if so the grid is updated.

Configuring a Grid Item "Go To" form

As stated, the default form that an Inspections tab double click action will display is the Workflow Inspection form. To configure an alternate form…

As an administrator, in the Govern New Administration (GNA)…

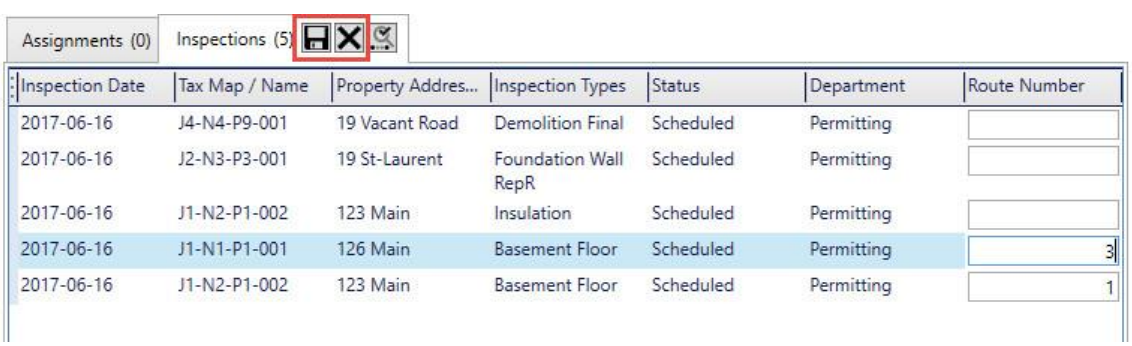
1. In the GNA ribbon, select Parameters (tab) > System Parameters (group) > **General Settings Editor**.
2. In the **OpenForms General Settings** form, set the Registry Filter to **Workflow Management**.
3. Under the Key Value, set the Key Value to the required target form.

Inspection Routing

When inspections are scheduled, they are often prioritized based upon region and location, this allows the manager or inspector to manage their required travel time.

Inspection Route Number

The route number is an unmanaged priority designator that is strictly as a visual reference. As this feature is unmanaged by the Govern system, there is no validation. The route number is the only editable field in the inspection grid. The inspection route number may be assigned/modified by a manager or by an inspector.



Modifying the Inspection Route Number

In the inspection **Route Number** field under the Inspections tab…

1. Click on the line item under the column.
2. Highlight and enter a new number; whenever a route number is changed the **Save** and **Cancel** buttons are enabled.
3. Click **Save** to save the change.

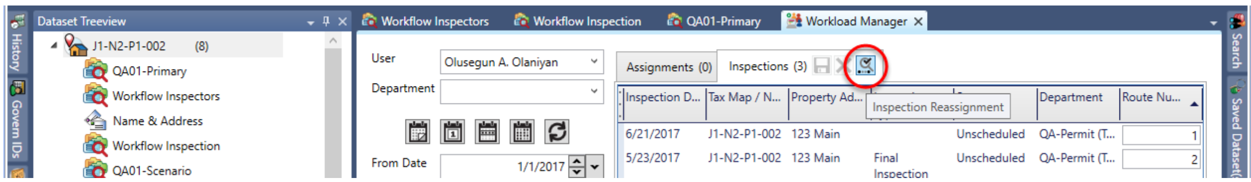
NOTE: The Route Number is unmanaged by the Govern system. As there is no validation, duplicate route numbers may be entered by users.

Inspection Reassignment

The Inspection Reassignment feature is a part of the Workload Manager that allows users to reassign the inspections of a given inspector on a specific date. This feature uses information from three (3) sources:

- The Calendar
- The Workflow Inspections form
- The Workflow Inspectors form

Inspections are reassigned through an interface that can be accessed through the *Reassign Inspection* **Reassignment** button on the *Workload Manager - Inspections* tab.



The Inspection Reassignment user form is presented as a modal window that is divided into two sections. Each section contains a group box, with each group box containing a grid labelled **Inspections** and **Available Inspectors** respectively.

Inspections group – parameters

Inspector – This is the name if the inspector whose inspections can be reassigned. Although this name defaults to the User that was selected in the Workload Manager, it may be changed.

Date – The list of inspections will be filtered based on this date.

Inspections (grid)

This grid displays all inspections that are assigned to the selected **Inspector** for the selected Date. Column headings are as follows:

- New Inspector
- Seq *(Sequence)*
- Time
- Address
- Tax Map
- Type
- Territory

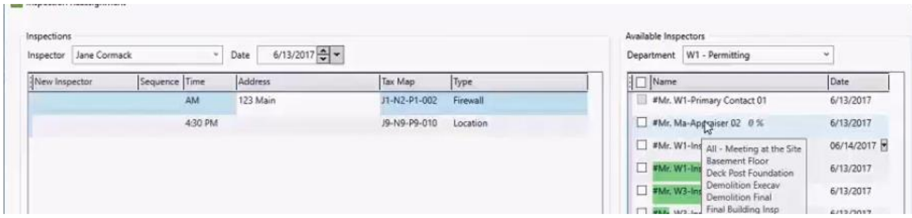
Available Inspectors group

Department – The list of available inspectors is filtered based on the Department selected here. It defaults to the Department corresponding to the selected Inspector, but it can be changed.

Available Inspectors (grid)

This grid displays all available inspectors for the selected Department. Note that inspectors with the status *Inactive* are not displayed. Column headings are, Name, Date, and Territory.

TIP: When you hover your mouse pointer over the inspector name under the name column, a tooltip is displayed that will indicate the Inspection Types that the inspector is qualified to review.

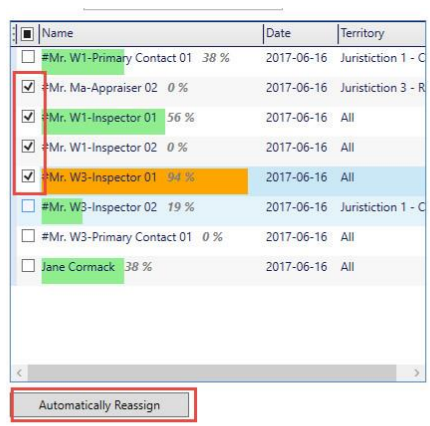


Selecting an Inspector

Inspectors are designated as selected through the checkbox located at the left of each line item. If the line item greyed out, this is an indicator that the Inspector is not on duty.

Available Inspectors and the Capacity Indicator

The *Available Inspectors* group displays the inspectors that are available to perform inspections on the selected date. The



Name – This field displays the name of the selected inspector, along with a colored bar that is a percentage indication of the inspectors capacity on the date appearing under the date column. The thresholds of the *Capacity Indicator* colored bars are as follows:

- **Green** (Inspector capacity is < 75%)
- **Orange** (Inspector capacity is 75% - 100%)
- **Red** (Inspector capacity > 100%)

As an inspection is added to an inspector the Capacity Indicator will update to display the capacity of the inspector based on the selected date.

Viewing Inspection Types

A tooltip is displayed when the mouse pointer is hovered over the column displaying the inspection types that the inspector is eligible to perform.

- **Name** – This column displays the name of available inspectors based upon the selected department.
- **Date** – This is the date where any assigned inspections will be rescheduled. By default this is the Date that appears in the Inspections group. This date can be modified for each inspector. When the date is modified, the inspectors' availability information will be modified accordingly.
- **Territory** – The territory assigned to the inspector is displayed in this column.

Automatic Reassignment of an Inspection

Click **Automatically Reassign** to reassign all inspections to the selected inspectors automatically. When using Automatically Reassign, selection checkboxes are used to select the inspectors. When this feature is used, Govern will try to balance the workload of the selected inspector.

Performing an Automatic Reassignment

To perform an automatic reassignment, In the **Available Inspectors** grid…

1. Select the inspections that are to be reassigned.
2. Click the checkbox located in the column heading; this action will select all inspectors.
3. Click **Automatically Reassign**.

NOTE: When two or more inspectors have the same amount of time available, the system will reassign the inspections based upon the *alphabetical order* of the inspectors.

Business Rules – Inspection Reassignment

In order for an Inspection to qualify for reassignment, i.e. can be applied to a new inspector, the following business rules are applied:

1. The inspector must be available to perform the inspection on the required date, i.e. not off duty.
2. To re-assign to the original inspector, the date must be different from the original scheduled date.
3. The inspector must be qualified to perform all inspection types that are linked to the inspection.
4. The required inspector must belong to the territory that the inspection will occur in. Inspection territory is determined by the parcel that is linked to the inspection; i.e. areas with **Sequence = 0**, **Frozen ID = 0**, and **Year = Inspection Year** *(year of the inspection)*.

Manually Reassigning an Inspection

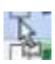
Inspections can be manually reassigned with a drag and drop action. To manually reassign an inspection…

1. Under the Name column, click and hold down the right mouse button on the name of the inspection.
2. Drag the name over the new date.
3. Release the mouse button to move the inspection.

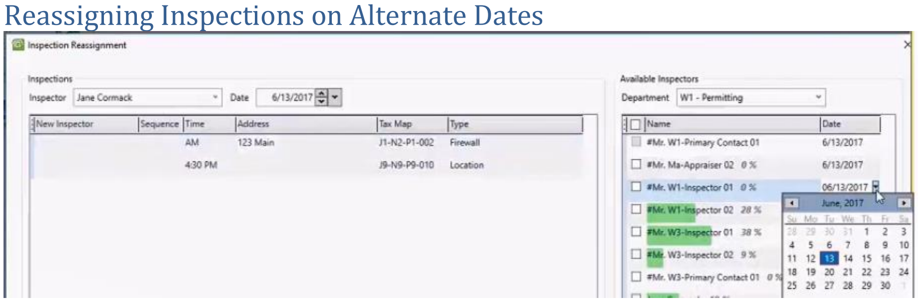
Users should note that as a validation, the system will not allow the reassignment of an inspection to an inspector that is not qualified to perform it.

Manual Reassignment Status indicators

 When the circle with a diagonal slash is displayed during a drag and drop action, this is an indicator that the reassignment is not allowed, i.e. the inspector is not available for the inspection.

 When the reassignment is accepted, the inspection will be added to the destination name; in addition the colored capacity indicator will change to reflect the new addition.

Reassigning Inspections on Alternate Dates



The interface that is used for the drag and drop action that manually reassigns an inspection for the selected date may also be used for reassigning an inspection for an alternate date. If the date is changed in the Date field in the Inspections group, the date change is applied to the inspectors that appear in the *Available Inspectors* grid. Should an alternate date be required for the inspector, the Date for the inspector that is listed under the Date column in the grid can be selected and changed using the *date-picker*. To select an alternate date for an inspection reassignment…

1. Locate the date beside the inspector; click on the end of the date column.
2. The date picker will appear.
3. Navigate the date picker calendar to locate the desired alternate date.
4. When the date has been selected, as explained in *Manually Reassigning an Inspection* above, drag and drop the inspection to the new date.

NOTE: When an alternate inspection date is selected, the *Capacity Indicator* will indicate 0%, if no inspection is assigned for the inspector on the new date, or it will reflect the capacity for the date.

Inspection Reassignment – Command Buttons

- **Save** – Click *Save* to accept any changes.
- **Cancel** – When you click *Cancel*, no changes are made, and the form is closed.

Inspection Reassignment Security

The **Inspection Reassignment** button can be secured through the *Security Manager*. *See the Securing the Workload Manager section in this document.*

Workload Manager – User Personalization Features

The following personalization features are maintained with the user of the Workload Manager.

Workload Manager Tabs

When you exit from the Workload Manager form, the position of the active tab will be persistent. When the application is reopened, the tab that was selected will still be selected.

Workload Manager Columns

Upon exiting from the Workload Manager, columns that are hidden in either the Assignments or Inspections grid, will remain hidden when the application is reopened.

Date Selection Mode

The date selection mode will default to the last used mode prior to exiting the Workload Manager.

Workload Manager – Notable User Personalization Features

The following personalization features are maintained with the user of the Workload Manager.

Workload Manager Tabs

When you exit from the Workload Manager form, the position of the active tab will be persistent. When the application is reopened, the tab that was selected will still be selected.

Workload Manager Columns

Upon exiting from the Workload Manager, columns that are hidden in either the Assignments or Inspections grid, will remain hidden when the application is reopened.

Date Selection Mode

The date selection mode will default to the last used mode prior to exiting the Workload Manager.

CONFIGURATION

The configuration process for the Workload Manager is relatively simple; use the following steps:

In GNA…

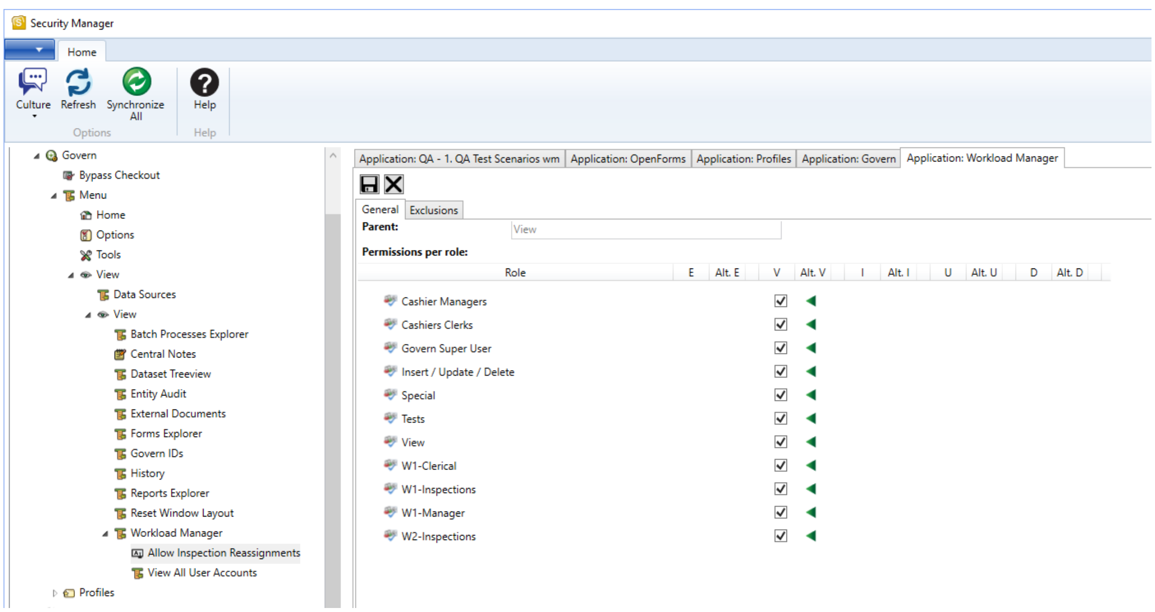
1. Run the Verify Database process to obtain the VT User menu descriptions and the required Security options. *See Security Options below*.

NOTE: The Refresh or Synchronize All processes are not required in GSM, they will be performed by the *Govern New Administration* (GNA).

The Refresh or the **Synchronize All** processes are not required in the GSM, these will be performed by the GNA.

Security

Access to the Workload Manager interface is controlled through the Govern Security Manager (SM). As is standard with the SM access can be granted via Role or User. *Refer to the Govern Security Manager user guide for details about securing Govern suite applications with the SM*.



Securing the Workload Manager

Restricting user access to the Workload Manager is carried out in the Govern *Security Manager* (**SM**). As with other features of Govern, access to the Workload Manager can be restricted by user or by role.

NOTE: When secured, the button for the *Workload Manager* will not be visible on the ribbon.

Access the required node by expanding the following nodes:

Applications > Govern > Menu > View > View > **Workload Manager**

…drill down into the Workload Manager node and locate the following options:

- **Allow Inspection Reassignment** – The Allow Inspection Reassignment feature will give the User or Role access to the *Inspection Reassignment* form. The default is unchecked.
- **View All User Accounts** – Edit this node to specify that all user accounts are visible.

APPENDIX

Data Tables

The following data tables were created or modified for the implementation of this feature.

Inspection Reassignment process:

- WM_INSPECTION
- WM_INSPECTION_LINKED_IDS
- WM_INSPECTION_TYPE
- WM_INSPECTION_INFO
- WM_INSPECTOR
- WM_WORK_HOURS
- WM_TIME_OFF