



Modify Schedule User Guide

Scheduling Module



Introduction

The **Modify Schedule** User Guide will provide an overview of schedule modification including layout, button functions, and navigation.

The **Modify Schedules** menu in the Manage tab is where administrators manage their schedule and make changes to an existing or future schedule. From the menu of Modify Schedule options, administrators can edit, move, copy, unassign, delete, explain shift, or put a shift up for bid.

Quick schedule changes can now be made with a few clicks instead of hours of manual editing. Real-time, cloud-based visibility of scheduling elements allows for greater schedule accuracy and satisfaction, frequently improving employee morale.

Once you've mastered the basics of the Modify Schedule functionality you will be able to efficiently edit schedules to meet your staff management needs.

Other related topics are listed on the Resources Page.

Table of Contents

Please select any topic to skip to that section.

Edit	3
Move	4
Copy	5
Unassign	6
Explain	7
Delete	8
Bid	9
Add, Repeat Add, & Remove Add	10
Note & Repeat Note	11
Resources	12

Edit

The **Edit** function allows you to make adjustment to an individual shift within a set schedule period. This is useful for making micro changes to a single shift and is also less time intensive than editing a template.

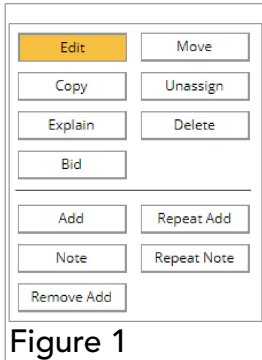


Figure 1

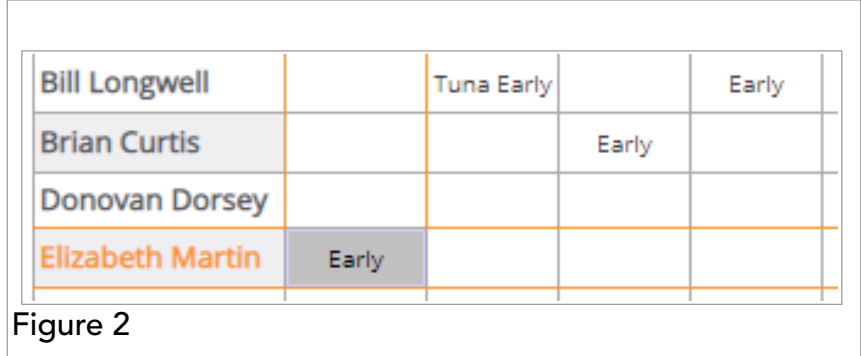


Figure 2

To begin, select the **Edit** button from the Modify Schedule Menu (**Figure 1**) and then select the shift you wish to edit on the Manage grid. (**Figure 2**)

From the **Edit Shift** menu (**Figure 3**) you can change the location of the shift, start time, and the length of time for the unpaid break. (If there is no unpaid break, enter 0) The menu will display the end time of the shift on the far right. Remember to **Save Changes** for the edits to apply to this shift.

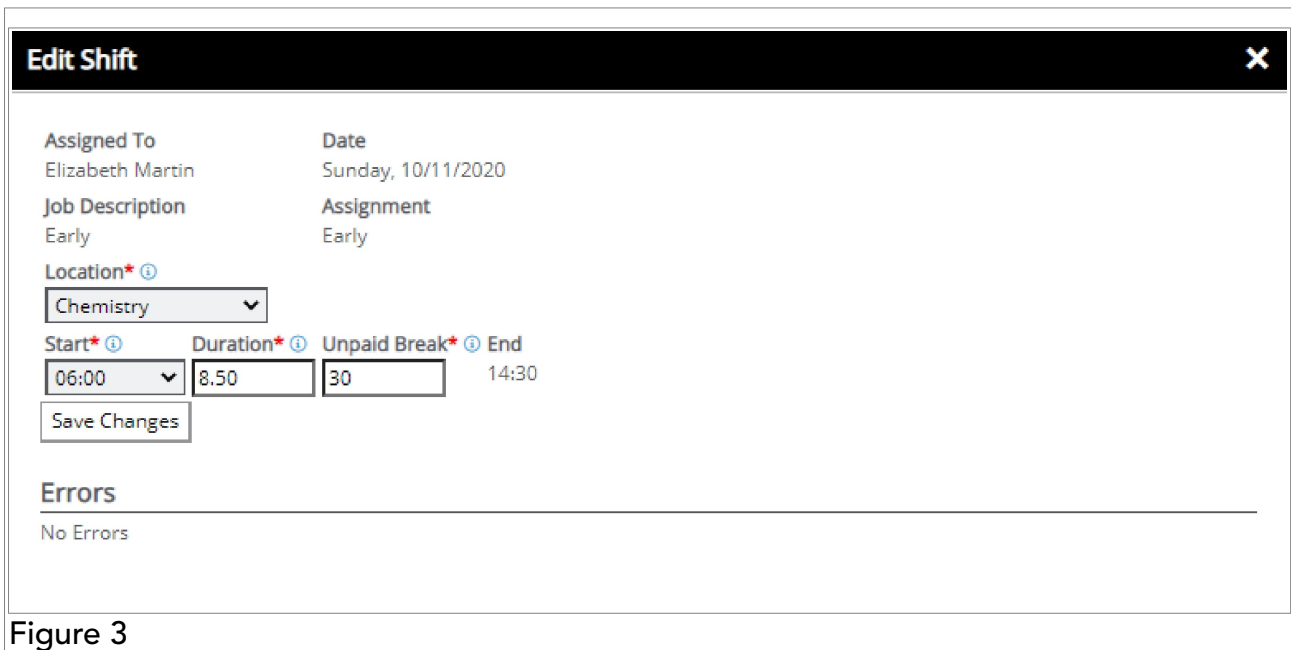


Figure 3

Move

The **Move** function allows you to move a shift from an existing position to a new position on the schedule grid associated with an employee. This includes moving shifts from the **Unassigned** shifts area onto the schedule grid but not from the grid to the unassigned shifts area. For this function see the section on Unassign. This does not include moving shifts into the **Shift Bids** area. For shift bids, see the Shift Bid section of this document for more information.

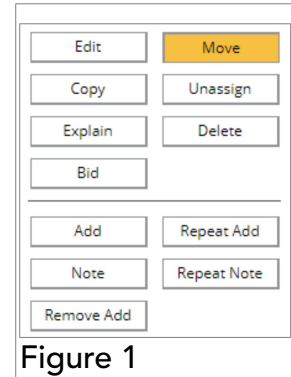


Figure 1

To move a shift from one employee to another, simply select the shift from the calendar grid (**Figure 2**) and then select the appropriate cell for the employee you wish to move the shift to. (**Figure 3**)

Bill Longwell		Tuna Early		Early	
Brian Curtis			Early		
Donovan Dorsey	Early				
Elizabeth Martin					

Figure 2

Once you select a cell to move it will be highlighted gray.

If you attempt to move a shift that falls outside of your account permissions, the shift will move, you will receive an error message (**Figure 4**) and your change will revert to what it was previously.

Bill Longwell		Tuna Early		Early	
Brian Curtis			Early		
Donovan Dorsey					
Elizabeth Martin	Early				

Figure 3

Copy

The **Copy** function is used when you wish to duplicate a single shift from one employee to another while still making sure that the first employee retains that shift. This is useful for making micro adjustments to the schedule on a one off basis.

Brian Curtis		Early	Early			Early	
Donovan Dorsey	Early						
Elizabeth Martin							

Figure 1

Edit	Move
Copy	Unassign
Explain	Delete
Bid	
Add	Repeat Add
Note	Repeat Note
Remove Add	

To begin, first select the shift that you wish to copy (**Figure 1**) and then select the appropriate cell for the employee you wish to copy the shift to.

An exact copy of the shift will be generated and assigned to your designated recipient. (**Figure 2**) If you have the correct permissions, you will see a message (**Figure 3**) that the shift copied successfully.

Brian Curtis		Early	Early			Early	
Donovan Dorsey	Early						
Elizabeth Martin	Early						

Figure 2

✓
Successfully copied the shift

Figure 3

Note: The **Copy** function only allows you to copy shifts to other employees on the same day as the shift you have selected to copy occurs.

Unassign

The **Unassign** function is useful for when you wish to retain the shift as part of your shift pool without deleting the shift entirely or if you wish to assign it to another employee later on.

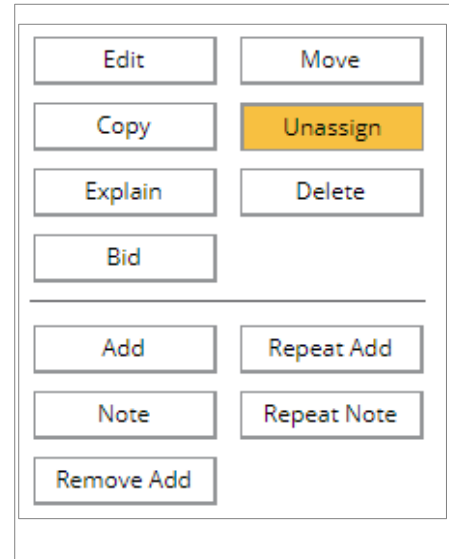
Selecting **Unassign** and then an existing shift assignment id will remove the shift from the employee it was assigned to and move it to the unassigned shifts section at the top of the Manage grid.

If the calendar change was successful, the successfully assigned shift window will briefly appear.

Any shift that you unassign or that was not initially assigned will be placed in the Unassigned Shifts section at the top of the calendar grid. **(Figure 1)**

To reassign an unassigned shift, simply select **Move** and then the calendar cell for the employee you wish to assign it to and the shift will be reassigned.

As before, if you do not have permissions to make your desired changes a red error message will display indicating that you do not have adequate permissions and any changes you made will revert and not be saved.



Employee Name	10/18	10/19	10/20	10/21	10/22
	Sun	Mon	Tue	Wed	Thu
Unassigned Shifts	On Call HE Days:1		On Call 2		

Figure 1

Explain

The **Explain** function is a unique feature for when you need an in depth analysis of a given shift. By selecting **Explain** and then your desired shift id, you bring the **Explain Shift Assignment** menu (Figure 1).

From the **Explain Shift Assignment** menu, you are able to view the shift history, any errors that occurred during the build process and where they occurred, and each step that the shift went through during schedule generation. You can view the name of the employee assigned to it, location, date, beginning and end time, whether it was auto assigned or manually assigned, who changed it most recently and the date it was last edited.

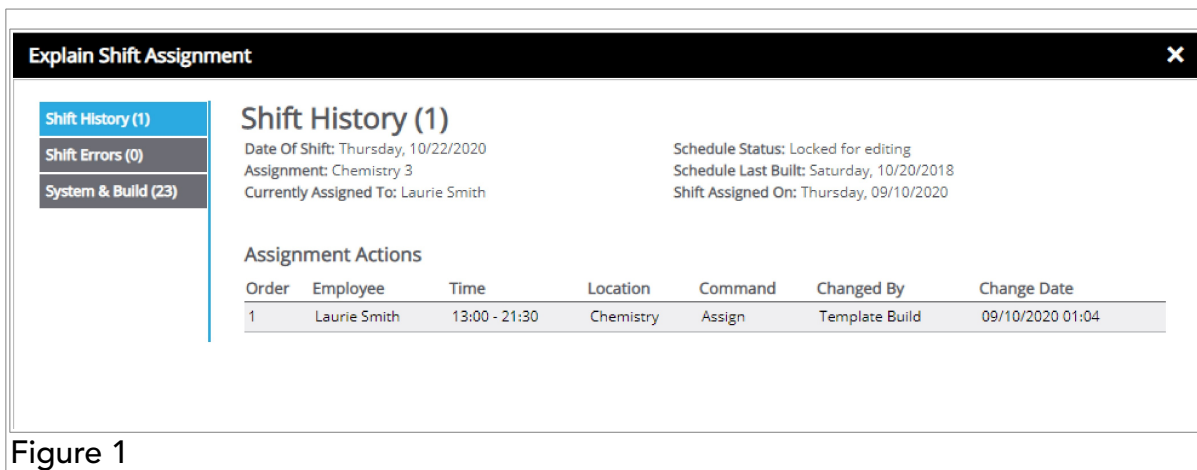
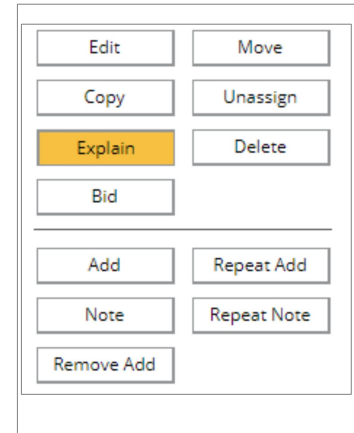


Figure 1

By selecting **System & Build**, you can view which employees have had this shift assignment previously, the other assignments they had at the time, and whether or not there were any errors. If an evaluation has been done for the shift, you will be able to view that also. (Figure 2)

From a troubleshooting standpoint, this is also useful for situations where you may have assigned a shift to an employee but it doesn't appear on the schedule. This can indicate an employee is not qualified for the shift, not available, or they were already assigned to a shift at the same time.

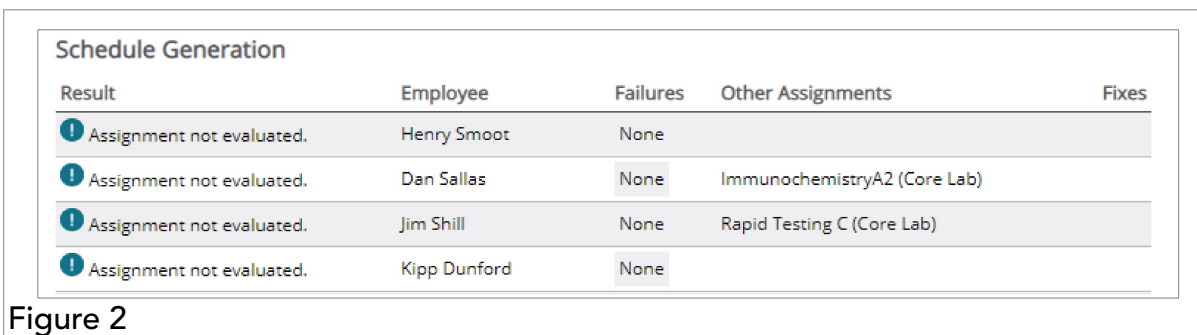


Figure 2

Delete

The **Delete** function will delete a shift in entirety from a designated schedule period. If you are trying to make a permanent change to your schedule period, this is the option to use. Using Delete will not remove shifts from past or future schedule periods. To permanently remove the shift from circulation, please consult the **Job Descriptions** user guide.

If you are not sure whether or not you will require this shift later, we recommend using the **Unassign** function as was previously described.

To delete the shift, select the delete function button (**Figure 1**) and then select the cell of the shift you would like deleted. The shift you selected will be highlighted in gray. (**Figure 2**)

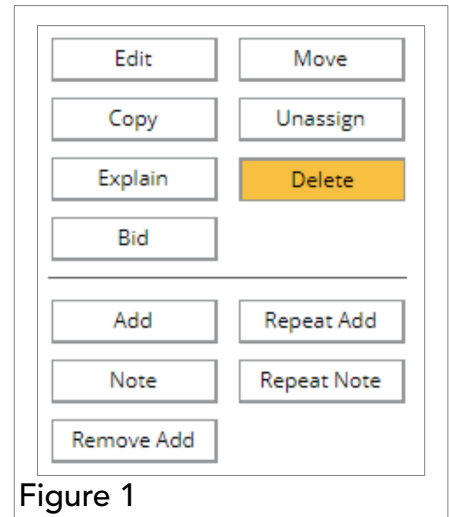


Figure 1

You will receive an additional prompt to confirm shift deletion (**Figure 3**). Selecting okay will delete the shift.

Bill Longwell		Tuna Early		Early	
Brian Curtis			Early		Early
Donovan Dorsey					
Elizabeth Martin	Early				

Figure 2

If the shift deletion was successful, you will see a small dialog box appear in the bottom left corner confirming the deletion. (**Figure 4**)

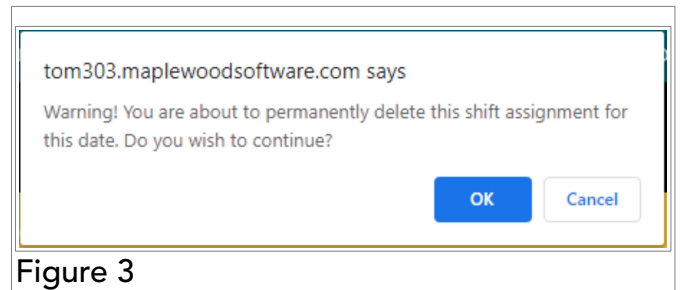


Figure 3

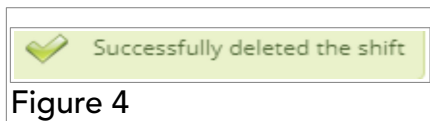


Figure 4

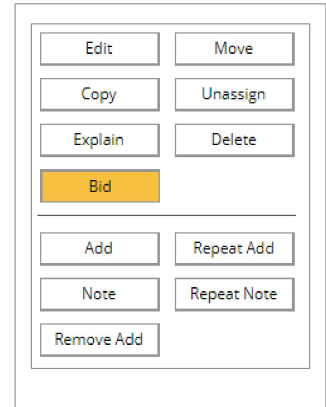
Note: Deletion is permanent and any shift deletions cannot be recovered. Any deleted shifts that you wish to recover will need to be recreated entirely in order to be used again.

Bid

The **Bid** function allows you to put shift assignments in the Unassigned Shifts section of the calendar grid out for staff to bid on. Once a shift bid has been created, bid recipients can accept or deny it. For further information on how employees accept and deny shift bids, please see our My Schedule [user guide](#) in the Training Media section of StaffReady.

To begin, select the **Bid** function and then select an unassigned shift that you would like to post for staff to bid on.

In the new shift bid window, you can remove and add employees to the bid recipients list.



Shift Bid Filters

To filter out employees who are not available for the shift assignment, select **Available** from the recipient filters list. **(Figure 1)**

To filter out employees who are currently working full time, select **Full Time**.

To filter out employees who would receive overtime if they were to work the shift assignment, select **No Overtime**.

To filter out employees currently scheduled, select **Scheduled Today**.

To filter out employees by skill level, select **Skill Level**.

To filter out employees by their qualifications, select **Qualified**.

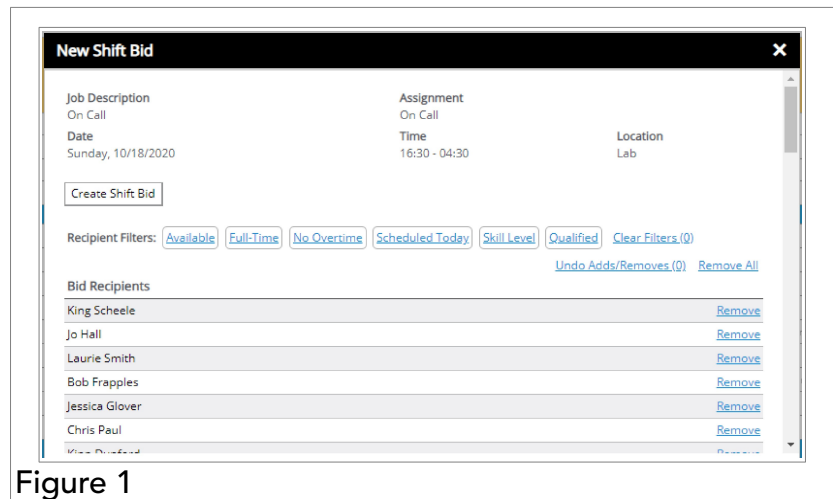
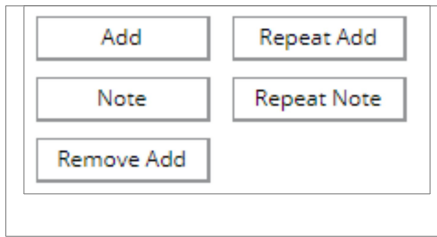


Figure 1

Add, Repeat Add, & Remove Add

Occasionally, you may need to create a new shift assignment for a schedule period. You would use the **Add** function when the shift you are seeking to create has unique characteristics from currently existing shifts.

To begin, select the add button and then a blank schedule square for an employee within the calendar grid. This will open the **Add** shift menu. (Figure 1)



You will need to select the job description type, assignment ID, location, start and end time, and duration of the unpaid break, if any. Saving your changes will add the newly created shift to the schedule.

Figure 1

Selecting **Repeat Add** will allow you to duplicate the shift that you just created using the **Add** function.

Note: You must use Add and then **Repeat Add** for the **Repeat Add** function to work as intended. You will receive an error message if this has not been done. (Figure 2)

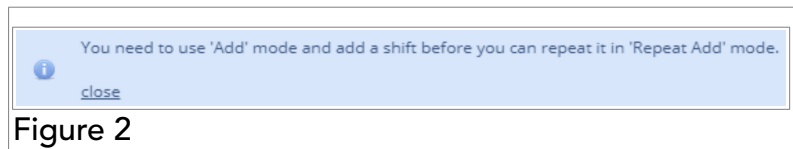


Figure 2

Selecting **Remove Add** will allow you to permanently remove any of the shift assignments you just added. (Figure 3) This will only apply to recently created shifts and you will need to use the **Delete** function to remove older shifts.

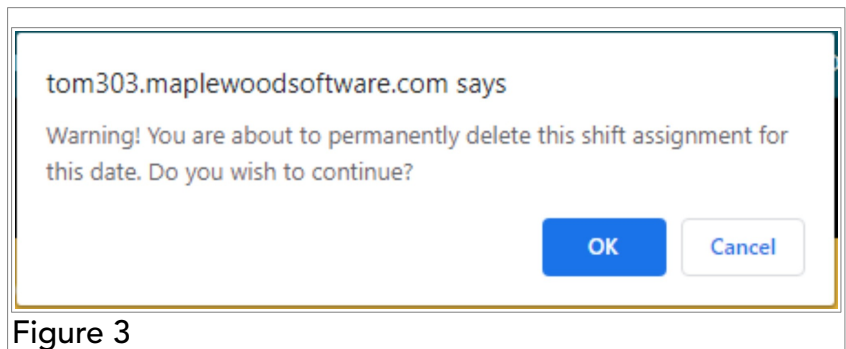


Figure 3

Note & Repeat Note

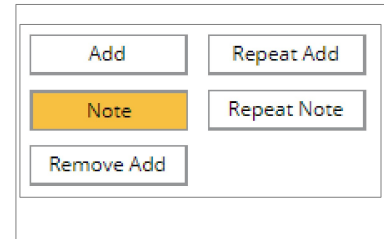
If you would like to add extra notes to a shift assignment for an individual employee, you will want to use the **Note** function. This is useful if you need to note an early departure or perhaps that the employee was attending a training at some point during the shift.

To begin, select the **Note** button and then select an existing shift within the calendar grid. This will open the **Edit Note** menu. (Figure 1)

You will need to first enter a **Note Label** (the name of the note). Then enter the note text (brief description of what you're trying to communicate, select a custom color, and who the note is visible to. You can choose all employees, just that individual employee, or schedule managers only. When finished, select save changes and your note will be added to the shift.

If you wish to add the note to multiple shifts, select **Repeat Note** and then select all shifts in the calendar grid you wish to apply the note to. Once you select Save Changes, the note will appear on the schedule highlighted yellow. (Figure 2)

You must enter a note first to be able to use **Repeat Note**. If you have not done so, you will receive an error message. (Figure 3)



Edit Note

Note
Day Shift on 10/18

Note Label* ⓘ

Note Text* ⓘ

Note Color* ⓘ

Visible To* ⓘ

All Employees ▼

Figure 1

Note: When making a note visible to all employees, only the note text will show. It will not indicate which employee the note was assigned to.

Donovan Dorsey		Early
Elizabeth Martin	Test	
Joseph Gonzalez		

Figure 2

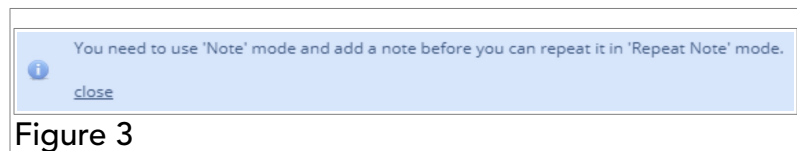


Figure 3

Resources

This concludes the user guide for the **Modify Schedule Menu**. While not being an exhaustive resource, we hope that you have at least a cursory knowledge of this feature and how it functions within the entire framework of the scheduling module.

For more focused Guides on the functions 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

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