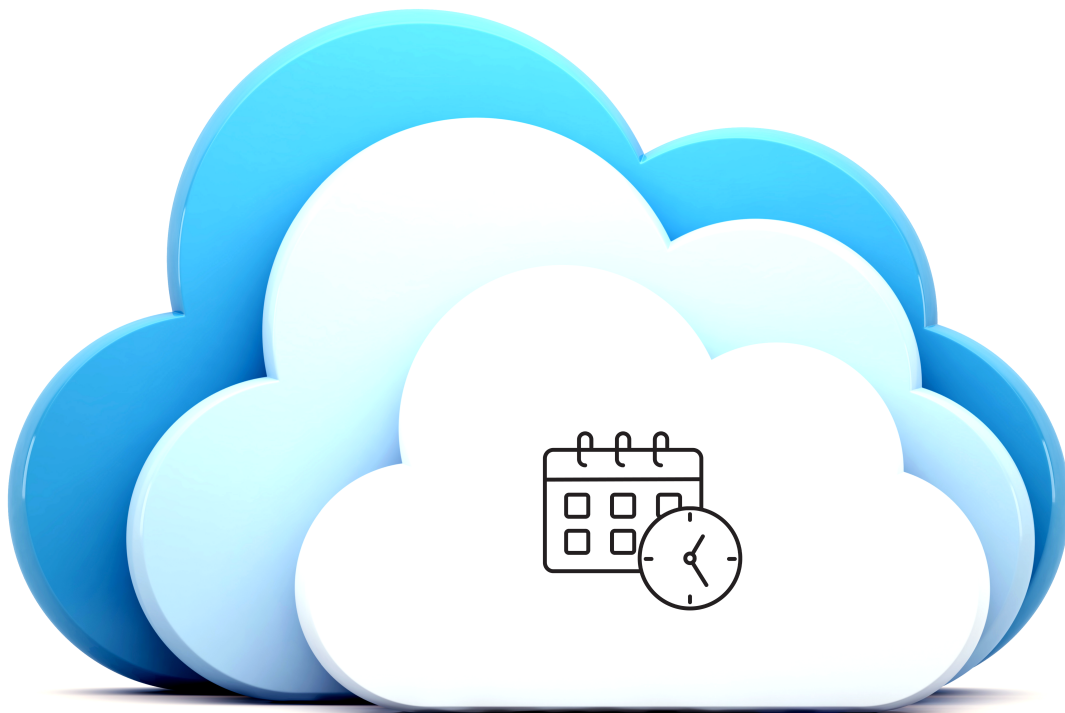




Getting Started: Core User Guide

Scheduling Module



Introduction

StaffReady Scheduling was specifically designed to make life easier for all employees, from core users to managers, system administrators and everything in between. This Getting Started: Core User Guide is designed to highlight all the features specific to Core users regarding managing personal settings, managing leave, managing shift bids and trades, and accessing schedules.

With StaffReady Scheduling, staff can now view schedules and make shift and leave requests from home. Employees can quickly see the status of leave or shift requests, knowing all communication and requests are date and time stamped. Staff can also communicate directly with supervisors regarding all aspects of the schedule without emailing, calling or filling out a form.

As a result of these features, managing your personal schedule is a much more flexible and easy process. Admin scheduling decisions are more transparent, the shift and leave request process is centrally organized, and ease-of-access to schedule information dramatically increases. As you get started, we've created a Glossary at the end highlights terms unique to the software.

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Updating Personal Settings

Before jumping into how to use our modules, we want to configure our basic settings. Select the gear symbol next to your user name and then select **Settings**. (Figure 1)

This will open the **My Settings** pop-up window.

In the **Contact Information** side tab, you can manage your email address(es) and phone numbers. Email settings can be further adjusted by selecting the **Adjust Email Settings** link adjacent to your email address. (Figure 2)

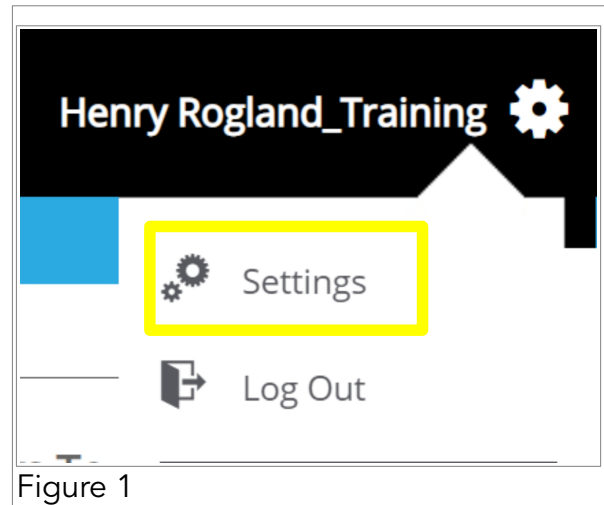


Figure 1

This will open the **Days to Receive Mail** pop-up window. (Figure 3)

You can opt into or out of receiving alert messages or informational notifications by selecting the appropriate check boxes. (Yellow box, Figure 3)

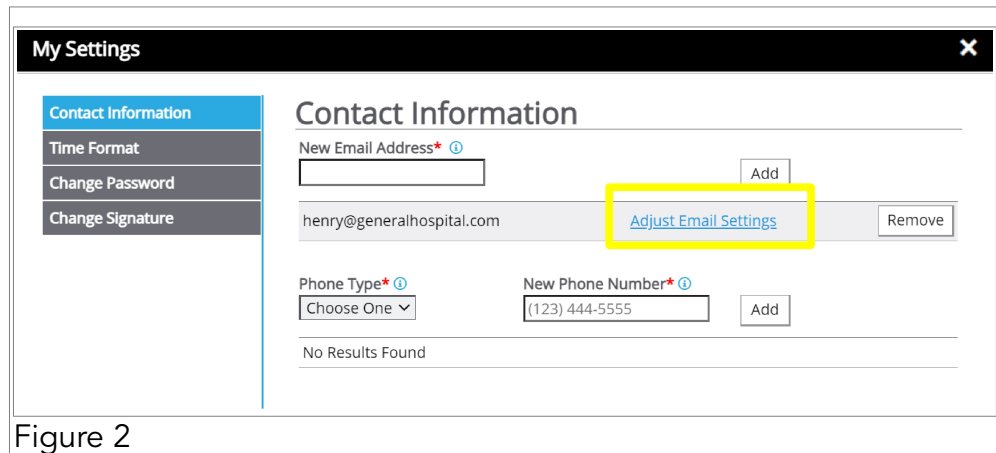


Figure 2

If you opt to receive informational messages, you can also choose which days you receive them on. Once you have made your choices, select the **Save Changes** button.

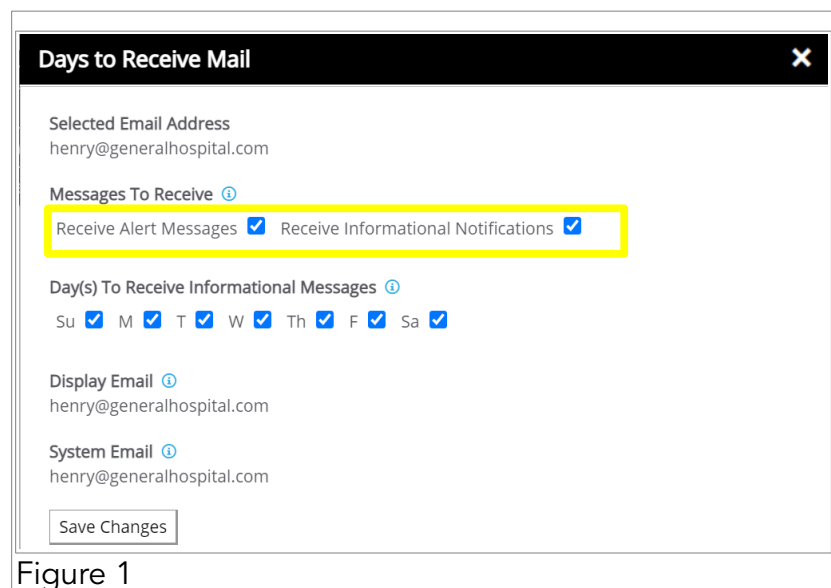


Figure 1

Updating Time Format, Password, and Signature

Selecting **Time Format** will allow you to adjust the **Time Style** display to either 12 or 24 hour time. You can also adjust the **Date Format** to MM/DD/YYYY (i.e. 12/25/2021) or DD/MMM/YYYY (i.e. 12-Dec-2021). **(Figure 1)** You will need to logout and back in for this change to take effect.

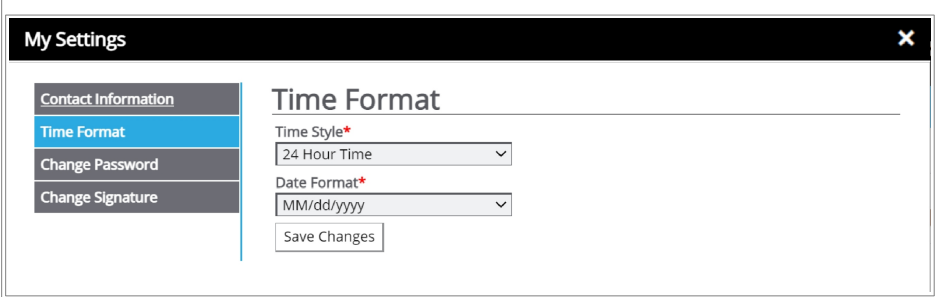


Figure 1

Selecting the **Change Password** side tab will allow you to enter and save a new password. **(Figure 2)**

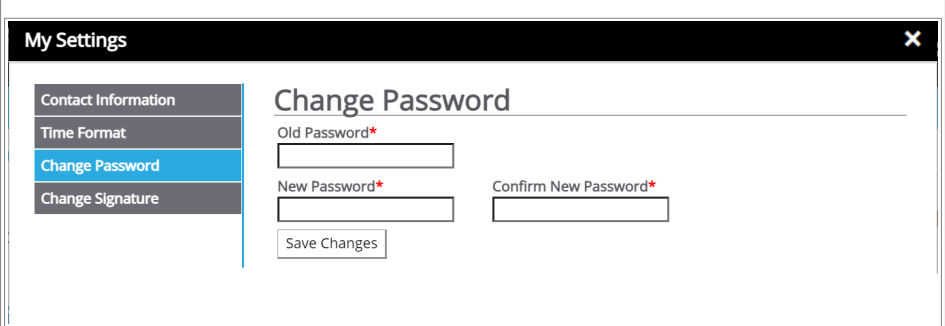


Figure 2

Selecting the **Change Signature** side tab will allow you to enter a new PIN as well as enter the name for your signature and customize its style. Both the PIN and the signature can be used to sign documents. **(Figure 3)**

Once you have finished making your selections, select the **Save Changes** button.

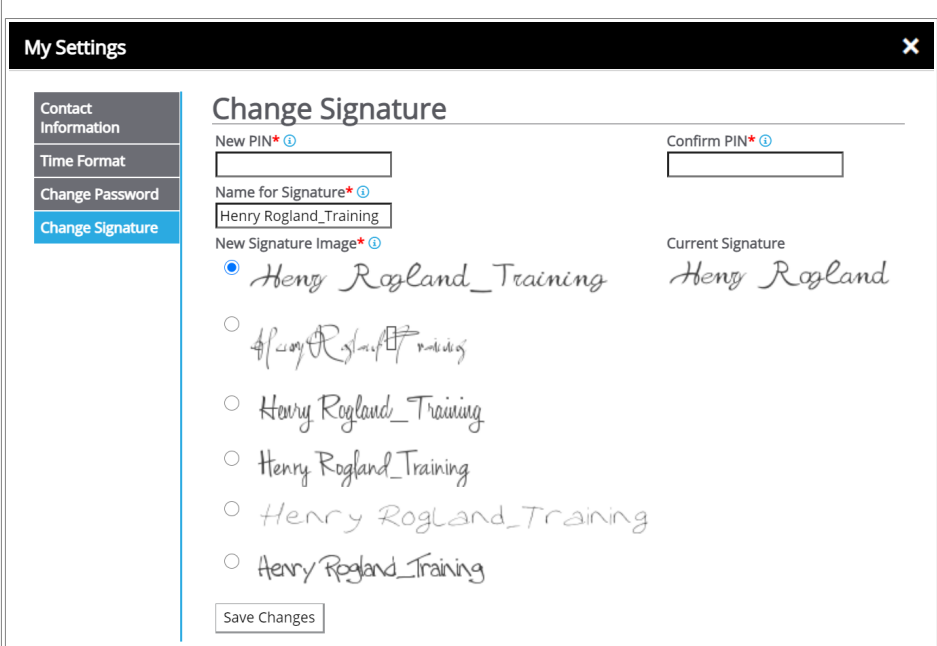


Figure 3

Welcome View

Once you've configured your basic settings, you're ready to look at the **Welcome View** and the Scheduling module. Select **Welcome** from the **Home** dropdown menu (Figure 1) or by selecting the **Welcome** tab in the **View** selection bar. (Figure 2)

The **Welcome View** is where you will view the schedules you are currently a part of as well as your competency assessments and tasks you need to complete. **Note: Only modules that your organization enables your access to and are part of your organization's StaffReady license will be visible on the Welcome View screen so what is visible to you may differ from the screenshot in Figure 2.**

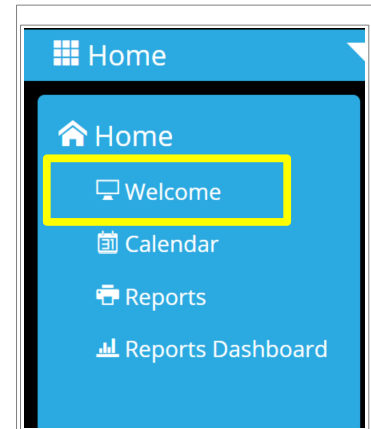


Figure 1

My Schedule

If your license contains the **Scheduling** module, you will be able to create leave requests and view shift requests made to you by other employees. You'll only be able to access modules that are part of your organization's StaffReady license and that you have permission to see. Your experience of the Welcome View screen may differ from the screenshot in Figure 2.

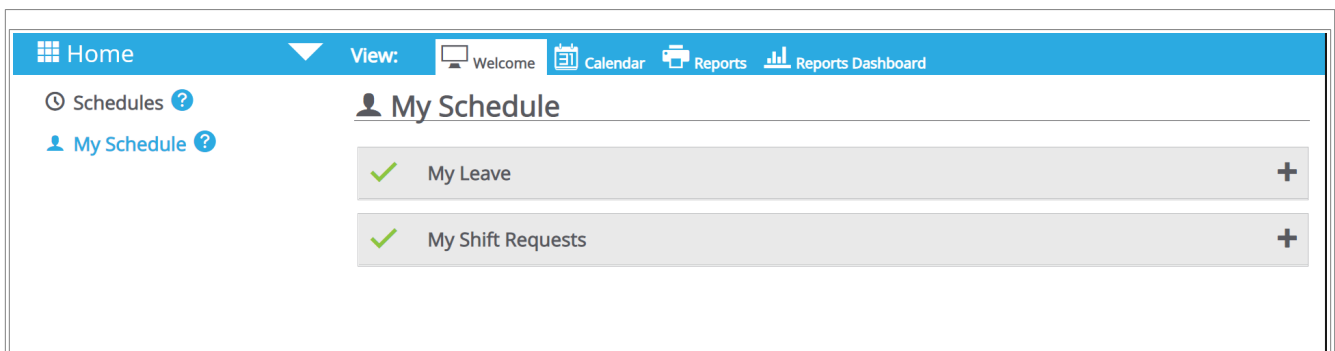


Figure 2

Selecting either the **My Leave** or the **My Shift Requests** color bars will expand them.

My Leave

To enter a new leave request, select the **My Leave** color bar to expand it and then select the **New** link. (Yellow box, Figure 1)

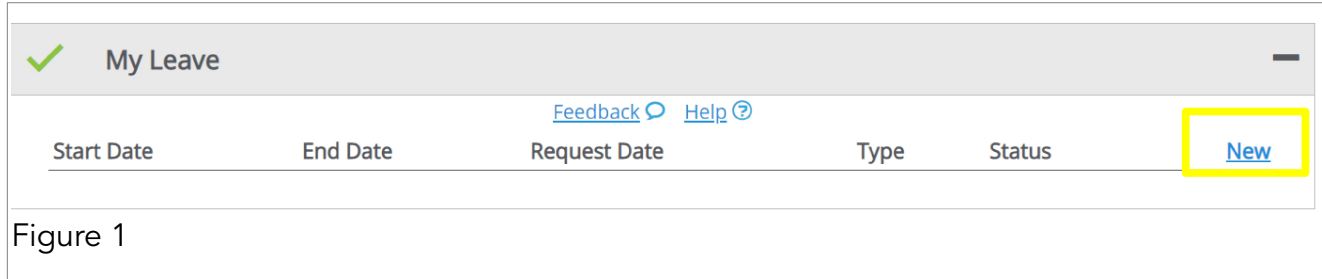


Figure 1

This will open the **Request/Edit Leave** pop-up menu. (Figure 2)

Enter the date and time your leave begins, the date and time it ends, and the leave type. Types of leave may vary depending on what types your organization has created. Once you have finished, select the **Save Changes** button.

Selecting the **Leave for Schedule** side tab allows you to view all leave requests submitted within a certain window of time. If there are no leave requests currently submitted, this area will be blank. (Figure 3)

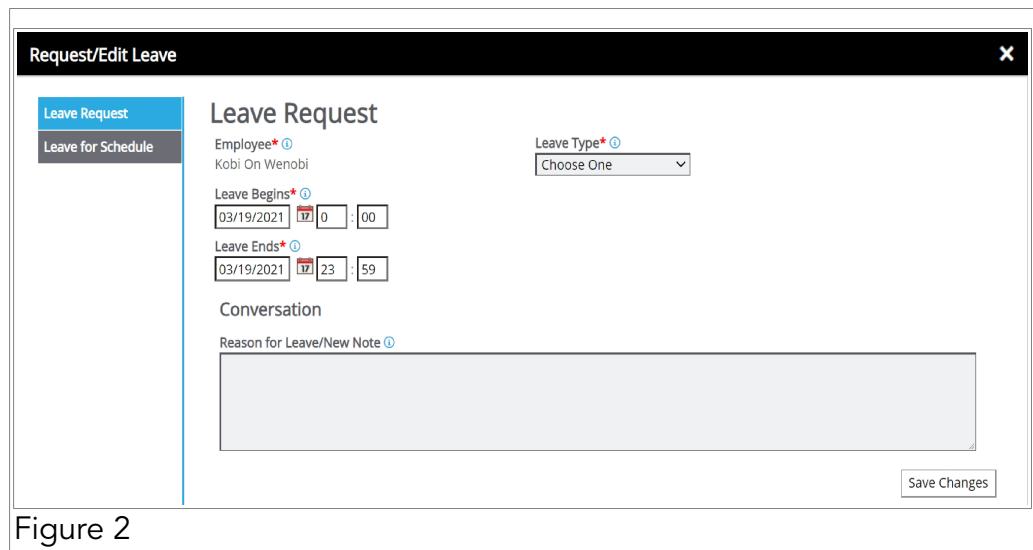


Figure 2

This is useful if your organization has rules governing how many people can have time off concurrently or if you're trying to plan when to put your own time off request in.

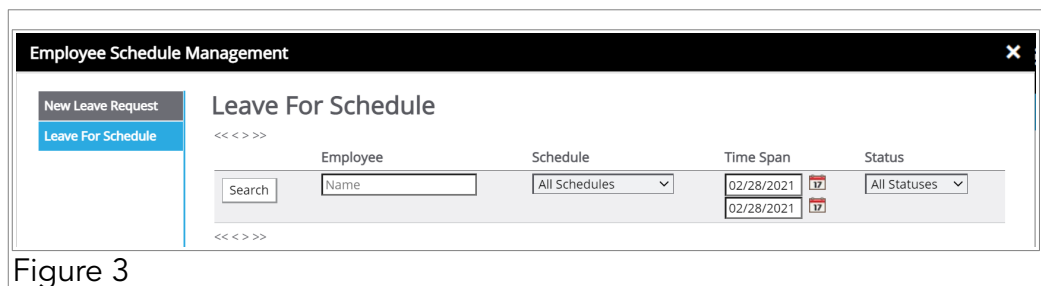


Figure 3

My Leave: Availability

Another option available for users in StaffReady Scheduling is the Availability leave type option. This allows employees to indicate that they are 'available' on days they are not scheduled to work. This is useful because it can indicate to managers what employees are willing to pick up additional shifts or who are able to provide coverage if another employee calls out.

Select Availability from the dropdown menu (**Green box, Figure 1**) to set your leave type and then select your beginning and end date and time. Add a note if you'd like to provide more detail for your availability request i.e. "I am available to work any shifts that need coverage Thursday April 24th." When you are finished, select **Save Changes**.

Figure 1

Figure 2

You can confirm that your request is successful by navigating to the calendar grid. (**Figure 2**) Select the Leave Request Filter (**Green box, Figure 2**) and then check the date that you submitted the availability request on and it will be visible tagged as **Availability**. (**Yellow box, Figure 2**)

My Shift Requests

From the calendar grid, select a shift that you wish to make a shift request for. (Figure 1) This will open the **Employee Schedule Management** pop-up window. You can choose from 3 types of requests to make: **Unassign Shift**, **Shift Giveaway**, and **Shift Trade**. (Figure 2)

Unassign Shift is a request you make to have a shift removed from your responsibility. If approved by a supervisor, the shift will no longer be assigned to you and will not be visible on your calendar.

Shift Giveaway requests will assign a shift the requester is currently assigned to, to another employee. The request must first be approved by both that employee and a supervisor.

Shift Trade requests will exchange a shift you currently have with one a coworker is currently assigned.

Unassign Shift: To request a shift be unassigned, select a shift, add a reason for it to be unassigned (if applicable), and then select the **Save Changes** button. If there is a conflict, it will appear in the red conflicts box in the **Employee Schedule Management** pop-up window.

If a supervisor approves the request, it will be removed from your schedule and will no longer be visible.

Additionally, you will be able to respond to open shift bids by selecting the request from the calendar grid (Figure 3 and 4), selecting the **Shift Bid** tab in the **Employee Schedule Management** menu (Figure 5) and then selecting either agree or disagree.

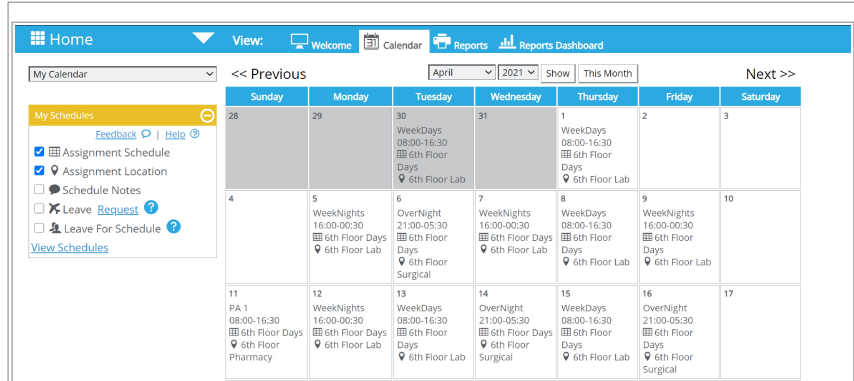


Figure 1

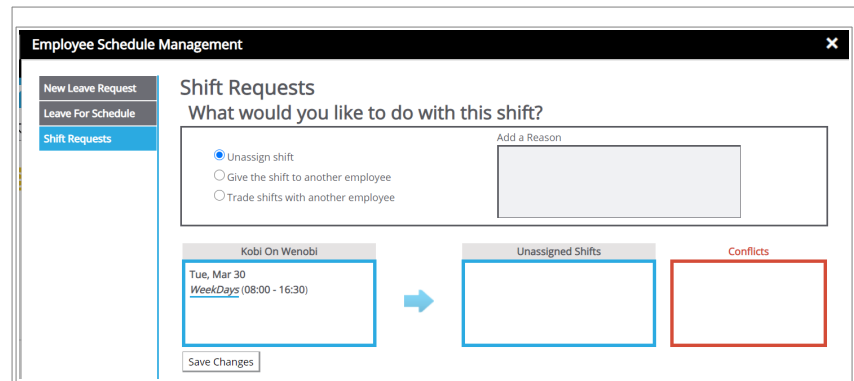


Figure 2



Figure 3

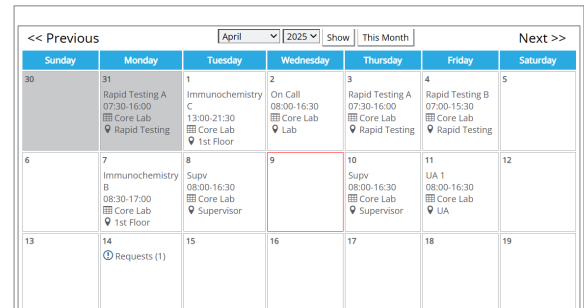


Figure 4

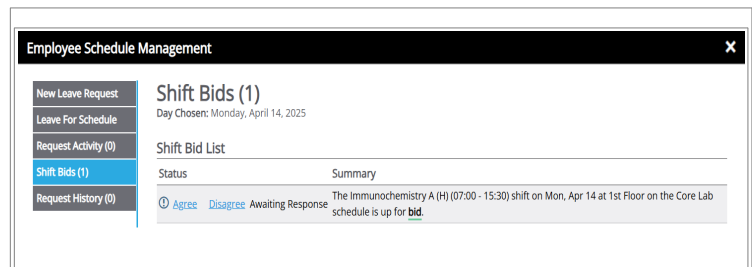


Figure 5

Shift Requests (Continued)

Shift Giveaway: If you would like to give away a shift to another employee, first select the shift you wish to giveaway, enter a reason if applicable and then select who you would like to give the shift to from the recipient dropdown menu. If there is a conflict with your intended recipient, it will be highlighted in the **Conflicts** box. (Figure 1)

Shift Trade: To trade a shift with another employee, first select a shift you wish to trade and a recipient, the relevant date for a shift you want to receive, and then which shift you will receive. (Figure 2)

It will display the details of the shift you are trading as well as the details of the one you will receive. If there are conflicts, they will be highlighted in the **Conflicts** box. (Figure 3)

Once finished, select the **Save Changes** button.

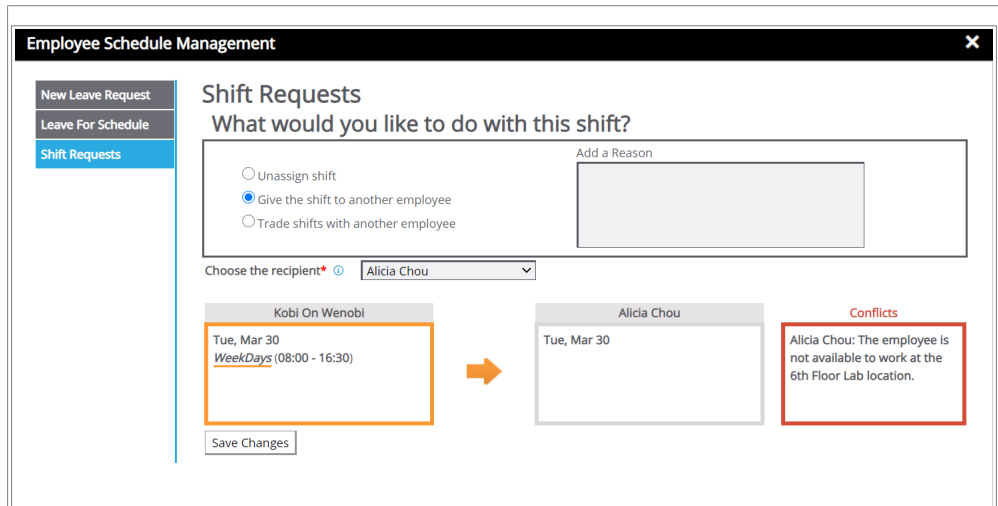


Figure 1

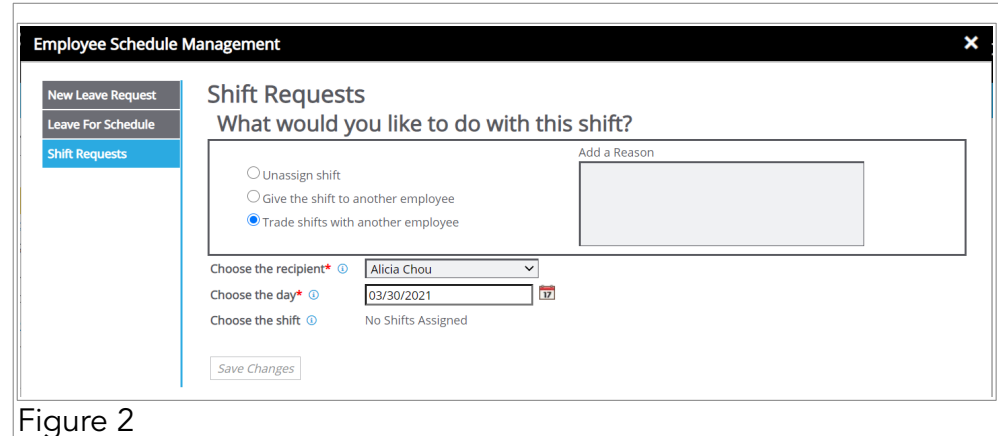


Figure 2

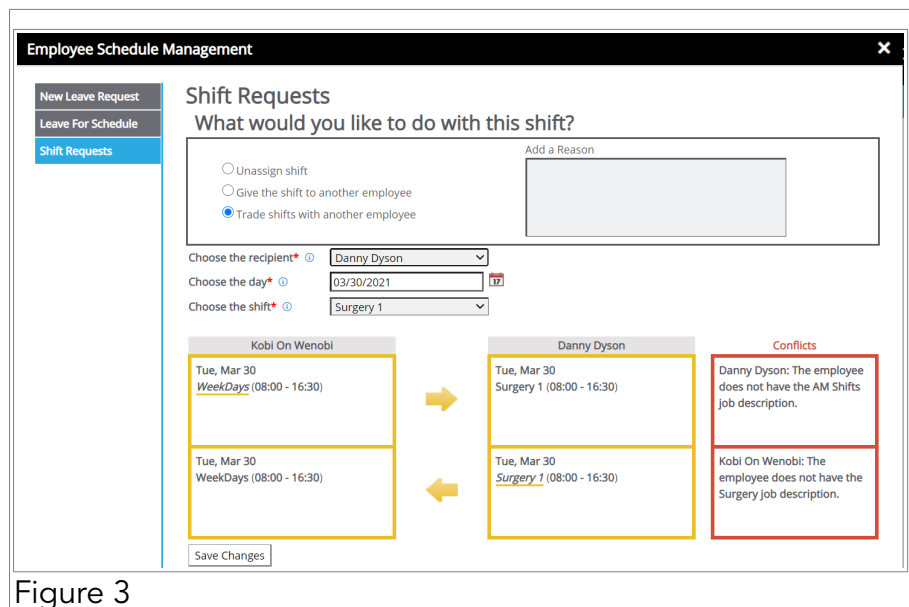


Figure 3

Glossary

This page contains definitions and explanatory screenshots for common terms and features you will find throughout our software and documentation regarding Scheduling. You will find definitions on the left of the page and screenshots of those concepts on the right.

Color Bar: An editable area within a module whose appearance can change depending on whether or not information has been entered for it. **(Figure 1)**

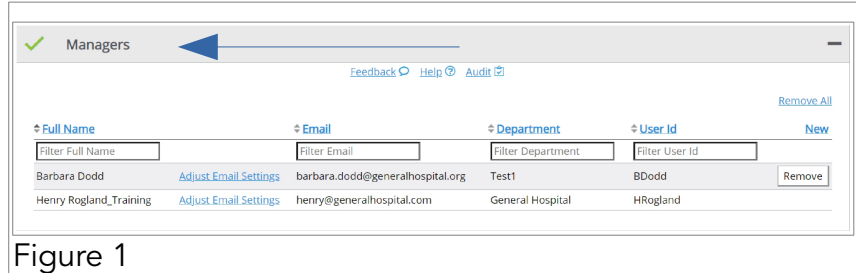


Figure 1

Tabs: Selectable topics within the navigation bar at the top of each page. **(Figure 2)**



Figure 2

Side Tabs: Editable settings menus within pop-up windows. **(Figure 3)**

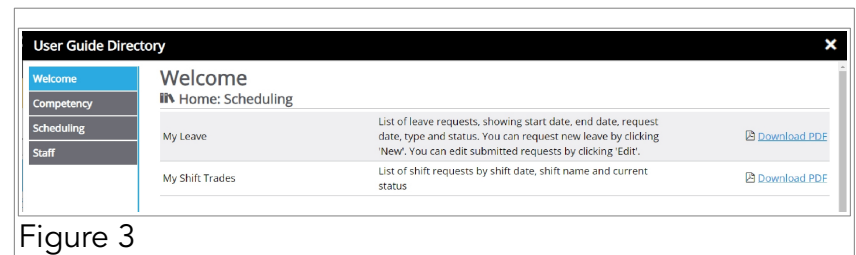


Figure 3

Modules: Within our entire suite of products, modules are individual parts such as the **Scheduling**, **Competency**, or **Document Control** modules. They can operate independently or integrated with each other. **(Figure 4)**

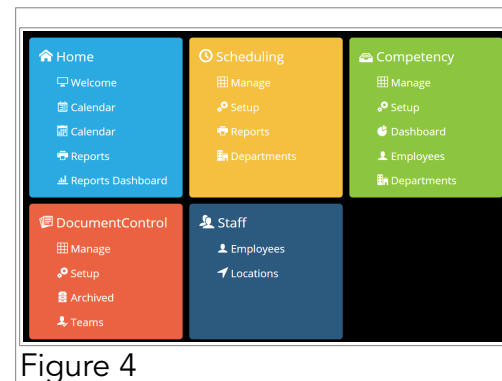


Figure 4

Minibar: a small specialized color bar designed to fulfill needs for a specific module or feature. **(Figure 5)**

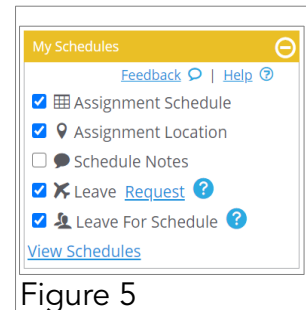


Figure 5

Resources

This concludes the Core User Guide for the **Scheduling Module**. We hope that you have a better understanding 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 skip to that topic.

Getting Started: Competency	PDF Document
Getting Started: Document Control	PDF Document