UNIFOCUS
WORKFORCE MANAGEMENT

Release Document

1. Core Data Upload – Enhancements
2. Housekeeping – Split Credits by Task Type

June 2024

Contents

UNIFOCUS

CORE DATA UPLOAD MODULE - ENHANCEMENTS

INTRODUCTION

This release outlines the new features and functionalities added to the Core Data Upload module, enabling the import of multilingual data.

The Core Data Upload module facilitates the import of bulk data for various modules, including Department, Designations, Skills, Service Action Reasons, Job Manager, Glitch Action Reasons, and Glitch Manager.

This document is intended for corporate users responsible for managing bulk data uploads within the Service application.

GETTING STARTED

Accessing the module

To access the Core Data Upload module, follow these steps:

1. Go to **System Configuration > Settings**.
2. Select **Core Data Upload**.

User roles and permissions

To access the Core Data Upload module, you must have corporate user rights.

ENHANCEMENTS

With the latest enhancement, users can now import multilingual data for the modules listed above using the same Excel spreadsheet. The secondary language can be included in the Excel sheet for bulk import.

Please read the following conditions carefully before importing multilingual data:

- Import Second Language Only:
  - If you select the **Import Second Language Only** option, the system will import only the data of the second language.
- Data Override:
  - Any existing data for a particular module item will be automatically overridden with the data provided in the Excel sheet.
- Secondary Language Errors:
  - If you provide two different secondary languages for the same module item, the system will display an error notification and disable the Submit button until you resolve the data provided.

HOUSEKEEPING PRODUCT ENHANCEMENT - SPLIT CREDITS BY TASK TYPE

INTRODUCTION

We are excited to announce a new enhancement to our Housekeeping product that improves how credits are split by task type. This enhancement provides greater flexibility and accuracy in managing task sheets, especially in setups involving multiple teams such as Porters, Minibar, Window Cleaners, and Linen Teams.

Previously, if the application setting *Allow credits to be split* was enabled, any location appearing more than once on a task sheet would have its credits split, regardless of the task type. This often caused issues in setups where multiple teams have tasks, as credits would be split incorrectly.

To address this, we have introduced a new application setting called *Split credits by task type* (which works only when Allow credits to be split on Task sheets = Yes). This setting allows credits to be split by both location and task type, providing more accurate credit allocation.

GETTING STARTED

Accessing the application setting

- Go to the application settings in your Housekeeping product.
- Name: Split credits by task type (works only when *Allow credits to be split on Task sheets* = Yes).
- Functionality:
  - If Enabled: Credits will be split by both location and task type.
  - If Disabled: Credits will continue to be split by location only, as per the previous logic.

Acceptance criteria

- **Added Setting:** A new application setting called *Split credits by task type* (works only when Allow credits to be split on Task sheets = Yes) has been added.
- **Functionality when enabled:** If both *Allow credits to be split* and *Split credits by task type* settings are enabled, credits will be split by location and task type.
- **Functionality when disabled:** If *Split credits by task type* is disabled, the existing logic of splitting credits by location will remain in effect.

Benefits

- **Improved accuracy:** Ensures that credits are accurately split based on both location and task type, preventing incorrect credit allocations.
- **Greater flexibility:** Accommodates setups involving multiple teams with different task sheets, such as Porters, Minibar, Window Cleaners, and Linen Teams.
- **Customizable settings:** Allows users to choose whether to split credits by location only or by both location and task type, based on their specific needs.

How to enable the new setting

1. Access application settings:
   o Go to the application settings in your Housekeeping product.
2. Locate the new setting:
   o Find the setting named *Split credits by task type* (which works only when Allow credits to be split on Task sheets = Yes).
3. Enable the setting:
   o Set the toggle to **Yes** to enable splitting credits by both location and task type.
4. Save changes:
   o Save your changes to apply the new setting.

HELP US IMPROVE

We value your input and want to hear from you! As we continue to enhance Unifocus products, we invite you to share your questions, suggestions, and feedback with us. If you have any thoughts or ideas on how we can improve our products, please don't hesitate to reach out to us at product@unifocus.com or Ideas Portal (aha.io).