

To ensure Schedulers, Managers, and Leadership can view the full schedule, needed employee information, and appropriate alerts, below are the recommended settings for Clairvia Staff Manager and Clairvia Web.

## Logging into Clairvia

- Navigate to Member Organizations' intranet page.
- Search for Clairvia in the Quick Links section.

**NOTE:** Add Clairvia to favorites for ease of use.

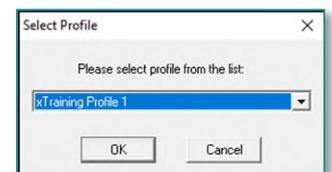
- Select **Clairvia** Quick Link.
- A login page will open. Use network login and password to access Clairvia.
- Select **Clairvia** folder.
- Select **Clairvia** PROD folder.
- Three icons will be available to select:



- **Clairvia Job Aids** is a direct link to all Clairvia content in the CI Education Library.
- **Clairvia Staff Manager** is where the schedule is created and modified. This is also where employee settings are managed.



**NOTE:** If this is the first-time logged into Clairvia Staff Manager, there will be a pop-up window asking to choose a profile. Select any profile then click OK.



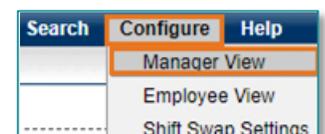
- **Clairvia Web** is where employees can see the schedule and submit requests, and where managers approve or deny opportunities, Shift Swaps, and future time off requests.

## Clairvia Web Recommended Settings

- Select **Clairvia Web** icon.
- Hover over the **Configure** menu, then select **Manager View**.
- Manager View Selections:



1. Select the desired **Profiles/Units** to be displayed on the Admin Dashboard. A maximum of five profiles may be selected.
2. Enter 1 FTE Threshold for staffing alerts.
3. Enter **90** days for competency expirations.



4. Enter 1 days for staffing alerts.
  5. 5-15 should all be checked.
  16. Defaults to **Hover Only**. This setting is recommended.
  17. Defaults to **No spacing**. This setting is recommended.
  18. 18-20 are optional if the manager/scheduler would like email notifications. It is recommended to select all and select “send once daily” for each. This will send one email with a summary of all pending requests, Shift Swaps, and Opportunities pending approval to the manager/scheduler around 4pm each day.
- Select **Save Changes**.

**Manager View**

**On Home Page:**

1. Select up to 5 Profiles to display on the Admin Dashboard  
xTraining Profile 1  
xTraining Profile 2  
xTraining Profile 3  
xTraining Profile 4  
xTraining Profile 5  
xTraining Profile CI
2. FTE Threshold for Staffing Alerts  FTEs
3. Include Competency Expirations for the next  days
4. Show staffing alerts in StaffView for the next  days
5.  Show workload (census) for selected Profiles in StaffView
6.  Show pending requests links for selected Profiles
7.  Show StaffView Staffing Chart

**On Who's Here Page:**

8.  Show Staffing Alerts
9.  Show Employee Competency Expiration Alerts
10.  Show Message Center
11.  Show My Alerts in page headers
12.  Display Assignment Notes

**On Schedule Page:**

13.  Show Float Employees
14.  Show Opportunities
15.  Show Seniority Date in Opportunity Details

**16. Show Assignment Notes in Schedule as:**

Hover only  
 Full Note in grid only  
 Full Note in hover with Note in grid limited to  characters

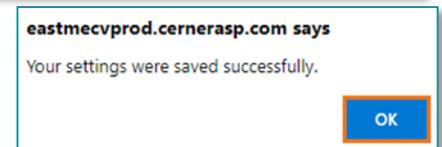
**17. Choose spacing between Employees/Tasks in Weekly View**

No spacing  
 Single space  
 Double space  
 Single space only after note/float  
 Double space only after note/float

**Send Email Notifications:**

18.  Requests
19.  Shift Swaps   
 Send once daily
20.  Opportunities   
 Send once daily

- Select **OK** on the settings saved successfully pop-up.



**NOTE:** Requests notifications can be overwhelming during the team scheduling period. Due to this most managers do not check this for email notifications.

➤ **Manager Preferences for Filled Shift Alert Notifications**

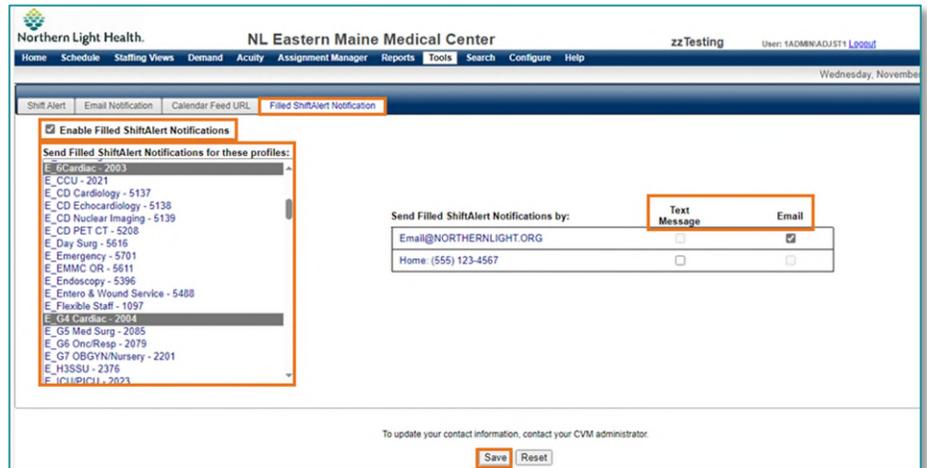
1. Select **Tools** in the menu bar, then select **My Information**, then select **Preferences**.
2. Select the **Filled Shift Notifications** tab.
3. Check the **Enable Filled Shift Alert Notifications**.
4. Select all **Profiles** that apply. CTRL + click allows to select multiple profiles.



5. Select appropriate **Text** or **Email** notification by selecting the checkbox.

- a. These notification preferences will apply to all profiles selected during step 4.

6. Select **Save**.

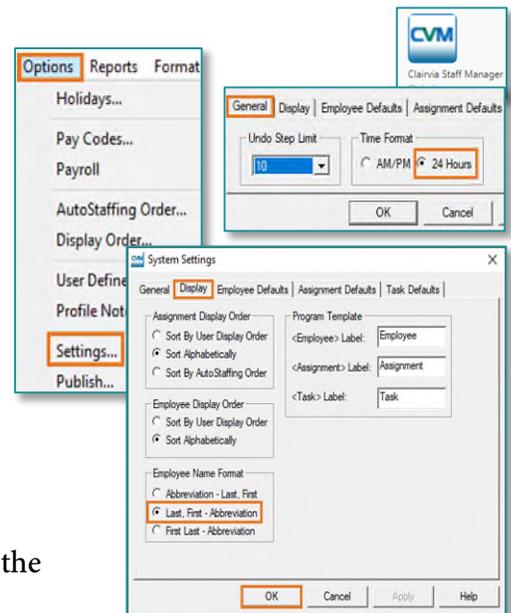


## Clairvia Staff Manager Recommended Settings

➤ Select **Clairvia Staff Manager**.

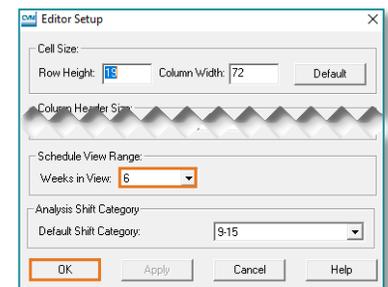
➤ User specific settings

- Select **Options** in the menu bar, then select **Settings...**
  - **General tab** – Undo Step Limit: keep default at **10**.
  - **General tab** – Time Format: **24 Hours**
  - **Display tab** – Employee Name Format: choose **Last, First – Abbreviation**.
  - Leave other settings on **Display tab** set to defaults. No updates are need on the other tabs.
  - Click **OK** to save and close.
- Select **Maintain** in the menu bar, then **Schedule Editor** in the dropdown.
  - Select **Format** in the toolbar, then **Editor Setup**.
  - Confirm the **Weeks in View** is set to the designated schedule length of the unit (4 or 6 weeks).
  - Select **OK** to save and close.



➤ Employee settings

- Most employee settings are controlled by managers.
- For information on how to set-up new staff, see the Clairvia Manager Checklist & Employee Set-Up flyer [here](#).



➤ Profile-wide settings:

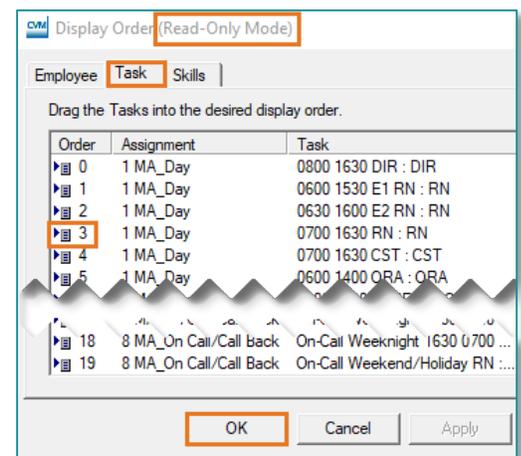
- Display Order

- Each profile can set a custom display order for employees and tasks. While the general alphabetic order is also available to managers in Clairvia Staff Manager, employees only see the custom display order in Clairvia Web.

1. Select **Options** in the toolbar, then select **Display Order**.
2. Select the **Task** tab to sort the **Task Order**.
3. **Drag and drop the icon** under the **Order Column** to reorder. If the mouse is while the do not enter symbol is visible , no changes will be made.
4. Click **Ok** to save and close the window.

- Tips for Display Order.

- If the Display Order is **Read Only**, make sure Schedule Editor is closed then try again.
- Expand the window and resize the columns close together for ease of viewing.



**NOTE:** The Employee display order can also be customized within the Employee tab. This may be useful when running certain reports. This is completed in the same manner as above.