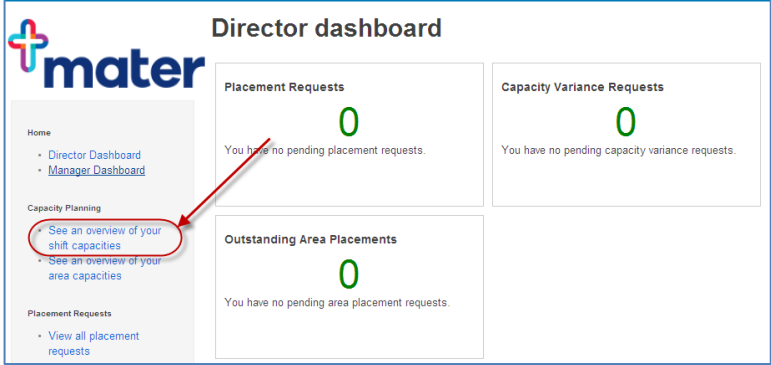
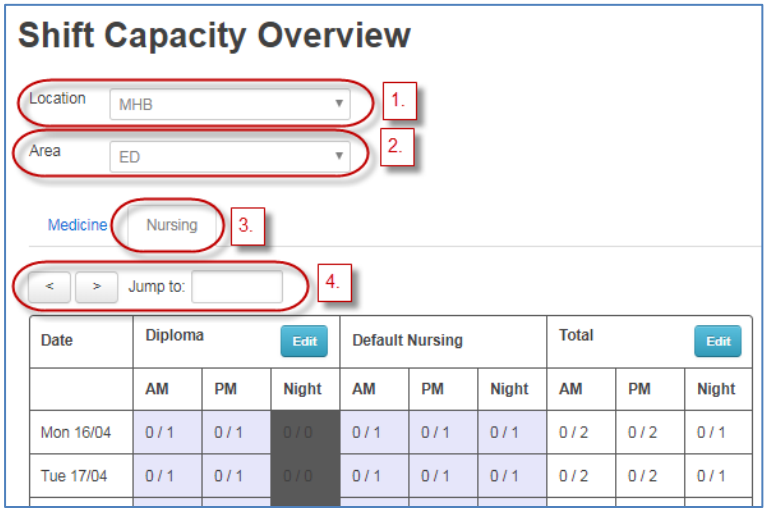
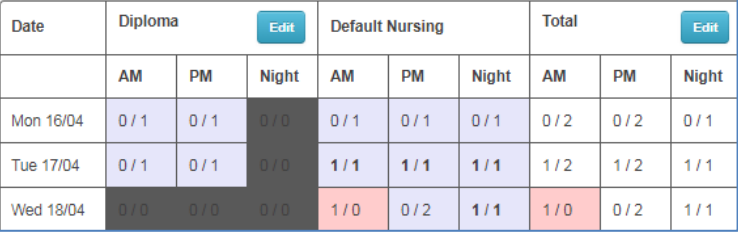


DRef-04a - Director Reference Sheet – Managing your SHIFT Capacity Overview.

Steps	Action	What it looks like																																																	
1.	<p>In the sidebar on your Director Dashboard is the See an overview of your <u>shift</u> capacities link.</p> <p>Click on this link to navigate to the Shift Capacity Overview screen.</p>	 <p>The screenshot shows the Director dashboard with a sidebar on the left. A red circle highlights the link 'See an overview of your shift capacities' in the Capacity Planning section. A red arrow points from this link to the main dashboard area.</p>																																																	
2.	<p>The Shift Capacity Overview screen shows how many shifts are “available” and how many are “booked” in your area/s, for each discipline and student group.</p> <p>You view a capacity overview by choosing:</p> <ol style="list-style-type: none"> 1. a Location. 2. an Area within the chosen Location. 3. a Discipline within the chosen Area. 4. a range of dates by clicking the forward/back arrows (jumping forward/back 4 weeks) or choosing a date from the Jump to: field to jump straight to a specific date. 	 <p>The screenshot shows the Shift Capacity Overview screen. It has four numbered callouts: 1. Location dropdown (MHB), 2. Area dropdown (ED), 3. Discipline radio button (Nursing), and 4. Jump to: field with navigation arrows.</p> <table border="1" data-bbox="740 1205 1481 1397"> <thead> <tr> <th rowspan="2">Date</th> <th colspan="3">Diploma Edit</th> <th colspan="3">Default Nursing</th> <th colspan="3">Total Edit</th> </tr> <tr> <th>AM</th> <th>PM</th> <th>Night</th> <th>AM</th> <th>PM</th> <th>Night</th> <th>AM</th> <th>PM</th> <th>Night</th> </tr> </thead> <tbody> <tr> <td>Mon 16/04</td> <td>0 / 1</td> <td>0 / 1</td> <td>0 / 0</td> <td>0 / 1</td> <td>0 / 1</td> <td>0 / 1</td> <td>0 / 2</td> <td>0 / 2</td> <td>0 / 1</td> </tr> <tr> <td>Tue 17/04</td> <td>0 / 1</td> <td>0 / 1</td> <td>0 / 0</td> <td>0 / 1</td> <td>0 / 1</td> <td>0 / 1</td> <td>0 / 2</td> <td>0 / 2</td> <td>0 / 1</td> </tr> </tbody> </table>	Date	Diploma Edit			Default Nursing			Total Edit			AM	PM	Night	AM	PM	Night	AM	PM	Night	Mon 16/04	0 / 1	0 / 1	0 / 0	0 / 1	0 / 1	0 / 1	0 / 2	0 / 2	0 / 1	Tue 17/04	0 / 1	0 / 1	0 / 0	0 / 1	0 / 1	0 / 1	0 / 2	0 / 2	0 / 1										
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3.	<p>Each box shows two numbers.</p> <p>The first number shows how many shifts are booked by that student group, while the second shows how many shifts in total are available to that student group.</p> <p>i.e. 1 / 2 means that there is currently 1 shift booked out of a total of 2 available.</p> <p>Timeslots that are:</p> <ul style="list-style-type: none"> - Not available will display 0/0 and greyed out. - Fully booked will have numerals displayed in Bold. - Overbooked will be highlighted Red. 	 <p>The screenshot shows the Shift Capacity Overview table with the following data:</p> <table border="1" data-bbox="740 1621 1481 1854"> <thead> <tr> <th rowspan="2">Date</th> <th colspan="3">Diploma Edit</th> <th colspan="3">Default Nursing</th> <th colspan="3">Total Edit</th> </tr> <tr> <th>AM</th> <th>PM</th> <th>Night</th> <th>AM</th> <th>PM</th> <th>Night</th> <th>AM</th> <th>PM</th> <th>Night</th> </tr> </thead> <tbody> <tr> <td>Mon 16/04</td> <td>0 / 1</td> <td>0 / 1</td> <td>0 / 0</td> <td>0 / 1</td> <td>0 / 1</td> <td>0 / 1</td> <td>0 / 2</td> <td>0 / 2</td> <td>0 / 1</td> </tr> <tr> <td>Tue 17/04</td> <td>0 / 1</td> <td>0 / 1</td> <td>0 / 0</td> <td>1 / 1</td> <td>1 / 1</td> <td>1 / 1</td> <td>1 / 2</td> <td>1 / 2</td> <td>1 / 1</td> </tr> <tr> <td>Wed 18/04</td> <td>0 / 0</td> <td>0 / 0</td> <td>0 / 0</td> <td>1 / 0</td> <td>0 / 2</td> <td>1 / 1</td> <td>1 / 0</td> <td>0 / 2</td> <td>1 / 1</td> </tr> </tbody> </table>	Date	Diploma Edit			Default Nursing			Total Edit			AM	PM	Night	AM	PM	Night	AM	PM	Night	Mon 16/04	0 / 1	0 / 1	0 / 0	0 / 1	0 / 1	0 / 1	0 / 2	0 / 2	0 / 1	Tue 17/04	0 / 1	0 / 1	0 / 0	1 / 1	1 / 1	1 / 1	1 / 2	1 / 2	1 / 1	Wed 18/04	0 / 0	0 / 0	0 / 0	1 / 0	0 / 2	1 / 1	1 / 0	0 / 2	1 / 1
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4. To set the base level **Total Discipline Capacity** for the Area, (i.e. how many Nursing and Midwifery students in total, regardless of year level or program studied, can be in a particular ward at a time) click on the **EDIT** in the Total column heading.

This displays the **Change Expected Total Capacities** pop-up box.

Shift Capacity Overview

Location:

Area:

Medicine Nursing

< > Jump to:

Date	Diploma <input type="button" value="Edit"/>			Default Nursing			Total <input type="button" value="Edit"/>		
	AM	PM	Night	AM	PM	Night	AM	PM	Night
Mon 16/04	0 / 1	0 / 1	0 / 0	0 / 1	0 / 1	0 / 1	0 / 2	0 / 2	0 / 1
Tue 17/04	0 / 1	0 / 1	0 / 0	1 / 1	1 / 1	1 / 1	1 / 2	1 / 2	1 / 1

5. Enter the dates that you want these capacities to apply in the **From** and **Until** fields.

Enter the maximum number of shifts available to students for each day by typing the value in the appropriate boxes then click **Submit** button when done.

A message:

Success. Your changes will appear shortly.

will display and your updated capacities will show on the dates entered.

Change Expected Total Capacities

From:

Until:

Shift Category	Mon	Tues	Wed	Thur	Fri	Sat	Sun
AM	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
PM	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
Night	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>

6. Once the Total Discipline Capacity is set, (and no capacity has been allocated to specific Student Groups) the **Default** Student Group will display this capacity and allow students to book shifts.

Medicine Nursing

< > Jump to:

Date	Diploma <input type="button" value="Edit"/>			Default Nursing			Total <input type="button" value="Edit"/>		
	AM	PM	Night	AM	PM	Night	AM	PM	Night
Mon 16/04	0 / 0	0 / 0	0 / 0	0 / 2	0 / 2	0 / 1	0 / 2	0 / 2	0 / 1
Tue 17/04	0 / 0	0 / 0	0 / 0	1 / 2	1 / 2	1 / 1	1 / 2	1 / 2	1 / 1
Wed 18/04	0 / 0	0 / 0	0 / 0	1 / 2	0 / 2	1 / 1	1 / 2	0 / 2	1 / 1
Thu 19/04	0 / 0	0 / 0	0 / 0	0 / 2	0 / 2	1 / 1	0 / 2	0 / 2	1 / 1
Fri 20/04	0 / 0	0 / 0	0 / 0	0 / 2	1 / 2	0 / 1	0 / 2	1 / 2	0 / 1
Sat 21/04	0 / 0	0 / 0	0 / 0	0 / 2	1 / 2	0 / 1	0 / 2	1 / 2	0 / 1
Sun 22/04	0 / 0	0 / 0	0 / 0	0 / 2	0 / 2	0 / 1	0 / 2	0 / 2	0 / 1

7.

Capacity can be copied for **Total Capacity** by selecting **Copy**. This allows the user to select a specific week's capacity and apply this to another time frame.

Note this only copies Total Capacity.

Date	Diploma	Edit	Dual Degree	Edit	Default Nursing	Total	Edit			
	AM	PM	AM	PM	AM	PM	Night	AM	PM	Night
Mon 15/04	0/0	0/0	0/0	0/0	0/2	0/2				
Tue 16/04	0/0	0/0	0/0	0/0	0/2	0/2				
Wed 17/04	0/0	0/0	0/0	0/0	0/2	0/2				
Thu 18/04	0/0	0/0	0/0	0/0	0/2	0/2				
Fri 19/04	0/0	0/0	0/0	0/0	0/2	0/2				
Sat 20/04	0/0	0/0	0/0	0/0	0/2	0/2				
Sun 21/04	0/0	0/0	0/0	0/0	0/2	0/2				

Date	Diploma	Edit	Dual Degree	Edit	Default Nursing	Total	Edit
	AM	PM	AM	PM	AM	PM	Night
Mon 22/04	0/0	0/0	0/0	0/0	0/2	0/2	

8.

You can also set the base level **Student Group Capacity** for any **Specific** student groups assigned to the Area, (i.e. any shifts from the Total Discipline Capacity that you want to allocate, or “reserve”, for a specific group) by clicking **EDIT** in the **Student Group Name** column heading (i.e. Diploma)

Fill out the **Set Default Capacities** pop-up with any shifts you want to allocate to this group (i.e. 1 shift on both Mon-Tue and both AM-PM) and click **Submit**.

Shift Capacity Overview

Location: MHB
Area: ED
Medicine: Nursing

Jump to:

Date	Diploma	Edit	Default Nursing	Total	Edit				
	AM	PM	Night	AM	PM	Night	AM	PM	Night
Mon 16/04	0/0	0/0	0/0	0/2	0/2	0/1	0/2	0/2	0/1
Tue 17/04	0/0	0/0	0/0	1/2	1/2	1/1	1/2	1/2	1/1

9.

Any capacity allocated to a **Specific** Student Group will automatically reduce the **Default** Student Group capacity by the same amount. For example:

- 1 AM and 1 PM shift have been allocated to the Diploma group on Monday and Tuesday as these are the only days they are available to attend clinical placement.
- 2 AM and 2 PM shifts have also been allocated to the Dual Degree group on Tuesday and Wednesday.
- The **Default** group's capacities for the Monday, Tuesday and Wednesday is automatically reduced by the amount allocated to the **Specific** groups.
- The Total Discipline capacity remains the same and reflects all shifts booked by all Student Groups.

Date	Diploma Edit		Dual Degree Edit		Default Nursing			Total Edit		
	AM	PM	M	PM	AM	PM	Night	AM	PM	Night
Mon 23/04	0 / 1	0 / 1	0 / 0	0 / 0	0 / 2	0 / 1	0 / 1	0 / 3	0 / 2	0 / 1
Tue 24/04	0 / 1	0 / 1	0 / 2	0 / 2	0 / 0	0 / 0	0 / 1	0 / 3	0 / 2	0 / 1
Wed 25/04	0 / 0	0 / 0	0 / 2	0 / 2	0 / 1	0 / 0	0 / 1	0 / 3	0 / 2	0 / 1
Thu 26/04	0 / 0	0 / 0	0 / 0	0 / 0	0 / 3	0 / 2	0 / 1	0 / 3	0 / 2	0 / 1
Fri 27/04	0 / 0	0 / 0	0 / 0	0 / 0	0 / 3	0 / 2	0 / 1	0 / 3	0 / 2	0 / 1
Sat 28/04	0 / 0	0 / 0	0 / 0	0 / 0	0 / 2	0 / 2	0 / 1	0 / 2	0 / 2	0 / 1
Sun 29/04	0 / 0	0 / 0	0 / 0	0 / 0	0 / 2	0 / 2	0 / 1	0 / 2	0 / 2	0 / 1

10.

To make a one-off change the number of available shifts without changing the overall base capacity, click on the timeslot that you want to change and the **Request Capacity Variance** pop up will display.

Request Capacity Variance ×

Capacity:

From:

Until:

Apply to:

Reason:

Nursing

Jump to:

Diploma Edit		
AM	PM	Night
0 / 1	0 / 0	0 / 0
0 / 1	0 / 0	0 / 0
0 / 1	0 / 0	0 / 0
0 / 1	0 / 0	0 / 0
0 / 1	0 / 0	0 / 0



11. To complete the variance, fill out the following fields:

- **Capacity:** This is the new total number of shifts you wish to make available.
- **Until:** If you want this variance to apply to multiple days, choose until when you'd like this to apply.
- **Apply to:** Either "Every day between dates", which will apply the change for consecutive days, or "Once per week between dates", which will apply the change on the same day of each week over several weeks.
- **Reason:** Why you need the variance approved. You will be unable to submit the request if this field is left blank.

Finally, click the **Submit** button.

Request Capacity Variance ✕

Capacity:

From:

Until:

Apply to:

Reason:

12. Once a capacity variance has been submitted, the changed capacities will display on your Capacity Overview as **Green** boxes, and the details of the variance can be seen by hovering the mouse pointer over the box.

Medicine Nursing

< > Jump to:

Date	Diploma <input type="button" value="Edit"/>			Default Nursing			Total <input type="button" value="Edit"/>		
	AM	PM	Night	AM	PM	Night	AM	PM	Night
Mon 16/04	0 / 2	0 / 0	0 / 0	0 / 0	0 / 2	0 / 1	0 / 2	0 / 2	0 / 1
Tue 17/04	0 / 1	0 / 0	0 / 0	1 / 1	1 / 2	1 / 1	1 / 2	1 / 2	1 / 1

13. **Troubleshooting 1: Location or Area not in the drop down list**

If a *Location* or *Area* that you wish to review capacity for is not displayed in the drop down field, this will be because the *Location* or *Area* either:

- has not been created **and/or**
- has not been allocated to your user profile.

Contact your System Administrator to add it or, if you have Administrator access, refer to [ARef-10 - How to Administer Areas](#), [ARef-09 - How to Add and Disable Locations and Areas](#) and [ARef-02 - How to Administer Users](#)

14. **Troubleshooting 2: Discipline tab not available**

If an *Area* that you wish to review capacity for is not displaying a particular *Discipline*, this will be because either:

- the *Discipline* has not been created **and/or**
- you do not have the *Discipline* allocated to your user profile **and/or**
- the *Discipline* has not been assigned to the *Area*.

Contact your System Administrator to rectify, if you have Administrator access, refer to [ARef-10 - How to Administer](#)



[Areas](#), [ARef-05 - How to Administer Disciplines](#) and [ARef-02 - How to Administer Users](#)

15. ***Troubleshooting 3: Student Group is not displaying or missing Shift Categories***

If a *Discipline's* capacity is not displaying a particular *Student Group*, or is displaying the *Student Group* but is missing a particular *Shift Category*, this will be because either:

- the *Student Group* has not been created **and/or**
- the *Student Group* has not been assigned to any Shift in the corresponding *Shift Category* in that *Area*.

Contact your System Administrator to rectify, if you have Administrator access, refer to [ARef-10 - How to Administer Areas](#) and [ARef-05 - How to Administer Disciplines](#)