Air Traffic Organization Operational Planning and Scheduling (OPAS)

Training Guide

OPAS

Table of Contents

Select a link to jump to the corresponding section.

Related Pages

Welcome to the Operational Planning And Scheduling (OPAS) Wiki

Please use the links to the left to find all training materials, how to's and best practices for using the OPAS suite of scheduling applications.

What is OPAS

Operational Planning and Scheduling (OPAS) is an online scheduling tool that optimizes start times and work patterns, allowing schedulers to produce more efficient schedules.

- Long-term planning
    - Allocation of resources
    - Provides transparency and ability to analyze a facility's scheduling practices
    - Aides in local and national negotiations
- Short/Mid-term Planning
    - Provides ability to manage and track day-to-day scheduling operations through desktop and web applications
    - Replaces pen and paper, WebSchedule, or other facility "home-grown" scheduling methods

Who is Quintiq

Quintiq is a market leader in the air traffic arena (NAV CANADA, Germany, Australia) and has successfully implemented systems in many complex companies (Danone, DHL, QVC).

Who is the FAA Team

Team	Name	Role
Core Team	Glen Buchanan	Project Manager – Finance Lead
Core Team	Karen Burcham	Operations Lead
Core Team	Carolyn Pokres	Technology Lead
Core Team	Jenifer McCoy	NATCA Representative
Subject Matter Expert	Brandon Kreutel	National OPAS SME
Implementation	Gretchen Koch-Noble	Implementation Lead

What's New?

- Coming soon!

Recent Changes

- Content updated to reflect functionality in OPAS and OPAS Lite for Release 20.

OPAS Overview

OPAS Home

Table of Contents

Select a link to jump to the corresponding section.

This section outlines how to access OPAS, how to troubleshoot potential login issues, submit feedback and basic information about OPAS.

Website

To access OPAS go to: https://opastest.faa.gov/.

To launch the main application from the Home Page, select OPAS

Providing Feedback

To submit feedback on OPAS, click on the link on the bottom left hand side of the Home Page.

You can also submit feedback from here.

Help Desk

For passwords or other technical problems, contact the NSC Help Desk at 1-866-954-4002.

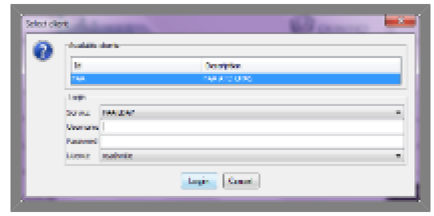
Login

After clicking on OPAS, the application will load.

Log into OPAS using your NextGen/Webmail username and password, making sure that FAA LDAP is populated in the "Service" dropdown.

If you are unable to log in, please ensure that you have entered in your username and password in the correct format: first name spacebar middle initial (if any) spacebar last name.

If you are still unable to log in, contact the Help Desk to verify you have been set up with a NextGen/Webmail username and password and that you are entering it correctly.



You may be entering your username and password correctly, but you are not setup in OPAS correctly. If this is the case, contact your OPAS Point of Contact and notify them of the issue.

Java Issues

Open the "Start menu", select the "Windows Control Panel", and double click "Java."

In the "General" tab, click the "About" button and check that the current version is listed as Version 6 or above and the build is listed as 1.6.0_16 or higher.

In the "General" tab, click the "Settings" button and ensure that the checkbox for "Keep temporary files on my computer" is enabled.

Right-click Menus

Right-clicking will reveal various options and hovering will provide additional information.

Hovering

OPAS checks all applicable business rules and constraints each time a user attempts to perform an action in the user interface. Certain scheduling options are disabled when they would violate business rules or the user does not have the correct authorization to perform the action. In any context menu, scheduling options that are disabled will be grayed out.

Anytime you find that an option is not available in the application or that an action cannot be performed,
OPAS provides explanatory feedback in the form of a tooltip. Hover your mouse over the grayed-out option to view a quick explanation of why the action cannot be performed currently.

In some cases, it is possible to override the precondition by holding control (CTRL) – this will be indicated in the feedback text.

Business Rules

OPAS takes in account all nationally negotiated business rules in all optimizations and actions.

Facility Specific Rules

While all business rules and parameters are set at a national level, OPAS can be tailored for locally negotiated scheduling practices.

Home Page

Home Page

OPAS Home

Table of Contents

Select a link to jump to the corresponding section.

The OPAS "Home Page" contains various options. Views include:

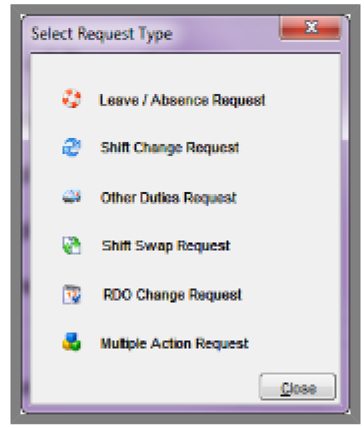
- Day of Operations (Controller View)
- Group Schedule
- Employee Requests
- Employee Bidding
- Employee Details
- Schedule Generation
- Day of Operations (Supervisor)

Quick Link Request types:

- Leave/Absence Request
- Shift Change Request
- Other Duties Request
- Shift Swap Request
- RDO Change Request
- Multiple Action Request

These requests are also accessible from the "Make Request Quick Link."

Quick Link Requests



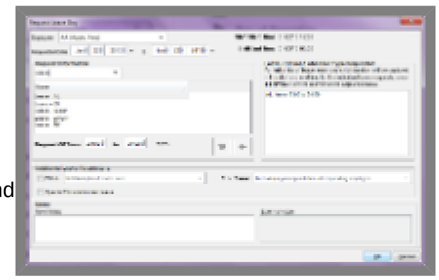
The “Make Request Quick Link" is accessible from any screen on the right of the OPAS Toolbar. Clicking on it will provide a list of possible requests to make:

- Leave/Absence Request
- Shift Change Request
- Other Duties Request
- Shift Swap Request
- RDO Change Request
- Multiple Action Request

If you happen to be on the "Home Page," these same request types are available there as well.

Leave/Absence Request

Full Day Leave/Absence Request



1. Clicking on “Leave/Absence Request” will bring up a dialog box.
2. Using the date selector, choose which day you would like to request leave for.
3. Select the leave type you would like to request. If you would like request an excused absence, select “Excused Absence” from the “Request Information" dropdown.
4. Once you have selected the appropriate leave type, select the blue plus mark to add to the “Leave/Excused Absence Type Requested" pane.
5. If there are any additional leave parameters, select them using the appropriate checkbox and dropdown.
6. Add notes, as appropriate.
7. Select “Ok” to submit the request.

Partial Day Leave/Absence Request

1. Clicking on “Leave/Absence Request” will bring up a dialog box.
2. Using the date selector, choose which day you would like to request leave for.
3. Select the leave type you would like to request. If you would like request an excused absence, select “Excused Absence” from the “Request Information" dropdown.
4. Then select the blue plus mark to add to the partial “Leave/Excused Absence Type Requested" pane.
5. If there are any additional leave parameters, select them using the appropriate checkbox and dropdown.
6. Add notes, as appropriate.
7. Select “Ok” to submit the request.

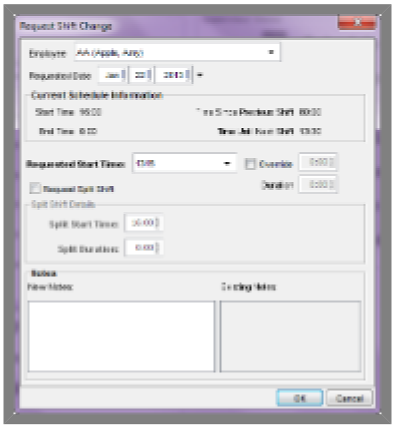
Multiple Day Leave/Absence Request

1. Clicking on “Leave/Absence Request” will bring up a dialog box.
2. Using the date selector, choose which day you would like to request leave for. Once you have selected the start date of your leave, adjust the end date accordingly.
3. Select the leave type you would like to request. If you would like request an excused absence, select “Excused Absence” from the “Request Information" dropdown.
4. Once you have selected the appropriate leave type, select the blue plus mark to add to the “Leave/Excused Absence Type Requested" pane.
5. If there are any additional leave parameters, select them using the appropriate checkbox and dropdown.
6. Add notes, as appropriate.
7. Select “Ok” to submit the request.

Proxy Leave/Absence Request

1. Clicking on “Leave/Absence Request” will bring up a dialog box.
2. Select the name of the employee you wish to enter the proxy request for from the “Employee" dropdown.
3. Using the date selector, choose which day you would like to request leave for. Once you have selected the start date of your leave, adjust the end date accordingly.
4. Select the leave type you would like to request. If you would like request an excused absence, select “Excused Absence” from the “Request Information" dropdown.
5. Once you have selected the appropriate leave type, select the blue plus mark to add to the “Leave/Excused Absence Type Requested" pane.
6. If there are any additional leave parameters, select them using the appropriate checkbox and dropdown.
7. Add notes, as appropriate.
8. Select “Ok” to submit the request.

Shift Change Request

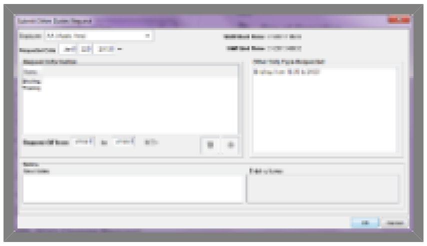


1. Clicking “Shift Change Request” will bring up a dialog box.
2. Using the date selector, choose which day you would like to change your shift on.
3. Using the “Requested Start Time" dropdown, choose the time you would like to change your shift to.
4. If your requested start time does not appear in the dropdown, select the “Override" checkbox and input the start time manually. Overriding will also allow you to adjust the duration of the shift manually.
5. To split your shift, select the “Request Split Shift" checkbox. Select the time you would like the shift to begin to split and how long the split should last.
6. Add notes, as appropriate.
7. Select “Ok” to submit the request.

Proxy Shift Change Request

1. Clicking “Shift Change Request” will bring up a dialog box.
2. Select the name of the employee you wish to enter the proxy request for from the “Employee" dropdown.
3. Using the date selector, choose which day you would like to change your shift on.
4. Using the “Requested Start Time" dropdown, choose the time you would like to change your shift to.
5. If your requested start time does not appear in the dropdown, select the “Override" checkbox and input the start time manually. Overriding will also allow you to adjust the duration of the shift manually.
6. To split your shift, select the “Request Split Shift" checkbox. Select the time you would like the shift to begin to split and how long the split should last.
7. Add notes, as appropriate.
8. Select “Ok” to submit the request.

Other Duties Request



1. Clicking “Other Duties Request” will bring up a dialog box.
2. Using the date selector, choose which day you would like to request other duties on.
3. Select the other duty you would like to request.
4. Once you have selected the appropriate other duty, choose the time would like to request off from using the time selector.
5. Select the blue plus mark to add to the “Other Duty Type Requested" pane.
6. Add notes, as appropriate.
7. Select “Ok” to submit the request.

Proxy Other Duties Request

1. Clicking “Other Duties Request” will bring up a dialog box.
2. Select the name of the employee you wish to enter the proxy request for from the “Employee" dropdown.
3. Using the date selector, choose which day you would like to request other duties on.
4. Select the other duty you would like to request.
5. Once you have selected the appropriate other duty, choose the time would like to request off from using the time selector.
6. Select the blue plus mark to add to the “Other Duty Type Requested" pane.
7. Add notes, as appropriate.
8. Select “Ok” to submit the request.

Shift Swap Request

1. Clicking “Shift Swap Request” will bring up a dialog box.
2. Using the date selector, choose which day you would like to request a swap.
3. Using the “Select Recipient" dropdown, select the employee you would like to swap with.
4. Using the "Swap Details" checkboxes, select the combination of start and end times you would like to swap. A preview of the swap is shown on the right side of the dialog box.
5. Add notes, as appropriate.
6. Select “Ok” to submit the request.

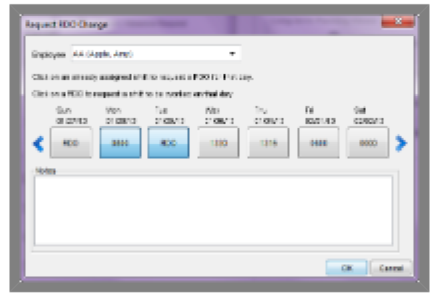
Note: The swap request will be forwarded to the recipient to approve or deny prior to a Supervisor.

Proxy Shift Swap Request

1. Clicking “Shift Swap Request” will bring up a dialog box.
2. Select the name of the employee you wish to enter the proxy request for from the “Initiator" dropdown.
3. Using the date selector, choose which day you would like to request a swap.

4. Using the "Select Recipient" dropdown, select the employee you would like to swap with and what time they are working.
5. Using the "Swap Details" checkboxes, select the combination of the start and end times you would like to swap. A preview of the swap is shown on the right side of the dialog box.
6. If you would like to request to be approved automatically, make sure that the “Automatically Approves Swap Request” checkbox is selected. Otherwise, the request will be forwarded to the recipient to approve or deny prior to a Supervisor.
7. Add notes, as appropriate.
8. Select “Ok” to submit the request.

RDO Change Request

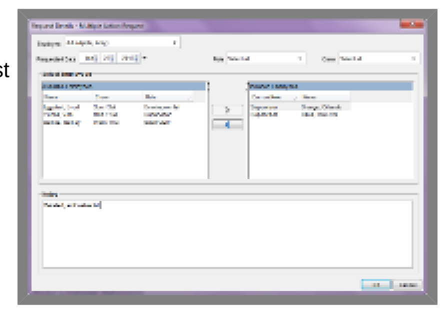


1. Clicking “RDO Change Request” will bring up a dialog box.
2. Select the week you would like to change your RDO by navigating using the blue arrows.
3. Click on an already assigned shift to request an RDO.
4. Click on a RDO to request a shift to be worked on that day.
5. This will open a dialog box where you will request a start time on that day.
    a. On that dialog, using the “Requested Start Time,” choose the time you would like to change your shift to.
    b. If your requested start time does not appear in the dropdown, select the “Override" checkbox and input the start time manually.
    c. Add notes, as appropriate.
6. Select “Ok” to submit the request.

Proxy RDO Change Request

1. Clicking “RDO Change Request” will bring up a dialog box.
2. Select the name of the employee you wish to enter the proxy request for from the “Employee" dropdown.
3. Select the week you would like to change your RDO by navigating using the blue arrows.
4. Click on an already assigned shift to request an RDO.
5. Click on a RDO to request a shift to be worked on that day.
6. This will open a dialog box where you will request a start time on that day.
    a. On that dialog, using the “Requested Start Time,” choose the time you would like to change your shift to.
    b. If your requested start time does not appear in the dropdown, select the “Override" checkbox and input the start time manually.
    c. Add notes, as appropriate.
7. Select “Ok” to submit the request.

Multiple Action Request



1. Clicking “Multiple Action Request” will bring up a dialog box.
2. Using the date selector, choose which day you would like to submit a multiple action request on.
3. If this request involves any employees, select them from “Available Employees" pane by highlighting their name and selecting the blue arrow to move them over to the “Included Employees" pane. You can filter by “Role” or “Crew.”
4. To remove an included employee, highlight their name and select the blue arrow to move them back to the “Available Employees” pane.
5. Include detailed actionable instructions.
6. Select “Ok” to submit the request.

Proxy Multiple Action Request

1. Clicking “Multiple Action Request” will bring up a dialog box.
2. Select the name of the employee you wish to enter the proxy request for from the “Employee" dropdown.
3. Using the date selector, choose which day you would like to submit a multiple action request on.
4. If this request involves any employees, select them from “Available Employees" pane by highlighting their name and selecting the blue arrow to move them over to the “Included Employees" pane. You can filter by “Role” or “Crew.”
5. To remove an included employee, highlight their name and select the blue arrow to move them back to the “Available Employees” pane.
6. Include detailed actionable instructions.
7. Select “Ok” to submit the request.

Request Bubble

The “Request Bubble" link is accessible from any screen on the OPAS Toolbar.

Left-clicking on the bubble will open a dialog box with all requests requiring your attention. It will show swaps awaiting your approval and will show pending, approved, or denied requests as well.

These requests will be sorted by date, with the most immediate first.

Doubling-clicking on a pending request will bring up that request's dialog box populated with specific information about that request. You can only open requests that are pending, which will allow you to approve or deny the requests.

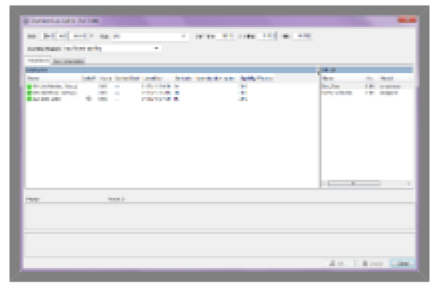
To act upon the request:

1. Review all information for the request.
2. Add reason, as appropriate.
3. Approve or deny the request.

> Note: Approved requests can be denied at a later time and vice versa.

Full Shift Overtime

Assigning Ranked By Volunteers



The "Full Shift Overtime" link is accessible from any screen on the OPAS Toolbar.

Left-clicking on the bubble will open the "Overtime" dialog box.

The dialog box will default to today's date but you can adjust the date and time to when you would like to assign overtime using the date and time selectors. As you change the date and time, you will see the employees included in the "Employees" pane change.

Select the role you would like to assign overtime for in the "Role" dropdown. Employees of that role will populate the "Employees" pane below.

Adjust the start time of overtime shift you would like to assign. The default duration of the overtime shift is eight hours.

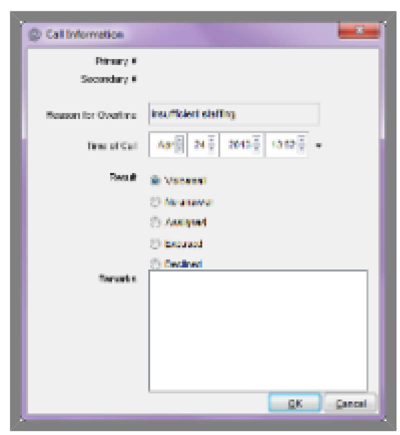
You will also be able to adjust the filter on the employees being displayed in the "Employees" pane. However, employees showing will be on their RDO so adjusting the filter will not change the employees in the list.

The default of this page is to show only employees eligible to work the overtime shift. To see all employees, right-click within the "Employees" pane or on an employee's name and select "Show All Employees." The "Unavailability Reason" column will provide information as to why they were not included in the original sort.

Once you have decided on the date and time of the overtime shift, select a reason using the "Overtime Reason" dropdown.

To assign the overtime to someone on the list, select their name then select "Assign."

To call the first person on the list, select "Call."



A dialog box will open where you can record the result of the call:

- Voicemail
- No answer
- Assigned
- Excused
- Declined
- Remarks, as appropriate

Select "Ok" to complete.

Repeat this process until you have assigned the overtime shift.

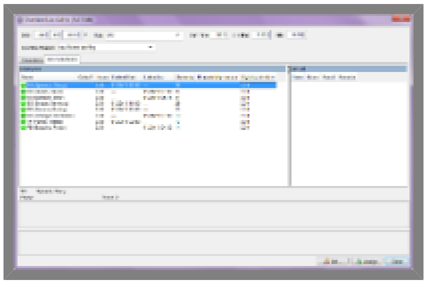
Assigning Ranked By Non-Volunteer

The "Full Shift Overtime" link is accessible from any screen on the OPAS Toolbar.

Left-clicking on the bubble will open the "Overtime" dialog box.

The dialog box will default to the "Volunteers" tab. Select the "Non-Volunteers tab" to the right to view the "Employees" pane ranked by non-volunteers.

The dialog box will default to today's date but adjust the date and time to when you'd like to assign overtime using the date and time selectors. As you change the date and time, you will see the employees included in the "Employees" pane change.



Select the role you would like to assign overtime for in the "Role" dropdown. Employees of that role will populate the "Employees" pane below.

Adjust the start time of overtime shift you would like to assign. The default duration of the overtime shift is eight hours.

You will also be able to adjust the filter on the employees being displayed in the "Employee" pane. However, employees showing will be on their RDO so adjusting the filter will not change the employees in the list.

The default of this page is to show only employees eligible to work the Overtime shift. To see all employees, right-click within the “Employees" pane, or select an employee's name and right-click and select “Show All Employees.” The “Unavailability Reason” column will provide information as to why they were not included in the original sort.

Once you have decided on the date and time of the overtime shift, select a reason using the “Overtime Reason" dropdown.

To assign the overtime to someone on the list, select their name then select “Assign.”

To call the first person on the list, select “Call.”

A dialog box will open where you can record the result of the call:

- Voicemail
- No answer
- Assigned
- Excused
- Declined
- Remarks, as appropriate

Select “Ok” to complete.

Repeat this process until you have assigned the overtime shift.

Employee Requests

The "Employee Requests" page contains your request and leave information.

- Your approved requests are indicated with a green check.
- Your denied requests are indicated with a red X.
- Your cancelled request are indicated with a person/x icon.
- Your pending requests are highlighted in yellow.

Clicking in the white space on this screen will allow you to toggle in between all requests, pending requests only, and approved requests only.

To view other employee’s requests, use the “Employee" dropdown, and deselect the "All" checkbox.

Filtering On Employees

If you are a CPC, you will be unable to view requests for anyone but yourself.

As a Supervisor or CIC, deselect the “All" checkbox. To view other employee’s requests, use the “Employee" dropdown and choose the employee’s requests you would like to view.

Filtering By Dates

Deselect the “All" checkbox to the right of the dates.

When deselected, choose the start and end dates for the range of requests you would like the view.

Filter On Request Activity

The "Employee Requests" page opens to all active requests. You can filter the list by right-clicking in the "Employee Requests" pane and select:

- Show All Requests
- Show Pending Requests
- Show Approved Requests

The "Employee Requests" page automatically opens to "Show All Requests."

Hide Inactive Requests

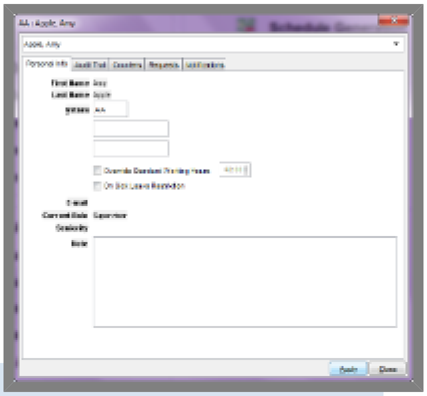
To view all requests, include inactive requests, right-click anywhere within the "Employee Requests" pane and deselect "Hide Inactive Requests."

All requests will be shown in the list. You will notice that deleted requests will be signified with a trash can icon to the left and the text of the request will be grey.

To only see active requests, right-click and select “Hide Inactive Requests.”

Employee Details

You are able to view or change various pieces of personal information from this screen.



Proxy Employee Detail

To change the personal information being displayed, use the “Employee" dropdown with your name and select another employee.

Phone Numbers

The Phone Numbers shown in employee details are pulled directly from the NDC and are used in OPAS in the "Overtime Call List." However, they can be edited by the employee.

Note: The Phone Number on the "Overview" tab is not the number that you will receive Notifications at.

Audit Trail

Anything pertinent that happens to the employee overall gets recorded in the "Audit Trail." For example, the shift line they bid on, if their seniority changes, role changes, etc.

However, it does not capture day-by-day changes such as every time a shift of theirs is moved or every time a request of theirs is approved. It is only data that is dependent upon the employee, not the employee's day or shift. This information is contained in various other audit trails throughout OPAS.

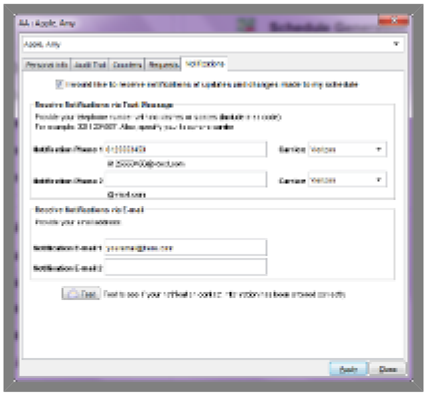
Counters

Based on the user's authorization, various counters will be available to view. Users will be able to view all of their counters.

A CIC is able to view other employees' details but will not be allowed to view the leave counters.

All higher authorizations will be able to see all counters for other employees.

Notifications



To receive notifications any time something impacts you in a published schedule:

1. Click “Show Employee Details.”
2. Click on “Notifications" tab.
3. Click the check box “I would like to receive notifications and changes made to my schedule.”
4. To receive text message notifications, enter your cell phone number (with no dashes or spaces) and choose the carrier from the “Carrier” drop down menu.
5. To receive email notifications, enter you email address.
6. To see if your notification contact information has been entered correctly, click the “Test” button.
7. Select “Apply” to save changes.

Acknowledge Shift Change

Anytime your schedule has been changed from what you bid into prior to publication or manually changed post publication, a green pencil will appear in the middle of the OPAS toolbar. Hovering over the button will indicate that “One or more shifts have been changed.” Opening up this dialog box will reveal all “Unseen Shift Changes.”

Mark Changes As Seen

To clear the unseen shift to the list, right click on a request and select “Mark Changes As Seen,” "Mark All Changes As Seen,"or left-click on the change and hit the Space Bar.

Return To Previous Shift

Right-click on an unseen shift and select “Return To Previous Shift.”

> Note: This will not create a pending request.

An arrow icon will appear on the "Group Schedule" and "Schedule Generation" pages on the shift that has been changed. This will serve as a visual cue for a Supervisor or CIC to let them that you would like to return to what you bid into or were supposed to work.

Curves and Shifts

OPAS Home

Table of Contents

Select a link to jump to the corresponding section.

Curves and Shifts

The "Curves and Shifts" page is the first step in long term planning.
This page is where you will set your demand curve, generate and create shift start times, and demand off of those shift start times.

Curves Pane

The "Curves" pane will display all demand curves that have been created or uploaded in OPAS.
Individual curves are grouped by role and date. There may be more than one curve per year plan due to seasonality and these curves are grouped together by default.

Create New Curve

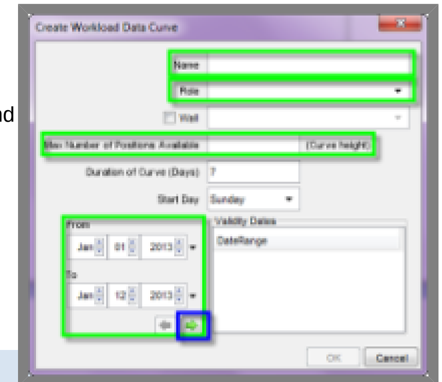
1. To create a curve, right-click within the "Curves" pane and select "Create New Curve."
2. The "Create Workload Data Curve" dialog box will open for you to fill out information regarding the curve. In the dialog, define the following:
    a. Name the curve, the more descriptive the better
    b. Specify the role that you would like to create to curve for using the "Role" dropdown.
    c. Select the "Wall" checkbox and choose the wall you would like to create the curve for, if applicable.
    d. In the "Max Number Of Positions Available" textbox, specify how many positions your facility or area could have open at one time. It is best to overestimate in this textbox to ensure the number of shifts generated can account for the worst case scenario.
    e. The "Duration Of Curve Days" defaults to seven. Do not adjust this unless you plan on making a curve that's duration is not a week long.
    f. "Start day" defaults to Sunday. Do not adjust this field.

g. Specify the date range of the curve. To do so, adjust the dates using the "From" and "To" date selectors. Once the date is correct, use the right Green arrow to add the date to the "Validity Dates" pane.
h. If that date is no longer accurate, select the time period in the "Validity Dates " pane" and select the "left Green arrow" to remove the date.
i. As noted above, you may have more than one curve per year plan, as your facility or area may have seasonality associated with the operation. Each segment of the year must have its own curve. Make sure that all curves associated with the year plan have the correct start and end dates.

3. Once you have filled out all of the relevant information, select "Ok". The individual curve will be added to the "Curves" pane.

> To align a curve with the year plan, do so at:
> http://www.opm.gov/policy-data-oversight/pay-leave/leave-administration/fact-sheets/leave-year-beginning-and-ending-dates/

If your curve has been entered with any constraints, you will receive sadness in the "Curves" pane. To remove the sadness:



1. Hover over the curve to understand what the issue is with the curve.
2. Right-click on the curve and select "Edit Curve."
3. Make the appropriate changes and select "Ok."
4. The new curve will not contain any demand and you will need to create the build the demand from scratch in the "Curve Display" pane, detailed below.

Import Single Curve

If you have an external source for demand, you can upload it into the "Curves" pane. To do so:

> Note: Curves to be uploaded into OPAS need to be formatted specifically and files uploaded must be .csv.

1. Right-click in the "Curves" pane and select "Import Single Curve."
2. In the dialog box that opens, find where you have saved the file, left-click on it and select "Open."
3. If the specifications of the .csv file that is uploaded do not match the facility or area that it is being uploaded into, OPAS will not accept the file. Adjust the file accordingly and retry to upload.
4. Once uploaded, the curve will be subjected to the same constraints as a curve that was created using "Create New Curve." To remove the sadness, hover over the curve to understand what the issue is.
5. Right-click on the curve and select "Edit Curve," make the appropriate changes and select "Ok."

The curve that was uploaded will appear in the "Curve Display" pane. The demand associated with that curve will also appear in the "Curve Display" pane and tweaks and edits can be made manually to the within OPAS, detailed below.

Duplicate Curve

To create a duplicate of a curve that has already been created or uploaded in OPAS:

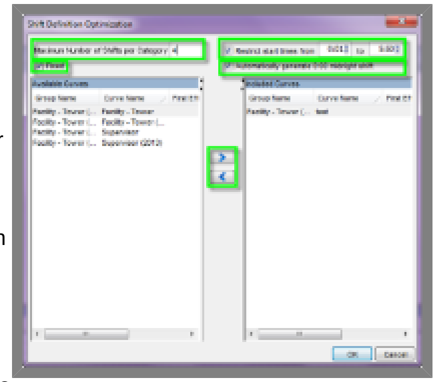
1. Left-click on the desired curve to select it.
2. Right-click on the selected curve and select "Duplicate Curve."
3. This will open the "Edit Staffing Requirements Curve" dialog box. The "Name" will default to current curve's name with "copy" at the end. Rename the curve, as appropriate.
   a. If you are duplicating the curve to conduct a what-if analysis for the current year, keep everything else in the dialog box the same and select "Ok."
   b. The curve will be added to the "Curves" pane.
   c. If you are duplicating the curve for planning for the next year, adjust the information in the dialog box, making sure that the validity dates are consistent with the next year plan.
4. When you are done making changes, review the dialog box and select "Ok."
5. The curve will be added to the "Curves" pane.

When the duplication is made, all information regarding that curve is copied including the demand curve, shift start times, and demand for those shift start times.

Create Optimal Shift Definitions

Once you have finalized the curve in the "Curves" display pane (see below for instructions), you are ready to use the optimizer to generate shift start times to cover the specified demand.

1. Left-click on the desired curve in the "Curves" pane.
2. Right-click on the selected curve and select "Create Optimal Shift Definition."
3. Note: Shift definitions created manually will be lost if this optimizer is run.
4. In the dialog box that opens, define the following about the optimizer run:



    a. "Maximum Number Of Shifts Per Category", which defaults to four. In this field, you will specify how many shifts per category the optimizer will produce.
    b. The "Fixed" checkbox is automatically checked by default. This indicates that the optimizer must generate the specified number of shift definitions defined in the "Maximum Number Of Shifts Per Category" textbox. If this option is unchecked, the optimizer will be unrestrained to produce as many shift definitions it thinks will cover the curve best.
    c. "Available Curves" pane is a list of all the curves currently available to be added to the optimizer.
    d. Note: If you have included seasonality or multiple curves, make sure that they are in the "Included Curves" pane.
    e. To move a curve from the "Available Curves" pane to the Included curves pane, click on the desired curve in the available list and click the green arrow pointing towards the direction you would like to move the curve.
    f. The "Restrict Start Times" checkbox defines the set of start times that are not allowed for the optimizer to assign. If unchecked, the optimizer will be unrestricted to assign start times at any point of the day.
    g. If checked, the "Start and End Time" boxes are used to restrict what start times the optimizer create assign.
    h. Automatically generate "0:00 Midnight Shift" checkbox indicates whether or not the optimizer must generate a 0000 shift, regardless of demand. If unchecked, the optimizer will generate what it thinks the best midnight shift is to cover the specified demand.
5. Review the contents of the dialog and select "Ok" to begin running the optimizer.
6. The optimizer will produce start times and demand for those start times based on the curve.
7. You can review the outcome of the optimizer in the "Shift Definitions" and "Demand Per Shift Per Day" panes, the details of which are described below.

Generate Demand For Existing Shift Definitions

If you have created shift definitions without the use of the optimizer, you can generate demand for those shift definitions based on the demand curve. To do so:

1. Left-click on the desired curve in the "Curves" pane.
2. Right-click on the selected curve and select "Generate Demand for Existing Shift Definitions."
3. This will generate "Demand per Shift per Day" without changing the shift definitions that have been manually created.

Lock Curve

Once you have set up your demand, shift definitions, and demand per shift per day, the first step in using the curve for planning and execution is to lock the curve. To do so:

1. Left-click on the desired curve in the "Curves" pane.
2. Right-click on the selected curve and select "Lock," indicated with a lock icon.
3. If changes were made to the curve, the "Lock Curve" dialogue will open. To save any changes made to the curve, click the "Save Shanges" radio button, enter a "Reason" for the update, then click "Ok."
4. To discard any changes made, click the discard changes radio button and click "Ok." No reason is required if you are discarding the changes.
5. If "Ok" is selected, the curve will be locked from editing.
6. Select "Cancel" to exit the window and continue editing the unlocked curve.

Used For Scheduling

The last step in using the curve for planning and execution is to make sure a curve is marked and used for scheduling:

1. Left-click on the desired curve in the "Curves" pane.
2. Right-click on a locked curve and select "Used for Scheduling."

> Important Note: Unless this option is selected, you cannot use this curve throughout OPAS to set up work patterns or build and publish schedules.

Shift Definitions Pane

Shift start times generated by the optimizer, uploaded externally or created manually within OPAS will appear in the "Shift Definitions" pane. This pane will contain information regarding the name of the shift, and start and end time of each shift.

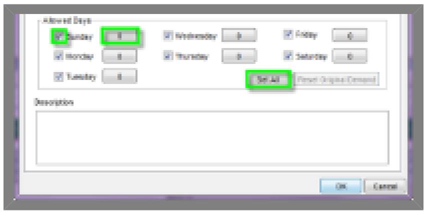
Create New Shift Definition

If the optimizer has produced a result without a desired start time or you starting from a blank curve, you are able to create a new shift definition. To do so:

1. Right-click in the "Shift Definitions" pane and select "New."
2. In the "New Shift Definition" dialog that opens you will define the following in the "General" tab:
    a. Use the "Name" textbox to name the shift. Regardless of the parameters of the shift definition, the shift name is freeform textbox.
    b. Protip: Name the shift something that is descriptive, as the shift name appears in many places throughout OPAS. This will make it easier to identify the desired shift throughout the year.
    c. Indicate the start time of the shift using the "Start Time" selector or type in the start time manually.
    d. Shifts default to eight hours in duration. If you would like to adjust the duration of a shift, select the "Override Shift Length" checkbox and adjust the shift length accordingly.
    e. Shifts default to a shift category based on the application parameters. If you would like to adjust the shift category, select the "Override Shift Category" checkbox and adjust the shift category accordingly.
    f. All shifts are given the same priority (used in the schedule generation optimizer) unless otherwise specified. To change, select the "Override Priority" checkbox.
    g. Indicate the Priority in the textbox. The priority of a shift definition is a rank. The lower the rank, the higher priority (#1 being the highest).
    h. "Activation Date" will default to today's date. Adjust using the date selectors.
    i. By default, the "Set Expiration Date" checkbox is unchecked. If you would like to put an "Expiration Date" on a shift definition, select the checkbox and adjust the date accordingly.
    j. All shift definitions by default do not contain any flex time. To assign flex to a shift definition, select the "Flex / Core Time" checkbox. Adjust the "Core Start Time" to match the shift start time, if necessary. Then, specify the amount of flex time associated with the shift.
    k. All shift definitions by default do not contain any overtime at the start. To add overtime at the start, select the "Overtime at Start" checkbox. Specify how much overtime the shift definition will have.
    l. For example, the 0000 shift will typically have six minutes of overtime at the start. You will also need to specify the overtime reason that will be associated with the shift using the "Reason" dropdown.
3. In order to specify allowed days and demand for those days, you must first create the shift definition by selecting "Ok" and going back to edit the shift definition. To do so:
    a. Finish creating the shift definition and select "Ok." The shift definition will be added to the "Shift Definitions" pane.
    b. Right-click on the recently added shift definition and select "Edit."
    c. When the dialog box is reopened for that shift definition, you will be able to specify what days the shift will be available to be assigned and what the demand is for the shift on each day.
    d. By default, a shift definition will be available to be assigned on all days. To disallow a shift on a day, deselect the checkbox next to the day.
    e. If the demand for this shift will be consistent across all days, select "Set All." In the "Set Demand" dialog box that appears, indicate what the demand for this shift will be for all days and select "Ok."
    f. If you would like to set the demand for an individual day, left-click on the number to the right of each day. In the "Set demand" dialog box that appears, indicate what the demand for this shift will be for that day and select "Ok."
    g. Select "Reset Original Demand" if you would like to have the demand for all days default back to what it was when the dialog box was opened for editing.
4. Once you are done adjusting the demand, select "Ok."
5. The shift definition will be added and you will be able to verify the demand in the "Demand Per Shift per Day" pane.

> Important Note: If shift definition(s) is/are created while the Curve is not marked as "Used for Scheduling," they will be pushed to all schedules as soon as that curve is marked as "Used for Scheduling" once again.

Edit Existing Shift Definition



Right-click on any shift definition in the "Shift Definitions " pane" and select "Edit." You will only be able to edit a shift definition in an unlocked curve.
The "Edit Shift Definitions" dialog box will open for you to make the appropriate changes to the shift definition. The steps on how and what to edit are outlined above.
Once you are done adjusting, select "Ok," and the change will be made to that shift definition.

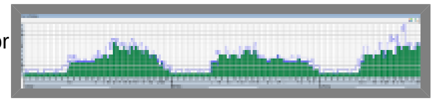
Demand Per Shift Per Day Pane

The "Demand Per Shift Per Day" pane will display how many shifts are required on each day.
Left-click on a "Day of Week" on the left to view the associated demand to the right of the right of the pane.

> Note: You are unable to adjust the demand from this pane. Any edits to a shift definition's demand must be made from the "Shift definitions" pane and can only be viewed and validated in the "Demand per Shift per Day" pane.

Curve Display Pane

The "Curve Display" pane shows a seven week period broken down into fifteen minute increments.



The Y-axis displays the minimum number of open positions necessary to work traffic at your facility or area, based on an uploaded demand curve or manual edits.
The X-axis displays time, broken down into fifteen minute blocks along with a count of the minimum number of open positions.
Below the X-axis is a visualization of the shifts from the Shift definitions pane as well as the associated demand from the "Demand per Shift per Day" pane.

Manual Edits To The Demand Curve

There are two ways to enter a demand curve. As outlined above, you can upload a demand curve from an external source. You can also manually create a demand curve within OPAS. In either scenario, there are various ways to make changes, edits, or updates to a demand curve in the "Curve Display" pane, detailed in the subsequent sections.

Fill To Next Change

Right-click on a box within the "Curve Display" pane and select "Fill to Next Change."
Based on where you have right-clicked, the curve will fill forward until it finds a box that is different than what you are filling forward.

Fill To End Of Day

Right-click on a box within the "Curve Display" pane and select "Fill to End of Day."
Based on where you have right-clicked, the curve will fill forward for the rest of the day.

Zero To Next Change

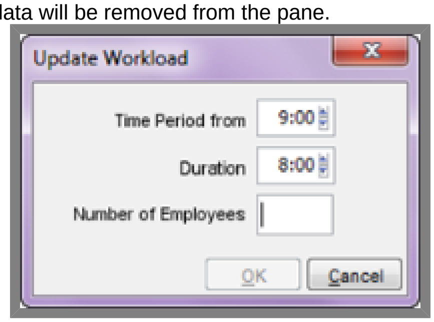
Right-click on a box within the "Curves Display" pane and select "Zero Demand to Next Change."
Based on where you have right-clicked, the demand will be removed from the curve until it finds a box that is different than what you are removing forward.

Zero To End Of Day

Right-click on a box within the "Curve Display" pane and select "Zero Demand to End of Day."
Based on where you have right-clicked, demand will be removed from the curve for the rest of the day.

Clear all Curve Data

Right-click anywhere in the "Curve Display" pane and select "Clear All Curve Data" and all demand data will be removed from the pane.



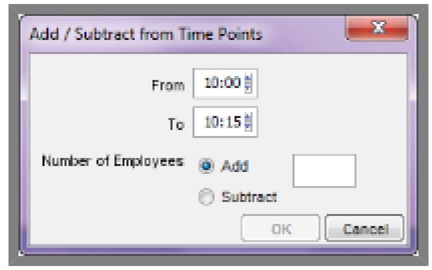
Update Workload For Time Period

1. Right-click on a box and within the "Curve Display" pane select "Update Workload For Time Period."
2. In the "Update Workload" dialog box that opens, the time period from will default to where you right-clicked in the "Curve Display" pane.
3. Adjust the time, as necessary.
4. The "Duration" defaults to eight hours but adjust, as necessary.
5. Indicate the number of employees necessary in the textbox and then select "Ok."
6. The changes will then be made in the "Curve Display" pane.

Add/Subtract From Time Points

1. Right-click on a box within the "Curve Display" pane and select "Add/Subtract From Time Points."
2. In the "Update Workload" dialog box that opens, the "From" will default to where you right-clicked in the "Curve Display" pane. Adjust the time, as necessary.
3. The "To" will default to 15 minutes after the "From" time. Adjust the end time, as necessary.
4. Select whether or not you would like to "Add" or "Subtract" the number of employees using the corresponding radio button and specify the number to be added or subtracted in the text box.
5. When completed, select "Ok" and changes will be made in the "Curve Display" pane.

Manual Changes To Curve



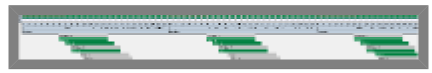
There are various was to make manual changes to the curve.
Left-clicking on any box within the curve will set the demand for that time period at that height. This type of manual edit to the curve is best for minor changes to a curve that has already been established.

Copy Days

If demand is consistent across different days, you are able to copy a day of demand that you have created and paste it accordingly onto another day.
To do so, right-click on a day you would like to copy and select "Copy Day(s) To Clipboard."
Find the day you would like to update the demand for, right-click and select "Paste Day(s) From Clipboard" and the day's demand will be updated accordingly.

View Generated Shifts

You are able to view shifts against demand below the demand curve.



Shift start times that do not have any demand associated with them are displayed in grey. If a time period will be covered by a shift, it will display in green.
Below, if a shift has no demand on that day, it will display in grey and be indicated with a "0." If the shift has demand on that day, it will display in green and will who show many of those shifts are necessary.

Shift Line Setup

OPAS Home

Table of Contents

Select a link to jump to the corresponding section.

Shift Line Setup

The "Shift Line Setup" page is the second step in the long term planning process.

This page is where you will set up the work patterns for every employee in the facility or area to bid into.

Select Year Plan

In order to view or add work patterns, select the appropriate year from the "Year Plan" dropdown at the top left of the page.

Select Role

Use the "Role" dropdown that appears to the right of the "Year Plan" dropdown to view or create work patterns for the selected role. Work patterns created for a particular roll will be unavailable for someone assigned another role.

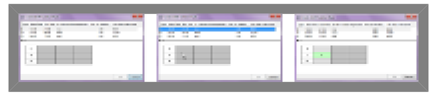
Shift Rotation Rule Pane

The "Shift Rotation Rule" pane is where you will specify how the work patterns you create are governed.

> Note: You will be able to create a work pattern that violates the shift rotation rules that have been entered. However, the shift(s) that violate the shift rotation rules will be highlighted in red.

Create New Shift Rotation Rule

Note: In this pane, there is the option to copy rotations and work patterns from the previous year. Selecting this option will allow you to carry over information from the previous year.



1. Right-click in the "Shift Rotation Rules" pane and select “New.”
2. The "Create Shift Rotation Rule" dialog box will appear with information regarding how each shift category is defined in your facility or area.
3. There are two ways to create a shift rotation rule:
    a. You can left-click on a shift category above and drag-and-drop into a cell below. Each column represents the rules by which a work pattern can be created. There can only be one category selected per column.
    b. You can also click into the cell directly where you would like to assign that particular shift category.
4. Once the rotation rule has been set up, select "Ok" and it will be added to the "Shift Rotation Rules" pane.

Note: If you would like to change how a shift category is defined, contact an OPAS POC at your facility that has the access rights to change application parameters.

Edit Existing Shift Rotation Rule

1. Left-click on an existing shift rotation rule to select it.
    - Right-click the selected shift rotation rule and select “Edit.”
2. In the dialog box that opens, make changes to the rotation rule, as necessary and select "Ok."
    - The changes will be made to that Shift Rotation Rule.

Work Patterns Pane

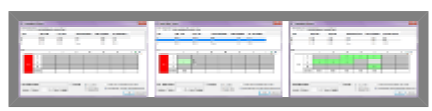
The "Work Patterns" pane is where you will create and maintain the work patterns and shift lines that employees will bid into.

Create Work Pattern

1. Left-click on a shift rotation rule in the "Shift Rotation Rules" pane. This will populate the "Work Patterns" pane with any already existing work patterns that are governed by a shift rotation rule.
2. To create a new work pattern, right-click in the "Work Patterns" pane and select “New.”
3. The "Create Work Patterns" dialog box will open. There are several ways to create a work pattern, described in the sections below.

Create Work Pattern By Shift Category

Note: When the Fixed RDO radio button is selected, the numbers above the work pattern represent working days in a week. When Flexible RDO is selected, "1" represents the first Sunday of the year.



The "Create Work Pattern Dialog" box will default to the "Shift Categories" tab.

You can create a work pattern comprised of shift categories in several ways.

1. You can left-click on a shift category above and drag-and-drop into a cell below.
2. You can also left-click a cell within the work pattern to assign a shift category to that particular day.
3. If you enter a shift category into a box that violates the selected shift rotation rule, the box will turn red. Hover over the red cell to reveal the work rule you are violating and correct the issue accordingly. For example, you will be unable to enter a work pattern that has more or less than the standard week duration.
4. Complete filling the work pattern with shift categories.
5. When you have completed, select "Ok" and the work pattern will be created in the "Work patterns" pane.

Create Work Pattern By Shift Definition

1. Once the "Edit Work Pattern" dialog box has been opened, select the "Shift Definitions" tab at the top left of the dialog. All shift definitions that have been created for the year plan will appear.
2. In order to create a work pattern populated with shift definitions, you must left-click on the desired shift definition, drag-and-drop onto the desired day below.
3. The start time will automatically be added into the correct cell category.
4. Complete filling the work pattern with shift start times.
5. When you have completed, select "Ok" and the work pattern will be created.

Assigning shift categories will automatically assign eight hour shifts. However, if you assign shifts using specific shift start times, you may be assigning AWS shifts.

Change Work Pattern Name

If your facility uses many unique work patterns, it is advisable to name each unique work pattern so that they can be easily identified throughout OPAS. To do so, in the "Edit Work Pattern" dialog box:

1. Select the “Override” checkbox below the work pattern.
2. This will allow you to type a name into "Work Pattern Name" text box.

Set Number Of Weeks

1. When opened, the "Create Work Pattern" dialog box defaults to a one week work pattern.
2. To create a work pattern that’s duration is longer than a week; adjust the "Number Of Weeks" text box at the bottom left of the dialog box and select "Apply."
3. The number of weeks specified will be added to the work pattern.
4. You will need to add categories or shift definitions to all weeks.
5. When you have completed, select "Ok" and the work pattern will be created and the work pattern will repeat for the duration of the year.

Fixed/Flexible RDOs

Combining a work pattern with multiple weeks and flexible RDOs provides numerous possibilities for potential work patterns.

As mentioned above, when the Fixed RDO radio button is selected, the numbers above the work pattern represent working days in a week.

When Flexible RDO is selected, the days of the week are shown with Sunday representing the first day of the year.

A work pattern that is fixed will have the same RDOs for the duration of the year. Even if the work pattern has more than one week, the RDOs will remain consistent and the pattern will repeat. When Fixed RDO is selected, you will be unable to submit a work pattern that has RDOs that are more than one week and have different RDOs. In this case, select the "Flexible RDO" radio button and you will be able to submit this work pattern.

Note: Steps to establish which days the RDOs fall on are provided in the "Shift Line Instance Calendar" section.

Shift Line Optimizer

Once you have created all possible work patterns, the shift line optimizer will establish the number of shift line instances required to cover the demand set up in the "Curves and Shifts" page.

Shift Line Optimizer

1. Complete entering all work patterns, steps detailed above.
2. Make sure that all work patterns are selected using the checkbox in the "Work Patterns" pane.
3. Select the puzzle piece to the right of the "Role" dropdown to calculate the number of optimum shift lines.
4. Do not deselect the "Consider Number Of Employees" checkbox if you are creating shift line instances for your facility.
5. Based on the demand that was established in Curves and Shifts and the number of employees you have in your facility or area, the Shift Line Optimizer will calculate the number of shift line instances for each work pattern.

Consider Number Of Employees

When the "Consider Number Of Employees" checkbox is selected, the shift line optimizer will produce a result that takes into account the demand as well as the number of employees of the particular role selected. For example, this optimizer will never produce a result that is less than the number of employees you have.

When this option is unselected, the shift line optimizer will only consider the demand when producing a result.

Shift Lines Pane

Based on the work pattern that is selected in the "Work Patterns" pane, the "Shift Lines" pane will display a work pattern’s crews, the number of instances created and employees and supervisors assigned to work the crew.

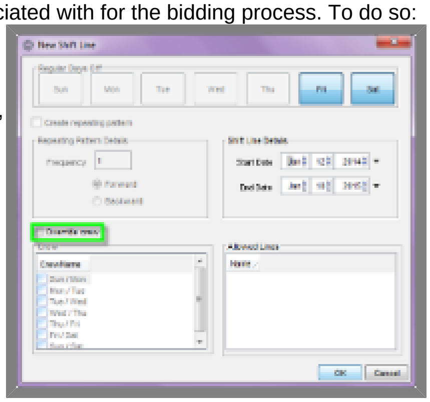
Set Number of Shift Line Instances

When you created the work pattern, RDOs were automatically created and the shift line optimizer provided a baseline number for each crew. You are able to adjust the results of the shift line optimizer in the "Shift Lines" pane.

1. Left-click on a work pattern you would like to adjust in the "Work Patterns" pane.
2. Any RDOs that have been automatically created will be displayed in the "Shift lines" pane under the column titled “Nr.”
3. Right-click on an RDO/Crew and select “Set number of shift line instances.”
4. The "Create Shift Line Instances" dialog box will prompt you to change the number of shift line instances.
5. Adjust the number in the text box and select "Ok."
6. The number will be adjusted in the "Shift Lines" pane and shift lines with those RDOs will be added below to the "Shift Line Instance Calendar."

Adding an RDO

Because Flexible RDOs are fixed to specific RDOs, you may need to specify the Crew it will be associated with for the bidding process. To do so:



1. Left-click on the work pattern in the "Work Patterns" pane. Right-click in the "Shift Lines" pane and select "New."
2. The "Regular Days Off" bar will be prepopulated with the current RDOs. To change the crew, select the "Override Crew" checkbox.
3. You will be able to select a new crew for this shift line instance.
4. Once you have selected a new crew for this work pattern, select "Ok."
5. The new Crew will be added to the "Shift Lines" pane.
6. To add a new instance, follow the steps in the Set number of shift line instances section.
7. While the RDO for this work pattern will not change, it will be associated with the specified crew in the bidding process.

Shift Line Instance Calendar

The "Shift Line Instance Calendar" will display all work patterns and shift line instances that have been created by the shift line optimizer or adjusted manually.

Along with the date, the "Shift Line Instance Calendar" will display the supply (based on the number of shift line instances) and demand (taken from demand per shift per day from "Curves and Shifts") for each day of the year.

You will also be able to use the "Shift Line Instance Calendar" to validate that the shift line instances that have been created fall on the correct days of the year.

Use the same navigation tools present on other pages to validate shift line instances outside the current range of dates.

From the "Shift Line Instance Calendar," you are able to delete specific shift line instances by right-clicking anywhere within the calendar and selecting “Remove Shift Line Instance.”

Employees Pane

The "Employees" pane will display all employees for the role you have selected in the "Role" dropdown.

If your facility is going to bypass the bidding process because you are receiving OPAS during the middle of the year, you are able to automatically assign employees to shift lines. To do so:

1. Left-click on the employee.
2. Drag-and-drop them onto the desired shift line. You will be able to identify a shift line in the Shift Line Instance Calendar by the name.
3. An icon will appear next to their name in the "Employees" pane to indicate they have been assigned to a shift line.

> Note: If an employee is not displaying in the "Employees" pane, confirm you are looking at the correct role in the dropdown. If they are still not appearing, verify their role is correct in Manage Employees.

Assigning Supervisor To Shift Line

As you are creating shift line instances for CPCs, you will notice sadness associated with any Crew without a supervisor assigned to that line.

1. With the CPC role selected in the "Role" dropdown, right-click in the "Employees" pane and deselect "Show Only Employees for Selected Role." Supervisors will now appear in the "Employees" pane.
2. Within the Employees pane, left-click on a Supervisor's initials and drag it to a crew in the in the Shift line pane, and drop it on the desired shift line crew.
3. Assigning a supervisor to a Crew automatically assigns them to work the selected shift line.

To assign the same supervisor to a second crew, left-click on the supervisor's initials drag-and-drop it to a second crew in the Shift line pane. To do so, you will need to select "CTRL" to override and assign them as a supervisor to the second crew.

Manage Employees

OPAS Home

Table of Contents

Select a link to jump to the corresponding section.

Manage Employees

The "Manage Employees" page is where users can add, track, and update employee information including roles, rankings, qualifications, counters, and overtime status.

Employees Pane

All employees are for your facility or area is listed in the “Employees" pane. This pane contains each employee’s current role, first and last name, rank and overtime volunteer status.

Retire Employee

To retire an employee leaving the FAA:

1. Find the employee in the "Employees" pane, right-click and select “Retire Employee.”
2. Select the date the employee will be retiring in the “Select Date/Time” dialog box and select “Ok.”
3. On the date and time that you have selected for the employee to be retired, they will be removed from the "Employees" pane.

Until that point, the employee will remain active within the dataset.

Export Employee

To export and employee and make them available to be scheduled in another facility or area:

1. Find the employee in the Employees pane, right-click and select “Export Employee.”
2. In the Export Employee dialog box that opens:
    a. Select the date you would like to have the employee exported,
    b. Select the facility where they will be moving to and area within that facility, if applicable.
    c. Select "Ok" to complete exporting the employee.
3. The employee selected to be exported will turn red in the "Employees" pane list. This will last until the facility that you have exported them to have imported them within OPAS.
4. After the employee has been export but before the new facility has imported them, you can right-click on the red employee and select “Undo Export Employee.” The employee will remain in the facility and will be unable to be imported into the new one.

Import Employee

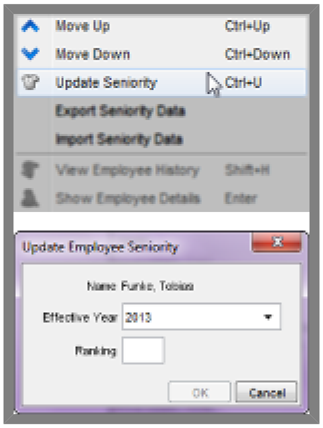
If an employee has been available your facility or area, a traffic light will appear in the OPAS quick link bar to indicate an “Employee Transfer Request.”

1. Left-clicking on the icon will bring up the "Manage Employees" page. The new employee will be indicated in red in the "Employees" pane.
2. Right-click on the employee and choose whether you want to “Import Employee” or “Reject Employee Transfer.”
3. If you select “Reject Employee Transfer”, a "Reason" dialog box will open. Enter the reason you are rejecting the employee and select "Ok." The employee will be removed from the "Employees" pane.
4. If you select “Import Employee”, a dialog box will open allowing you to assign or update personal information about the person joining the facility or area in the "General" tab, including:
    a. Adding or editing Operating Initials
    b. Change area where they will be scheduled
    c. Effective date of import
    d. Role
    e. Bid schedule (if applicable)
    f. Ranking
5. The other tabs contain information about various counters. If you would like to adjust an individual counter, right-click on a counter and select "Overrule." A dialog box will open for you to manually overrule the value.
6. You can also set the number of offered overtime hours in the "Overtime" tab. Depending on the rules and regulations at your facility, choose:
    a. Minimum number of offered hours anyone has in the area
    b. Maximum number of offered hours anyone has in the area
    c. The average amount of offered hours in the area
    d. Manually override the number of offered hours
    e. Once you finalize information about the new employee, select "Ok."
    f. The employee will be officially added to the "Employees" pane but will still need to be assigned shifts in the "Schedule Generation" page.

Update Rank

There are several ways to update an employee’s rank, depending on personal preference.

1. To update an individual employee’s rank, right-click on that employee.
    a. Select “Move Up” or “Move Down” to change that employee’s rank by one.
    b. Select “Update Seniority” to manually change the rank.



Export Rank

To update multiple employees rank:

1. Right-click on any employee and select “Export Seniority Data.”
2. A dialog box will open up where you need to specify the effective year for the rankings and name to file that you will exporting the rank information to.
3. In the “Select Seniority Data File,” name the file. Select the folder icon to specify where the file will be saved.
4. Select "Ok" when you have chosen where you would like to save the file.
5. A dialog box will open asking if you would like to "Open" or "Save" the file.
6. Select "Open" and an Excel file will open with the area’s employees and ranking.
7. Make manual changes in the Excel file, as appropriate.
8. Once you completed making changes to the file, save the file.

Import Rank

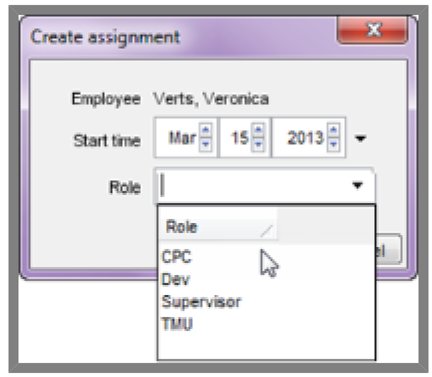
1. Once you have completed making manual changes in the external Excel file, you are able to import the updated rankings.
2. Right-click anywhere in the "Employees" pane and select “Import Seniority data.”
3. Select the folder icon and find where you have saved the exported ranking file.
4. Once the path appears in the “Select seniority data file”, select "Ok" and the file will be uploaded into OPAS with the uploaded rankings.

Assignments Pane

Left-clicking on an employee in the "Employees" pane will reveal their role history in the "Assignments" pane.

Roles will be listed in chronological order based on their start and expiration dates.

New Assignment



1. Right-click anywhere in the Assignments pane and select “New.”
2. The “Create Assignment” dialog box will appear for you to specify the start date of the new assignment and what role you would like the new assignment to be.
3. Once you have filled in the appropriate information select "Ok."
4. The employee’s role will change in the "Employees" pane and a new record will be created in the "Assignments" pane.

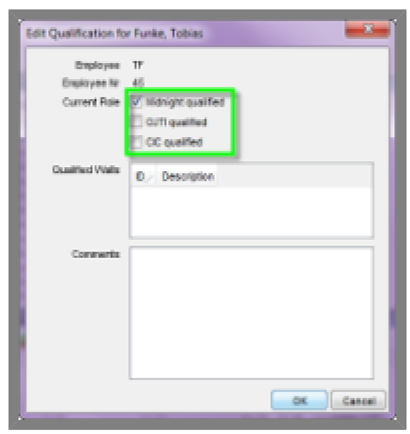
Edit Assignment

1. If you would like to change an employee’s role without creating a record in the "Assignments" pane, right-click on the current role and select “Edit.”
2. In the dialog box that opens, select the role you would like to edit and select "Ok."
3. The employee’s role will be changed in the "Assignments" and "Employees" pane.

Qualifications Pane

The "Qualifications" pane will display the current status of an employee’s basic qualifications. The three qualifications that are displayed in the pane are "Trainer", "Midnight," and "CIC". In this case, “true” indicates “yes,” while “false” indicates “no.”

Edit/Delete Qualification



1. To change a qualification, right-click on a qualification and select “Edit Qualification.”
2. In the dialog box that opens, select or deselect a qualification using the checkboxes to the left of the three qualifications.
    a. This dialog box will also display the "Walls" or "Lines" that employee is qualified to work.
    b. You can also add in comments about the qualification, as necessary.
3. When you are finished editing the employee’s qualification, select "Ok."

To delete a qualification, right-click on the qualification and select “Delete Qualification.” This will remove the current qualification.

Rank Pane

The "Rank" pane will display an employee’s current rank as well as that employee’s rank for previous years.

Note: Editing a rank can only be done from the "Employees" pane.

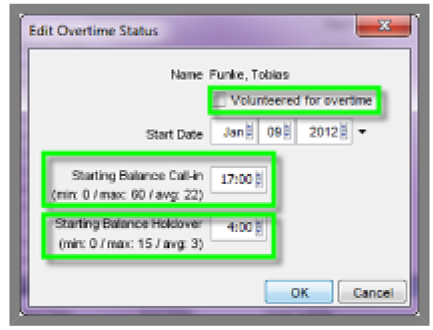
Counters Pane

The "Counters" pane will provides a detailed list of various counters maintained within OPAS for a specific employee. These counters range from move counts off of a specific shift to excused absence counts.

Overtime Status Pane

The "Overtime Status" pane will display an employee's current and past overtime status and hours.

The pane will display whether or not the employee is an overtime volunteer and their call-in and holdover balances.



Changing Overtime Status

1. Right-click on the employee's current overtime status and select "Edit."
2. In the "Edit Overtime Status" dialog box that opens, you are able to adjust whether or not that person is an overtime volunteer and their starting call-in and holdover balances.
3. The dialog box will provide you with information regarding the facility's minimum, maximum, and average call-in and holdover balances.
4. When you have completed adjusting overtime information, select "Ok" and the changes will be made to the current record.

Scheduled Shifts Pane

The "Scheduled Shifts" pane will list out the selected employee's published shifts, both past and present.

Schedule Generation

OPAS Home

Table of Contents

Select a link to jump to the corresponding section.

Schedule Generation

The "Schedule Generation" page is where schedulers at the facility will create schedules on a pay period to pay period basis.

To make changes to a specific day, select the schedule segment that contains that date and make changes accordingly (see below for specific steps).

To sort a particular day by start time, right-click date at the top of the page and select "Sort By Shift Start Time."

To sort a particular day by end time, right-click date at the top of the page and select "Sort By Shift End Time."

Navigation

There are several ways to navigate between days:

- Select “Go to Date” to navigate to a specific date.
- Select "Go to Start Date" to navigate to the first day of the selected schedule.
- Select “Go to Today” if you have navigated away from today and wish to return.
- Based on the zoom level, double blue or regular blue arrows will navigate you backward or forward in time.

When you hover over the time bar (directly below the dates), a hand will appear. Click on the bar and drag-and-drop in the opposite direction you wish to navigate.

Left-click on the schedule dropdown to navigate in between published and non-published schedules.

Zoom Levels

The "Schedule Generation" page opens viewing two weeks at a time. To change the zoom of this page:

- Select the “+” or “--” magnifying glass to zoom in or out in the upper right corner.
- Left-click on the dropdown where it currently is set to “Two weeks” and select the level you would like to view the "Schedule Generation" page.

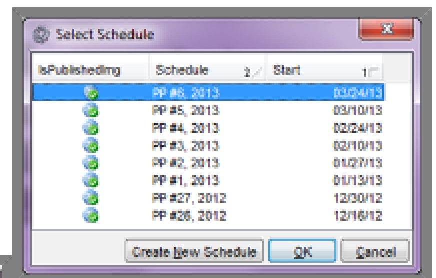
Link to Day of Operations

If you would like to view additional information about a day you are scheduling for, double-click on a day in the date bar at the top of the page.

A "Day of Operations" page will open populated with the information of that day. This new page will open up on top of the "Schedule Generation" page and closing the "Day of Operations" page will return you to "Schedule Generation."

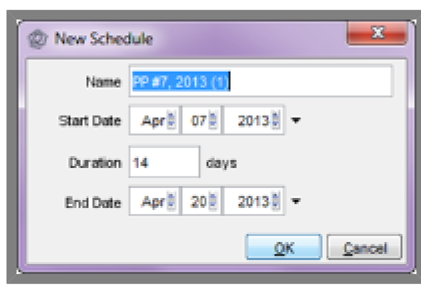
Select Schedule

To avoid loading all of the shifts associated with a schedule segment, when you select "Schedule Generation" page from the "Home Page," the “Select Schedule” dialog box will open and you can select to publish, plan, or create a schedule.



Create New Schedule

1. Select the “Create New Schedule” to open the "Schedule Generation" page with a blank schedule segment.
2. In the dialog that opens, the “Start date” and “End date” will automatically be populated based on the last published schedule and the duration of the schedule.
3. Change either the start date or the duration to adjust when the schedule segment will be for.
4. Select “Ok” and the schedule segment will be created in Schedule Generation.



Schedules Pane

The “Schedules” pane is located in the bottom left of the "Schedule Generation" page.

Schedules that are published are indicated with a globe and a check mark.

By default, the “Schedules” pane will display a number of fields about a schedule, published or otherwise:

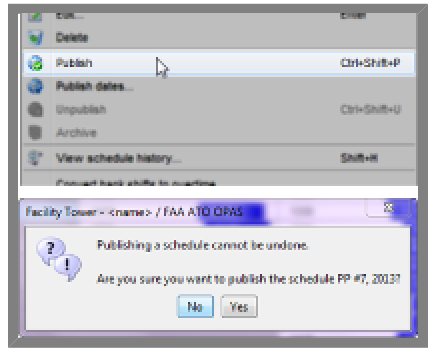
- Schedule Name
- Schedule start date
- Basic statistics about that schedule

Create New Schedule

You are also able to create a new schedule as you are working on a segment within Schedule Generation. To do so:

1. Select the "Create New Schedule" button at the top middle of the page.
2. Selecting this button will open the "New Schedule" dialog for you to fill in the details of the schedule segment you wish to create.
3. Change either the start date or the duration to adjust when the schedule segment will be for.
4. Select “Ok” and the schedule segment will be created and opened.

Publish Schedule



Once the schedule has been finalized, it is necessary to publish the schedule. This makes the schedule visible to all users and allows them to start entering requests against the new schedule.

To publish the entire schedule or specific dates, in the "Schedules" pane, right-click on the schedule you wish to publish and select "Publish" or "Publish Dates."

1. A dialog will appear saying that a publishing a schedule cannot be undone. If you are sure you want to continue, click "Yes."
2. The schedule segment is now published and is visible to employees.

Once published, a schedule should not be unpublished under normal circumstances.

Unpublish Schedule

1. If absolutely necessary, it is possible to unpublish a schedule that has already been published. The unpublish action will be recorded in the audit trail, so care should be exercised when deciding to unpublish a schedule.
2. Right-click on the desired published schedule and select the "Unpublish."
3. A dialog will open saying a schedule should not be unpublished unless absolutely necessary and ask if you would like to continue, select "Yes."
4. The schedule is unpublished and is no longer visible to users.

Export Schedule

At any time, you can view the schedule you are working on in Microsoft Excel. To do so:

1. Right-click on a schedule segment in the "Schedules" pane and select "Export Schedule."
2. You will be prompted with a dialog box where you will specify what you would like to name the file and where you like to save it.
3. Enter the information and select "Save."
4. The file will be saved in that location and you will be able to open up and view the schedule in an Excel file.

Generate Shift Change Report

1. To generate a batch of shift change reports for a schedule segment, right-click on a schedule segment and select "Generate Shift Change Report for all Moved Employees."
2. You will be prompted with a box where you will select where you would like to save the shift change reports and what you would like the base file name of these shift change reports will be and select "Save."
3. All shift change reports will be saved in the location specified, with operating initials of who was moved and the date which they were moved.

> Note: If you will be generating shift change reports for all schedule segments, set up a folder that these can be saved to.

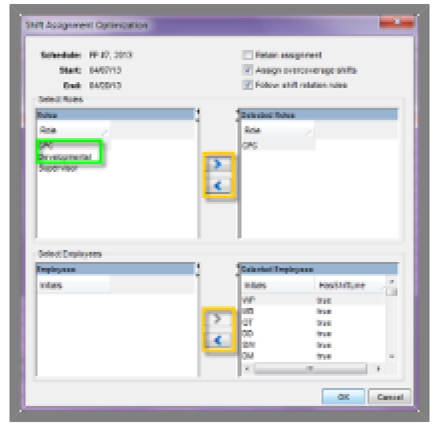
Roles Pane

After a new schedule segment has been created, a blank schedule will display the shifts each employee has bid into at the beginning of the year. Shifts still need to be generated for each role.

Generate Shift Bank

The following steps need to be performed for each role you need to generate schedules for.

1. Left-click on the schedule you would like to work on in the “Schedules” pane.
2. In the “Roles” pane, right-click on the specific role you would like to generate schedules for and select “Generate Shift Bank.”
3. The “Shift Assignment Optimization” dialog box will open. The role you have selected to generate shifts for is populated in the “Selected Roles” pane.



4. All employees assigned a shift line will be included in the “Selected Employees” pane. To remove an employee, left-click on their "Operating Initials" and select the blue arrow toward the left.
5. Once all employees have been included, select “Ok.”
6. A blue box will appear to indicate OPAS will run for several minutes to assign shifts accordingly.
7. Once OPAS is finished running, blue shifts will populate the schedule and additional statistics will appear in the “Roles” pane for the particular role in that schedule.
8. Again, repeat this process for each role that will be included in a published schedule segment.

Return All Shifts To Bank

If you have already optimized shifts to a schedule segment, you can return all shifts to the shift bank:

1. Right-click on a role in the “Roles" pane and select “Return All Shifts to Bank.”
2. All shifts in the schedule segment will be removed and placed in the shift bank, located above the “Schedules" pane.
3. These shifts will be available to be manually assigned to employees with that role.

Reminder: This will return all assigned shifts to the bank and cannot be undone. Only select this option if you are sure.

Delete All Shifts

If you have already optimized shifts to a schedule segment, you can delete all shifts assigned:

1. Right-click on a role in the “Roles" pane and selecting “Delete All Shifts.”
2. If you select this option, you will be prompted with a dialog box asking “Are you sure you want to delete all shifts?”
3. If you select “No,” you will be returned to Schedule Generation.
4. If you select “Yes,” all shifts in that schedule, whether assigned or in the shift bank, will be deleted.

Reminder: All shifts will be deleted and cannot be undone. Only select his option if you are sure.

Optimize Shift Assignments

The following steps need to be performed for each role you need to generate schedules for.

1. Left-click on the schedule you would like to work on in the “Schedules” pane.
2. In the “Roles” pane, right-click on the specific role you would like to generate schedules for and select “Optimize Shift Assignments.”

Note: This is the same process outlined above for "Generate Shift Bank." The "Generate Shift Bank" optimizer will take into account what that role bid into, leave within the schedule segment, and the demand specified that will make moves based on the constraints listed above. "Optimize Shift Assignments" will assign shifts based only on what that role bid into, potentially leaving undercoverage based on leave or demand. In addition, using the "Optimize Shift Assignment" options will not assign any midnight shifts. You must do this manually or follow the steps outlined in the "Match Shift Line" section below.

1. The “Shift Assignment Optimization” dialog box will open. The role you have selected to generate shifts for is populated in the “Selected Roles” pane.
2. All employees assigned a shift line will be included in the “Selected Employees” pane. To remove an employee, left-click on their Operating Initials and select the blue arrow.
3. Once all employees have been included, select “Ok.”
4. A blue box will appear to indicate OPAS will run for several minutes to assign shifts accordingly.
5. Once OPAS is finished running, blue shifts will populate the schedule and additional statistics will appear in the “Roles” pane about particular role in that schedule.
6. Again, after "Optimize Shift Assignments" has completed running, no midnight shifts will have been automatically assigned. You must do this manually or follow the match shift line steps below.

Match Shift Line

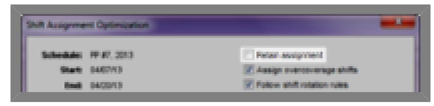
If you are generating a schedule and have not generated the shift bank, you can optimize shift assignments so that all shifts, including midnight shift, are allowed to be assignable as overcoverage:

1. Left-click on the schedule you would like to work on in the “Schedules” pane.
2. In the “Roles” pane, right-click on the specific role you would like to generate schedules for and select “Optimize Shift Assignments.”

3. The “Shift Assignment Optimization” dialog box will open with the role you are working on.
4. The “Match Shift line” checkbook has been automatically check in the top right of the dialog box. This allows all shifts to be assigned exactly as they match their shift lines.
5. Once the checkbox is selected, select "Ok."
6. A blue box will appear to indicate OPAS will run for several minutes to assign shifts accordingly, including midnight shifts.

Retain Assignment

If you are generating a schedule and a new employee has been added, you can assign them shifts using the optimizer without interfering with the work that you have already put in for the rest of the employees in that schedule segment. To do so:



1. Left-click on the schedule you would like to work on in the “Schedules” pane.
2. In the “Roles” pane, right-click on the specific role you would like to generate schedules for and select “Generate Shift Bank” or “Optimize Shift Assignments.”
3. The “Shift Assignment Optimization” dialog box will open with the role you are working on.
4. Make sure that the “Retain Assignment” checkbook has been selected in the top right of the dialog box. This will ensure that employees that already have shifts keep those shifts and anyone without one will get assigned one.
5. Once the checkbox is selected, select "Ok."
6. A blue box will appear to indicate OPAS will run for several minutes to assign shifts accordingly.
7. Once completed, the new employee will receive shifts.

Shift Definitions Pane

The "Shift Definitions" pane will display all available shifts to assign based on the role selected in the "Roles" pane. This pane will display information about each shift, including start and end time, whether or not the shift has flex or overtime and how many of that particular shift has been assigned in the schedule segment.

You are able to drag and drop the shifts that appear in the "Shift Definitions" pane into a schedule segment via the shift bank, described below.

The shifts are specific to the role that has been selected.

For example, when the DEV role is selected, you will be assigning a training shift when dragged and dropped from the "Shift Definitions" pane, regardless of who it is assigned to.

Capacity Chart

The Capacity Chart above the panes discussed above gives a visual representation of how your schedule segment’s supply is fairing versus demand.

There is a legend to the right of the capacity chart will provide more information about what the colors represent, but at a high level, the blue indicates demand, green indicates overcoverage, and red indicates undercoverage.

Changing Shifts

OPAS will generate schedules based on what employees have bid into and the demand required at the facility. You can make manual changes prior to a schedule being published.

There are several ways to make changes to a schedule, detailed in the sections below.

Changes Outside Schedule Segment

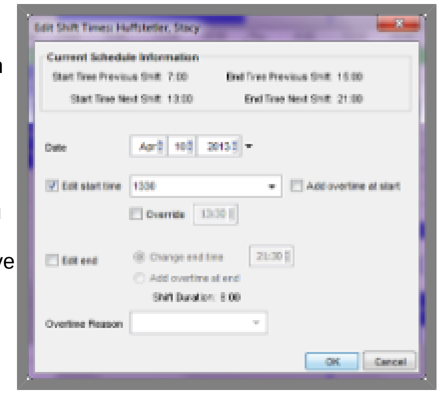
Prior to making manual changes, make sure that you have selected the correct schedule segment in the "Schedules" pane.

You will be unable to make a change to date or shift outside of the schedule segment you have selected.

Based on the application parameters set up for your facility or area, a certain number of days will be highlighted outside of the schedule segment.

Move Shifts

1. Right-click on a shift and select “Move Shift.”
2. A dialog box will open for you to change the start time or the duration of the shift.
3. Use the “Edit Start Time” dropdown to change the shift to a negotiated start time. Select the “Override” checkbox and manually enter a non-negotiated start time.



4. Select the “Edit End” checkbox to change the duration of the shift. As you change the end time, you will see the shift duration change below.
5. You can also add overtime at the end of the shift by changing the end time and selecting an overtime reason.
6. When finished, select “Ok” and the shift will be moved.

This can be done for multiple shifts regardless of start time or day.

1. To select multiple shifts, left-click on a shift, then while holding "CTRL," select the shifts you would like to change to the same start time.
2. Once you have selected all of the shifts you would like to change right-click and select “Move Shift.”
3. Follow the steps above to select the new start time and duration.
4. When finished, select “Ok” and the shifts will be moved.

Dragging and Dropping

1. The “Shift Definitions” pane contains all negotiated shifts in the bottom right of the "Schedule Generation" page, by role.
2. Right-click on a shift you would like to change and select “Delete Shift” or hit "Delete" on your keyboard.
3. Once the shift has been cleared out, left-click on the shift you wish to assign in the “Shift Definitions” pane, drag and drop that shift onto the now cleared out day.
4. The employee will be assigned the shift on that day.

Set As RDO

If you would like to adjust the RDO in an employee’s week:

1. Right-click on the work day you would like to convert to a RDO.
2. In the right-click menu, select "Set as RDO." Any shift that was being worked on that day will be removed and that employee will be put on RDO.
3. Doing so may result in a total working hours violation that needs to be corrected prior to publication.

Set As Work Day

If you would like to adjust the working days in an employee’s week:

1. Right-click on the RDO you would like to convert to a work day.
2. In the right-click menu, select "Set as Work Day."
3. Clicking on this option will open up a dialog for you to assign a new shift start time on that day.
   a. Using the “Requested Start Time” dropdown, choose the time you would like to change your shift to.
   b. If your requested start time does not appear in the dropdown, select the “Override” checkbox and input the start time manually.
   c. Select the "Edit End" checkbox, if changing the duration of the shift is necessary.
   d. When finished, select "Ok."
4. The employee will be removed from RDO and assigned the specified shift.
5. Doing so may result in a total working hours violation that needs to be corrected prior to publication.

Shift Bank

The Shift Bank is located above the capacity chart but below the actual schedule segment. It is the staging area for shifts prior to assigning them to an employee.

Assign Shifts

There are several ways to manually assign shifts from the shift bank:

1. Right click in the "Shift Bank" (within the specific days) and select the “Add Shifts To Bank.”
2. In the dialog that opens, select the appropriate shift definitions by clicking in the checkboxes.
3. Click the "Ok" button to close the dialog.
4. If you would like to duplicate shifts in the bank, left-click on the shift that has been added, copy the shift either through the right-click menu or "CTRL-C" and paste in the shift bank until you have the number of shifts that you need to assign.

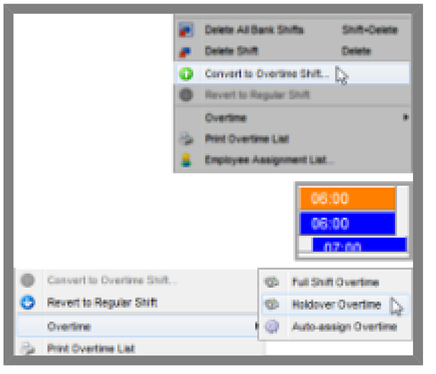
You can also add shifts to the shift bank by selecting the role you would like to assign shifts to in the “Roles" pane.

1. In the “Shift Definitions" pane, left-click on the shift you would like to move to the make, drag and drop into the shift bank.
2. Drag a shift definition from the "Shift Definitions" pane and drop it in the desired day in the shift bank.
3. You can delete a shift by right-clicking on the shift and choosing the option to "Delete Shift."
4. You can delete the shifts in the shift bank by right clicking within the shift bank and choosing the option to delete all bank shifts.

It is also possible to manually assign shifts to employees and/or modify the generated assignment of shifts from the bank. All shifts assignments that cannot be generated will remain in the shift bank, which is the pane directly below the schedule. Shifts may be assigned to employees in the following ways:

1. Drag a shift from the shift bank and drop it on an employee’s day.
2. Drag a shift start time from the "Shift Definitions" pane in the lower right panel and drop it on an employee’s day.
3. Drag a shift from one employee and drop it on another employee's shift. In this case, the application swaps the shifts.

Converting Shifts to Overtime



1. Left-click on one or more (shift click) shifts in the shift bank to select them.
2. After all of the shifts have been selected, right-click on one of those shifts and select the option to "Convert to Overtime Shift."
3. In the dialog that opens, specify the overtime reason and any additional notes or comments, as necessary.
4. Select "Ok."
5. The shifts that you have selected in the "Shift Bank" will be turned into overtime shifts, indicated by the color orange.
6. At any time, you can right-click on an overtime shift in the shift bank and select "Revert to Regular Shift" and it will revert back to a regular coverage shift.

Once the shift has been converted to an overtime shift, there are several ways to assign it on the day.

1. Right-click on the overtime shift and select "Auto-Assign Overtime."
2. The overtime shift will be automatically assigned to the person that should receive the overtime shift, based on how the overtime list is set up at your facility or area (typically, this means volunteers and offered hours).

You can manually assign the overtime shift through the "OT Assignment List." You can drag-and-drop the overtime shift from the bank onto anyone for that day. To do so:

1. Left-click drag and drop the overtime shift onto whom you would like to work the shift. Typically, employees who are on RDOs will be available to work the overtime shift.
2. If you are unable to drop the overtime shift onto an employee, hover over the cell you would like to drop the overtime into (while still holding) to see why you are unable to assign the shift.
3. To override the constraint, hold "CTRL" and drop the shift. A reason box will open up for you provide one (if necessary).
4. Select "Ok" and the overtime shift will be assigned. If you’ve overridden a constraint, sadness will appear and you will have to make an additional change prior to publication.

Convert To CIC/SUP Shift

To change an employee’s shift to a CIC/SUP shift:

1. Right-click on the shift and select "Convert to CIC/SUP Shift."
2. The employee’s full shift will be converted to a supervisor and they will be taken out of the coverage numbers.

Convert To Training

To change an employee’s shift to an training shift:

1. Right-click on the shift and select "Convert to Training."
2. The employee’s full shift will be converted to training and they will be taken out of the coverage numbers.

All DEVs will automatically be assigned training shifts by OPAS but any CPC assigned a training shift will still appear with the CPCs in the "Day of Operations" page.

To remove a shift from an employee to assign to another employee:

1. Right-click on the shift you want to remove and select “Return to Shift Bank.”
2. The shift will be moved off the employee and into the shift bank to be assigned to another employee for that date.

Return To Shift Bank

To remove a shift from an employee to assign to another employee:

1. Right-click on the shift you want to remove and select “Return to Shift Bank.”
2. The shift will be moved off the employee and into the shift bank to be assigned to another employee for that date.

Delete Shift

To delete a shift, right-click on that shift and select “Delete Shift.”

You can also hit the "Delete" button on your keyboard and the shift will be deleted.

Note: You can only use the Delete button on your keyboard from the "Schedule Generation" page.

Change Shift Line

Temporary Change

1. Right-click on the shift you would like to create a new change for and select “Change Shift Line,” then select "New Change"
2. In the “Change Shift Line” dialog box, specify the “Start” and “End” dates.
3. Assign a supervisor via the “Supervisor" dropdown.
4. The "Temporary Change" option should be automatically selected
5. Check or uncheck the “Highlight Change” checkbox. If unchecked, the highlight associated with this temporary assignment will be removed and it will appear like the other shifts in the "Group Schedule" page.

If you would like to assign a new shift line using an already existing shift line, right-click in the “Select a Shift Line" pane and select “Show All Employee Shift Lines."

1. Select the new shift line that you would like to assign.
2. Choose what activity type you would like the shift line to be using the “Activity Type” drop down.
3. Review the shift line and select “Ok.”
4. A dialog box will open asking if you "Would like to retain the shifts or remove them from the employee?"
    a. Retaining shifts will keep the employee on any shifts they have been assigned in a published schedule.
    b. Removing shifts will remove all shifts the employee has been assigned in a published schedule. The employee will need to be manually assigned shifts in this case.
5. The employee's shift line will be temporarily changed.

If you would like to assign a new shift line that does not appear in the list, right-click in the “Select A Shift Line" pane and select “Create New Shift Line."

1. The “Create Work Pattern” dialog box will open.
2. To create a new shift line, select the “Shift Category” or “Shift Definitions” tab. To do so, select a shift category or definition, left-click, drag-and-drop on the work day, keeping in mind "1" signifies the first work day and not “Monday.”
3. Once the shift line has been created properly, select “Ok.”
4. You will be prompted with a new dialog to select the RDOs. Left-click the first day of the RDO and the other will automatically select.
5. If the shift line is repeating or rotating, specify the frequency by checking “Create repeating pattern” and update accordingly.
6. Select “Ok.”
7. Your new shift line will now appear checked in the “Select a Shift Line" pane.
8. Choose what activity type you would like the shift line to be using the “Activity Type” drop down.
9. Review the shift line and select “Ok.”
10. A dialog box will open asking if you "Would like to retain the shifts or remove them from the employee?"
    a. Retaining shifts will keep the employee on any shifts they have been assigned in a published schedule.
    b. Removing shifts will remove all shifts the employee has been assigned in a published schedule. The employee will need to be manually assigned shifts in this case.
11. The employee's shift line will be temporarily changed.

If you would like to create a shift line using an already existing work pattern, right-click and select “Create Shift Line From Selected Pattern.”

1. You will be prompted a new dialog to select the RDOs. Left-click the first day of the RDO and the other will automatically select.
2. If the shift line is repeating or rotating, specify the frequency by checking “Create Repeating Pattern” and update accordingly.
3. Select “Ok.”
4. Your new shift line will now appear checked in the “Select A Shift Line" pane.
5. Choose what activity type you would like the shift line to be using the “Activity Type" drop down.
6. Review the shift line and select “Ok.”
7. A dialog box will open asking if you "Would like to retain the shifts or remove them from the employee?"
    a. Retaining shifts will keep the employee on any shifts they have been assigned in a published schedule.
    b. Removing shifts will remove all shifts the employee has been assigned in a published schedule. The employee will need to be manually assigned shifts in this case.
8. The employee's shift line will be temporarily changed.

If you would like to duplicate an already existing shift line, right-click and select “Duplicate Shift Line.”

1. The “Create Work Pattern” dialog box will open for you to edit.
2. Select the “Activity Type" tab.
3. Find the activity you would like to assign. Left-click, drag and drop onto the day of the week.
4. Select “Ok.”
5. You will be prompted a new dialog to select the RDOs. Left-click the first day of the RDO and the other will automatically select.
6. If the shift line is repeating or rotating, specify the frequency by checking “Create Repeating Pattern” and update accordingly.
7. Select “Ok.”
8. Review the shift line and select “Ok.”
9. A dialog box will open asking if you "Would like to retain the shifts or remove them from the employee?"
    a. Retaining shifts will keep the employee on any shifts they have been assigned in a published schedule.
    b. Removing shifts will remove all shifts the employee has been assigned in a published schedule. The employee will need to be manually assigned shifts in this case.
10. The employee's shift line will be temporarily changed.

Permanent Change

1. Right-click on the shift you would like to create a new change for and select “Change Shift Line,” then select "New Change"
2. In the “Change Shift Line” dialog box, specify the “Start” date.
3. Assign a supervisor via the “Supervisor" dropdown.
4. Select the "Permanent Change" option.

If you would like to assign a new shift line using an already existing shift line, right-click in the “Select a Shift Line" pane and select “Show All Employee Shift Lines."

1. Select the new shift line that you would like to assign.
2. Choose what activity type you would like the shift line to be using the “Activity Type” drop down.
3. Review the shift line and select “Ok.”
4. A dialog box will open asking if you "Would like to retain the shifts or remove them from the employee?"
    a. Retaining shifts will keep the employee on any shifts they have been assigned in a published schedule.
    b. Removing shifts will remove all shifts the employee has been assigned in a published schedule. The employee will need to be manually assigned shifts in this case.
5. The employee's shift line will be permanently changed.

If you would like to assign a new shift line, right-click in the “Select a Shift Line" pane and select “Create New Shift Line."

1. The “Create Work Pattern” dialog box will open.
2. To create a new shift line, select the “Shift Category” or “Shift Definitions” tab. To do so, select a shift category or definition, left-click, drag-and-drop on the work day, keeping in mind "1" signifies the first work day and not “Monday.”
3. Once the shift line has been created properly, select “Ok.”
4. You will be prompted with a new dialog to select the RDOs. Left-click the first day of the RDO and the other will automatically select.
5. If the shift line is repeating or rotating, specify the frequency by checking “Create repeating pattern” and update accordingly.
6. Select “Ok.”
7. Your new shift line will now appear checked in the “Select a Shift Line" pane.
8. Choose what activity type you would like the shift line to be using the “Activity Type” drop down.
9. Review the shift line and select “Ok.”
10. A dialog box will open asking if you "Would like to retain the shifts or remove them from the employee?"
    a. Retaining shifts will keep the employee on any shifts they have been assigned in a published schedule.
    b. Removing shifts will remove all shifts the employee has been assigned in a published schedule. The employee will need to be manually assigned shifts in this case.
11. The employee's shift line will be permanently changed.

If you would like to create a shift line using an already existing work pattern, right-click and select “Create Shift Line From Selected Pattern.”

1. You will be prompted a new dialog to select the RDOs. Left-click the first day of the RDO and the other will automatically select.
2. If the shift line is repeating or rotating, specify the frequency by checking “Create Repeating Pattern” and update accordingly.
3. Select “Ok.”
4. Your new shift line will now appear checked in the “Select A Shift Line" pane.
5. Choose what activity type you would like the shift line to be using the “Activity Type" drop down.
6. Review the shift line and select “Ok.”
7. A dialog box will open asking if you "Would like to retain the shifts or remove them from the employee?"
    a. Retaining shifts will keep the employee on any shifts they have been assigned in a published schedule.
    b. Removing shifts will remove all shifts the employee has been assigned in a published schedule. The employee will need to be manually assigned shifts in this case.
8. The employee's shift line will be permanently changed.

If you would like to duplicate an already existing shift line, right-click and select “Duplicate Shift Line.”

1. The “Create Work Pattern” dialog box will open for you to edit.
2. Select the “Activity Type" tab.
3. Find the activity you would like to assign. Left-click, drag and drop onto the day of the week.
4. Select “Ok.”
5. You will be prompted a new dialog to select the RDOs. Left-click the first day of the RDO and the other will automatically select.
6. If the shift line is repeating or rotating, specify the frequency by checking “Create Repeating Pattern” and update accordingly.

7. Select “Ok.”
8. Review the shift line and select “Ok.”
9. A dialog box will open asking if you "Would like to retain the shifts or remove them from the employee?"
    a. Retaining shifts will keep the employee on any shifts they have been assigned in a published schedule.
    b. Removing shifts will remove all shifts the employee has been assigned in a published schedule. The employee will need to be manually assigned shifts in this case.
10. The employee's shift line will be permanently changed.

Edit Temporary Change

1. Right-click on an already assigned temporary assignment and select “Edit Change” within the “Change Shift Line" tree.
2. The details of the temporary change will populate the dialog box, based on where you have right-clicked.
3. Using the steps in the "Temporary Change" section above, make the appropriate changes to the temporary shift line change.
4. Review the shift line and select “Ok.”
5. The employee will be put on the edited temporary shift line change.

Remove Temporary Change

1. Right-click on the date you would like to remove the temporary change from and select “Remove Change” within the “Change Shift Line" tree.
2. The employee will no longer be assigned shifts specified in the temporary shift line, based on where you have right-clicked.

> Permanent shift line changes may not be edited. Permanent shift line changes will now become that employee's "base layer" for their shift line.

Application Parameters

OPAS Home

Table of Contents

Select a link to jump to the corresponding section.

Application Parameters

The application parameters govern what can and cannot be done throughout OPAS in the areas of:

National Standard

All application parameters were set at a national level at the OPAS Parameter Working Group.

They take into account all nationally negotiated work rules and scheduling practices.

Facility Specific Rules

While the parameters have been set at a national level, they are able to be tweaked or changed at any time to accommodate any locally negotiated rules or scheduling practices.

This should be done with the assistance of the National OPAS Team as well as coordination between local Management and NATCA OPAS points of contact.

Viewing/Changing

Only authorized users are able to open, view and edit the application parameters. If you are unable to access them, please contact your Local OPAS POC.

View the application parameters from the "Edit" menu and select "Application Parameters."

You can also use ALT-A from any screen in OPAS to bring up the application parameter dialog box.

Bidding

The "Bidding" tab of the "Application Parameters" governs how bidding will occur at your facility or area at a high level.

Additional set up for bidding will have to be done within the "Bid Schedule Setup" page.

Maximum number of prime time weeks - Default National Value: 2

Maximum bids per employee per round - Default National Value: 10

Automatic bidding notify window buffer - Default National Value: 0:30

Warning prior to bid window close - Default National Value: 0:05

- Based on how long you have allowed employees to bid at your facility, this parameter will warn whoever is currently bidding how much time left they have before the bid window closes and they will be unable to submit their bid.

Allow changes to sort during bidding - Default National Value: Checked

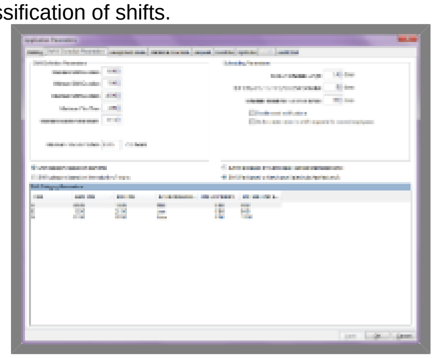
- This will allow bid rounds to be ordered differently than specified in "Mange Employees" under "Rank."

Default leave type - Default National Value: AL

- Selections include all types of available leave. All primetime and non-primetime bids will be entered as whatever is chosen for this parameter.

Shifts & Schedule

The "Shifts & Schedule Parameters" tab of the "Application Parameters" governs work rules and classification of shifts.



Shift Definition Parameters

This section defines the rules by which a shift definition can be created.

Standard shift duration - Default National Value: 8:00

Minimum shift duration - Default National Value: 8:00

Maximum shift duration - Default National Value: 10:00

Maximum flex time - Default National Value: 1:00

Standard duration increment - Default National Value: 0:15

Maximum time on position - Default National Value: 0.875

- This percentage takes into account minimum amount of rest time (30 minutes for lunch and two 15 minute breaks) for a shift.

Scheduling Parameters

This section defines the default rules by which schedules are created. They can be changed on a schedule to schedule basis.

Default schedule length - Default National Value: 14 days

Extra time at end of schedule - Default National Value: 5 days

- The value set for this parameter dictates how many days you will be able to view at both edges of a schedule segment.

Schedule should be published before - Default National Value: 28 days

Email schedule when schedule is published - Default National Value: Unchecked

- Selecting this parameter will enable notifications for your facility or area.

Auto-create return to shift request for moved employees - Default National Value: Unchecked

- If this option has been selected when a schedule is published, a shift change request will be created for any employee moved off of their category or start time requesting a return to that original category or time.

Shift category based on start time

- Example: If a shift has a start time of 1045 and your Day category ends at 1100, this shift will be classified as a Day shift.

Shift category based on majority of hours

- Example: If a shift has a start time of 1045 and your Day category ends at 1100, this shift will be classified as an Eve shift because the majority (0745 hours) of the shift falls in the Eve category.

Shift flex based on worst case (earliest start/end time)

- Example: If a shift begins at 7000 and has 15 minutes of flex at the start, OPAS will assume this person will begin working at 0645.

Shift flex based on best case (latest start/earliest end)

- Example: If a shift begins at 7000 and has 15 minutes of flex at the start, OPAS will assume this person will begin working at 0700.

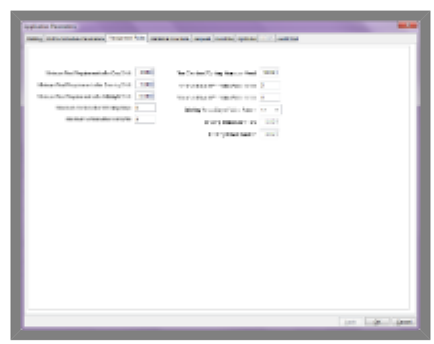
Shift Category Parameters

To adjust one of these shift categories, double-click or right-click on a category and select "Edit." You are able to adjust the following fields:

- Start Time - Inclusive
- End time - Exclusive
- Is allowed developmental
- On time position – this is set above but can be overridden at a shift category level.
- Min rest time after shift – This can be adjusted "Assignment Rules" tab in the "Application Parameters."

Assignment Rules

The "Assignment Rules" tab of the "Application Parameters" governs minimum rest requirements.



Minimum rest requirement after day shift - Default National Value: 8:00

Minimum rest requirement after evening shift - Default National Value: 9:00

Minimum rest requirement after midnight shift - Default National Value: 12:00

Maximum consecutive working days - Default National Value: 6 days

Maximum consecutive midnights - Default National Value: 2 days

Non overtime working hours per week - Default National Value: 40 hours

Minimum days off in one week period - Default National Value: 2 days

Maximum days off in one week period - Default National Value: 3 days

Briefing day work pattern - Default National Value: <>

- Drop down the list and select the working day employees will all of their briefing periods on.
- This indicates the workday day in which every employee will have their briefing period automatically assigned to them.

Briefing period start time - Default National Value: 0:00

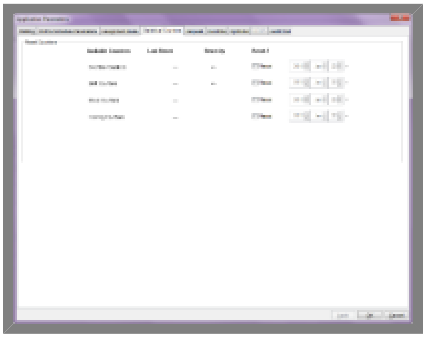
- Unless a working day is selected under “Briefing day work pattern”, you will be unable to change this field.

Briefing period end time - Default National Value: 0:00

- Unless a working day is selected under “Briefing day work pattern”, you will be unable to change this field.

Statistical Counters

The "Statistical Counters" tab of the "Application Parameters" governs when various counters in OPAS have been or will be reset.



Available counters to reset are:

- Overtime
- Shift
- Move
- Training

If checked, you will be able to specify the date that you would like to have the counters reset.

Last reset - This indicates the date a counter was last reset

Reset by - This indicates the user that rest each of the counters last.

Reset? - Default National Value: Unchecked

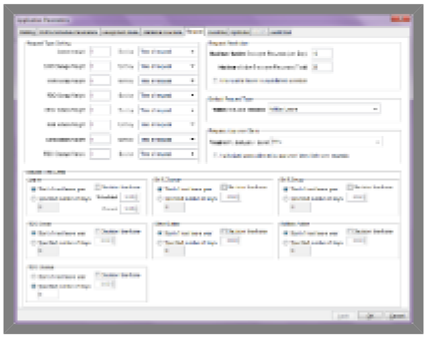
- If checked, you will be able to specify the date that you would like to have the counters reset.

Date

- If the "Rest" checkbox is checked, specify the date that you would like to have the counters reset.

Request

The "Request" tab of the "Application Parameters" governs the sort order and time limits for all requests.



Request Type Sorting

Each request type has its own individual weight and should remain consistent:

- Leave weight
- Shift change weight
- RDO swap weight
- Other duties weight
- Multi action weight
- Cancelation weight
- RDO change weight

Default National Value: 1

All requests types should have the weight of 1. If you would like a request type to be sorted after another, increase the weight associated with that request type.

They can be sort by: "Time of Request" or "Seniority."

Request Restriction

This section details the restrictions users can put in requests.

Maximum number employee requests (per day) - Default National Value: 10

- This value is the number of pending requests an employee can have for a day.

Maximum active employee requests (total) - Default National Value:10

- This value is the total number of pending requests an employee can have in OPAS.

Allow partial leave in unpublished schedule - Default National Value: Unchecked

Default request type - Default National Value: Holiday Leave

- The request type selected here will be what holiday or holiday in lieu of will be entered as automatically.

Request Approve / Deny

This section governs which users can approve or deny what requests.

Required authorization level - Use the dropdown to select what level you would like to be able to act upon requests:

- Supervisor+
- CIC+

If Supervisor+ is selected, users that are CIC qualified and have the CIC authorization will approve/deny or enter proxy requests.

Authorized users allowed to approve /deny their own requests - Default National Value: Unchecked

Request Time Limits

This section Specify for each request type how far out one can be made and what the decision timeframe is.

Leave

- Start of next leave year – This restricts leave to the current year plan
- Specified number of days – This restricts leave to the specified amount of days
- Decision timeframe – If checked, this will determine the amount of time an approval or denial must be provided for a Leave request
    - Scheduled
    - Current

RDO Swap

- Start of next leave year – This restricts leave to the current year plan
- Specified number of days – This restricts leave to the specified amount of days
- Decision timeframe – If checked, this will determine the amount of time an approval or denial must be provided for a leave request

Shift change

- Start of next leave year – This restricts leave to the current year plan
- Specified number of days – This restricts leave to the specified amount of days
- Decision timeframe – If checked, this will determine the amount of time an approval or denial must be provided for a leave request

Other duties

- Start of next leave year – This restricts leave to the current year plan
- Specified number of days – This restricts leave to the specified amount of days
- Decision timeframe – If checked, this will determine the amount of time an approval or denial must be provided for a leave request

Shift swap

- Start of next leave year – This restricts leave to the current year plan
- Specified number of days – This restricts leave to the specified amount of days
- Decision timeframe – If checked, this will determine the amount of time an approval or denial must be provided for a leave request

Multiple action

- Start of next leave year – This restricts leave to the current year plan
- Specified number of days – This restricts leave to the specified amount of days
- Decision timeframe – If checked, this will determine the amount of time an approval or denial must be provided for a leave request

Overtime

The "Overtime" tab of the "Application Parameters" governs how overtime is counted and assigned.

Scheduling Parameters

The section details the increments in which overtime and holdover can be assigned.

Overtime not normally canceled within

Holdover Overtime Min Duration - Default National Value:1 hour

Full Shift Overtime Min Duration - Default National Value: 8 hour

Call List Sort Criteria

This section details what constitutes overtime and holdover hours counted against an employee.

Historical OT Hours Weight

- Default National Value: 1
- Include Historical overtime: Unchecked
- If this checkbox is checked, then all published hours assigned prior to today’s date will count towards an employee’s overtime total.

Unpublished OT Hours Weight

- Default National Value: 1
- Include Unpublished OT Hours: Unchecked.
- If this checkbox is checked then all unpublished hours assigned from today’s date forward will count towards an employee’s overtime total in both published and unpublished schedules.

Published OT Hours Weight

- Default National Value: 1
- Include Published OT Hours: Unchecked.
- If this checkbox is checked then all published hours assigned from today’s date forward will count towards an employee’s overtime total in published schedules.

Offered But Not Assigned OT Hours Weight

- Default National Value: 1
- Include Offered But Not Assigned OT Hours: Checked.
- If this checkbox is, then the parameters checked in the "Overtime/Holdover Call List" response will each count towards the employee's overtime total.

Full Shift Overtime Sort Includes - Default National Value: Call-in hours only

- Options include: "Call-in hours only" or "All hours" (call-in and holdover)

Holdover Sort Includes - Default National Value: All hours (call-in and holdover)

- Options include: "Holdover hours" or and "All hours" (call-in and holdover)

Overtime / holdover call list response

If the "Offered But Not Assigned OT Hours Weight" is checked, then these options will become available to determine what will count as offered hours.

- Voicemail will increase offered hours - Default National Value: Checked
- No answer will increase offered hours - Default National Value: Checked
- Excused will increase offered hours - Default National Value: Unchecked
- Declined will increase offered hours - Default National Value: Checked

Role Setup

- Lists all roles and if Comp or Credit Time is allowed. To change the status of for a role, right-click on it and select “Edit.”
- In the dialog box, check or uncheck each option accordingly and select "Ok."

Overtime reasons

- The "Overtimes Reasons box" will list all overtime reasons available to your facility or area with code, reason, and overtime code.

OPAS Optimizer

The "Optimizer" tab of the "Application Parameters" governs OPAS's three optimizers:

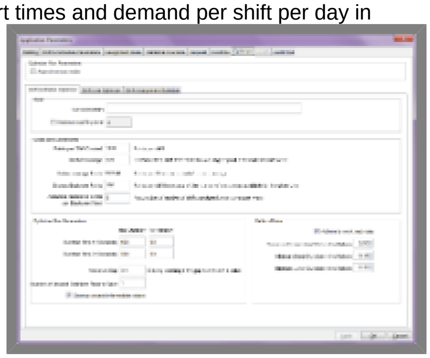
- Shift Definition Optimizer
- Shift Line Optimizer
- Shift Assignment Optimizer

Asynchronous Mode

Checkbox indicates that all optimizations will run in the background. When this option is selected users will still be able to perform functions within OPAS.

Shift Definition Optimizer

The "Shift Definitions Optimizer" tab of the "Optimizer Application Parameter" determines optimal start times and demand per shift per day in "Curves and Shifts" based on the demand curve.



Input Parameters

This section determines how demand curves can be uploaded and the maximum height of a demand curve.

Curve Directory - This contains the path for the directory containing the curves CSV files.

Maximum staffing level

- If checked, you can specify the maximum height of a demand curve. This can also be done when creating a curve in "Curves and Shifts."

Goals and Constraints

This section details the goals and constraints of the "Shift Definition Optimizer."

Points per shift created - Default National Value: 1000

- This defines the number of points for each required shift. If the value is increased, then the other goals (e.g., preferred start times and avoiding excess) have a relatively smaller weight. Typically, other values should be changed, while this value is considered a reference base value that is not changed.

Useful coverage - Default National Value: .01

- This defines the minimum demand a shift has to cover to be worth creating. (DemandToCover = TotalNumberBuckets x UsefulCoverage). Higher values will result in more undercoverage.

Undercoverage points - This is automatically determined based on the shift points and the calculated demand to cover. (UndercoveragePoints = ShiftPoints / (DemandToCover – 0.5)

Excess employee points - Default National Value: 100

- This applies to multiple checkout facilities. Higher values will result in fewer shifts being created in excess of the number of employees available to work.

Assumed number of shifts per employee week - Default National Value: 5

- This indicates how many shifts are typically assigned per week for an employee. (ExceedNrOfShift = TotalNrOfShift – (NrEmployees x AssumedNrOfShift) ExcessEmployeePointsPerWeek = ExceedNrOfShift x ExcessEmployeePoints. The higher the number, the more shifts are generated.

Optimizer Run Parameters

This section determines how long the optimizer will run before producing an acceptable result.

Duration Step 1 - Default National Value: 600 Max Duration and 90 per-iteration

- Maximum duration must be greater or equal than duration per iteration.

Duration Step 2 - Default National Value: 600 Max Duration and 90 per-iteration

- Maximum duration must be greater or equal than duration per iteration.

Maximum Gap - Default National Value: .1

- The difference between the theoretical best score and the best integer score found during the current optimization run. Higher values indicate that the final result may be further from optimal.

Number of unused optimizer runs to save - Default National Value: 1

- Increasing the number increases the memory requirements of the OPAS Application Server. Higher values result in more instances kept in memory.

Cleanup unused intermediate objects - Default National Value: Checked

- When this option is checked, the unused optimizer shift definition instances will be deleted at the end of the run.

Pattern Rules

This section determines the patterns and rules the "Shift Definition Optimizer" must take into account.

Adhere to work / rest rules - Default National Value: Checked

- If this option is checked, the patterns created must follow the work rest rules.

Maximum consecutive work in the pattern - Default National Value: 2:00 hours

- This is the duration of the maximum consecutive work blocks allowed in an activity pattern before there must be a break.

Minimum break duration in the pattern - Default National Value: 0:15 hours

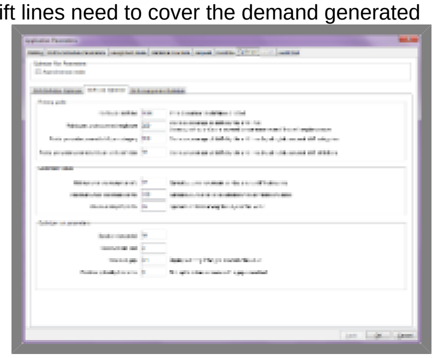
- This is the duration of the minimum break duration allowed in the pattern. Each break must be at least this long.

Minimum lunch duration in the pattern - Default National Value: 0:30 hours

- This is the duration of the minimum lunch duration allowed in the pattern.

Shift Line Optimizer

The "Shift Line Optimizer tab" of the "Optimizer Application Parameter" determines the number of shift lines need to cover the demand generated using the "Shift Definition Optimizer."



Primary Goal Parameters

This section details the primary goal parameters which are the first items that the "Shift Line Optimizer" will consider when producing a result.

Points per shift line - Default National Value: 1000

- This represents the number of points to create a shift line. Higher values result in fewer shift lines being created and more undercoverage.

Points per undercovered employee - Default National Value: 200

- This determines the points of leaving demand uncovered from a high--level perspective. The higher the value, the more effort the optimizer will put forth to cover any shift.

Points per undercovered shift per category - Default National Value: 100

- The number of points to leave a shift category uncovered. The higher the value, the more effort the optimizer will put into using the correct shift lines that match the demand without having to create moves at shift assignment level.

Points per undercovered shift per shift definition - Default National Value: 50

- This applies to shift definitions and not shift categories. The higher the value, the more effort the optimizer will put into using the correct shift lines that match the demand without having to create moves at shift assignment level.

Secondary Goal Parameters

The second goal parameters are considered after the above parameters have been met when producing a result.

Minimum overcoverage benefit - Default National Value: 10

- This works to balance the distribution of overcoverage among shift categories and minimize cases in which the overcoverage falls into just one category.

Maximum undercoverage points - Default National Value: 100

- This works with the previous parameter in order to balance the amount of undercoverage among shift definitions and days. The higher the value, the more important the balancing of the under coverage.

Maximum day off points - Default National Value: 10

- This works to minimize the maximum number of days off on the same day in order to spread them out among days of the week. Higher values result in more balanced undercoverage.

Optimizer Run Parameters

This section determines how long the optimizer will run before producing an acceptable result.

Duration - Default National Value: 30

- Determines how long the optimizer runs before returning the most optimal result at that time. The higher the value, the longer the potential run.

Maximum run kept - Default National Value: 0

- The more saved runs, the higher the amount of memory used. The higher the value, the more instances are kept, and thus the higher amount of memory required.

Maximum gap - Default National Value: .1

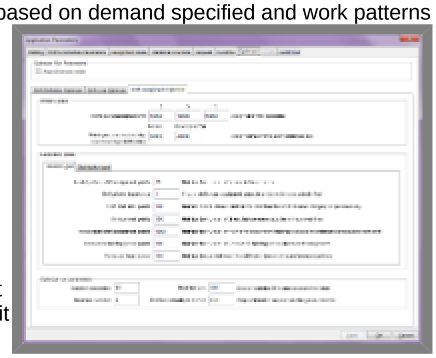
- The difference between the theoretical best score and the best integer score found during the current optimization run. Higher values indicate that the final result may be further from optimal.

Relative optimality tolerance - Default National Value: 0

- Decides at what point the optimizer has reached a solution that is deemed "good enough." Higher values result in less optimal solutions.

Shift Assignment Optimizer

The "Shift Assignment Optimizer" tab of the "Optimizer Application Parameter" produces schedules based on demand specified and work patterns created.



Primary Goal Parameters

This section describes the primary goal parameters which are the first items that the "Shift Assignment Optimizer" will consider when producing a result.

Points per Unassigned Shift

For every shift left in the bank, a penalty is incurred as determined by the points per unassigned shift parameter. The shift category with the highest point total will get priority to be assigned first, making it preferable to have shifts of the other two shift categories be left in the shift bank if necessary.

- Points per unassigned shift type E - Default National Value: 10000
- Points per unassigned shift type D - Default National Value: 10000
- Points per unassigned shift type M - Default National Value: 15000

Represents the number of points for leaving a day without a shift assigned

- Normal - Default National Value: 50000
- Developmental - Default National Value: 40000

Points per Unscheduled Day

Represents the number of points for leaving a day without a shift assigned

- Normal - Default National Value: 50000
- Developmental - Default National Value: 40000

Secondary Goal Parameters

Minimize Goal

Invalid pattern shift assignment points - Default National Value: 10

- This point value aims to reduce the number of times that moves occur. The higher the value, the less often that moves will occur.

Shift priority importance - Default National Value: 1

- This represents the number of points for assigning lower priority shifts. The higher the value, the more important this parameter is compared to others.

Shift start later points - Default National Value: 100

- This defines the number of points for violating the preference for shifts assigned to an employee to start earlier within each shift category. The higher the value, the more emphasis is placed on balancing the distribution of shift definitions.

Minimum Rest Points - Default National Value: 100

- This minimizes the number of times that someone gets the minimum rest time between shifts.

Invalid Night Shift Assignment Points - Default National Value: 1000

- This minimizes the number of night shift assignments that may exceed the minimum consecutive night shifts.

Uncovered Briefing Period Points - Default National Value: 100

- This minimizes the number of uncovered briefing period due to shift assignment.

Points Per Hour Moved - Default National Value: 100

- This maximizes the gap between the shift start time and the preferred start time.

Distribution Goal

Minimum number over assignment per category - Default National Value: 10

- This attempts to distribute the shift assignment across the shift categories in order to create a balanced schedule. Higher values result in a more even distribution of shift definitions amongst employees in the schedule.

Maximum shift assignment points - Default National Value: 10

- This attempts to distribute the shift assignment across the shift definitions in order to create a balanced schedule. The higher the value, the more emphasis is placed on balancing the distribution of shift definitions.

Maximum number of shift points - Default National Value: 10

- This attempts to balance the number of moves among employees. Higher values will result in a more even distribution of shifts amongst employees.

Maximum number of moves points - Default National Value: 10

- This attempts to balance the number of moves among employees. Higher values will result in fewer total moves.

Maximum number coverage shifts assigned to developmental points - Default National Value: 10

- This attempts to balance the number of coverage shifts assigned to developmentals. Higher values will result in a more even distribution of coverage shifts amongst developmentals.

Optimizer Run Parameters

This section determines how long the optimizer will run before producing an acceptable result.

Duration - Default National Value: 60

- This determines how long the optimizer runs before returning the most optimal result at that time. The higher the value, the longer the potential run.

Maximum run kept - Default National Value: 0

- The more saved runs, the higher the amount of memory used. The higher the value, the more instances are kept, and thus the higher amount of memory required.

Maximum gap - Default National Value: 800

- The difference between the theoretical best score and the best integer score found during the current optimization run. Higher values indicate that the final result may be further from optimal.

Relative optimality tolerance - Default National Value: 0.01

- Decides at what point the optimizer has reached a solution that is deemed “good enough.” Higher values result in less optimal solutions.

Audit Trail

The "Audit Trail" will detail any changes made to any application parameters, indicated the user who made the change, what the change was and when the change was made.

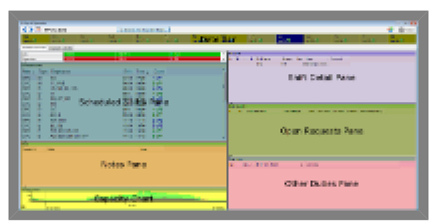
Day of Operations

OPAS Home

Table of Contents

Select a link to jump to the corresponding section.

Day of Operations



The "Day of Operations" page displays what are employees are doing at the facility or area on a day.

Shift Assignments

The day’s shifts can be viewed in the “Scheduled Shifts" pane. This pane will provide information about who is working when.

Count Information

Above the “Scheduled Shifts" pane displays count information by role and supply and demand for each shift category.

In the “Scheduled Shifts" pane, there is a column for "Count." This information indicates the number of people required to work a shift.

This information has been set up by schedulers at your facility.

Navigation

There are several ways to navigate between published days:

- If the day you would like to view is within the dates displayed in the date bar, left-click to display it.
- If the day you would like to view is outside of the range of dates displayed on the date bar, use the blue arrows to navigate forward or backward in time until you are able to view the day. Then left-click to display it.
- Select the calendar and choose the day you would like to view.

The date that you are currently on will display at the top right of the page.

View Shift Details

Left-click on a row in the “Scheduled Shifts" pane to view more information in the “Shift Detail" pane. This will reveal additional information about each person’s shift.

View Overtime Shifts

In the “Scheduled Shifts" pane, any set of initials accompanied with a "$" is an overtime shift.

In the “Shift Detail" pane, a shift that has overtime will have a “Money Bag" icon next to it.

View Open Requests

All requests on a day are displayed in the “Open Requests" pane, displayed in the order they have been entered.

- "Approved" requests are indicated with a green check.
- "Denied" requests are indicated with a red X.
- "Pending" requests are highlighted in yellow.

View Other Duties (Non-Coverage Activities)

The “Other Duties" pane will display all employees working other duties on that day.

Generate Day Of Operations Report

To produce a hard copy of the "Day of Operations" page, click the “Generate Day of Operations Report” on the top of the page.

Print Schedule Reports

To print an individual schedule:

1. Right-click your name in the “Shift Detail" pane.
2. Select the option to “Export Individual Schedule.”
3. The save dialog box prompts you to save the report to your local machine.
4. Enter a file name for the report. Click “Save” to save the report in the desktop folder.
5. The report will open as an Excel document and is ready for printing.

Requests

To make a request: Left-click the “Make Request Quick Link." Select one of the following request types:

- Leave/Absence Request
- Shift Change Request
- Other Duties Request
- Shift Swap Request
- RDO Change Request
- Multiple Action Request

Make Proxy Request

To make a proxy request: Left-click the “Make Request” Quick Link on the OPAS Toolbar. Select one of the following request types:

- Proxy Leave/Absence Request
- Proxy Shift Change Request
- Proxy Other Duties Request
- Proxy Shift Swap Request
- Proxy RDO Change Request
- Proxy Multiple Action Request

Approving/Denying Requests

All requests on a day are displayed in the “Open Requests" pane, displayed in the order they have entered.

- "Approved" requests are indicated with a green check.
- "Denied" requests are indicated with a red X.
- "Pending" requests are highlighted in yellow.

Doubling clicking on a pending request will bring up that request’s dialog box populated with specific information about that request. To act upon the request:

1. Review all information for the request.
2. Add reason, as appropriate.
3. Approve or deny the request.

> Note: Approved requests can be denied at a later time and vice versa.

Enter Cancellation Request

1. Find one of your approved requests in the “Open Requests" pane.
2. Right-click on the request and select “Submit Cancellation Request.”
3. A dialog box will open for you to choose the time you would like to change your shift to.
4. If your requested start time does not appear in the dropdown, select the “Override" checkbox and input the start time manually.
5. A pending cancelation request will appear in the “Open Requests" pane.
6. Until this cancelation request is approved, you will still have leave on that day.

Delete Request

1. Find one of your pending requests in the “Open Requests" pane.
2. Right-click on the request and select “Delete.”
3. The pending request will be removed from the“Open Requests" pane and will be unable to be acted upon.

Edit Shift Detail

Editing an employee’s shift detail will automatically assign an employee to an activity.

1. Right-click on the shift you would like to edit and select “Edit Shit Detail.”
2. The “Shift Detail pane" will display the employee’s shift broken down into 15 minute increments, populated with the activity they are working.
3. To change the whole shift’s activity, find the activity type from you would to assign. These include:
    a. Activity Types
    b. Absence Types
        i. Leave
        ii. Excuse Absence
4. Overtime reasons
    a.
        i. Overtime
        ii. Comp Time
        iii. Credit Hour
5. Left-click on the desired activity type, drag, and drop on the shift in the “Shift Detail" pane.
6. This will automatically assign that activity.
7. Select “Exit” to finalize the change.
8. If you have made a mistake assigning activity, select “Revert” and the shift will return to its most recent activity type.

You can also assign an activity to only part of the day from “Edit Shift Detail.” To do so:

1. Make sure that no activity type is select so you can clear out the desired time in the “Edit Shift Detail pane."
2. Clear out a portion of the day by left-clicking, dragging, dropping, and releasing on the desired time.
3. This will leave that portion of the day “Unassigned.”
4. Left-click on the desired activity type, drag, and drop over the “Unassigned” portion of the shift.
5. Select “Exit” to finalize the change.

6. If you have made a mistake assigning activity, select “Revert” and the shift will return to its most recent activity type.

Notes

Create Note

1. Right-click in the “Notes" pane and select “New.”
2. Add notes.
3. Select “Ok” to submit the note.

Edit/Delete Note

1. Right-click on your note in the “Notes" pane and select “Edit.”
2. Edits notes, as appropriate.
3. Select “Ok” to submit the note.

Overtime Assignment

Assigning Ranked By Volunteers

To bring up the “Full Shift Overtime List”, right-click on a row in the “Scheduled Shift"s pane and select “Overtime Assignment List.”

This dialog box will be populated with the date and time you wish to assign overtime to. The default duration of the overtime shift is eight hours.

Select the role you would like to assign overtime for in the "Role" dropdown. Employees of that role will populate the "Employees" pane below.

You will also be able to adjust the filter on the employees being displayed in the "Employee" pane. However, employees showing will be on their RDO so adjusting the filter will not change the employees in the list.

The default of this page is to show only employees eligible to work the overtime shift. To see all employees, right-click in the “Employees" pane and select “Show All Employees.” The “Unavailability Reason" column will provide information as to why they were not included in the original sort.

Once you have decided on the date and time of the overtime shift, select a reason using the “Overtime reason" dropdown.

To assign the overtime to someone on the list, select their name then select “Assign."

To call the first person on the list, select “Call.”

A dialog box will open where you can record the result of the call:

- Voicemail
- No answer
- Assigned
- Excused
- Declined
- Remarks, as appropriate

Select “Ok” to complete.

Repeat this process until you have assigned the overtime shift.

Assigning Ranked By Non-Volunteer

To bring up the “Full Shift Overtime List”, right-click on a row in the “Scheduled Shifts" pane and select “Overtime Assignment List.”

This dialog box will be populated with the date and time you wish to assign overtime to. The default duration of the overtime shift is eight hours.

The dialog box will default to the "Volunteers" tab. Select the "Non-Volunteers" tab to the right to view the "Employees" pane ranked by non-volunteers.

The dialog box will default to today’s date but adjust the date and time to when you’d like to assign overtime using the date and time selectors. As you change the date and time, you will see the employees included in the “Employees" pane change.

Select the role you would like to assign overtime for in the "Role" dropdown. Employees of that role will populate the "Employees" pane" below.

Adjust the start time of overtime shift you would like to assign. The default duration of the overtime shift is eight hours.

You will also be able to adjust the filter on the employees being displayed in the "Employee" pane". However, employees showing will be on their RDO, so adjusting the filter will not change the employees in the list.

The default of this page is to show only employees eligible to work the overtime shift. To see all employees, right-click in the “Employees” pane and select “Show All Employees.” The “Unavailability Reason” column will provide information as to why they were not included in the original sort.

Once you have decided on the date and time of the overtime shift, select a reason using the “Overtime Reason" dropdown.

To assign the overtime to someone on the list, select their name then select “Assign.”

To call the first person on the list, select “Call.”

A dialog box will open where you can record the result of the call:

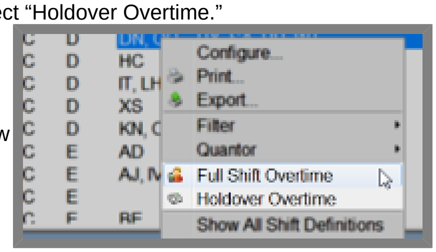
- Voicemail
- No answer
- Assigned
- Excused
- Declined
- Remarks, as appropriate

Select “Ok” to complete.

Repeat this process until you have assigned the overtime shift.

Assign Holdover Overtime

To bring up the “Full Shift Overtime List”, right-click on a row in the “Scheduled Shifts" pane and select “Holdover Overtime.”



This dialog box will be populated with the date and time you wish to assign holdover. The default duration of the holdover shift is two hours.

The dialog box will default to the "Volunteers" tab. Select the "Non-Volunteers tab" to the right to view the "Employees" pane ranked by non-volunteers.

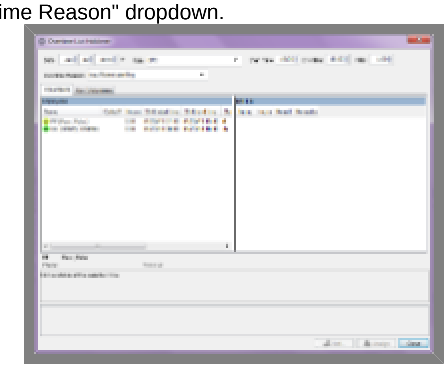
Select the role you would like to assign holdover for in the "Role" dropdown. Employees of that role will populate the "Employees" pane below.

Adjust the start time of the holdover shift you would like to assign.

You will also be able to adjust the filter on the employees being displayed in the "Employee" pane. The employees in the "Employees" pane will change based on the start and end time of the holdover as well as the filter you have select. Green faces meet the criteria exactly. Yellow faces do not meet the exact criteria but fall within the filter. The "Eligibility Window column" in the employees pane will provide information on how much that employee is off from the specified criteria of the holdover shift.

The default of this page is to show only employees eligible to work the holdover shift based on the filter parameters. To see all employees, right-click in the “Employees" pane and select “Show All Employees.” The “Unavailability Reason” column will provide information as to why they were not included in the original sort.

Once you have decided on the date and time of the holdover shift, select a reason using the “Overtime Reason" dropdown.



To assign the holdover to someone on the list, select their name then select “Assign.”

To call the first person on the list, select “Call.”

A dialog box will open where you can record the result of the call:

- Voicemail
- No answer
- Assigned
- Excused
- Declined
- Remarks, as appropriate

Select “Ok” to complete.

Repeat this process until you have assigned the holdover shift.

Employee Activities

Employees not working coverage can be viewed by clicking on the “Employee Activities tab" adjacent to the “Schedule Overview" tab.

View Briefing Periods

The “Briefing Periods" pane" displays a list of all employees assigned a briefing period on the selected day.

View Regular Days Off

The “Regular Days off pane" displays a list of all employees with a regular day off.

View Overtime/Comp/Credit

The “Overtime/Comp/Credit pane" displays a list of employees that are assigned to work time outside of their assigned shift (i.e. overtime).

View Leave/Absence

The “Leave/Absence" pane displays a list of employees who have leave or other absences scheduled.

View Day In Lieu Of

The “Day In Lieu Of" pane displays a list of all employees who are receiving their day in lieu.

View Holdover List

The “Holdover List” provides the scheduler with a list of employees, in ranked order, that are available to work a pre-determined increment of time.

Group Schedule

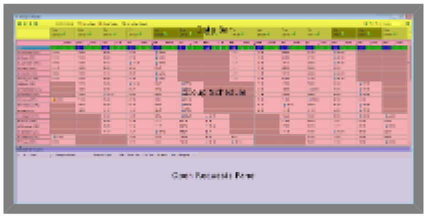
[OPAS Home]

Table of Contents

Select a link to jump to the corresponding section.

Group Schedule

The "Group Schedule" page displays a list of all employees and their assigned shifts throughout all published schedules.
A blue line will run vertically down the page indicating the current date and time.
Various icons populate this page. To find out what they all mean, refer to the legend on the top right of the page.



To sort a particular day by start time, right-click date at the top of the page and select "Sort By Shift Start Time."

To sort a particular day by end time, right-click date at the top of the page and select "Sort By Shift End Time."

Navigation

The "Group Schedule" page opens viewing two weeks at a time. To change the zoom of this page:

- Select the "+" or "--" magnifying glass to zoom in or out.
- Dropdown where it currently set to "Two Weeks" and select the level you would like to view this page.

There are several ways to navigate between published days:

- Select "Go to Date" to navigate to a specific date.
- Select "Go to Today" if you have navigated away from today and wish to return.
- Select "Go to Pay Period" and select the pay period you would like to view.
- Based on the zoom level, using the double blue or regular blue arrows will navigate you backward or forward in time.

When you hover over the time bar (right below the dates), a hand will appear. Click on the bar and drag and drop in the opposite direction you wish to navigate.

Requests

To make a request: Left-click the "Make Request" quick link on the OPAS Toolbar. Select one of the following request types:

- Leave/Absence Request
- Shift Change Request
- Other Duties Request
- Shift Swap Request
- RDO Change Request
- Multiple Action Request

Make Proxy Request

To make a proxy request: Left-click the "Make Request" quick link" on the OPAS Toolbar. Select one of the following request types:

- Proxy Leave/Absence Request
- Proxy Shift Change Request
- Proxy Other Duties Request
- Proxy Shift Swap Request
- Proxy RDO Change Request
- Proxy Multiple Action Request

Drag and Drop Swap

You can drag and drop a "Shift Swap Request" from the "Group Schedule" page To do so:

1. Find your shift on the day you would like to swap.
2. Find the shift you wish to swap with on the same day.
3. Left-click, drag, and drop your shift to the shift you wish to swap with.
4. The "Shift Swap Request dialog box" will open for you to review the swap.
5. Add notes, as appropriate.
6. Select "Ok" to submit the request.

> Note: The swap request will be forwarded to the recipient to approve or deny prior to a Supervisor.

Enter Leave/Absence Request For Multiple Days

1. CTRL left-click on all the days you wish to submit requests for.
2. Once all of the days have been selected, right-click and the menu will contain the same request options that appear in the quick links.

If you are making a "New Leave/Absence Request":

1. The dialog box that opens will populate with the date range you have selected.
2. Select the appropriate leave type and select the blue plus mark to add to the "Leave/Excused Absence Type Requested" pane.
3. Add notes, as appropriate.
4. Select "Ok" to submit the request.

If you are making any other available type of request:

1. A dialog box will appear with the date of the first day of days you wish to enter requests for.
2. Enter in all relevant information and select "Ok."
3. A dialog box will open for each day you wish to submit a request for. Enter in all relevant information and select "Ok" for each.

View Status Of Requests

Clicking on a day in the header will display all requests associated with that day.
All requests on a day are displayed in the "Requests For [date]" pane, displayed in the order they have been put in.

- "Approved" requests are indicated with a green check.
- "Denied" requests are indicated with a red X.
- "Pending" requests are highlighted in yellow.

Approving/Denying Requests

Left-clicking on a day will display all request associated with that day in the "Requests For [date]" pane.
Doubling clicking on a pending request will bring up that request's dialog box populated with specific information about that request.
To act upon the request:

1. Review all information for the request.
2. Add reason, as appropriate.

3. Approve or deny the request.

> Note: Approved requests can be denied at a later time and vice versa.

Enter Cancellation Request

1. Find one of your approved requests in the "Requests for [date]" pane.
2. Right-click on the request and select "Submit Cancellation Request."
3. A dialog box will open for you to choose the time you would like to change your shift to.
4. If your requested start time does not appear in the dropdown, select the "Override" checkbox and input the start time manually.
5. A pending cancelation request will appear in the "Requests for [date]" pane.
6. Until this cancelation request is approved, you will still have leave on that day.

Delete Request

1. Find one of your pending requests in the "Requests for [date]" pane.
2. Right-click on the request and select "Delete."
3. The pending request will be removed from the "Requests for [date]" pane and will be unable to be acted upon.

Edit Shift Detail

Editing an employee's shift detail will automatically assign an employee to an activity.

1. Right-click on the shift you would like to edit and select "Edit Shit Detail."
2. The "Shift Detail" pane will display the employee's shift broken down into 15 minute increments, populated with the activity they are working.
3. To change the whole shift's activity, find the activity type from you would to assign. These include:
    a. Activity Types
    b. Absence Types
        i. Leave
        ii. Excuse Absence
4. Overtime reasons
    a.
        i. Overtime
        ii. Comp Time
        iii. Credit Hour
5. Left-click on the desired activity type, drag, and drop on the shift in the "Shift Detail" pane.
6. This will automatically assign that activity.
7. Select "Exit" to finalize the change.
8. If you have made a mistake assigning activity, select "Revert" and the shift will return to its most recent activity type.

You can also assign an activity to only part of the day from "Edit Shift Detail."To do so:

1. Make sure that no activity type is select so you can clear out the desired time in the "Edit Shift Detail" pane.
2. Clear out a portion of the day by left-clicking, dragging, dropping and releasing on the desired time.
3. This will leave that portion of the day "Unassigned."
4. Left-click on the desired activity type, drag, and drop over the "Unassigned" portion of the shift.
5. Select "Exit" to finalize the change.
6. If you have made a mistake assigning activity, select "Revert" and the shift will return to its most recent activity type.

Change Shift Line

Temporary Change

1. Right-click on the shift you would like to create a new change for and select “Change Shift Line,” then select "New Change"
2. In the “Change Shift Line” dialog box, specify the “Start” and “End” dates.
3. Assign a supervisor via the “Supervisor" dropdown.
4. The "Temporary Change" option should be automatically selected
5. Check or uncheck the “Highlight Change” checkbox. If unchecked, the highlight associated with this temporary assignment will be removed and it will appear like the other shifts in the "Group Schedule" page.

If you would like to assign a new shift line using an already existing shift line, right-click in the “Select a Shift Line" pane and select “Show All Employee Shift Lines."

1. Select the new shift line that you would like to assign.

2. Choose what activity type you would like the shift line to be using the “Activity Type” drop down.
3. Review the shift line and select “Ok.”
4. A dialog box will open asking if you "Would like to retain the shifts or remove them from the employee?"
    a. Retaining shifts will keep the employee on any shifts they have been assigned in a published schedule.
    b. Removing shifts will remove all shifts the employee has been assigned in a published schedule. The employee will need to be manually assigned shifts in this case.
5. The employee's shift line will be temporarily changed.

If you would like to assign a new shift line that does not appear in the list, right-click in the “Select A Shift Line" pane and select “[Create New Shift Line|../../../../../../../../../../display/SD/Shift+Line+Setup#ShiftLineSetup-CreateWorkPatternByShiftCategory]."

1. The “Create Work Pattern” dialog box will open.
2. To create a new shift line, select the “[Shift Category|../../../../../../../../../../display/SD/Shift+Line+Setup#ShiftLineSetup-CreateWorkPatternByShiftCategory]” or “[Shift Definitions|../../../../../../../../../../display/SD/Shift+Line+Setup#ShiftLineSetup-CreateWorkPatternByShiftDefinition]” tab. To do so, select a shift category or definition, left-click, drag-and-drop on the work day, keeping in mind "1" signifies the first work day and not “Monday.”
3. Once the shift line has been created properly, select “Ok.”
4. You will be prompted with a new dialog to select the RDOs. Left-click the first day of the RDO and the other will automatically select.
5. If the shift line is repeating or rotating, specify the frequency by checking “Create repeating pattern” and update accordingly.
6. Select “Ok.”
7. Your new shift line will now appear checked in the “Select a Shift Line" pane.
8. Choose what activity type you would like the shift line to be using the “Activity Type” drop down.
9. Review the shift line and select “Ok.”
10. A dialog box will open asking if you "Would like to retain the shifts or remove them from the employee?"
    a. Retaining shifts will keep the employee on any shifts they have been assigned in a published schedule.
    b. Removing shifts will remove all shifts the employee has been assigned in a published schedule. The employee will need to be manually assigned shifts in this case.
11. The employee's shift line will be temporarily changed.

If you would like to create a shift line using an already existing work pattern, right-click and select “Create Shift Line From Selected Pattern.”

1. You will be prompted a new dialog to select the RDOs. Left-click the first day of the RDO and the other will automatically select.
2. If the shift line is repeating or rotating, specify the frequency by checking “Create Repeating Pattern” and update accordingly.
3. Select “Ok.”
4. Your new shift line will now appear checked in the “Select A Shift Line" pane.
5. Choose what activity type you would like the shift line to be using the “Activity Type" drop down.
6. Review the shift line and select “Ok.”
7. A dialog box will open asking if you "Would like to retain the shifts or remove them from the employee?"
    a. Retaining shifts will keep the employee on any shifts they have been assigned in a published schedule.
    b. Removing shifts will remove all shifts the employee has been assigned in a published schedule. The employee will need to be manually assigned shifts in this case.
8. The employee's shift line will be temporarily changed.

If you would like to duplicate an already existing shift line, right-click and select “Duplicate Shift Line.”

1. The “Create Work Pattern” dialog box will open for you to edit.
2. Select the “Activity Type" tab.
3. Find the activity you would like to assign. Left-click, drag and drop onto the day of the week.
4. Select “Ok.”
5. You will be prompted a new dialog to select the RDOs. Left-click the first day of the RDO and the other will automatically select.
6. If the shift line is repeating or rotating, specify the frequency by checking “Create Repeating Pattern” and update accordingly.
7. Select “Ok.”
8. Review the shift line and select “Ok.”
9. A dialog box will open asking if you "Would like to retain the shifts or remove them from the employee?"
    a. Retaining shifts will keep the employee on any shifts they have been assigned in a published schedule.
    b. Removing shifts will remove all shifts the employee has been assigned in a published schedule. The employee will need to be manually assigned shifts in this case.
10. The employee's shift line will be temporarily changed.

Permanent Change

1. Right-click on the shift you would like to create a new change for and select “Change Shift Line,” then select "New Change"
2. In the “Change Shift Line” dialog box, specify the “Start” date.
3. Assign a supervisor via the “Supervisor" dropdown.
4. Select the "Permanent Change" option.

If you would like to assign a new shift line using an already existing shift line, right-click in the “Select a Shift Line" pane and select “Show All Employee Shift Lines."

1. Select the new shift line that you would like to assign.
2. Choose what activity type you would like the shift line to be using the “Activity Type” drop down.
3. Review the shift line and select “Ok.”
4. A dialog box will open asking if you "Would like to retain the shifts or remove them from the employee?"
    a. Retaining shifts will keep the employee on any shifts they have been assigned in a published schedule.

    b. Removing shifts will remove all shifts the employee has been assigned in a published schedule. The employee will need to be manually assigned shifts in this case.
5. The employee's shift line will be permanently changed.

If you would like to assign a new shift line, right-click in the “Select a Shift Line" pane and select “Create New Shift Line."

1. The “Create Work Pattern” dialog box will open.
2. To create a new shift line, select the “Shift Category” or “Shift Definitions” tab. To do so, select a shift category or definition, left-click, drag-and-drop on the work day, keeping in mind "1" signifies the first work day and not “Monday.”
3. Once the shift line has been created properly, select “Ok.”
4. You will be prompted with a new dialog to select the RDOs. Left-click the first day of the RDO and the other will automatically select.
5. If the shift line is repeating or rotating, specify the frequency by checking “Create repeating pattern” and update accordingly.
6. Select “Ok.”
7. Your new shift line will now appear checked in the “Select a Shift Line" pane.
8. Choose what activity type you would like the shift line to be using the “Activity Type” drop down.
9. Review the shift line and select “Ok.”
10. A dialog box will open asking if you "Would like to retain the shifts or remove them from the employee?"
    a. Retaining shifts will keep the employee on any shifts they have been assigned in a published schedule.
    b. Removing shifts will remove all shifts the employee has been assigned in a published schedule. The employee will need to be manually assigned shifts in this case.
11. The employee's shift line will be permanently changed.

If you would like to create a shift line using an already existing work pattern, right-click and select “Create Shift Line From Selected Pattern.”

1. You will be prompted a new dialog to select the RDOs. Left-click the first day of the RDO and the other will automatically select.
2. If the shift line is repeating or rotating, specify the frequency by checking “Create Repeating Pattern” and update accordingly.
3. Select “Ok.”
4. Your new shift line will now appear checked in the “Select A Shift Line" pane.
5. Choose what activity type you would like the shift line to be using the “Activity Type" drop down.
6. Review the shift line and select “Ok.”
7. A dialog box will open asking if you "Would like to retain the shifts or remove them from the employee?"
    a. Retaining shifts will keep the employee on any shifts they have been assigned in a published schedule.
    b. Removing shifts will remove all shifts the employee has been assigned in a published schedule. The employee will need to be manually assigned shifts in this case.
8. The employee's shift line will be permanently changed.

If you would like to duplicate an already existing shift line, right-click and select “Duplicate Shift Line.”

1. The “Create Work Pattern” dialog box will open for you to edit.
2. Select the “Activity Type" tab.
3. Find the activity you would like to assign. Left-click, drag and drop onto the day of the week.
4. Select “Ok.”
5. You will be prompted a new dialog to select the RDOs. Left-click the first day of the RDO and the other will automatically select.
6. If the shift line is repeating or rotating, specify the frequency by checking “Create Repeating Pattern” and update accordingly.
7. Select “Ok.”
8. Review the shift line and select “Ok.”
9. A dialog box will open asking if you "Would like to retain the shifts or remove them from the employee?"
    a. Retaining shifts will keep the employee on any shifts they have been assigned in a published schedule.
    b. Removing shifts will remove all shifts the employee has been assigned in a published schedule. The employee will need to be manually assigned shifts in this case.
10. The employee's shift line will be permanently changed.

Edit Temporary Change

1. Right-click on an already assigned temporary assignment and select “Edit Change” within the “Change Shift Line" tree.
2. The details of the temporary change will populate the dialog box, based on where you have right-clicked.
3. Using the steps in the "Temporary Change" section above, make the appropriate changes to the temporary shift line change.
4. Review the shift line and select “Ok.”
5. The employee will be put on the edited temporary shift line change.

Remove Temporary Change

1. Right-click on the date you would like to remove the temporary change from and select “Remove Change” within the “Change Shift Line" tree.
2. The employee will no longer be assigned shifts specified in the temporary shift line, based on where you have right-clicked.

> Permanent shift line changes may not be edited. Permanent shift line changes will now become that employee's "base layer" for their shift line.

Group Schedule

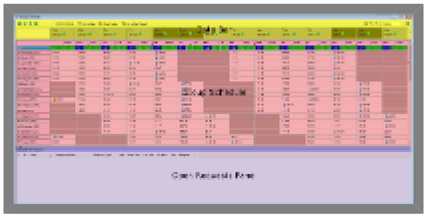
OPAS Home

Table of Contents

Select a link to jump to the corresponding section.

Group Schedule

The "Group Schedule" page displays a list of all employees and their assigned shifts throughout all published schedules.
A blue line will run vertically down the page indicating the current date and time.
Various icons populate this page. To find out what they all mean, refer to the legend on the top right of the page.



To sort a particular day by start time, right-click date at the top of the page and select "Sort By Shift Start Time."

To sort a particular day by end time, right-click date at the top of the page and select "Sort By Shift End Time."

Navigation

The "Group Schedule" page opens viewing two weeks at a time. To change the zoom of this page:

- Select the "+" or "--" magnifying glass to zoom in or out.
- Dropdown where it currently set to "Two Weeks" and select the level you would like to view this page.

There are several ways to navigate between published days:

- Select "Go to Date" to navigate to a specific date.
- Select "Go to Today" if you have navigated away from today and wish to return.
- Select "Go to Pay Period" and select the pay period you would like to view.
- Based on the zoom level, using the double blue or regular blue arrows will navigate you backward or forward in time.

When you hover over the time bar (right below the dates), a hand will appear. Click on the bar and drag and drop in the opposite direction you wish to navigate.

Requests

To make a request: Left-click the "Make Request" quick link on the OPAS Toolbar. Select one of the following request types:

- Leave/Absence Request
- Shift Change Request
- Other Duties Request
- Shift Swap Request
- RDO Change Request
- Multiple Action Request

Make Proxy Request

To make a proxy request: Left-click the "Make Request" quick link" on the OPAS Toolbar. Select one of the following request types:

- Proxy Leave/Absence Request
- Proxy Shift Change Request
- Proxy Other Duties Request
- Proxy Shift Swap Request
- Proxy RDO Change Request
- Proxy Multiple Action Request

Drag and Drop Swap

You can drag and drop a "Shift Swap Request" from the "Group Schedule" page To do so:

1. Find your shift on the day you would like to swap.
2. Find the shift you wish to swap with on the same day.
3. Left-click, drag, and drop your shift to the shift you wish to swap with.
4. The "Shift Swap Request dialog box" will open for you to review the swap.
5. Add notes, as appropriate.
6. Select "Ok" to submit the request.

> Note: The swap request will be forwarded to the recipient to approve or deny prior to a Supervisor.

Enter Leave/Absence Request For Multiple Days

1. CTRL left-click on all the days you wish to submit requests for.
2. Once all of the days have been selected, right-click and the menu will contain the same request options that appear in the quick links.

If you are making a "New Leave/Absence Request":

1. The dialog box that opens will populate with the date range you have selected.
2. Select the appropriate leave type and select the blue plus mark to add to the "Leave/Excused Absence Type Requested" pane.
3. Add notes, as appropriate.
4. Select "Ok" to submit the request.

If you are making any other available type of request:

1. A dialog box will appear with the date of the first day of days you wish to enter requests for.
2. Enter in all relevant information and select "Ok."
3. A dialog box will open for each day you wish to submit a request for. Enter in all relevant information and select "Ok" for each.

View Status Of Requests

Clicking on a day in the header will display all requests associated with that day.
All requests on a day are displayed in the "Requests For [date]" pane, displayed in the order they have been put in.

- "Approved" requests are indicated with a green check.
- "Denied" requests are indicated with a red X.
- "Pending" requests are highlighted in yellow.

Approving/Denying Requests

Left-clicking on a day will display all request associated with that day in the "Requests For [date]" pane.
Doubling clicking on a pending request will bring up that request's dialog box populated with specific information about that request.
To act upon the request:

1. Review all information for the request.
2. Add reason, as appropriate.

3. Approve or deny the request.

> Note: Approved requests can be denied at a later time and vice versa.

Enter Cancellation Request

1. Find one of your approved requests in the "Requests for [date]" pane.
2. Right-click on the request and select "Submit Cancellation Request."
3. A dialog box will open for you to choose the time you would like to change your shift to.
4. If your requested start time does not appear in the dropdown, select the "Override" checkbox and input the start time manually.
5. A pending cancelation request will appear in the "Requests for [date]" pane.
6. Until this cancelation request is approved, you will still have leave on that day.

Delete Request

1. Find one of your pending requests in the "Requests for [date]" pane.
2. Right-click on the request and select "Delete."
3. The pending request will be removed from the "Requests for [date]" pane and will be unable to be acted upon.

Edit Shift Detail

Editing an employee's shift detail will automatically assign an employee to an activity.

1. Right-click on the shift you would like to edit and select "Edit Shit Detail."
2. The "Shift Detail" pane will display the employee's shift broken down into 15 minute increments, populated with the activity they are working.
3. To change the whole shift's activity, find the activity type from you would to assign. These include:
    a. Activity Types
    b. Absence Types
        i. Leave
        ii. Excuse Absence
4. Overtime reasons
    a.
        i. Overtime
        ii. Comp Time
        iii. Credit Hour
5. Left-click on the desired activity type, drag, and drop on the shift in the "Shift Detail" pane.
6. This will automatically assign that activity.
7. Select "Exit" to finalize the change.
8. If you have made a mistake assigning activity, select "Revert" and the shift will return to its most recent activity type.

You can also assign an activity to only part of the day from "Edit Shift Detail."To do so:

1. Make sure that no activity type is select so you can clear out the desired time in the "Edit Shift Detail" pane.
2. Clear out a portion of the day by left-clicking, dragging, dropping and releasing on the desired time.
3. This will leave that portion of the day "Unassigned."
4. Left-click on the desired activity type, drag, and drop over the "Unassigned" portion of the shift.
5. Select "Exit" to finalize the change.
6. If you have made a mistake assigning activity, select "Revert" and the shift will return to its most recent activity type.

Change Shift Line

Temporary Change

1. Right-click on the shift you would like to create a new change for and select “Change Shift Line,” then select "New Change"
2. In the “Change Shift Line” dialog box, specify the “Start” and “End” dates.
3. Assign a supervisor via the “Supervisor" dropdown.
4. The "Temporary Change" option should be automatically selected
5. Check or uncheck the “Highlight Change” checkbox. If unchecked, the highlight associated with this temporary assignment will be removed and it will appear like the other shifts in the "Group Schedule" page.

If you would like to assign a new shift line using an already existing shift line, right-click in the “Select a Shift Line" pane and select “Show All Employee Shift Lines."

1. Select the new shift line that you would like to assign.
2. Choose what activity type you would like the shift line to be using the “Activity Type” drop down.
3. Review the shift line and select “Ok.”

4. A dialog box will open asking if you "Would like to retain the shifts or remove them from the employee?"
    a. Retaining shifts will keep the employee on any shifts they have been assigned in a published schedule.
    b. Removing shifts will remove all shifts the employee has been assigned in a published schedule. The employee will need to be manually assigned shifts in this case.
5. The employee's shift line will be temporarily changed.

If you would like to assign a new shift line that does not appear in the list, right-click in the “Select A Shift Line" pane and select “New Shift Line."

1. The “Create Work Pattern” dialog box will open.
2. To create a new shift line, select the “Shift Cateogry” or “Shift Definitions” tab. To do so, select a shift category or definition, left-click, drag-and-drop on the work day, keeping in mind "1" signifies the first work day and not “Monday.”
3. Once the shift line has been created properly, select “Ok.”
4. You will be prompted with a new dialog to select the RDOs. Left-click the first day of the RDO and the other will automatically select.
5. If the shift line is repeating or rotating, specify the frequency by checking “Create repeating pattern” and update accordingly.
6. Select “Ok.”
7. Your new shift line will now appear checked in the “Select a Shift Line" pane.
8. Choose what activity type you would like the shift line to be using the “Activity Type” drop down.
9. Review the shift line and select “Ok.”
10. A dialog box will open asking if you "Would like to retain the shifts or remove them from the employee?"
    a. Retaining shifts will keep the employee on any shifts they have been assigned in a published schedule.
    b. Removing shifts will remove all shifts the employee has been assigned in a published schedule. The employee will need to be manually assigned shifts in this case.
11. The employee's shift line will be temporarily changed.

If you would like to create a shift line using an already existing work pattern, right-click and select “Create Shift Line From Selected Pattern.”

1. You will be prompted a new dialog to select the RDOs. Left-click the first day of the RDO and the other will automatically select.
2. If the shift line is repeating or rotating, specify the frequency by checking “Create Repeating Pattern” and update accordingly.
3. Select “Ok.”
4. Your new shift line will now appear checked in the “Select A Shift Line" pane.
5. Choose what activity type you would like the shift line to be using the “Activity Type" drop down.
6. Review the shift line and select “Ok.”
7. A dialog box will open asking if you "Would like to retain the shifts or remove them from the employee?"
    a. Retaining shifts will keep the employee on any shifts they have been assigned in a published schedule.
    b. Removing shifts will remove all shifts the employee has been assigned in a published schedule. The employee will need to be manually assigned shifts in this case.
8. The employee's shift line will be temporarily changed.

If you would like to duplicate an already existing shift line, right-click and select “Duplicate Shift Line.”

1. The “Create Work Pattern” dialog box will open for you to edit.
2. Select the “Activity Type" tab.
3. Find the activity you would like to assign. Left-click, drag and drop onto the day of the week.
4. Select “Ok.”
5. You will be prompted a new dialog to select the RDOs. Left-click the first day of the RDO and the other will automatically select.
6. If the shift line is repeating or rotating, specify the frequency by checking “Create Repeating Pattern” and update accordingly.
7. Select “Ok.”
8. Review the shift line and select “Ok.”
9. A dialog box will open asking if you "Would like to retain the shifts or remove them from the employee?"
    a. Retaining shifts will keep the employee on any shifts they have been assigned in a published schedule.
    b. Removing shifts will remove all shifts the employee has been assigned in a published schedule. The employee will need to be manually assigned shifts in this case.
10. The employee's shift line will be temporarily changed.

Permanent Change

1. Right-click on the shift you would like to create a new change for and select “Change Shift Line,” then select "New Change"
2. In the “Change Shift Line” dialog box, specify the “Start” date.
3. Assign a supervisor via the “Supervisor" dropdown.
4. Select the "Permanent Change" option.

If you would like to assign a new shift line using an already existing shift line, right-click in the “Select a Shift Line" pane and select “Show All Employee Shift Lines."

1. Select the new shift line that you would like to assign.
2. Choose what activity type you would like the shift line to be using the “Activity Type” drop down.
3. Review the shift line and select “Ok.”
4. A dialog box will open asking if you "Would like to retain the shifts or remove them from the employee?"
    a. Retaining shifts will keep the employee on any shifts they have been assigned in a published schedule.
    b. Removing shifts will remove all shifts the employee has been assigned in a published schedule. The employee will need to be manually assigned shifts in this case.
5. The employee's shift line will be permanently changed.

If you would like to assign a new shift line, right-click in the “Select a Shift Line" pane and select “Create New Shift Line."

1. The “Create Work Pattern” dialog box will open.
2. To create a new shift line, select the “Shift Category” or “Shift Definitions” tab. To do so, select a shift category or definition, left-click, drag-and-drop on the work day, keeping in mind "1" signifies the first work day and not “Monday.”
3. Once the shift line has been created properly, select “Ok.”
4. You will be prompted with a new dialog to select the RDOs. Left-click the first day of the RDO and the other will automatically select.
5. If the shift line is repeating or rotating, specify the frequency by checking “Create repeating pattern” and update accordingly.
6. Select “Ok.”
7. Your new shift line will now appear checked in the “Select a Shift Line" pane.
8. Choose what activity type you would like the shift line to be using the “Activity Type” drop down.
9. Review the shift line and select “Ok.”
10. A dialog box will open asking if you "Would like to retain the shifts or remove them from the employee?"
    a. Retaining shifts will keep the employee on any shifts they have been assigned in a published schedule.
    b. Removing shifts will remove all shifts the employee has been assigned in a published schedule. The employee will need to be manually assigned shifts in this case.
11. The employee's shift line will be permanently changed.

If you would like to create a shift line using an already existing work pattern, right-click and select “Create Shift Line From Selected Pattern.”

1. You will be prompted a new dialog to select the RDOs. Left-click the first day of the RDO and the other will automatically select.
2. If the shift line is repeating or rotating, specify the frequency by checking “Create Repeating Pattern” and update accordingly.
3. Select “Ok.”
4. Your new shift line will now appear checked in the “Select A Shift Line" pane.
5. Choose what activity type you would like the shift line to be using the “Activity Type" drop down.
6. Review the shift line and select “Ok.”
7. A dialog box will open asking if you "Would like to retain the shifts or remove them from the employee?"
    a. Retaining shifts will keep the employee on any shifts they have been assigned in a published schedule.
    b. Removing shifts will remove all shifts the employee has been assigned in a published schedule. The employee will need to be manually assigned shifts in this case.
8. The employee's shift line will be permanently changed.

If you would like to duplicate an already existing shift line, right-click and select “Duplicate Shift Line.”

1. The “Create Work Pattern” dialog box will open for you to edit.
2. Select the “Activity Type" tab.
3. Find the activity you would like to assign. Left-click, drag and drop onto the day of the week.
4. Select “Ok.”
5. You will be prompted a new dialog to select the RDOs. Left-click the first day of the RDO and the other will automatically select.
6. If the shift line is repeating or rotating, specify the frequency by checking “Create Repeating Pattern” and update accordingly.
7. Select “Ok.”
8. Review the shift line and select “Ok.”
9. A dialog box will open asking if you "Would like to retain the shifts or remove them from the employee?"
    a. Retaining shifts will keep the employee on any shifts they have been assigned in a published schedule.
    b. Removing shifts will remove all shifts the employee has been assigned in a published schedule. The employee will need to be manually assigned shifts in this case.
10. The employee's shift line will be permanently changed.

Edit Temporary Change

1. Right-click on an already assigned temporary assignment and select “Edit Change” within the “Change Shift Line" tree.
2. The details of the temporary change will populate the dialog box, based on where you have right-clicked.
3. Using the steps in the "Temporary Change" section above, make the appropriate changes to the temporary shift line change.
4. Review the shift line and select “Ok.”
5. The employee will be put on the edited temporary shift line change.

Remove Temporary Change

1. Right-click on the date you would like to remove the temporary change from and select “Remove Change” within the “Change Shift Line" tree.
2. The employee will no longer be assigned shifts specified in the temporary shift line, based on where you have right-clicked.

> Permanent shift line changes may not be edited. Permanent shift line changes will now become that employee's "base layer" for their shift line.

Employee Bidding

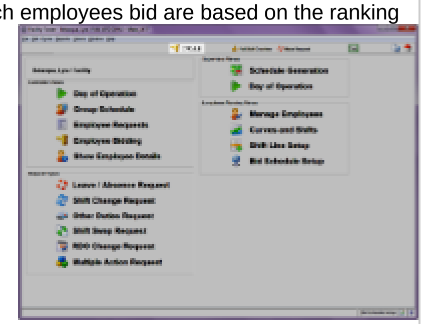
OPAS Home

Table of Contents

Select a link to jump to the corresponding section.

Employee Bidding

The Employee Bidding page is where employees bid on their shift line, primetime and non-primetime leave for the year. The order by which employees bid are based on the ranking set up at your facility.



If your facility bids by crew, shiftlines will always be bid together, but starting with primetime and nonprimetime rounds, the user can specify which crew the round belongs to.

Bidding Gavel

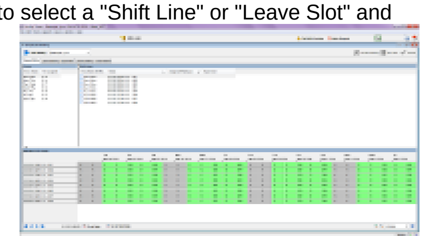
When bidding has begun in your facility or area, the "Bidding Gavel" will appear on the OPAS Toolbar.
The icon will indicate what role is bidding and the Operating Initials of the employee that is "Ready to Bid." Hovering over the icon will also reveal who is "Up Next" to bid.

Employee Bidding Page

The "Employee Bidding" page is accessible from the home page and can be viewed at any time during the bidding process.

If it is not your turn to bid, you will still be able to view the progress of the bid from this page. However, you will be unable to act until it is your turn to bid and you have selected the "Start Bidding" button at the top left of the page.

The "Start Bidding" button will be greyed out until it is your turn to bid. In this case, you will be unable to select a "Shift Line" or "Leave Slot" and OPAS will remind you that the "Bid round is not yet open."



Note: If you have opted in, you will receive three bidding related notifications; one notifying you that you are in the hole, the second notifying you that you are up next to bid, and the third notifying you that it is your turn to bid.

Start Bidding

When it is your turn to bid, select the "Bidding Gavel" from any page or select "Employee Bidding" from the home page. This will open up the "Employee Bidding" page.

When you are ready to begin bidding, select the "Start Bidding" button at the top left of the page.

Note: As part of the bidding setup at your facility, a duration will be set for how much time you have to complete your bid. This will not begin until you have selected “Start Bidding.”

Select Shift Line

The first step in the bidding process is to select your "Shift Line" on the “Select RDO” tab of the “Employee Bidding” page.

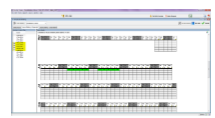
The “Crews” pane will display the available crews for you to bid on as well as the number of employees that have already bid onto a specific crew. Left-clicking on a crew in the “Crews” pane will reveal more information about the crew in the “Shift Lines” pane, for example, any employees that have already bid onto that crew or any SUP already assigned that shift line.

As you switch between crews in the “Crews” pane, you can see how that crew’s shift lines progresses throughout the year in the “Selected Shift Line(s)” pane.

Once you have decided what crew you would like to work and what shift line you would like to bid into, select the shift line by left-clicking in the checkbox to the left of the shift line in the “Shift Lines” pane. Your name will appear in the “Assigned Employee” column and the number in the “Nr Assigned” column in the “Crews” pane will increase by one.

Select Primetime Leave

After you have selected your "Shift Line," you will select your "Primetime Leave." You can do this from either the “Leave Bidding – Expanded” or “Leave Bidding – Compressed” tabs.



Consult the legend on either tab to obtain additional information about annotations and icons that appear.

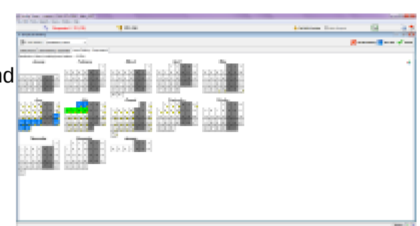
The “Leave Bidding – Expanded” tab will display all days in the calendar year and below each date, all leave slots available to bid into. The “Months in Leave Plan” pane on the left side of the screen displays primetime months highlighted in yellow. In this tab, you will be able to see everyone else who has bid in every "Primetime Leave" slot. To enter a bid, identify the days you would like to bid Primetime Leave on. Once you have identified the appropriate days, left-click on that day. Days that you have selected will be displayed in bright green.

ProTip: Shift-Left-Click on the first day of a week you would like to submit Primetime Leave for. Primetime Leave will be entered for that day and the subsequent four days. Using this method, Primetime Leave will wrap around RDOs.

The “Leave Bidding – Compressed” tab is a calendar view. To enter a bid, identify the days you would like to bid Primetime Leave on. Once you have identified the appropriate days, left-click on that day. Days that you have selected will be displayed in bright green.

Note: Both tabs will display the RDOs from the Shift Line you have selected.

If you have exceeded your two week maximum, you will receive a warning to notify you that you “cannot bid more than 2 weeks during the primetime bidding round.” You will be unable to submit your bid until this has been resolved.



Once finalized your Primetime Leave, select the “Submit” button at the top right of the page. You will asked if you are sure you would like to submit the bid. If you select “Yes,” your bid will be submitted and the next person will be up to bid next. Close out the page after you have selected it.

If you select “No,” you will be returned to the “Employee Bidding” page.

Select Non-Primetime Leave

The process by which you will bid Non-Primetime Leave is identical to how you have bid your Primetime Leave.

When you open up Employee Bidding page, the “Select RDOs” tab will be blank.

Navigate to either the “Leave Bidding – Expanded” or “Leave Bidding – Compressed” tabs to enter your Non-Primetime Leave. Unlike Primetime bidding, the Non-Primetime rounds will be governed by your requestable leave total. At the top left of each tab will be the remaining leave balance. As you enter in a bid, you will see that number decrease. You will be unable to submit a bid that exceeds your requestable total.

Note: If you have bid into an AWS work pattern, the remaining leave balance will deduct by the duration of your shift on that day.

Once finalized your Non-Primetime Leave, select the “Submit” button at the top right of the page. You will asked if you are sure you would like to submit the bid. If you select “Yes,” your bid will be submitted and the next person will be up to bid next. Close out the page after you have selected it.

This process will be completed until all Non-Primetime rounds have been completed.

Bid Later

If you wish to skip the current bid round, select the “Bid Later” button at the top right of the Employee Bidding page. Authorized users will be able to manually reopen your bid at a later time to complete the bid round.

End Bidding

From the Employee Bidding screen, you have the ability to end bidding for the rest of the bidding process, without having to click, "Start Bidding." You can also bid for the round, submit your bid, and then select, "End Bidding" to opt out of remaining rounds. If you opted out of a bid, you will not recieve a notification when the bid round is closed. Also no notifications are sent if a bid round/schedule is ended and then reopened.

Decline Bidding

If you wish to decline the entire bid round, you can do so by selecting the “Decline” button at the top right of the Employee Bidding page. You will be unable to decline a bid round involving shift lines.

Facility Specific Bid Setup

Depending on how your facility’s bidding has been set up, Shift Line and Primetime bid rounds may be done in the same round or split into two. The process by which each component is done remains the same, only the order in which they are done differs. The bid may also be set up to allow Crew bidding.

Print Bidding Results

On the Employee Bidding Form, you can print bidding results. Select, "Print Individual Bidding Results" or "Print SF-71 for Bid Leave." These options is available once the bidding round is closed.

Authorization Levels

OPAS Home

Table of Contents

Select a link to jump to the corresponding section.

Authorization Levels

The following are the authorization levels that can be assigned to any user in OPAS. These authorizations determine what a user can and cannot do in OPAS, regardless of their role.

In most cases, a user's authorization will match their role (i.e. a CPC will have CPC authorization rights). However, there are no restraints on what roles can be assigned what authorization level.

Administrator

The Administrator authorization right is typically not given up to users at the facility but a user with this authorization can perform any action in front and back end of OPAS. For example, uploading datasets, switching, and impersonating users.

Facility Level Administrator

The Facility Level Administrator right is given to select users at the facility and a user with this authorization can perform any action in the front end of OPAS. The OPAS POC at the facility or area should be granted this access right.

Viewing Scheduler

The View Scheduler can do everything that an OM and SM would need to do in order to oversee the facility in OPAS. This user will be primarily responsible for long term planning in OPAS. Functions that a Viewing Scheduler cannot do that a Facility Level Administrator can do include:

- Optimize Shift Definitions
- Update Order after bidding starts

- Unpublish a schedule
- Delete Requests

Non-Viewing Scheduler

The Non-Viewing Scheduler authorization is for a user that needs to use OPAS for mid-term planning including managing employees and producing schedules.

FLM/Sup

The FLM/Sup authorization is for a user that will be managing a schedule on a day-to-day basis, including changing shifts, approving and denying requests, submitting proxy requests, assigning overtime and administering bidding.

CIC

If the application parameter “Required authorization level” is set to CIC+, users with this authorization will be managing a schedule on a day-to-day basis, including changing shifts, approving and denying requests, submitting proxy requests, assigning overtime and administering bidding.

If the application parameter “Required authorization level” is set to Supervisor+, users with this authorization will be similar to a CPC in that will only be able to view and interact with their schedule.

CPC

The CPC Authorization is for a user that only needs to view and interact with their schedule.

Viewing Non-Scheduler

The View Non-Scheduler authorization is for a user that needs to see information in OPAS. However, this user will be unable to edit or change anything.

Authorization Grid

2	**Authorization Grid**						
	Admin	**Facil. Level Admin**	**Viewing Scheduler (e.g. OM/SM)**	**Non-Viewing Scheduler**	**FLM/Sup**	**CIC**	**CPC**
Manage Required Employee Data							
Load baseline data	X						
Edit	X	X					
View	X	X	X		X		
Create Shift Definitions							
Optimize	X	X					
Edit	X	X					
View	X	X	X		X		
Define Work Patterns							
Create	X	X					
Edit	X	X					
View	X	X	X		X		
Create Shift Lines and Crews							

Create	X	X					
Edit	X	X					
View	X	X	X		X		
Build VLOC							
Edit	X	X					
Update after start of bidding	X	X					
View	X	X	X		X		
Create Bid Schedule							
Edit	X	X					
Update after start of bidding	X	X					
View	X	X	X		X		
Employee Bidding							
Open/Close windows	X	X			X		
Enter proxy bids	X	X			X		
Open own bid window	X	X	X	X	X	X	X
View bid schedule	X	X	X	X	X	X	X
Manage Schedule							
View schedule before publ.	X	X	X	X			
Optimize	X	X	X	X			
Publish	X	X	X	X			
Unpublish	X	X					
Assign/change shift	X	X	X	X	X	X	
Overtime assignment	X	X	X	X	X	X	
View leave details	X	X	X	X	X	X	
View schedule after publ.	X	X	X	X	X	X	X
View shift counts/move counts	X	X	X	X	X		
Manage long-term assignments	X	X	X	X	X		
Employee transfer (w/in facility)	X	X	X	X			
Employee transfer (across facility)	X	X					
Employee Requests							
View/edit/delete own request	X	X	X	X	X	X	X
Enter proxy request	X	X	X	X	X	X	
Cancel proxy request	X	X	X	X	X	X	
Approve/Deny Requests							
Employee Master Data							
View master data records	X	X	X	X	X		
View/edit OT hours	X	X	X	X	X		

View OT status report	X	X	X	X	X	X	X
Audit Trail							
View any audit trail	X	X	X	X	X		
View own audit trail for requests	X	X	X	X	X	X	X

Authorization Permissions

The following list of Authorization Permissions corresponds to functions in the Authorization Grid. The sections below provide descriptions about these functions and actions.

Curves and Shifts

- Create / Load Curves - Allows the user to right-click in the "Curves" pane and select "Import Baseline Curves," "Import Single Curve," and "Create New Curve."
- Edit Curves - Allows the user to right-click any existing curve and edit its information (name, validity dates, role, etc.). Also allows user to update demand points in the "Curve Display" pane. Users will also be allowed to delete curves.
- Copy Curves - Allows the user to right-click an existing curve and select "Duplicate Curve."
- View Curves - Allows the user to open the "Curves and Shifts" page and view the curves information and view the "Curve Display."

Shift Definitions

- Optimize - Allows the user to right-click on a curve and select "Create Optimal Shift Definitions."
- Create - Allows the user to right-click in the "Shift Definitions pane" and "Create New Shift Definitions."
- Edit - Allows the user to right-click in the "Shift Definitions pane" and "Edit Existing Shift Definitions." Users are also able to delete shift definitions.
- View - Allows the user to open the "Curves and Shift" page and view the shift definitions that have been created.

Work Patterns

- Create - Allows the user to "Create Shift Rotation Rules" and "Work Patterns" in the "Shift Line Setup" page.
- Edit - Allows the user to edit and delete "Shift Rotation Rules" and "Work Patterns" in the "Shift Line Setup page."
- View - Allows the user to open the "Shift Line Setup" page and view the "Shift Rotation Rules" and "Work Patterns" that have been created.

Shift Lines and Crews

- Create - Allows the user to "Create Shift Lines" based off of work patterns in the "Shift Line Setup" page.
- Assign - Allows the user to manually assign employees to existing shift lines in the "Shift Line Setup" page.
- Edit - Allows the user to edit and delete shift lines in the "Shift Line Setup" page.
- View - Allows the user to open the "Shift Line Setup" page and view the shift lines and assignments that have been created.

Build VLOC (Vacation Leave)

- Create - Allows the user to determine the number of slots per day in "Bid Schedule Setup" page.
- Edit - Allows the user to edit and delete slots in the "Bid Schedule Setup" page.
- Update after start of bidding - Allows the user to update vacation leave after the start of bidding.
- View - Allows the user to open the bid schedule setup form and view bid schedule details, including bid rounds, leave calendar, and employee sort order.

Create Bid Schedule

- Create - Allows the user to create bid schedules in the "Bid Schedule Setup" page.
- Edit - Allows the user to edit bid schedules in the bid schedule form, prior to schedule publication.
- Update after start of bidding - Allows the user to update the bid schedule after the start of bidding.
- View - Allows the user to open the bid schedule setup form and view bid schedule details, including bid rounds, leave calendar, and employee sort order.

Employee Bidding

- Open/Close windows - Allows the user to open bid windows on behalf of other employees.
- Enter proxy bids - Allows the user to submit bids on behalf of other employees.
- Open own bid window - Allows the user to open their own bid window when it is their turn to bid.
- View bid schedule - Allows the user to view the bid schedule in the "Employee Bidding" page.
- Update Order after bidding starts - Allows the user to update the employee sort order after a bid schedule has been published and employees have started bidding.
- Pause / Resume Bidding - Allows the user to right-click a bid schedule that is currently in progress and select "Pause" (to pause the bid process) and "Continue" (to continue the bid process after it has been paused).
- Edit bids - Fixing a mistake made on another person's bid.

Manage Schedule

- Create Schedule - Allows the user to create a new schedule segment in the "Schedule Generation" page.
- Delete Schedule - Allows the user to delete a schedule segment in the "Schedule Generation" page.
- View schedule before publ. - Allows the user to view an unpublished schedule in both the "Schedule Generation" and "Day of Operation" pages.
- Optimize - Allows the user to optimize the shift assignments of a schedule segment in the "Schedule Generation" page.
- Publish - Allows the user to publish schedules, this will make them visible to all users in the "Schedule Generation" and "Day of Operation" pages.
- Unpublish - Allows the user to "Unpublish" published schedules.
- Assign/change shift - Allows the user to assign or change shifts to employees, including (but not limited to) the following ways: manual assignment via drag-and-drop, "Assign Shift," "Move shift," and the "Edit Shift Details" dialog boxes.
- Overtime assignment - Allows the user to use both the overtime lists. Allows the user to manually create overtime shifts and assign them to employees. This also includes editing overtime and removing overtime from employees.
- View leave details - Allows the user to view the request details of all employee requests.
- View schedule after publication - Allows the user to view the schedule once it has been published.
- View shift counts/move counts - Allows the user to view the "Shift Move" and "Shift Count" reports.
- Manage Temporary Assignments - Allows the user to create, edit, and delete temporary assignments to employees.
- Employee transfer (w/in facility) - Allows the user to transfer employees within the same dataset.
- Employee transfer (across facility) - Allows the user to transfer employees across separate datasets.

Employee Requests

- View/edit/delete own request - Allows the user to view, edit, and delete requests.
- Enter proxy request - Allows the user to enter and edit employee requests for other users.
- Cancel proxy request - Allows the user to delete pending requests that were created by proxy on behalf of other users.

Approve/Deny Requests

- Approve/Deny Requests - Allows the user to approve/deny employee requests.
- Delete Requests - Allows the user to delete denied requests.

Employee Master Data

- View master data records - Allows the user to view the "Manage Employees" page and view employee details for all employees.
- View/edit OT hours - Allows the user to view and update the overtime balances for all employees in the "Manage Employees" page.
- View OT status report - Allows the user to view the "Overtime Hours" report.

Audit Trail

- View any audit trail - Allows the user to view any audit trail for any employee. This includes (but is not limited to) request audit trails, employee audit trails, and shift audit trails.
- View own audit trail for requests - Allows the user to view their audit trails.

Reports

OPAS Home

Table of Contents

Select a link to jump to the corresponding section.

Reports

This section details the various reports available to the user from the Reports Menu. You can find reports under the "Reports" tab in the upper left corner of the screen.

Employee Shift Count Report

The Employee Shift Count Report provides information down to the individual employee on how many moves have occurred.

Select or deselect employees to include in the Report using the checkboxes next to each employee in the "Filter by Employee" pane.

Each employee will display a count of how many times they have been assigned an individual shift and on what day they worked that shift.

Employee Move Count Report

The Employee Move Count Report provides information down to the individual employee on how many times and the amount of hours an employee has been moved.

Select or deselect employees to include in the Report using the checkboxes next to each employee in the "Filter by Employee" pane.

Each employee will display a list of shifts they have been moved off of, the number of times they have been moved off of that shift, and the total duration of hours that those moves encompassed. This report will also display the number of times an employee has been moved to a particular category or shift.

Employee Qualifications Report

The Employee Qualifications Report provides information down to the role on each employee’s qualifications.

Select or deselect roles to include in the report using the checkboxes next to each employee in the "Filter by Employee" pane.

Each employee will display a list of the three qualifications: Trainer, Midnight, and CIC.

Leave Summary Report

Similar to Employee Requests, the Leave Summary Report provides leave information by employee and/or date.

By default, the report will display all dates. To narrow a date range, deselect the “All Dates” checkbox and use the “From’ and “To” selectors. Select or deselect roles to include in the report using the checkboxes next to each employee in the "Filter by Employee" pane. Select or deselect a leave type in the "Filter by Leave Types" pane.

Each employee will display a list of all leave in OPAS, including details of the request and when the leave was requested.

> Note: Leave cannot be acted upon from this Report.

Leave Balance Estimates Report

Because OPAS is not the system of record for leave, the Leave Balance Estimates Report provides an <u>estimate</u> on how much leave each employee has based on leave in OPAS.

Select or deselect employees to include in the Report using the checkboxes next to each employee in the "Filter by Employee" pane. Select or deselect a leave type in the "Filter by Leave Types" pane.

Additional information coming soon!

Leave Balance Estimates – Comp + CH

Because OPAS is not the system of record for leave, the Leave Balance Estimates – Comp + CH Report provides an estimate on how much Comp and Credit each employee has based on leave in OPAS.

Select or deselect employees to include in the Report using the checkboxes next to each employee in the "Filter by Employee" pane. Select or deselect a leave type in the "Filter by Leave Types" pane.

Additional information coming soon!

Employee FMLA Report

The Employee FMLA Report provides information about what employees have taken FMLA.

By default, the report will display all dates. To narrow a date range, deselect the “All Dates” checkbox and use the “From’ and “To” selectors. Select or deselect employees to include in the Report using the checkboxes next to each employee in the "Filter by Employee" pane. Select or deselect a leave type in the "Filter by Leave Type" pane.

Each employee will display a list of all FMLA in OPAS, including details of the request and when the leave was requested.

Sick Leave Restriction Report

The Sick Leave Restriction Report provides a list of employees who have been placed on Sick Leave Restriction.

Overtime Calls Report

The Overtime Calls Report provides an audit trail for all overtime called in using OPAS.

The "Shift Status" pane defaults to both Scheduled and Unscheduled (unpublished) overtime shifts checked. The "Call Result" pane defaults to all results being checked but can be adjusted to what overtime counts as offered (Assigned, Voice mail, No answer, Declined and Excused) based on the rules at the facility. Select or deselect employees to include in the Report using the checkboxes next to each employee in the "Filter by Employee" pane.

Each action will be listed along with the corresponding overtime shift, the caller, the overtime reason, the person called and the result of the call.

Overtime Hours Report

The Overtime Hours Report is external from OPAS and is formatted to be printed. It contains a list of employees, whether or not they are volunteers and how many offered hours they have in OPAS. The document also displays who produced the report and when it was produced.

> Note: Unpublished Hours are not included in the Counters.

Supervised Duration Report

The Supervised Durations report shows a list of all employees and the number of hours they have been scheduled to be supervised in OPAS.

Select or deselect employees to include in the Report using the checkboxes next to each employee in the "Filter by Employee" pane.

The "Employee Supervised Duration" pane will display each employee and the amount of hours they have been supervised.

Supervisor Report

The Supervisor Report provides information about which Supervisors are assigned to supervise which shift lines on any given day.

Left click on a Supervisor on a Filter by Supervisors pane.

Employees supervised by the selected Supervisor will display in the Supervised Employees pane along with the specific shift line and that shift line’s start and end dates.

Area Phone List

The Area Phone list provides information about how employees can be reached. The information in the list is optional.

Select or deselect roles to include in the Report using the checkboxes next to each employee in the "Filter by Employee" pane.

The report will list out overtime and notification contact information for each employee.

Employees Who Opted-in for Notifications

The Employees Who Opted-in for Notifications provides a printable list of all employees that have opted in for notifications. The document also displays who produced the report and when it was produced.

Seniority List Report

The Seniority List Report lists out all CPCs by Rank that has been set up in "Manage Employees." Changes to rank can be made from this report.

Team Briefing Report

The Team Briefing Report shows employees who have not had a briefing period within a specified number of days. The report defaults to seven days but this can be adjusted by changing the number and selecting “Filter.” The Report will also display the date of each employee’s last briefing period.

Other Duties Report

The Other Duties Report shows all other duties shifts that have been scheduled in OPAS.

By default, the report will display all dates, but deselect the “All Dates” checkbox and use the “From’ and “To” selectors to narrow a date range. Select or deselect roles to include in the Report using the checkboxes next to each employee in the "Filter by Employee" pane. Select or deselect other duties in the "Filter by Other Duties Types" pane.

The Employee’s Other Duties pane lists out all other duty shifts along with the date of the shift, the shift’s duration and the specific other duty worked.

Logon Report

The Logon Report provides a list of all users of OPAS along with the last time they logged into OPAS, shown in the "Employees" pane. Left-clicking on an employee will reveal a logon list in the "Logon Activity" pane.

Forms

In addition to the reports listed above, the following forms are also available:

- Area Phone List
- Employee FMLA
- Employee Logon Activity
- Employee Qualification
- Employee Supervisor Duration
- Leave Balance Estimates
- Leave Restrictions - The Leave Restrictions form will list any employee on leave restriction.
- Leave Summary
- Other Duties
- Overtime Calls
- Seniority List Report
- Supervisor – Employee
- Team Briefing
- Employee Counters

Views

OPAS Home

Table of Contents

Select a link to jump to the corresponding section.

Views

All pages and views within OPAS have been set at a national level. These views are the default for all users; however OPAS contains the flexibility for a great deal of customization to all views.

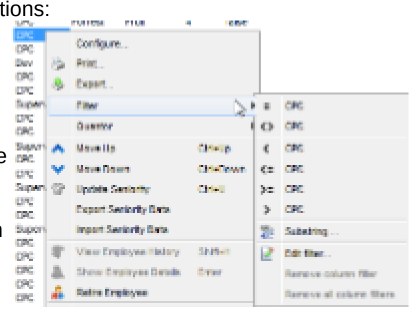
Sort Columns

Any column can be sorted within any pane in OPAS. To do so, left-click on a column heading and that column will be sorted.

To apply multiple filters to a pane, left-click on the columns in the order you would them to be filtered while holding the "CTRL" key on your keyboard.

Column Filters

Any column can be filtered within any pane in OPAS. To do so, right-click anywhere in a pane and expand the Filter tree. Based on where you right-clicked, the Filter tree will contain that piece of information along with various options on how to filter. For example, if you right-click directly on a name, that name will be what you are able to filter on. If within the same pane you right-click on a shift start time, that shift start time is what you will be able to filter on. When the filter tree expands, you will be able to select the following filter options:



- = (Equals) – Selecting this option will filter the pane to only display entries that exactly match what was selected.
- <> (Does not equal) - Selecting this option will filter the pane to only display entries that do not equal what as selected.
- <= (Less than or equal) - Selecting this option will filter the panel to only display entries that are less than or equal to what as selected. If you are filtering text, the list will be filtered on word equal to or prior to the word specified in the filter.
- < (Less than) - Selecting this option will filter the panel to only display entries that are less than or before what was selected. If you are filtering text, the list will be filtered on word prior to the word specified in the filter.
- >= - Selecting this option will filter the panel to only display entries that are greater than or equal to what as selected. If you are filtering text, the list will be filtered on word equal to or after to the word specified in the filter.
- >- Selecting this option will filter the panel to only display entries that are greater than / after what was selected. If you are filtering text, the list will be filtered on word after to the word specified in the filter.

Note: If the filter is incorrect in the Filter tree, try right-clicking elsewhere in the pane.

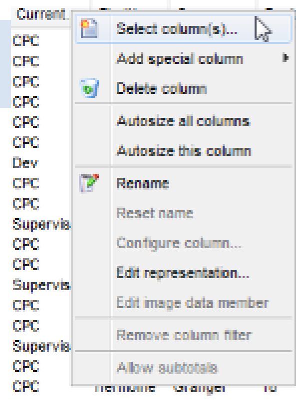
If a pane has been filtered, the column headings will appear underlined.

If you would like to clear a specific filter that has been applied to a pane, right-click on the column for which the filter has been applied and within the Filter tree, select “Remove Column Filter.”

If you would like to clear all filters that have been applied to a pane, right-click anywhere in the pane and within the Filter tree, select “Remove all Column Filters.”

Add Column

You are able to add a column to any pane within OPAS. To do so, right-click on a column heading in any pane and select “Select column(s)”. The “Select Attribute” dialog box will open. The dialog that opens will be populated with every possible attribute linked to that pane.



Note: Attributes are pulled from the OPAS database and many column names are technical.

Left-click on the checkbox to the left of the individual attribute to add it to the pane.

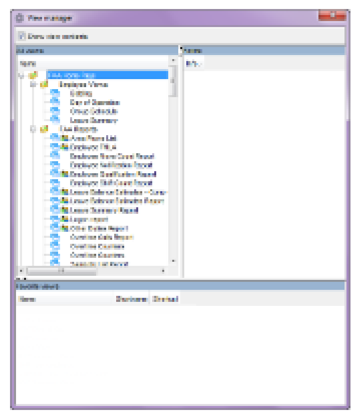
Facility Specific Views

Adding a specific column that is not in a national view will not be saved after you close the view and reopen it. Please provide feedback on these national views here.

To request an individualized facility or area view, please submit feedback here.

Manage Views

In the Views menu, the "Manage Views" dialog box contains all customized views that have been created in OPAS. The views are generally grouped for the purpose they were created.



To add a view to your “Favorite views”, left-click on the view, drag and drop it below into the “Favorite views” pane.

This view will now be easily accessible from the Views menu or from “Current View” at the bottom right of OPAS. Once added, drop down the "View" menu and select your desired view or left-click on the “Current View” at the bottom right of OPAS and select the view there.

OPAS Lite

OPAS Home

Table of Contents

Select a link to jump to the corresponding section.

OPAS Lite

OPAS Lite has a simple, clean design allowing users view and interact with schedules on mobile phones, tablets, Macs, and PCs. OPAS Lite has two components: (1) Desktop View and (2) Mobile View. Desktop view allows for increased supervisory functionality; while the Mobile view enables users on mobile devices to access and interact with their personal schedule.

OPAS vs. OPAS Lite

Function	OPAS	OPAS Lite
View shift assignments	X	X
View my requests	X	X
Enter request for myself	X	X
Enter request for someone else	X	X
Assign Overtime	X	
Kiosk Mode		X
Accessible on Macs and mobile devices		X
Employee Bidding	X	
Schedule Generation and Long Term Planning	X	
Change Employee Details	X	View Only
Create note	X	
View and print schedules	X	X
Approve/Deny requests	X	X
Proxy/self cancel or self delete a request	X	X
Edit shift details	X	

Website

To access OPAS go to: https://opastest.faa.gov/opaslite.

If you are using a web browser, you will automatically be directed to the "Desktop View."

If you are using a tablet or mobile device, you will be directed to the "Mobile View."

Login

Enter in your NextGen username and password. If you incorrectly enter your credentials. you will get an error message telling saying your LDAP password is expired or your account has been disabled.

Desktop View

If you are using a web browser, you will automatically be directed to the "Desktop View". The "Desktop View" is specifically optimized to be viewed using a browser and contains CIC and Supervisor functionality that "Mobile View" does not.

Select the "Mobile View" button at the bottom of any page to view Mobile OPAS.

Troubleshooting

Please consult the following document if you are having any issues with OPAS Lite: Quick Reference Guide

Home

The Home tab automatically opens up the "Day of Operation" to today's date.

Panels on the page can be minimized or maximized by selecting the "+" or "--" at the top right of the panel.

You can also move around panels by left-clicking, dragging and dropping based on your personal preference.

Select Date

Change the date on the "Day of Operations" page by clicking into "Select Date" or using the day forward/day backward selectors.

If using "Select Date," a calendar will open up for you to select the date you wish to navigate to.

Selecting a day in the calendar will automatically bring you to that date.

If you have navigated from today's date, select "Today" and today's date will be highlighted for you to select.

Days in the past are displayed in red to indicate that they are in the past

Legend

Located at the top right of the page, the legend contains any annotation a shift may have on the "Day of Operations" page.

* Shift Assigned to a Developmental / Trainee

~ Shift Whose duration does not Equal Standard Shift Duration

$ Shift with Overtime Activities

^ Shift with Time Outside Shift

[ ] Working a CIC/SUP Shift

Page Refresh

The "Day of Operations" page is set to automatically refresh every five minutes to load any new data.

At any time, you can stop this process by selecting "Stop" in the top right of the page.

You can also refresh the page at any time by selecting "Refresh." This will load any new data or changes made to the page.

Pending Requests (Today/Published/Total)

The "Day of Operations" page will display the total number of pending requests in your facility or area and your total number of pending requests.

The first number displays pending requests for today, the second number displays the total number of pending requests for all published schedules, and the third number displays the total number of pending requests.

Clicking on either of these buttons will bring you to pages specifically for pending requests.

> CPCs will only see their own pending request numbers.

CPC and Sup/CIC Panel

The "CPC" and "Sup/CIC" panels display the coverage shifts being worked. The top right of each panel will display the demand for each shift category. If you are working coverage, your operating initials will appear in blue bolded font.

Each line in the panel will display the "Shift Name," along with that shift's end time, who is working and demand for that shift.

Shift Notes Panel

If any shift notes have been created in OPAS, they will be displayed in the "Shift Notes" panel.

You will unable to create or edit notes in the current iteration of OPAS Lite.

Requests Panel

The "Requests" panel will display all pending, approved, and denied requests for the day. The title of the panel will indicate how many pending requests are for the day.

Each row will display relevant information about the request, including who it is by, its status, details, and the time of the request.

Requests you are able view additional details about will be indicated by a notepad icon in the right column in the panel.

View Request

Left-clicking on a request indicated with a notepad icon will open up the details of the request.

The dialog box that opens will provide additional information about the request.

Depending on the request’s status and your authorization, you will be able to perform various actions on the request, such as edit, delete, cancel, approve, and deny.

Approve/Deny Requests

Left-clicking on a pending request indicated with a notepad icon will open up the details of the request.

Review the details of the request and select "Approve" or "Deny."

Confirm the approval or denial by selecting "Submit."

A warning message will display if the request triggers a constraint or violation.

A banner will drop down from the top of your browser to indicate that your action has gone in.

Other Duties Panel

The "Other Duties" panel displays all full or partial other duty shifts on the day.

Overtime Panel

The "Overtime" panel displays all full or partial overtime shifts on the day.

Log Out

OPAS Lite provides users with the ability to quickly log in, log out, change users, and access the system in a read-only kiosk mode.

> For security reasons, OPAS Lite will automatically log out any user after 20 minutes of inactivity.

Log Out

From the "Log Out" menu, select "Login" to sign in to OPAS Lite.

Log Out

From the "Log Out" menu, select "Log Out" to sign out of OPAS Lite.

Change Facility

From the "Log Out" menu, select "Change Facility" to select the facility dataset you would like to view. This option is only available to Administrators or those employees who are scheduled in more than one facility.

Change Area

If your facility has multiple areas, select "Change Area" from the "Log Out" menu.

The "Change Area" page will open for you to select the area you would like to view.

Select the appropriate area and select "Set Area."

The "Day of Operations" page will be reopened with that area's information.

CPCs and CICs have view-only access to other areas.

Kiosk Mode

From the "Log Out" menu, select "Kiosk Mode" to view OPAS Lite without a user logged in.

"Kiosk Mode" allows you browse to OPAS Lite Desktop in view-only mode. The mobile view is unavailable when in "Kiosk Mode." At any time, any user can log in to interact with their schedule.

In "Kiosk Mode", you can view "Day or Operations" and "Group Schedule" but you will be unable to view, enter, approve, or deny requests or make any changes.

Login

If you would like to interact with your schedule while in "Kiosk Mode," select the "Login" button from the "Login" menu. This will allow you to log into OPAS Lite.

Change Area

If your facility has multiple areas, select "Change Area" from the "Log Out" menu.

The "Change Area" page will open for you to select the area you would like to view.

Select the appropriate area and select "Set Area."

The "Day of Operations" page will be reopened with that area's information remaining in "Kiosk Mode."

Schedules

The "Schedules" menu provides various ways to view published days.

Day of Operations

Selecting "Day of Operations" from the "Schedules" menu will opens the "Day of Operations" page. This page is also accessible by selecting the "Home" button.

Individual Schedule

Selecting "Individual Schedule" from the "Schedules" menu will provide a list of all shifts you are scheduled to work within all published schedule segments.

Group Schedule

Selecting "Group Schedule" from the "Schedules" menu opens the "Group Schedule" page.

This page will provide a grid view of all employees in your facility one pay period at a time, depending on the size of your browser.

Requests

The "Requests" menu allows you make any type of request.

The request dialog date will default to the date you are viewing in the "Day of Operations" page.

Supervisors or CICs are able to submit proxy requests by using the "Proxy Employee" dropdown in each request dialog.

After submitting any request, a warning message will display if the request triggers a constraint or violation.

Leave/Absence Request

From the "Requests" menu select “Leave/Absence Request.”

1. Enter the date that you would like to submit the Absence Request using start date calendar.
2. Drop down the “Absence Type” and select the type of leave you would like to request.
3. “Full shift” is pre-checked. If you would like to enter in a partial day shift, unselect it and enter in the times you wish the request to be.
4. Select “Multiple Days” if your request is more than one day and enter the "End Date" of the request.
5. Add comments, as appropriate.
6. Select “Submit” to submit the request.
7. Selecting “Yes, Proceed” to submit the request.

A banner will drop down from the top of your browser to indicate that your request has gone in.

Shift Change Request

From the "Requests" menu select “Shift Change.”

1. Enter the date that you would like to submit the Shift Change using start date calendar.
2. Your shift start time will display on that day.
3. Enter in the shift time and shift duration you wish to request.
4. Add notes, as appropriate.
5. If you would like to "Split Shift," select the checkbox. Indicate when you would like the split to begin and the split’s duration.
6. Select “Submit” to submit the request.
7. Selecting “Yes, Proceed” to submit the request.

A banner will drop down from the top of your browser to indicate that your request has gone in.

Shift Swap Request

From the "Requests menu" select “Shift Swap.”

1. Enter the date that you would like to submit the Shift Swap using the calendar icon.
2. Your shift start time will display on that day.
3. Drop down the select “Shift Swap With” and find the employee you wish to swap with.
4. Using the checkboxes, select the combination of start and end times you would like to swap. A preview of the swap is shown on the right side of the dialog box.
5. Add notes, as appropriate.
6. Select “Submit” to submit the request.
7. Selecting “Yes, Proceed” to submit the request.

A banner will drop down from the top of your browser to indicate that your request has gone in.

Other Duties Request

From the "Requests menu" select “Other Duties.”

1. Enter the date that you would like to submit the Other Duty using start date calendar.
2. Drop down the “Other Duty Type” and select the type of other duty you would like to request.
3. Use the "Start" and "End" time to specify what portion of your shift you would like to request other duties on.
4. Add comments, as appropriate.
5. Select “Submit” to submit the request.
6. Selecting “Yes, Proceed” to submit the request.

A banner will drop down from the top of your browser to indicate that your request has gone in.

RDO Change Request

From the "Requests" menu select “RDO Change.”

1. Using the arrows at the beginning or end of the week you would like to enter and RDO Change for.
2. Click on an already assigned shift to request RDO for that day. That day will read “New RDO.”

3. Click on an RDO to request a shift to be worked on that day. Enter in the details of the shift you would like to work including "Shift Start Time" and "Requested Duration."
4. Select “Submit” to submit the request.
5. Selecting “Yes, Proceed” to submit the request.

A banner will drop down from the top of your browser to indicate that your request has gone in.

Multiple Action Request

From the "Requests" menu select “Multiple Action.”

1. Enter the date that you would like to submit a Multiple Action request using the calendar icon.
2. Include detailed actionable instructions for the Supervisor or CIC.
3. Add notes, as appropriate.
4. Select "Submit" to submit the request.
5. Selecting “Yes, Proceed” to submit the request.

A banner will drop down from the top of your browser to indicate that your request has gone in.

Reports

The "Reports" menu provides users will additional information regarding their requests and published schedules.

Employee Requests

From the "Reports" menu select “Employee Requests” to see all requests you have in OPAS.

All Pending Requests

From the "Reports" menu select “All Pending Requests” to see all pending requests in OPAS for your facility and area.

Leave Calendar

The "Leave Calendar" displays the number of approved and pending requests for the upcoming fourteen days in a graph format.

Employee Roster

The "Employee Roster" displays a list of employees in a given area.

Help

Select "Help" to view step by step instruction on how to perform any function within OPAS Lite.

OPAS Lite - Mobile View

Mobile OPAS can be accessed from any browser or mobile device. It contains CPC specific functions.

Website

To access OPAS go to: https://opastest.faa.gov/OPASLite.

If you are using a tablet or mobile device, you will be directed to the "Mobile View."

If you are using a web browser, you will automatically be directed to the "Desktop View."

Login

Enter in your NextGen username and password.

Mobile View

If you are using a tablet or mobile device, you will be directed to the "Mobile View". Mobile OPAS contains CPC specific functions.

Select the "Desktop View" button at the bottom of any page to view OPAS Lite.

Navigation

If you are using a browser, left-click on all buttons to navigate and submit actions.

If you are using a mobile device or tablet, select buttons via the touch screen.

On any screen, you can return to the home screen by selecting the "Home Screen" icon in the top right or bottom right of each page.

Daily Schedule

View Daily Schedule

From the "Home Screen", navigate to the "Daily Schedule" screen by selecting it.

The current day's daily schedule will be shown.

If you would like to view the "Daily Schedule" for another day, select the calendar icon along the top of the screen and choose the day you would like to view.

View Daily Requests

At the bottom of the "Daily Schedule", there is a tab for "Daily Requests."

Selecting it will display all "Approved," "Denied," and "Pending" requests for the day displayed.

Group Schedule

From the "Home Screen," navigate to the "Group Schedule" screen by selecting it.

The number of days displayed is dependent on the browser or device you are using.

If you would like to view the daily schedule for another day, select the calendar icon along the top of the screen and choose the day you would like to view.

My Schedule

From the "Home Screen" navigate to the "My Schedule" screen by selecting it.

Your schedule for every published day will be viewable.

Make requests

Select the shift you wish to submit a request for. The day will expand with all requests types available.

Select the type of request you wish to submit and follow the steps outlined in the "Make Requests" section.

My Requests

From the "Home Screen" navigate to the "My Requests" screen by selecting it.

A list of all requests that you have entered will be shown.

Selecting a request will display additional information about it. This will include shift information, request type, notes entered with the request, who and when it was acted on (if applicable), and any available actions that can be performed on the request.

Delete Requests

Select “My Requests” from the "Home Screen." In the "My Requests" screen select “Delete Requests.”

1. Select a pending to expand it.
2. Select the “Delete” button at the bottom of the request information.
3. A confirmation dialog will open and you will be directed to confirm your decision to delete the request.
4. By selecting “Yes, Proceed” the request will be removed.

By selecting “Cancel” nothing will change and the request will still be in “My Requests.”

- If a user enters a request for themselves they are the only user who is able to delete the request
- If a user enters a proxy request for another user - they are able to delete the request, other Supervisors can delete the request, and the user who the request is for can delete the request

Cancel Requests

Select “My Requests” from the "Home Screen." In the "My Requests" screen, select “Cancel Requests.”

1. Click on an approved request to expand it
2. Select the “Request Cancellation” button at the bottom of the request information.
3. A confirmation dialog will open and you will be directed to confirm your decision to cancel the request.
4. By selecting “Yes, Proceed,” a cancellation request will be created and listed below the previously approved request.

By selecting “Cancel” nothing will change and the request will still be in “My Requests.”

Accept/Decline Swap

Select “My Requests” from the "Home Screen." In the "My Requests" screen, select “Accept/Decline Swap.”

A swap request that is made to you by another employee will be listed as “Pending approval by me.”

If you accept the swap, the status will be listed as “Pending Supervisor.” This request can be changed to “Rejected” any time prior to supervisor approval. It can be deleted by the other employee.

If you reject the swap, the status will be listed as “Rejected by me.” This request can be changed to “Accepted” any time prior to the other employee deleting it.

Make Requests

From the "Home Screen" navigate to the “Make Requests” screen by selecting it.

A list of all requests that you can make will be shown.

Absence Requests

Select “Make Request” from the "Home Screen." In the "Make Requests screen," select “Absence Request.”

1. Enter the date that you would like to submit the Absence Request using the calendar icon.
2. Drop down the “Absence Type” and select the type of leave you would like to request.
3. “Full shift” is pre-checked. If you would like to enter in a partial day shift, unselect it, and enter in the times you wish the request to be.
4. Add notes, as appropriate.
5. Select “Submit” to submit the request.
6. Selecting “Yes, Proceed” to submit the request.

Shift Changes

Select “Make Request” from the "Home Screen." In the "Make Requests" screen, select “Shift Change.”

1. Enter the date that you would like to submit the Shift Change using the calendar icon.
2. Your shift start time will display on that day.
3. Enter in the shift time you wish to request.
4. Add notes, as appropriate.

5. Select “Submit” to submit the request.
6. Select “Yes, Proceed” to submit the request.

Shift Swaps

Select “Make Request” from the "Home Screen." In the "Make Requests" screen, select “Shift Swap.”

1. Enter the date that you would like to submit the Shift Swap using the calendar icon.
2. Your shift start time will display on that day.
3. Drop down the select “Shift Swap With” and find the employee you wish to swap with.
4. Add notes, as appropriate.
5. Select “Submit” to submit the request.
6. Select “Yes, Proceed” to submit the request.

Other Duties

Select “Make Request” from the "Home Screen." In the "Make Requests screen," select “Other Duties."

1. Enter the date that you would like to submit the Other Duty using start date calendar.
2. Drop down the “Other Duty Type” and select the type of other duty you would like to request.
3. Use the "Start" and "End" time to specify what portion of your shift you would like to request other duties on.
4. Add comments, as appropriate.
5. Select “Submit” to submit the request.

RDO Change

Select “Make Request” from the Home Screen. In the requests menu, select “RDO Change.".

1. Using the arrows at the beginning or end of the week you would like to enter and RDO Change for.
2. Click on an already assigned shift to request RDO for that day. That day will read “New RDO."
3. Click on an RDO to request a shift to be worked on that day. Enter in the details of the shift you would like to work including "Shift Start Time" and "Requested Duration."
4. Select “Submit” to submit the request.
5. Selecting “Yes, Proceed” to submit the request.

Multiple Action

Select “Make Request” from the "Home Screen." In the "Make Requests screen," select “Multiple Action."

1. Enter the date that you would like to submit a Multiple Action request using the calendar icon.
2. Include detailed actionable instructions for the Supervisor or CIC.
3. Add notes, as appropriate.
4. Select "Submit" to submit the request.
5. Selecting “Yes, Proceed” to submit the request.

Accept Swaps

To view and act on a pending shift swap, from the "Home Screen," select the option "Accept Swap."

The "Swap List" page will open with a list of all offered shift swaps and their corresponding dates.

To view more information on a swap request or act on it, select the swap.

The request expands to show the "Accept" / "Reject" options.

From here, you can review all of the information involved with the swap and either "Accept" or "Reject" the request.

Change Area

If your facility has multiple areas, select "Change Area" from the "Home Screen."

The "Change Area page" will open for you to select the area you would like to view.

Select the appropriate area and select "Set Area."

The "Home Screen" for that area will open.