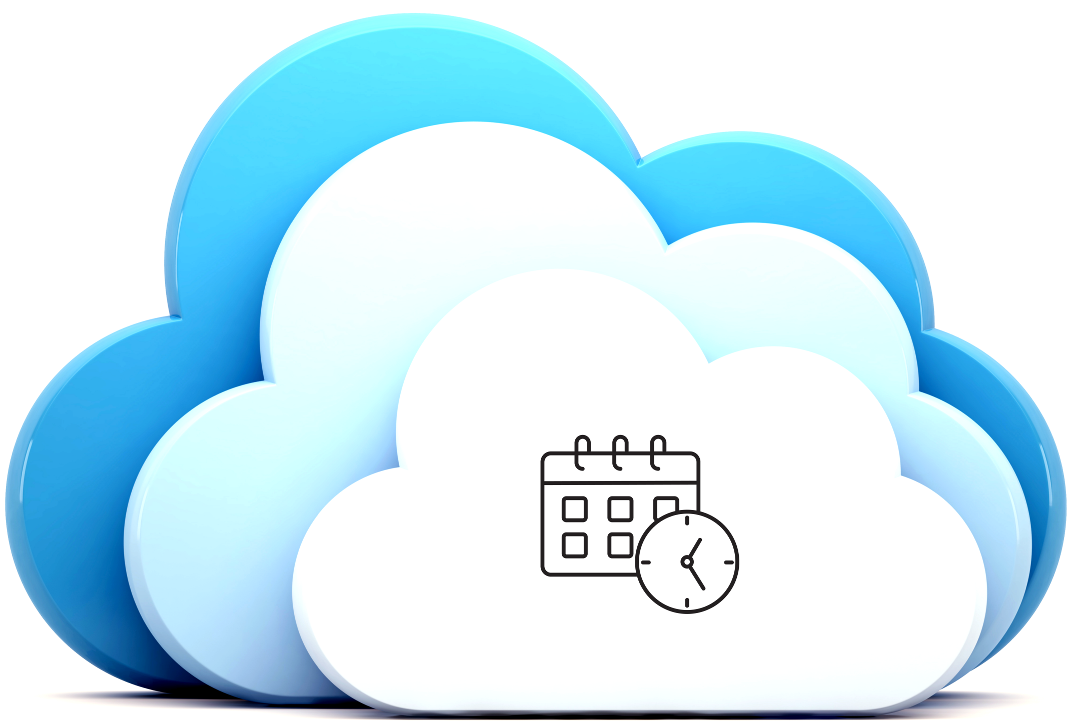
StaffReady

Adding and Removing Employees User Guide

Scheduling Module



Introduction

A foundational component of the StaffReady Scheduling module is being able to add and remove employees. As employees join or depart your organization, you will need the flexibility to make changes to your personnel without worrying that it will alter your automated schedule build.

Unlike manual scheduling, significant information about each employee may be stored in the employee's profile including information regarding their qualifications, availability, and other identifying information such as their User ID and contact information. Significant time-savings are recognized by being able to manage employees centrally in a cloud-based solution.

Once you've mastered this feature, you'll have an additional tool for managing personnel and a greater understanding of the robustness and flexibility of the StaffReady Scheduling module. Other topics related to Adding and Removing Employees are listed on the Resources Page.

Table of Contents

(Please select any topic to skip to that section)

©2023 StaffReady. All rights reserved.

Adding New Employees

To begin adding a new employee to a schedule, first navigate to the employees color bar panel within the schedule you wish to edit and select the blue new link. **(Figure 1)**

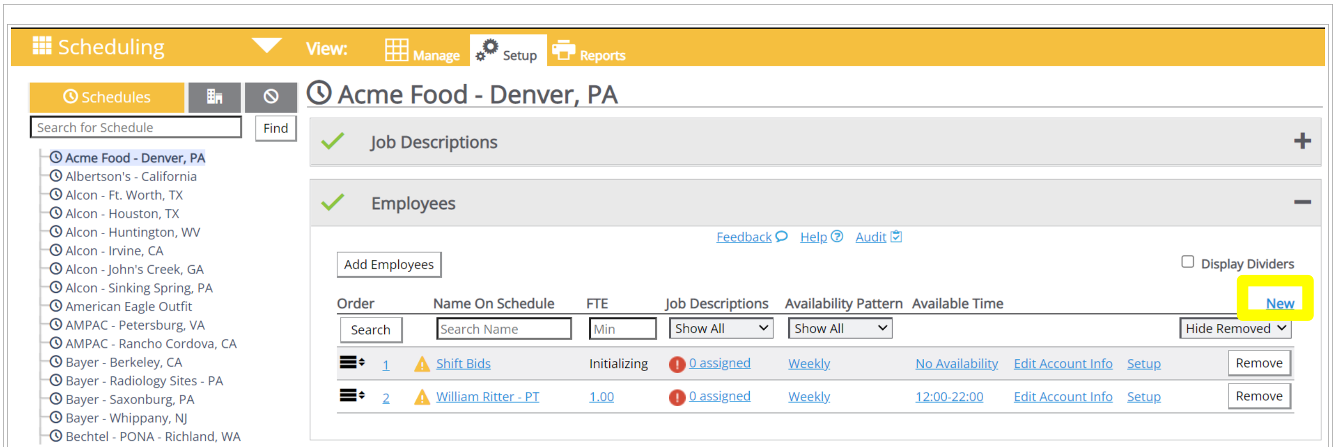


Figure 1

Selecting the new button will open the **Add Employee Wizard**. **(Figure 2)** The wizard allows you to search for existing employees or create new ones. If you type in the name of an existing employee, a list of search results will appear and you can move forward with adding an employee who is already present in your organization.

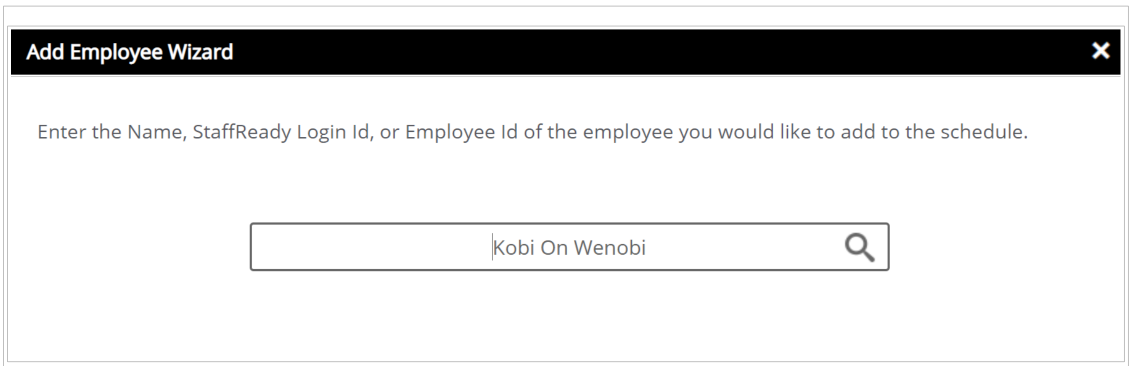


Figure 2

Otherwise, if you'd like to setup a brand new employee, type in their name and then select the **Create New Employee** button to progress to the next section of the **Add Employee Wizard**. **(Figure 3)**

Figure 3

©2023 StaffReady. All rights reserved.

Entering Employee ID Information

Fill in the required fields marked with a red asterisk. This includes Full Name, Employee Hire Date, Employee ID, StaffReady Login ID (It is recommended this be the same as Employee ID), Password, and Require Password Change Date. **(Figure 1)**

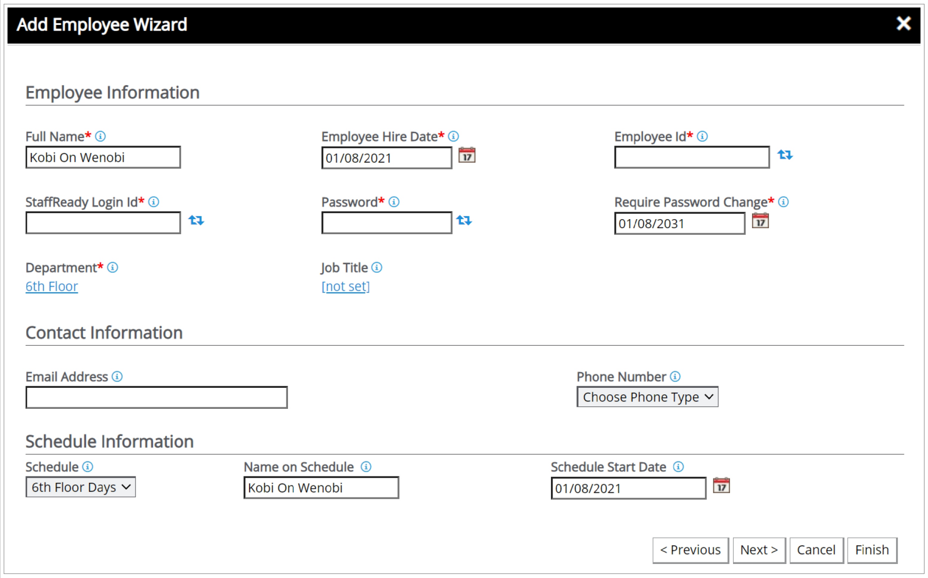
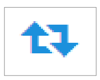


Figure 2

Selecting the blue arrow icon will auto-populate an ID using the “first initial last name” format.



Selecting the same icon beside Reset Password will generate a new random password.

If you choose to, you can also enter contact information for the new employee, the schedule they are to be assigned to from the dropdown menu, how their name appears on the schedule, and the calendar date on which they will begin working.
(Figure 2)

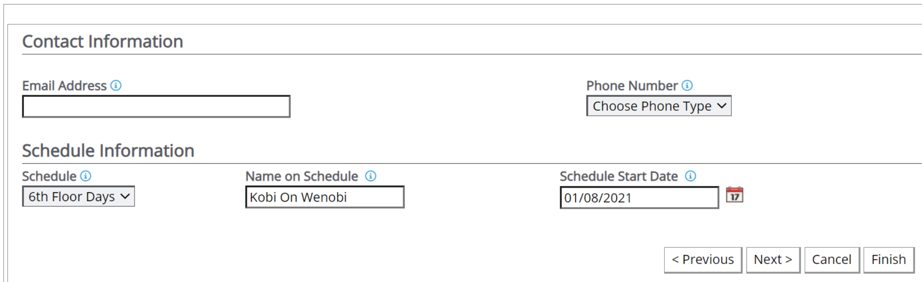


Figure 3

Once you have finished entering this information, select the next button.

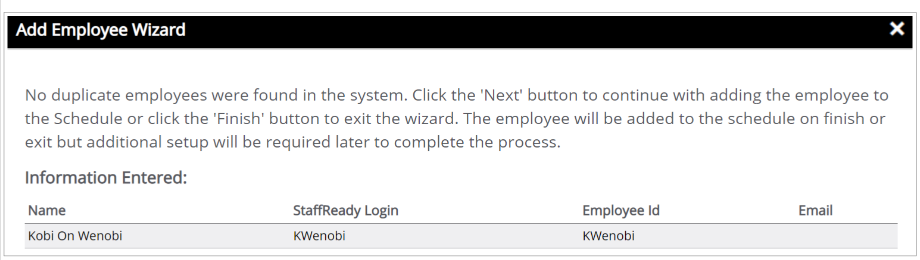


Figure 4

If no duplicate employees exist, you will be prompted to select the next button again. **(Figure 3)**

©2023 StaffReady. All rights reserved.

Adding Employee Qualifications

If the new employee is pinned to skillsets via department, schedule, or job title, those skillsets will be listed below the Skillset ID heading. **(Figure 1)** If they are not pinned, it will display 'no results found.'

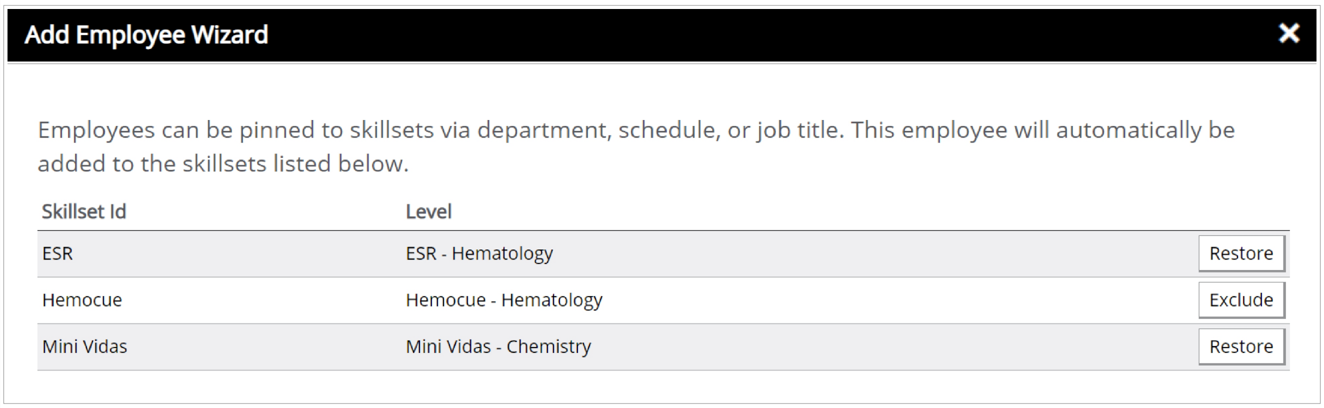


Figure 1

Selecting **Next** will advance you to the next section of the wizard **(Figure 2)** where you can update the qualifications the employee should have for each job description. Once you've made your choices, select the Next button. To learn more about how **Job Descriptions** function within StaffReady, please look at our Job Descriptions user guide.

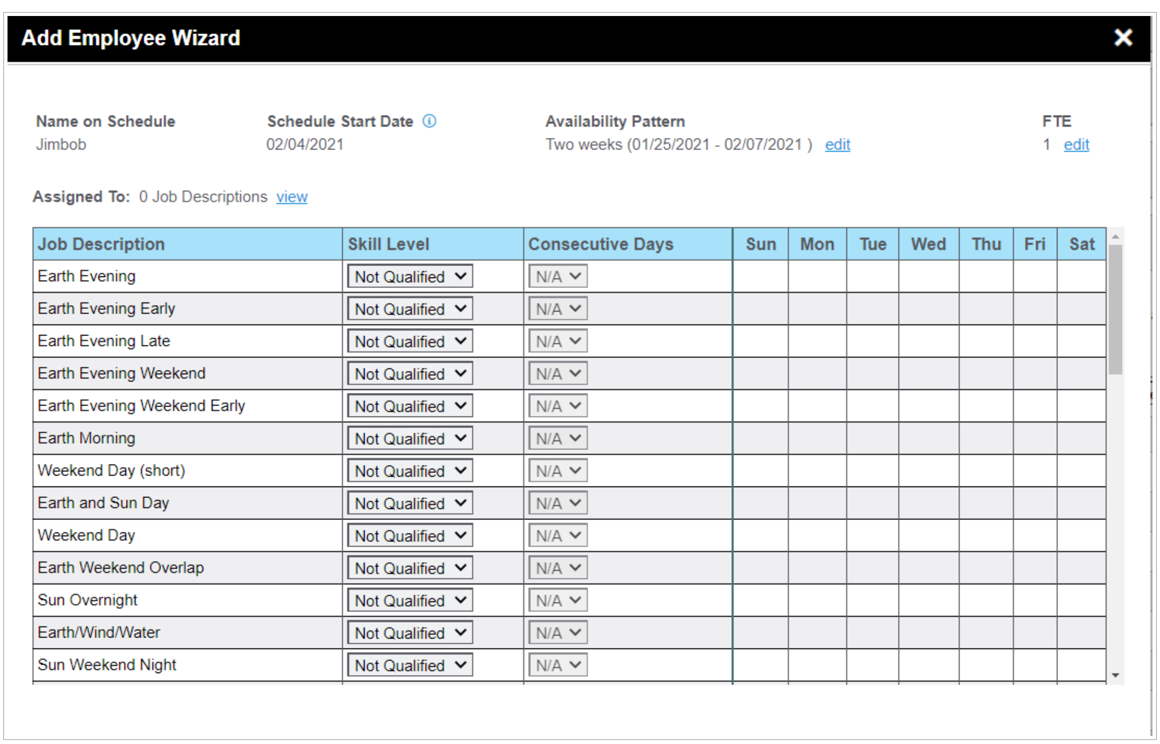


Figure 2

©2023 StaffReady. All rights reserved.

Adjusting Employee Availability

After selecting which shifts the employee is qualified for, you can choose to configure the employee's availability. It is not required and can be set at a future date. Enter the 'As Early As' and 'As Late As' times you want, the location they should be assigned to (by default this is set to 'All Locations').

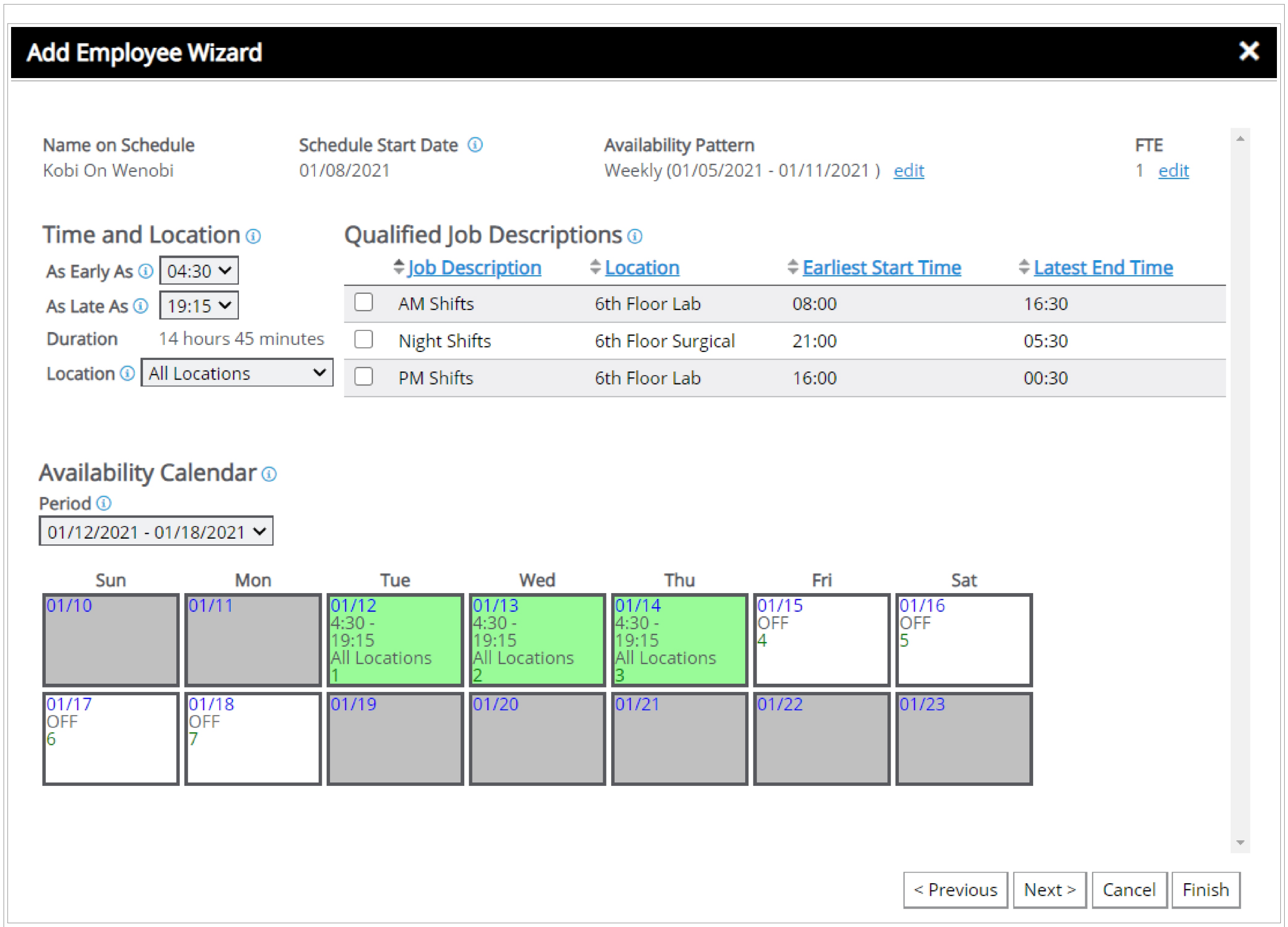


Figure 1

Next, select the schedule period you wish to edit and select days from the calendar grid on which the employee should be available. Once you've made your selections, select the **Next** button.

Note: If you would like to learn more about Employee Availability, please check out our Employee Prerequisites user guide.

©2023 StaffReady. All rights reserved.

Completing Employee Setup

Now that all required information has been filled out, you will be able to send a notification email to the employee who is being added to the schedule. Type in the email of the employee in the recipient field, check the send to recipient box, and then select the Finish button. A notification message is automatically generated but you may change the body text if you wish to. Once you're done, select the **Finish** button. **(Figure 1)**

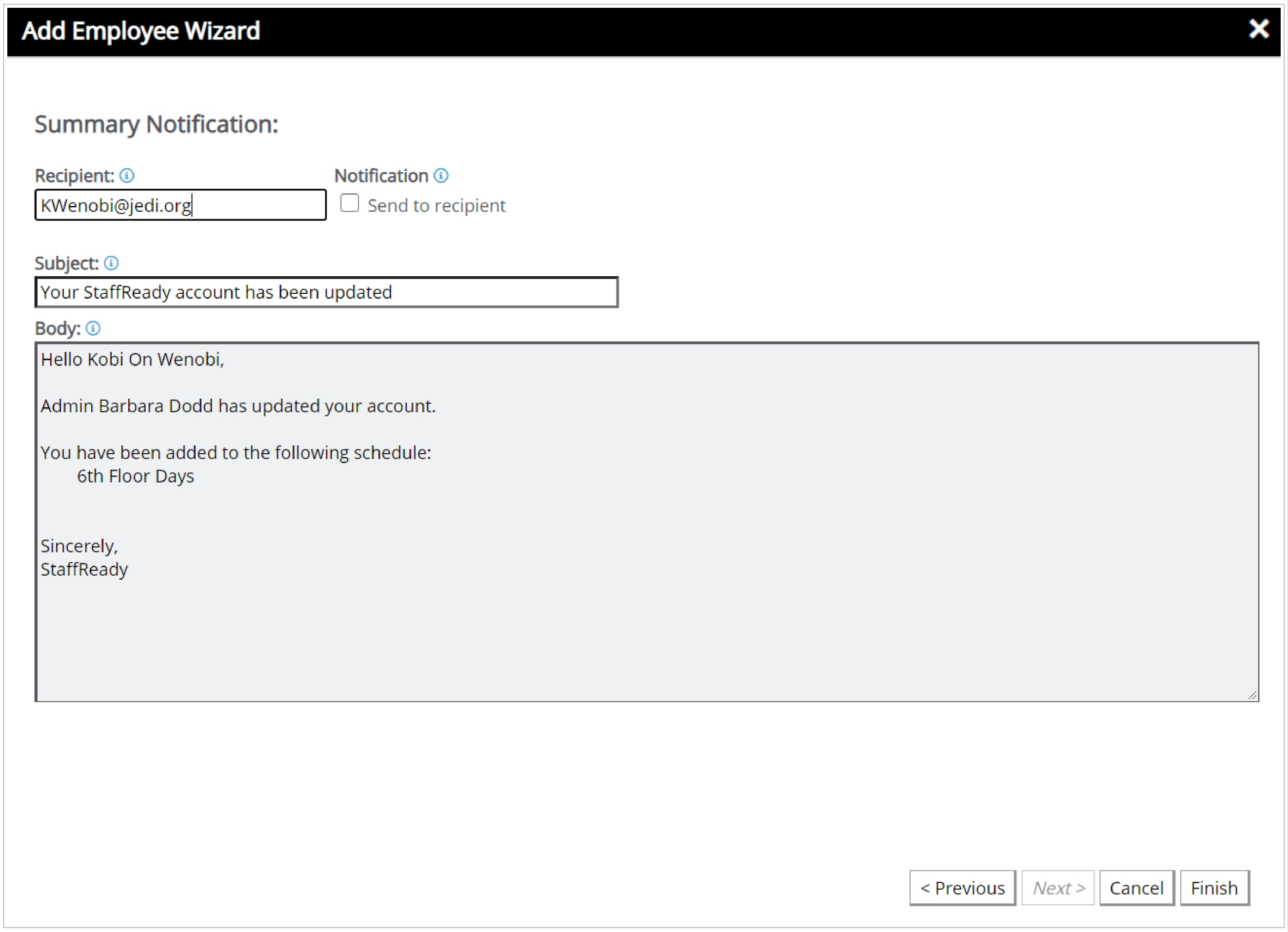


Figure 1

Your newly created employee will appear at the bottom of the list of employees within the **Employee** color bar panel. **(Figure 2)**

Figure 2

©2023 StaffReady. All rights reserved.

Adding Existing Employees to a Schedule

If you would like to add an existing employee to a schedule, you can also do that through the **Employee** color bar panel. Select the **Add Employees** button to begin this process. **(Figure 1)** You can search for the desired employee by name, department, or job title. **(Figure 2)**

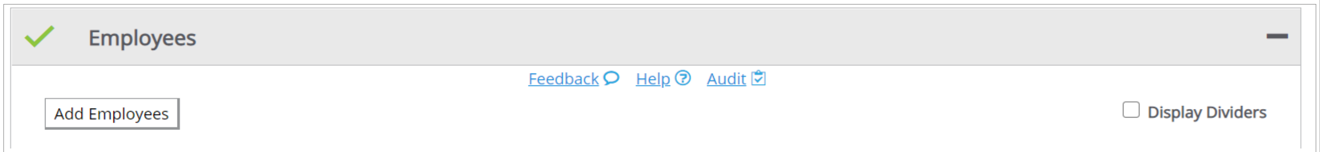


Figure 1

Once you've found your employee, select the **Add Employee** button **(Figure 2)** to add the employee to the schedule. Your newly added employee will appear at the end of the employees list.

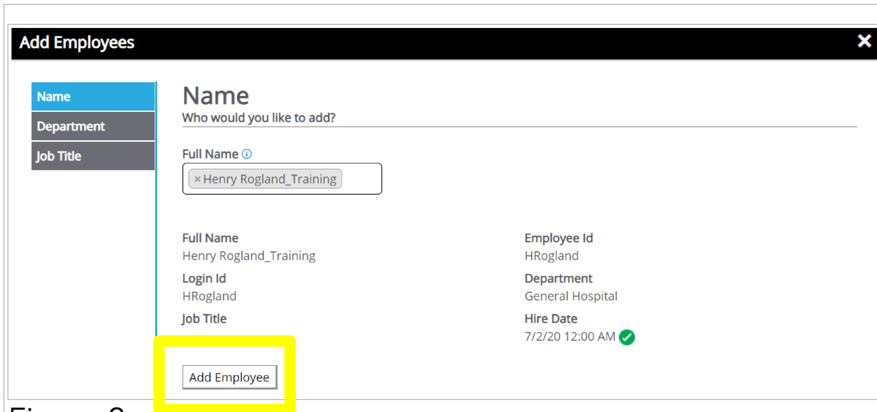


Figure 2

You can also search for an employee to add by department. Select the **Department** tab and you will be either able to search for an employee by name or select all employees within a given department. Selecting an individual department will expand it to display all employees within that department. **(Figure 3)**

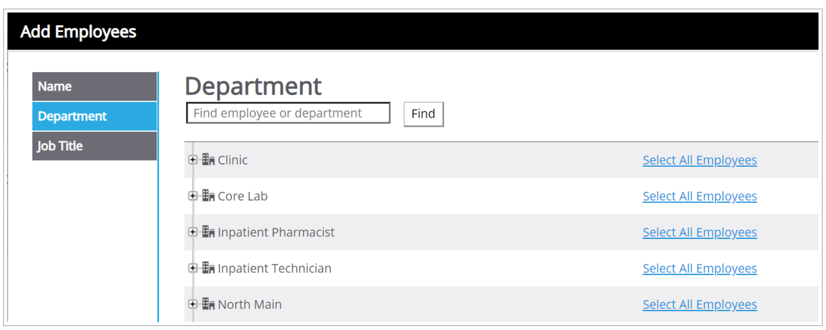


Figure 3

Selecting **Job Title** allows you to search by name or by browsing through the list of Job Titles. You can select all employees with a given job title by clicking the **Select All Employees** link or by clicking the position to expand it and find a specific employee. **(Figure 4)**

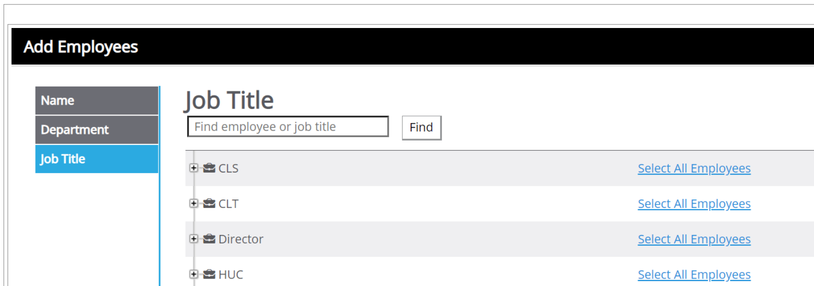


Figure 5

©2023 StaffReady. All rights reserved.

Removing an Employee from the Schedule

You may need to remove an employee from your schedule so that the system stops automatically assigning them work. A common reason for this occurring is when an employee leaves your organization. Open the **Employee** color bar panel within the schedule you wish to remove an employee from, and locate the employee you wish to remove. Select the **Remove** button. **(Figure 1)**

32	Mary Taylor	1.00	4 assigned	Weekly	No Availability	Edit Account Info		Remove
33	Tammi Ellis	1.00	4 assigned	Weekly	No Availability	Edit Account Info		Remove
34	Alicia Chou	1.00	5 assigned	Weekly	No Availability	Edit Account Info		Remove
35	Robert Scott	1.00	0 assigned	Weekly	08:00-05:30	Edit Account Info	Setup	Remove
36	Sheev Palpatine	1.00	5 assigned	Weekly	02:00-05:30	Edit Account Info		Remove

Figure 1

This will open the **Remove Employee From Schedule** pop-up window. In the **Remove Date** field, enter the last day that the employee should be active on the schedule. Select the **Save Changes** button to confirm. **(Figure 2)**

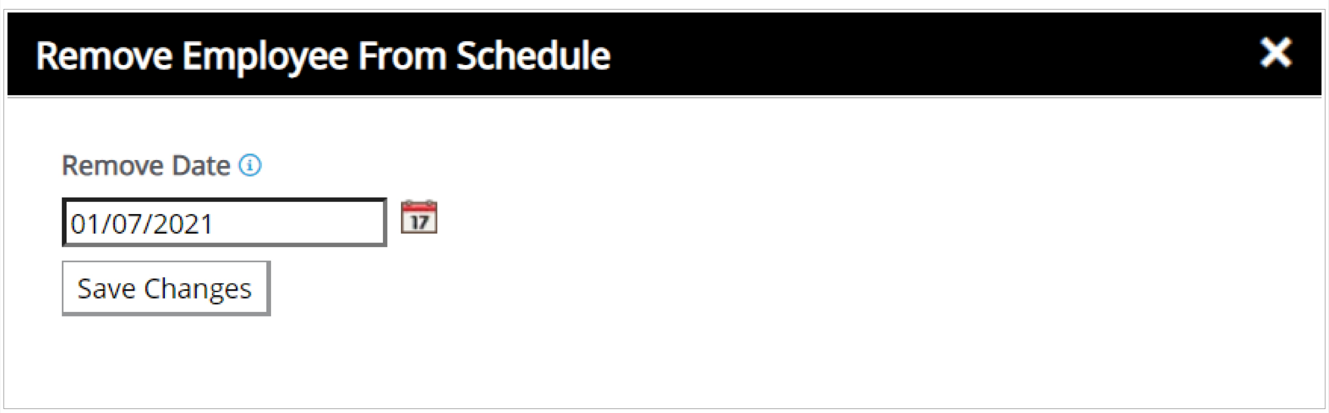


Figure 2

A removed employee will appear at the bottom of the employee list. It will also display the last date that they are on the schedule below their name. To see them you must have **Show All** enabled in the dropdown menu for the **Employees** color bar. **(Figure 3)**

41	Cameron Phillips *01/11/2021*	1.00	1 assigned	Weekly	No Availability	Edit Account Info	Reinstate

Figure 3

©2023 StaffReady. All rights reserved.

Reinstating Removed Employees

If you need to reinstate a removed employee, navigate to the **Employee** color bar panel and select the dropdown menu furthest right. It will display 'Show All' and 'Hide Removed'. **(Figure 1)**

Make sure that 'Show All' is selected and then scroll down through the list. Employees that have been removed will be displayed at the bottom of the list.

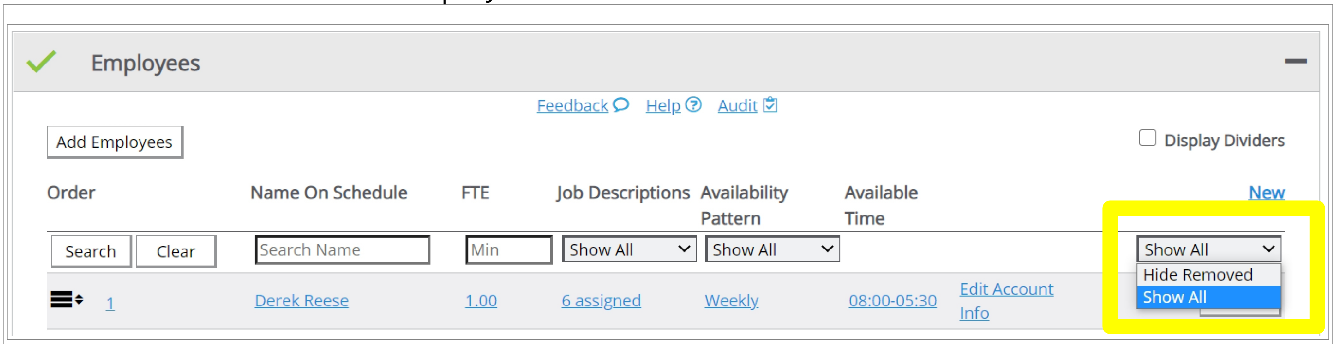


Figure 1

Select the **Reinstate** button to restore the employee to the schedule. **(Figure 2)**

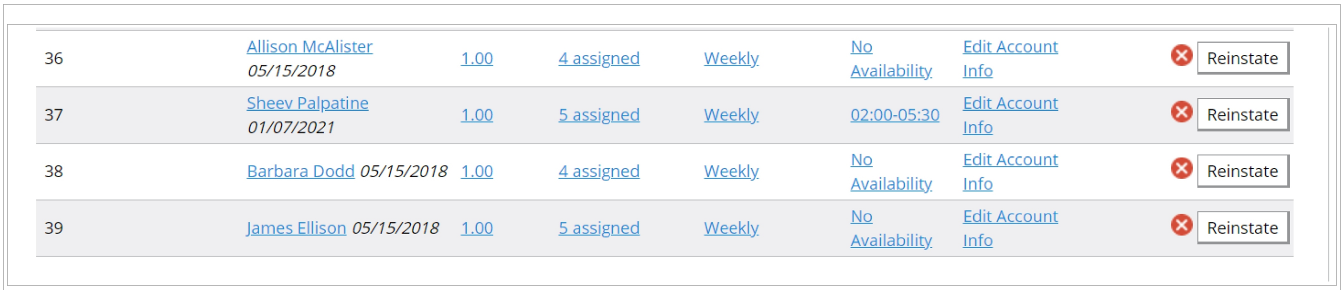


Figure 2

Once an employee has been reinstated, the button next to their name will now display as **Remove**. **(Figure 3)**

Figure 3

©2023 StaffReady. All rights reserved.

Resources

This concludes the User Guide for **Adding and Removing Employees**. We hope that this documentation was helpful and provided knowledge of this feature and how it functions within the entire framework of the Scheduling Module.

For more focused Guides on the functions and features discussed in this document, please check out the linked Guides on this page for supplemental reading.

For further assistance, please contact our Support Team directly.

Our service hours are Monday through Friday, 6am to 5pm PST.

Phone: 1-877-229-5230

Online Support Form

Related Topics

Please select any link to view that document.

Employee Prerequisites	PDF Document
Schedule Observers	PDF Document
Job Descriptions	PDF Document
Enforced Rotations	PDF Document

©2023 StaffReady. All rights reserved.