



Managers and Messages User Guide

Scheduling Module



Introduction

The Messages and Managers Color Bars are key features in providing speedy and transparent communication between managers and staff within StaffReady Scheduling. Managers are allowed to be designated as sending and receiving messages with staff related to leave requests, shift trade requests, when new schedules are posted and other functions. Messages between managers and staff allow for real-time awareness and updates on important information related to the schedule and employee's individual lives.

The Messages and Managers Color Bars functionalities provide a cornerstone in improving employee morale in regards to schedule management. Transparent and speedy communication between managers and staff creates significant employee morale gains as employees have easier access to their managers, speedier replies, and transparent information flow. Gone are the days of slow or ineffective responses to employee requests and schedule visibility.

Once you've mastered this effective feature, you will be communicating quicker and more effectively with staff, gaining even more from StaffReady Scheduling. Other associated topics related to the Messages and Managers Color Bars are listed on the Resources Page.

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Messages Color Bar

To edit message settings within StaffReady scheduling, begin by navigating to the **Messages** color bar. Selecting each of the side menus within the color bar will display a different set of messaging options.

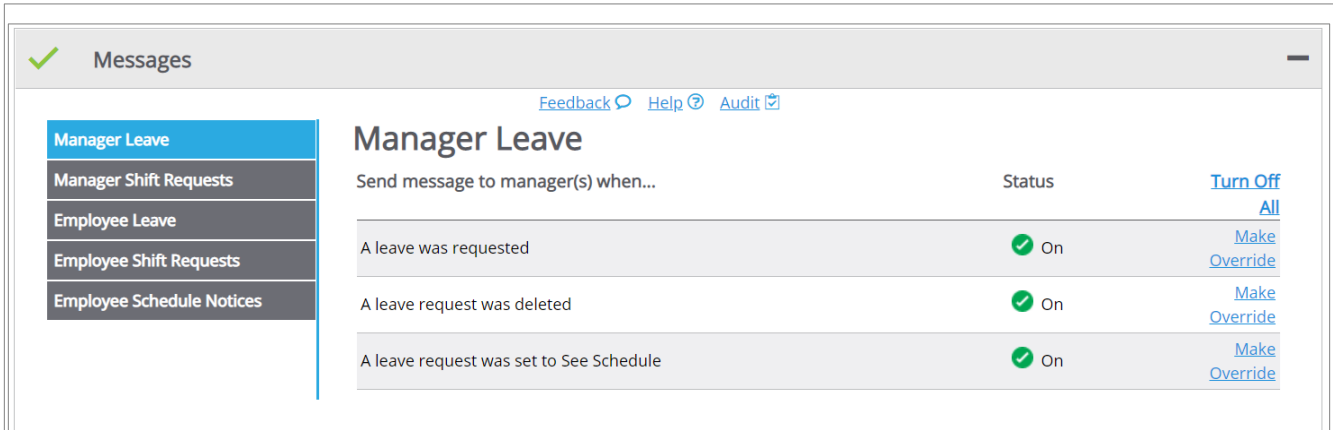


Figure 1

Selecting **Manager Leave** will allow you to set notifications for when a manager is notified if a leave request is made, when one is deleted, and when a request is set to See Schedule. **(Figure 1)** For more information on **Leave Requests** please check out our [Leave Requests user guide](#).

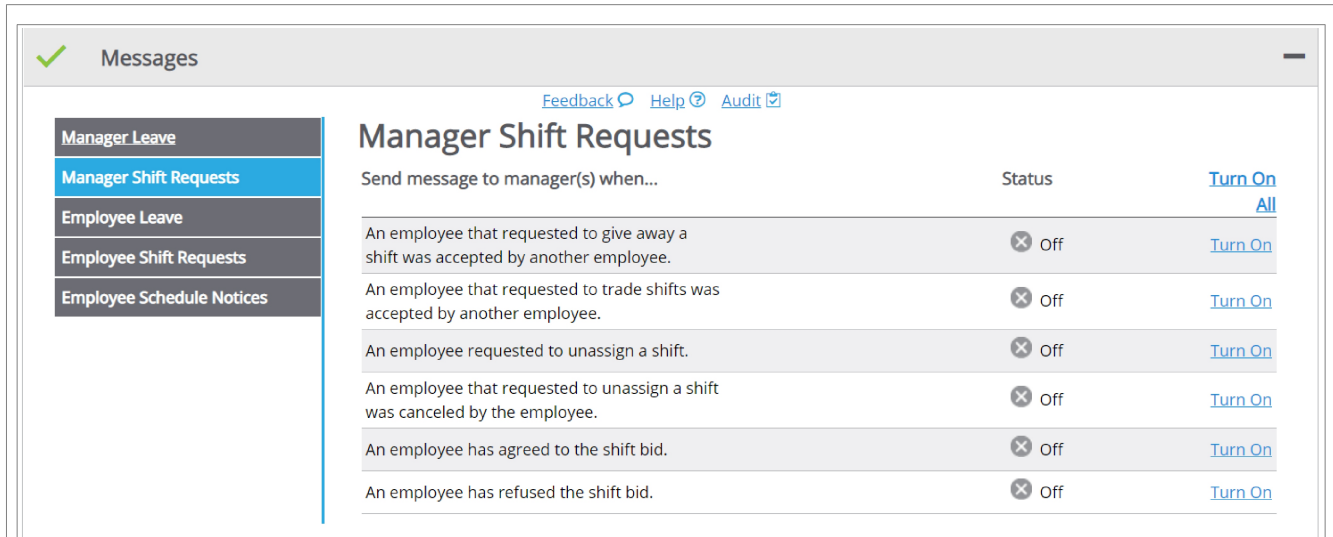


Figure 2

By selecting **Manager Shift Requests**, you can configure notifications for actions that employees take regarding shifts. This includes when an employee's given away shift is accepted by another employee, when a shift trade is accepted, when a request to have a shift unassigned is made or when that request is canceled, and when an employee accepts or refuses a shift bid. **(Figure 2)**

Employee Leave & Employee Schedule Notices

You can also set when messages are sent to employees. This increases visibility and transparency between managers and employees and streamlines communication.

Selecting **Employee Leave** will allow you to set notifications for when an employee’s leave request is confirmed, denied, deleted, or partially fulfilled. **(Figure 1)**

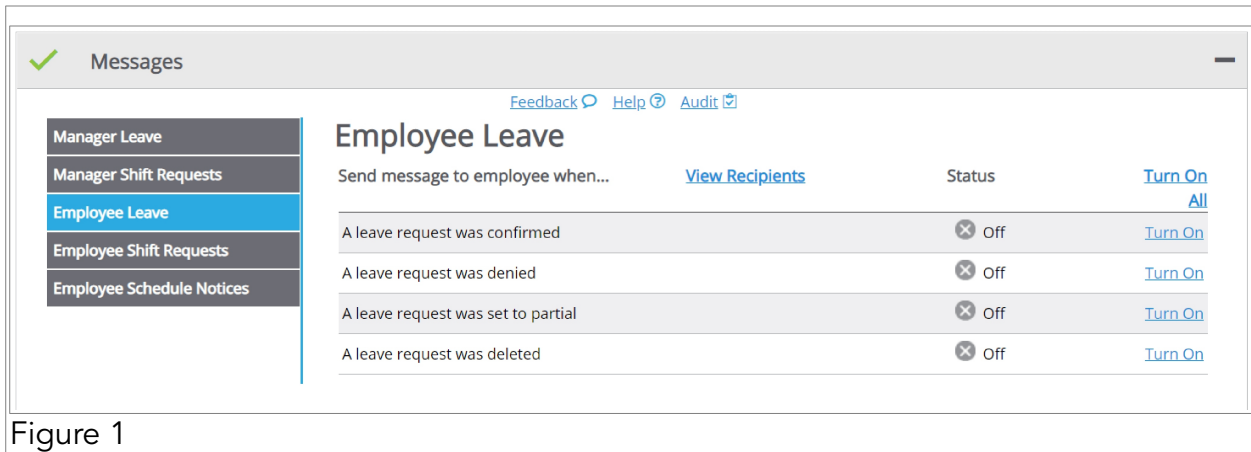


Figure 1

You can view which employees are set up to receive notifications by selecting the **View Recipients** link. **(Figure 2)**

Selecting **Employee Schedule Notices** will give you the option to mass send notifications when new schedules are published or when a shift is changed in a published schedule. **(Figure 3)**

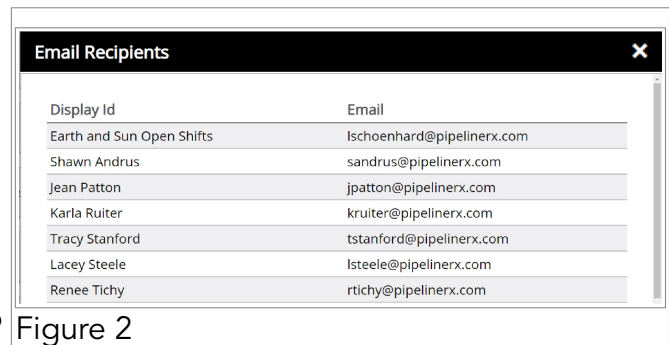


Figure 2

Any employees who do not have an email set up within StaffReady will have a red x displayed next to their name. Employee emails can be updated in the **Contact Information** section of the **Edit Employee Profile** menu.

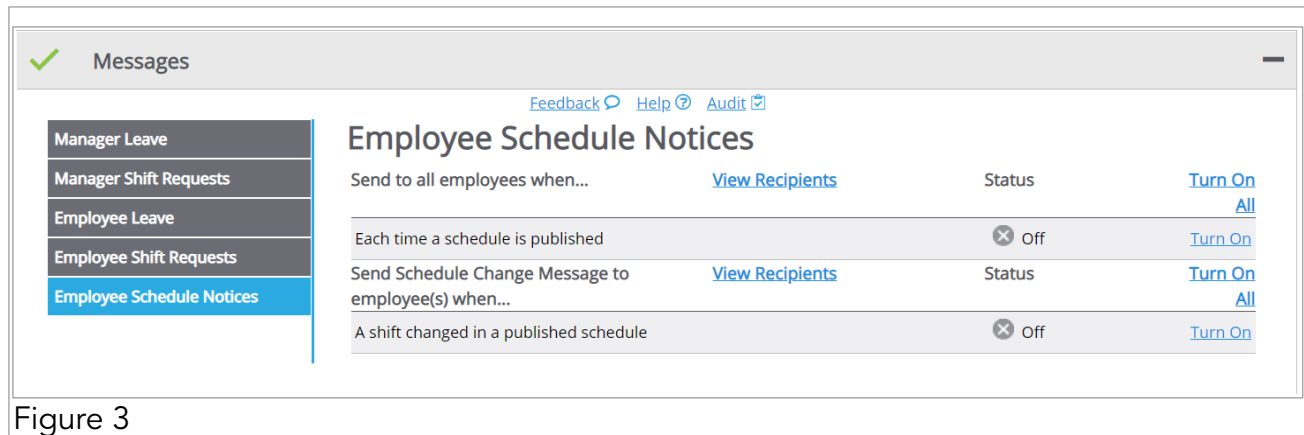


Figure 3

Employee Shift Requests

Selecting **Employee Shift Requests** will allow you to configure when shift change messages are sent to **Employees**. If you want to enable all message notifications, select the **Turn On All** links. Otherwise, select the **Turn On** link for the individual messages you wish to turn on. (Figure 1)

You will be able to activate notifications whenever an employee requests to give a shift away to another employee, when a manager approves or denies a give away request, and whenever an employee accepts or rejects a shift give away or if the request was canceled.

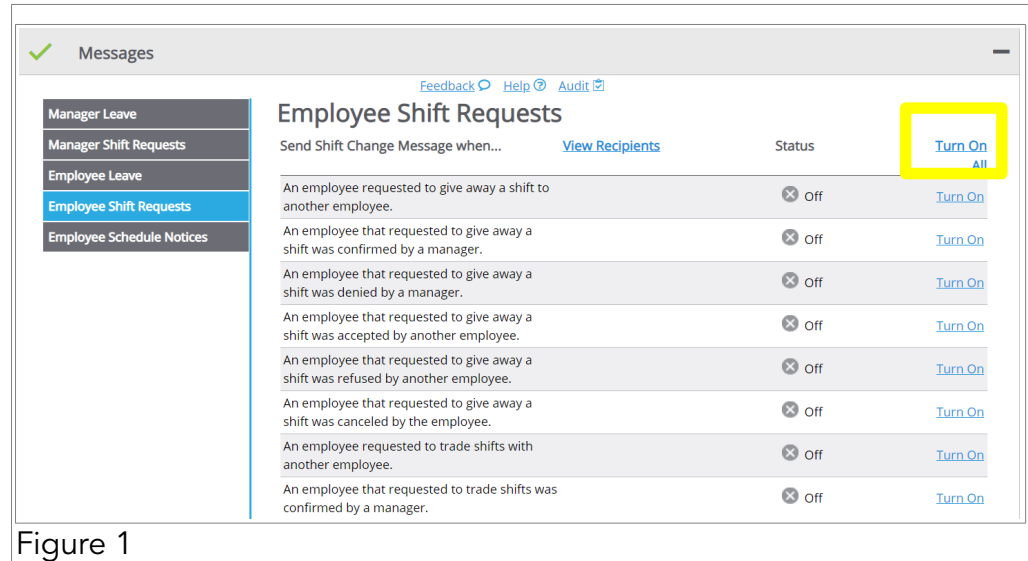


Figure 1

You can determine if the same notifications are sent out for shift trades and shift bids. (Figures 1 & 2)

Each of these notifications can be customized by schedule to meet your organization's needs.

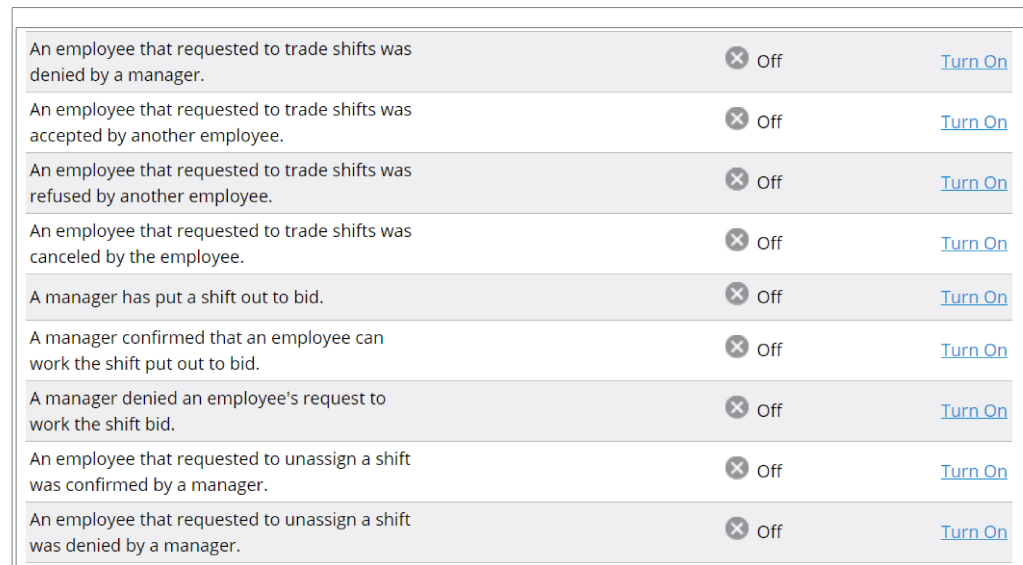


Figure 2

Managers Color Bar

One of the crucial parts of any schedule is setting up managers since they will determine how the schedule is to be filled and organized.

To set up managers within StaffReady Scheduling, first navigate to the schedule you wish to set up managers for and then locate the **Managers** color bar. (Figure 1)

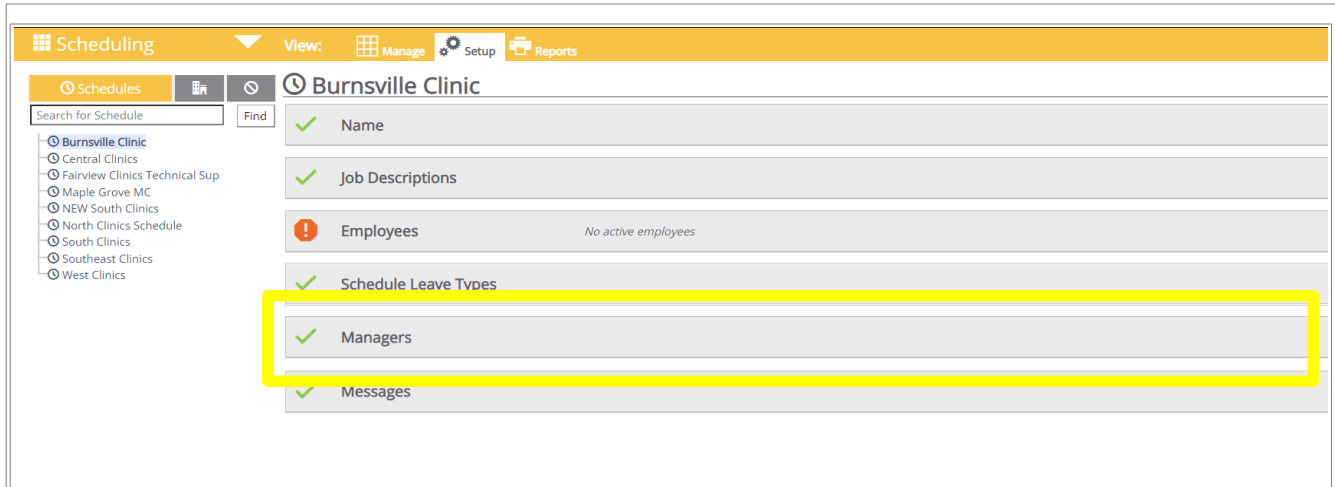


Figure 1

Selecting the **Managers** color bar will expand the panel. From here you can setup new managers, remove existing managers, or edit settings for existing managers.

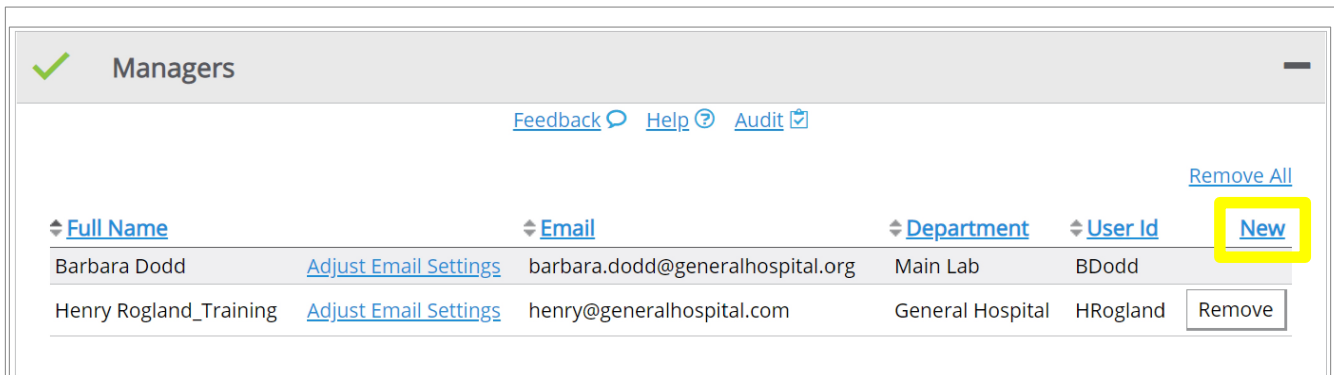


Figure 2

To begin adding a new manager, select the **New** button. (Figure 2)

This will open the **Add Manager** pop-up window.

Adding a Manager and Email Settings

Begin typing the name of the employee you want to set as manager and the field will auto-populate. You can add as many managers as you wish to but you must do so one at a time, opening the pop-up window each time. Selecting the **Save Changes** button will save the employee or employees as a new manager. (Figure 1)

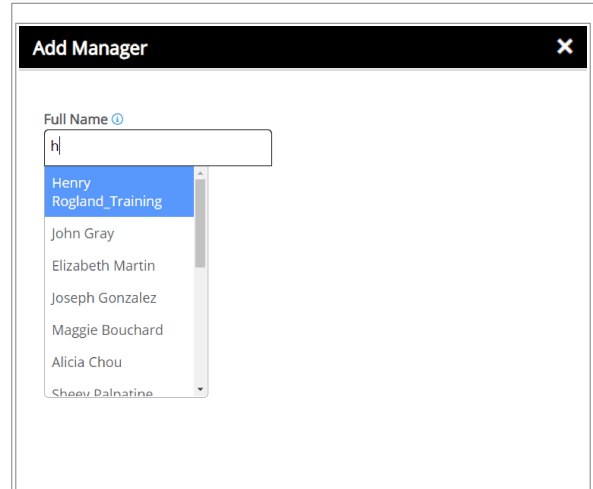


Figure 1

Once the employee is set up as a manager you can then edit their email settings. Select the **Adjust Email Settings** link adjacent to the employee's name in the **Managers** color bar panel. (Figure 2)

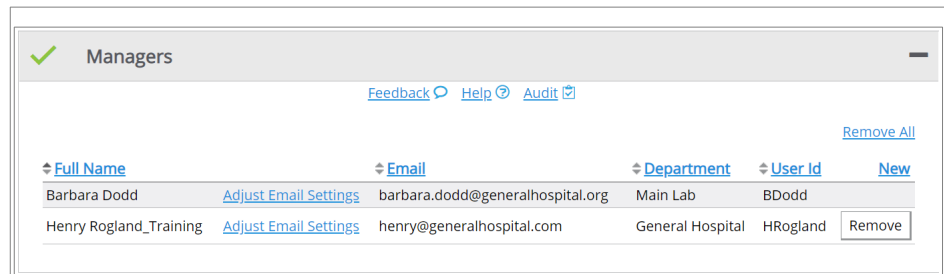


Figure 2

From the **Schedule Manager Email Settings** popup window you can determine when notification messages are sent. You can choose to have messages sent when a leave request is made, when a leave request was deleted, or when a leave request was set to See Schedule. (Figure 3)

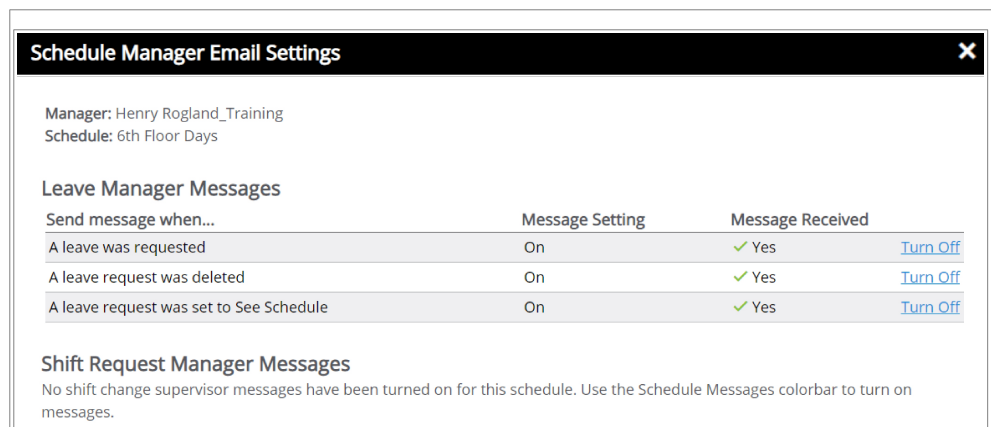


Figure 3

Shift Request Manager Messages are turned on from the **Messages** color bar panel which is covered on page 3.

Resources

This concludes the User Guide for **Messages** and **Managers**. We hope that this user guide has helped you understand how to set up automated messaging to employees and managers using the StaffReady messaging system.

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.

Employee Prerequisites	PDF Document
Manage Leave and Shift Trade Requests	PDF Document
Modify Schedule Menu	PDF Document