



## Locations User Guide

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### Staff Module

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## Introduction

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The StaffReady Locations tab is a foundational component of the Staff Module and serves to enhance your usage of our other modules such as Scheduling or Competency.

Locations allows for easy management, quick edits, and a top-down view of your organization. You can also view sites that your organization currently operates as well as closed locations. For those sites and locations, you can upload addresses for each of the facilities you operate, view the schedules that are associated with them, and much more.

When used in conjunction with our other StaffReady modules, Locations provides another layer of transparency and efficiency that manual systems are unable to provide.

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## Sites

From the Locations perspective, select a site from the list. **(Yellow box, Figure 1)** If the site contains multiple child locations, select a specific one to access its color bars.

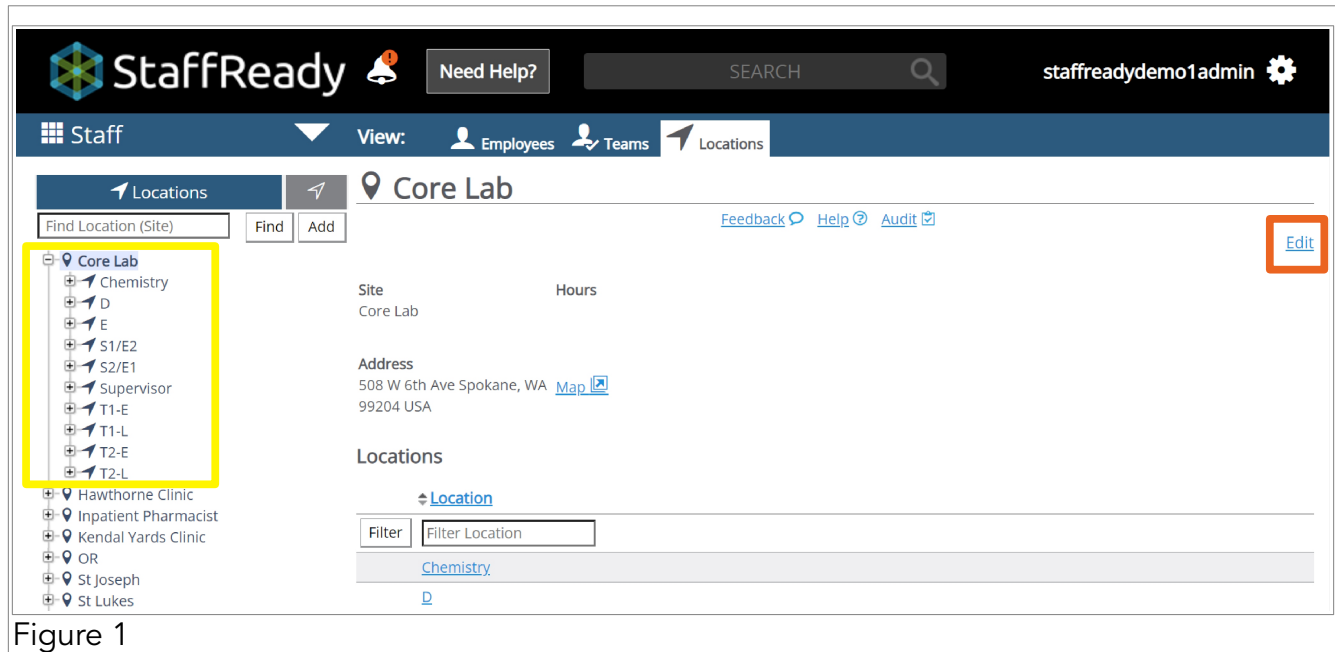


Figure 1

Select the **Edit** button. **(Orange box, Figure 1)** This will open the editing screen. **(Figure 2)** From here, you can edit the site name, city, address, suite number, state or province, postal and zip codes, and country. When finished, select the **Save Changes** button. You can add in latitude and longitude if you wish to make use of our Geolocation feature. If you wish to learn more about Geolocation, please check out the user guide for it located [here](#).

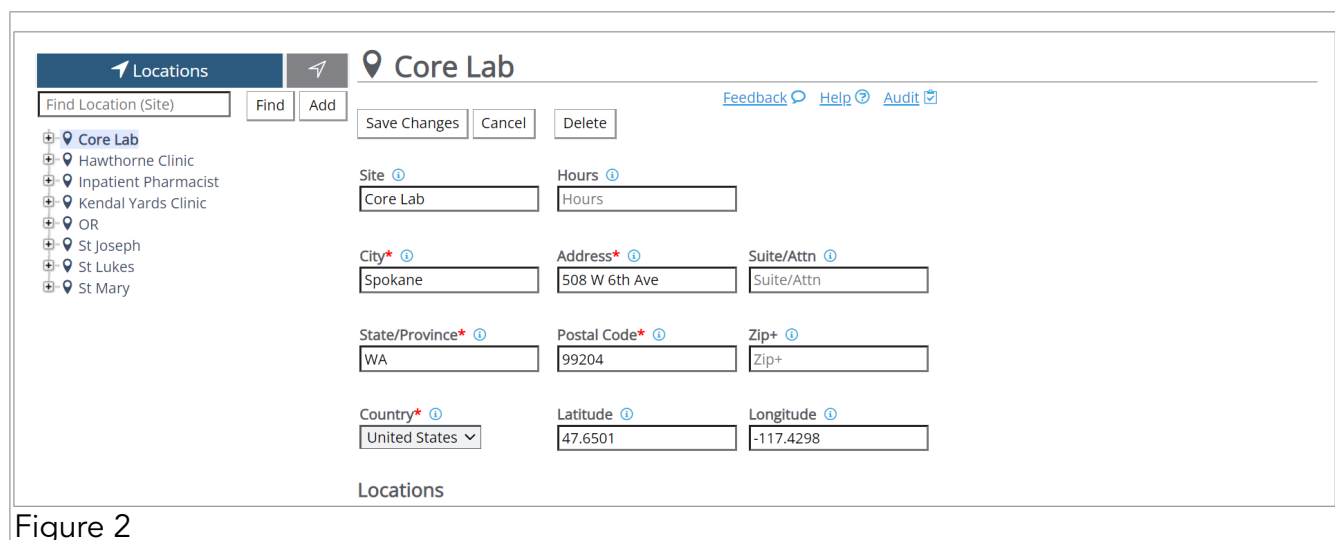


Figure 2

## Location and Schedules Color Bars

If you select a child Location, you will be able to select either the **Location** or **Schedules** color bars. You can update the Location name and where it resides in the hierarchy from this color bar. (Figure 1) To close a location, select it from tree selection, open the **Location** color bar, and select the **Delete** button.

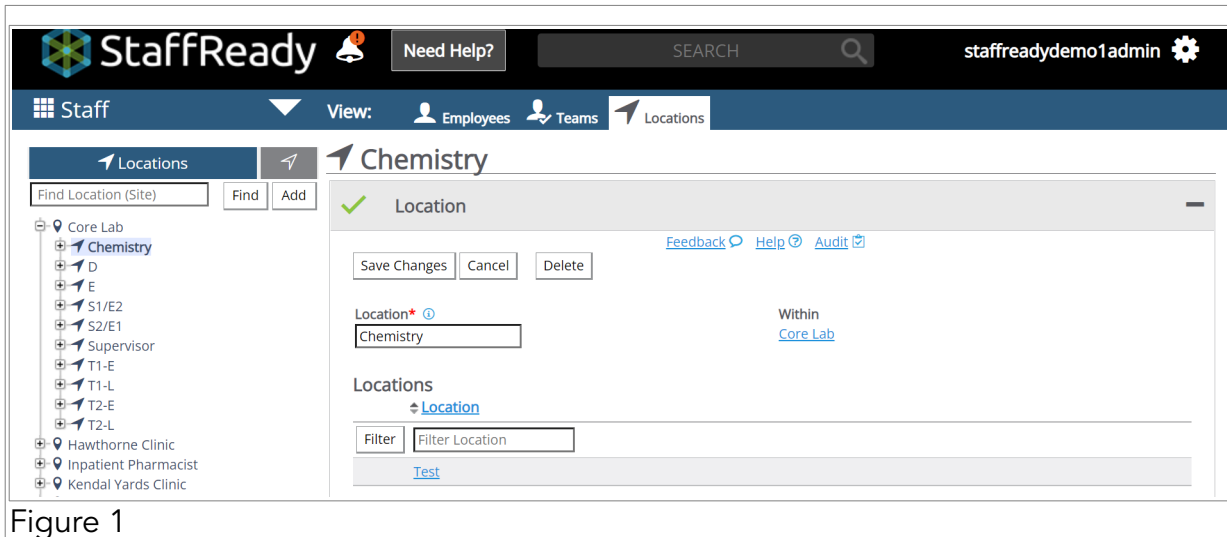


Figure 1

The **Schedules** color bar allows you to bulk edit all shifts on a particular schedule to the currently selected location. It also allows you to view all the shifts and job descriptions that are associated with a given location. To use the schedule group feature, choose which schedule you want from the **Choose A Schedule** dropdown menu (Yellow box, Figure 2) and then select a grouping method. You can choose to group by **Job Description**, **Start Time**, or **Location**. If you wish to make changes to all locations, you can use the **Change All Locations** bulk option link at the top of each section. (Teal boxes, Figure 2)

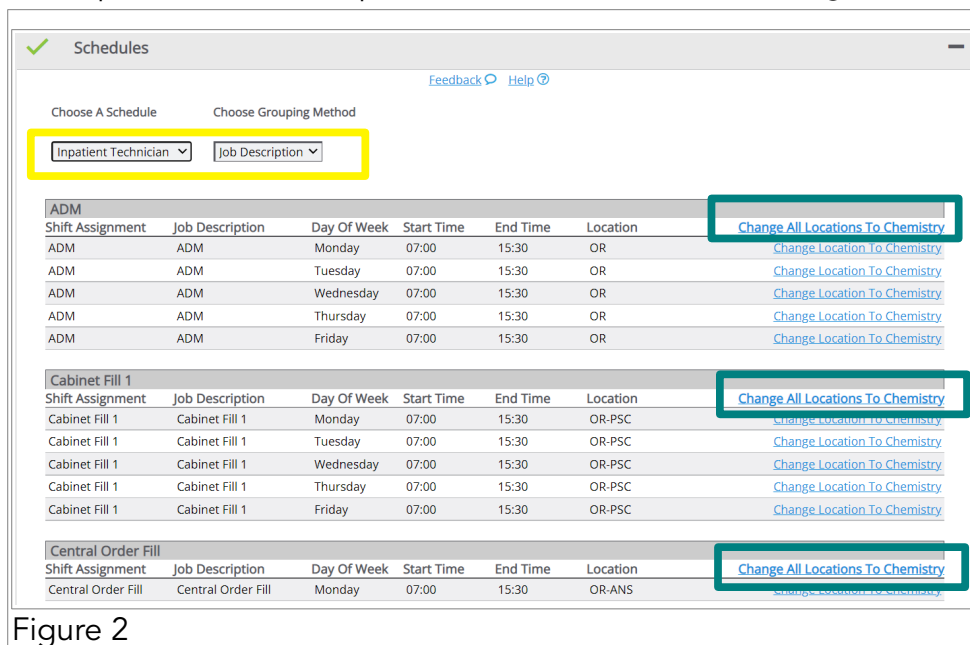


Figure 2

Changing the **Location** will affect shifts assigned via the **Availability** calendar within the **Employees** color bar. To remove a **Location**, you must first make sure that there are no active shift assignments associated with it. Otherwise, an error message will notify you that your attempt to delete has been blocked.

## Closed Locations

You can also view any closed locations by selecting the **Closed Locations** perspective. Any locations that are no longer active in your organization will be displayed here.

(Yellow box, Figure 1)

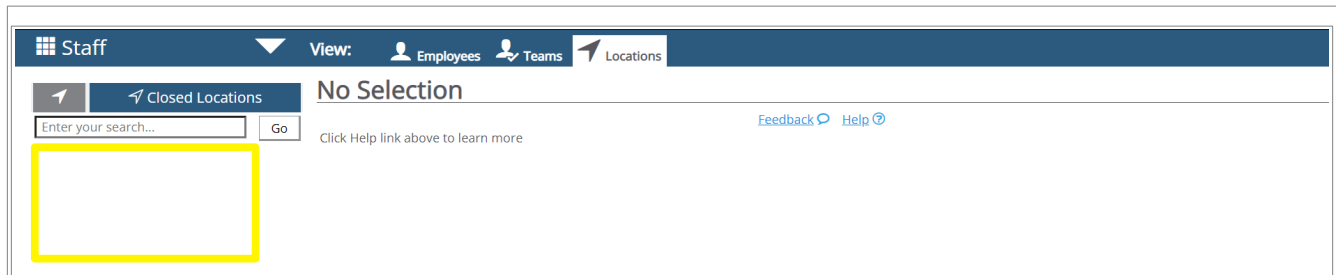


Figure 1

To restore a location to an active status, select a location and then select its color bar. Select the **Restore Location** button. (Yellow box, Figure 2)

The **Location** will be reinstated and be visible in the **Locations** perspective.

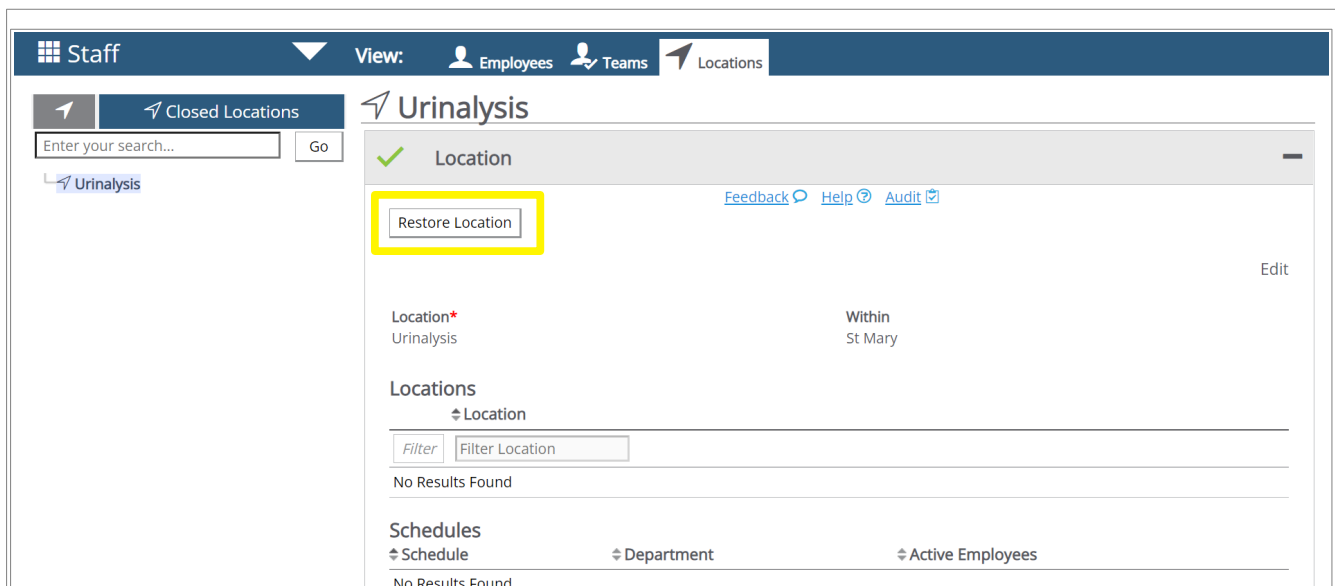


Figure 2

## Resources

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This concludes the User Guide for **Locations**. We hope that you have a better understanding of this feature and how it functions within the entire framework of the Staff 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.

<a href="#">Departments</a>	<a href="#">PDF Document</a>
<a href="#">Holidays</a>	<a href="#">PDF Document</a>
<a href="#">Staff Overview</a>	<a href="#">PDF Document</a>