



## New Calendar User Guide

---

### Scheduling Module

---



## Introduction

---

This user guide will cover all the improvements and features provided by our updated calendar. This calendar will eventually replace our old version of the calendar (the Legacy Calendar) and is designed to be more mobile friendly and easy to use.

This user guide will cover all basic operations within the new calendar, where information is located, and how to make new leave requests.

## Table of Contents

---

(Please select any topic to skip to that section)

<a href="#">Accessing the New Calendar</a> pg. 3
<a href="#">Viewing Calendar Data, Assigned Shift, Shift Requests</a> pg. 4
<a href="#">Shift Bids and Leave Requests</a> pg. 5
<a href="#">Schedule Notes and My Tasks</a> pg. 6
<a href="#">Schedules</a> pg. 7
<a href="#">Submitting a New Leave Request</a> pg.8
<a href="#">Resources</a> pg. 9

# Accessing the New Calendar

The New Calendar is available from the Home screen to the right of the Legacy Calendar. (Green box, Figure 1)

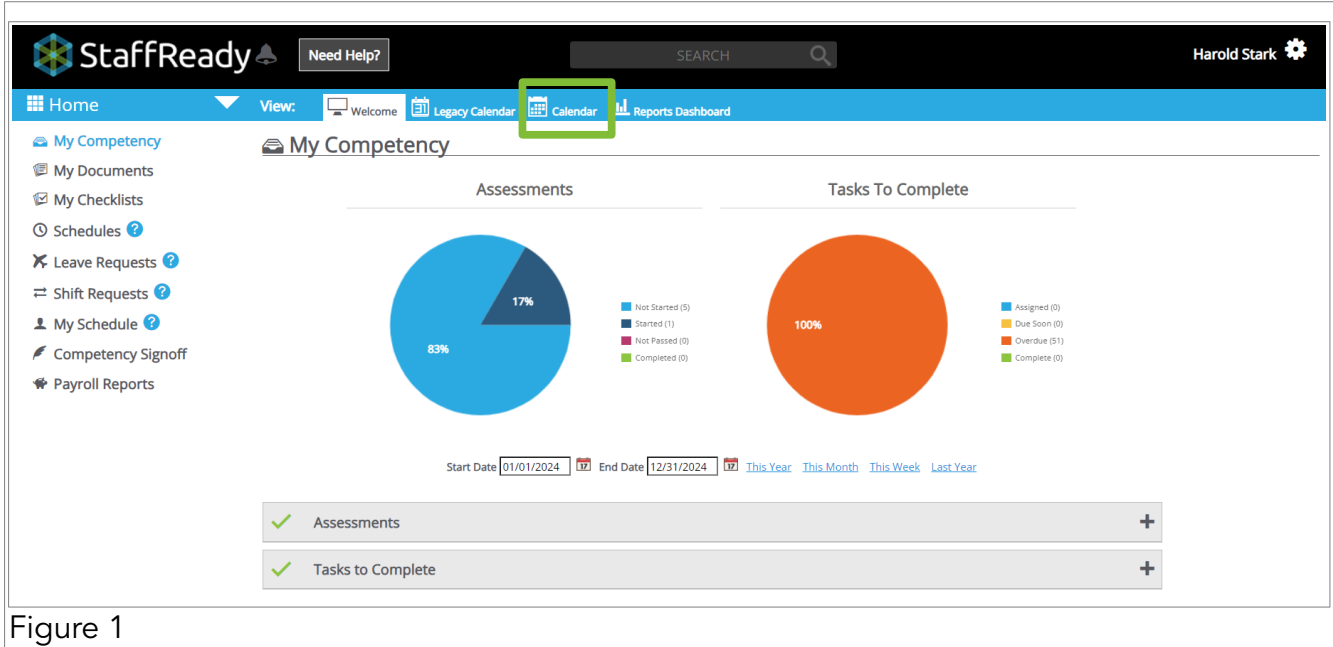


Figure 1

Select that tab and the new calendar will open, the Legacy Calendar tab will not appear while the new calendar is being accessed. From the new calendar, your assigned shifts, leave or shift requests, and notes will be visible as with the legacy calendar. (Figure 2)

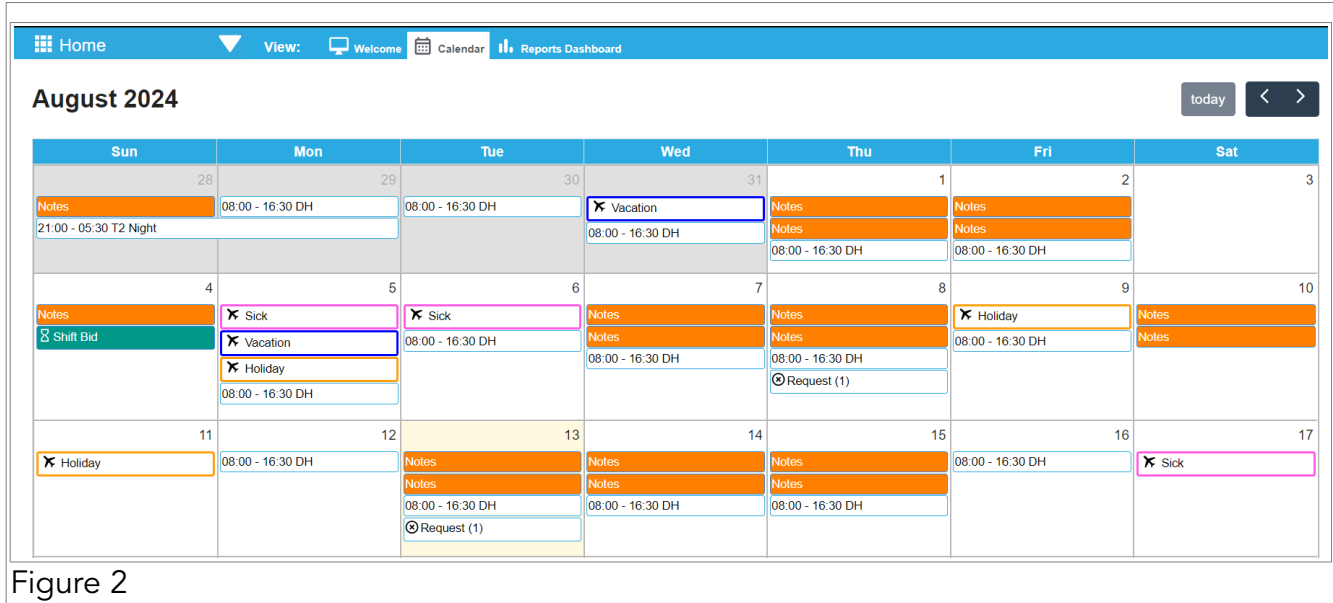


Figure 2

# Viewing Calendar Data

Select any calendar cell to open the calendar popup menu on the right side of the screen. (Figure 1)

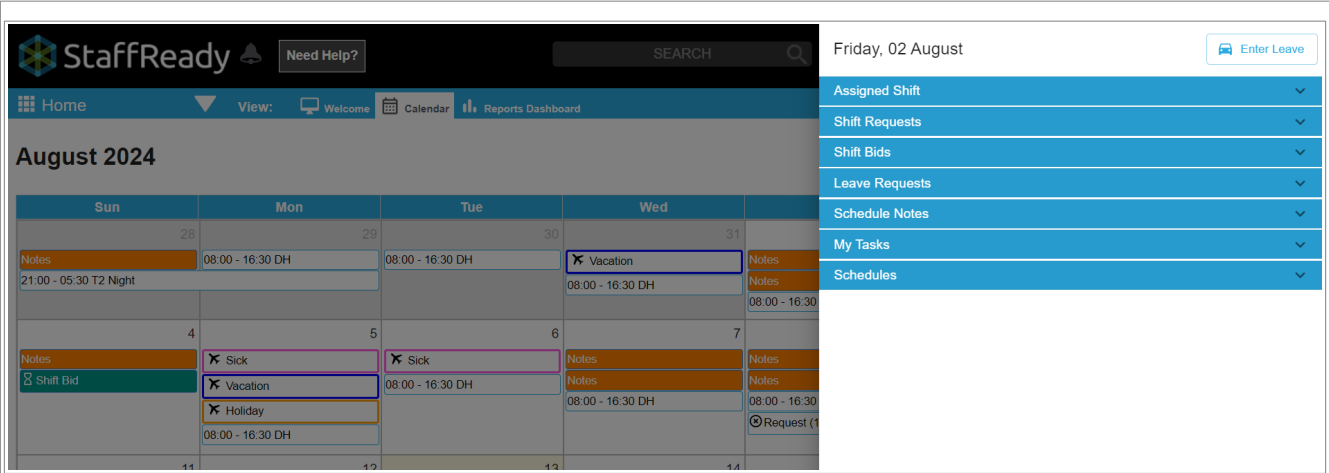


Figure 1

From here, you can select any of the menu entries to view information about that day.

## Assigned Shift

Selecting Assigned Shift will open the Assigned Shift tab. (Figure 2)

The name of the shift, its date and duration, site, and location will be displayed.

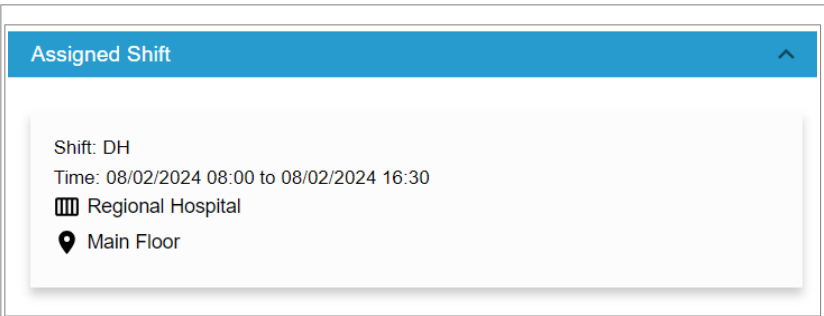


Figure 2

## Shift Requests

Selecting Shift Requests for a given day will display any of your active shift requests that you've submitted. (Figure 3) Selecting details (Green box, Figure 3) will display any specifics about the shift such as if the request would create a conflict. (Figure 4)

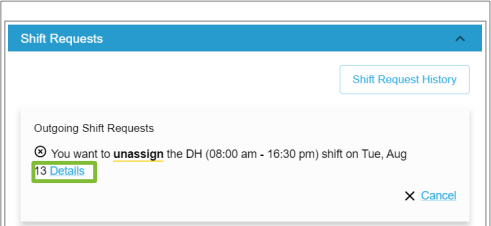


Figure 3



Figure 4

# Shift Bids

Selecting Shift Bids will display any bid requests that require your response on a given day. You can either agree or disagree with the bid to resolve it. (Figure 1)

As with Shift Requests, all pertinent shift information will be displayed.

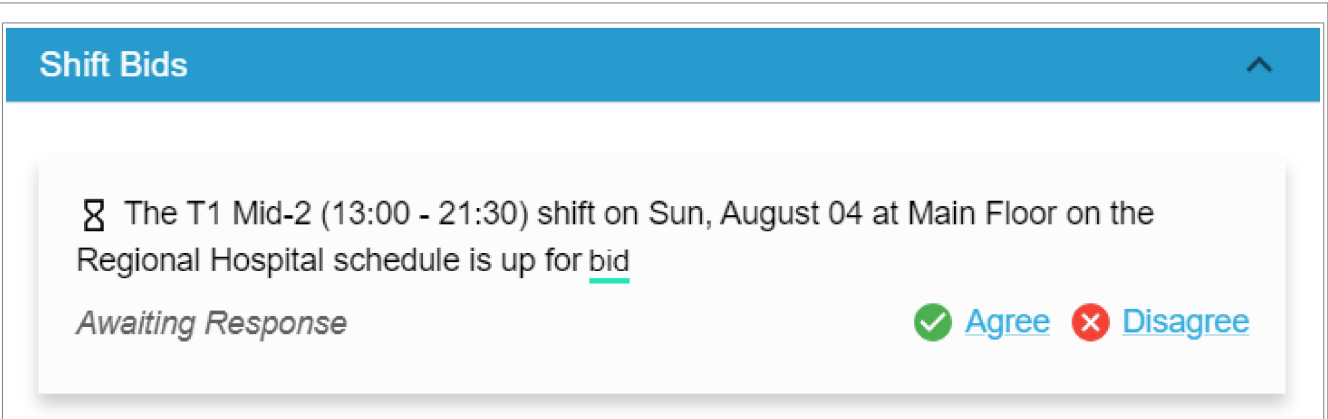


Figure 1

# Leave Requests

Selecting Leave Requests will allow you to view any leave requests that you have for a given day, as well as any employees who have previously requested leave as well as what the status of their leave request is. (Figure 2)

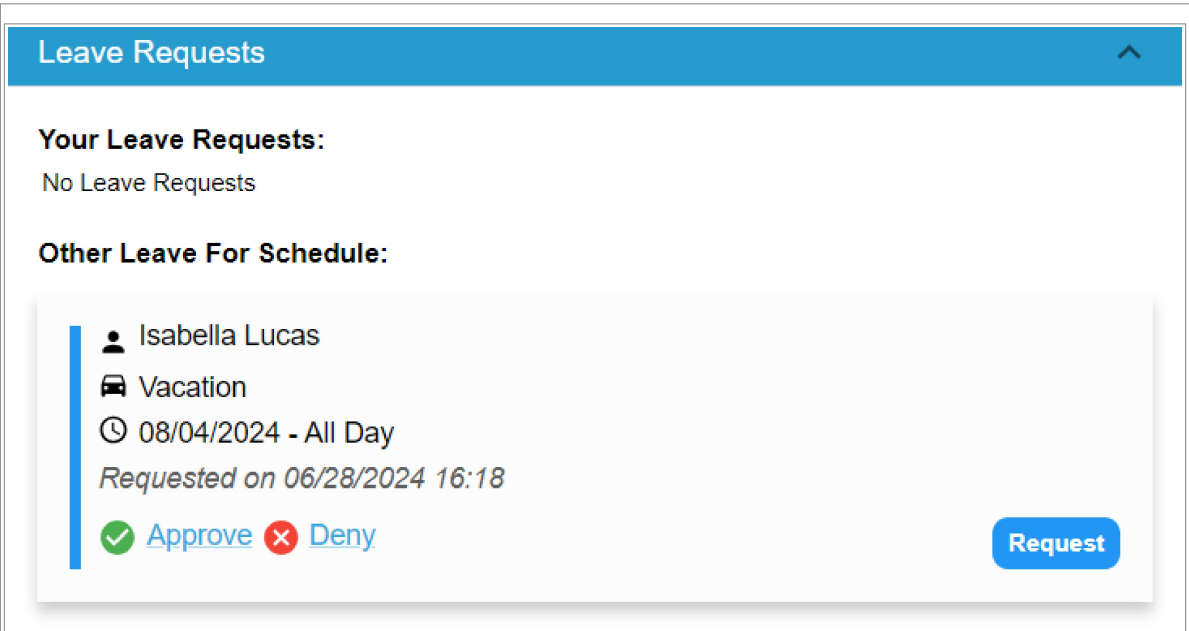


Figure 2

# Schedule Notes

Selecting Schedule Notes will display any notes for a given day. (Figure 1) They will either be labeled as Private which only you are able to see, or All which is visible to each employee on that schedule.

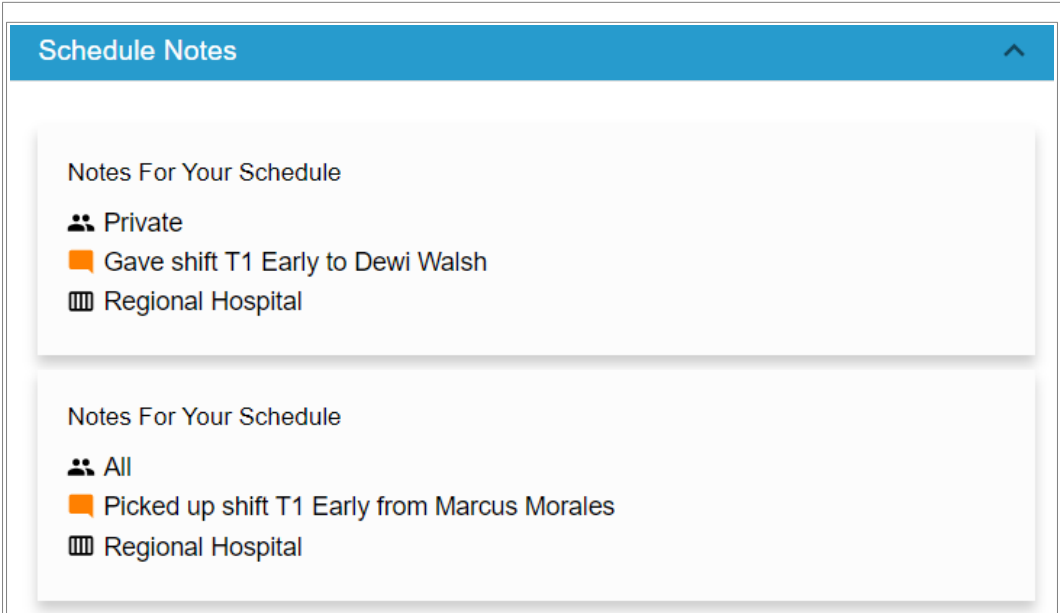


Figure 1

# My Tasks

Selecting My Tasks (Figure 2) will display a list of all assessments and tasks with the number of overdue, assigned, and upcoming tasks for **Assessments**, and overdue, due soon, assigned, and upcoming for **Tasks** respectively.

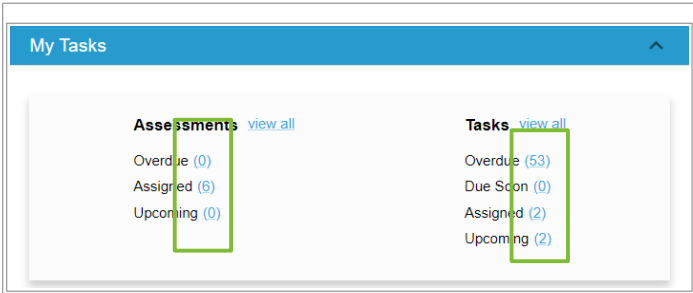


Figure 2

Selecting any of the blue hyperlinks (Green box, Figure 2) will open the Tasks menu.

Depending on your role and permissions, you will have the option to view statuses, document, requirement, and skillset information, assigned and due dates, and an option to begin tasks. (Figure 3)

The screenshot shows a 'Tasks' window with a table of task entries. The table has columns for Subject, Document, Requirement, Skillset, Status, Assigned, and Due. Each row includes a 'Start Task' link. The data is as follows:

Subject	Document	Requirement	Skillset	Status	Assigned	Due	
Helen Stewart	CL: ABL 90 (CC)	CL: ABL 90 (GH)	ABL 90 (GH)	Overdue	01/01/2024	06/29/2024	<a href="#">Start Task</a>
Isabella Lucas	CL: ABL 90 (CC)	CL: ABL 90 (GH)	ABL 90 (GH)	Overdue	01/01/2024	06/29/2024	<a href="#">Start Task</a>
Thomas Earl	CL: ABL 90 (CC)	CL: ABL 90 (GH)	ABL 90 (GH)	Overdue	01/01/2024	06/29/2024	<a href="#">Start Task</a>
Andres Plourde	CL: ABL 90 (CC)	CL: ABL 90 (GH)	ABL 90 (GH)	Overdue	01/01/2024	06/29/2024	<a href="#">Start Task</a>
Rusiko Sieger	CL: ABL 90 (CC)	CL: ABL 90 (GH)	ABL 90 (GH)	Overdue	01/01/2024	06/29/2024	<a href="#">Start Task</a>

Figure 3

# Schedules

Selecting Schedules will display details for all schedules you are assigned to. (Figure 1)

Selecting the view details button will open the View Schedules menu. (Figure 2)

From here you can select from the dropdown menu any schedule that you are assigned to, and then below it you will be able to view if a schedule has been published in the HTML field. (Figure 3)

Selecting any of the view links (Green box, Figure 3) will open a downloadable version of the schedule. (Figure 4)

It will include a full schedule breakdown for everyone assigned during the schedule period and the shift they are assigned to, and can be downloaded in portrait or landscape format.

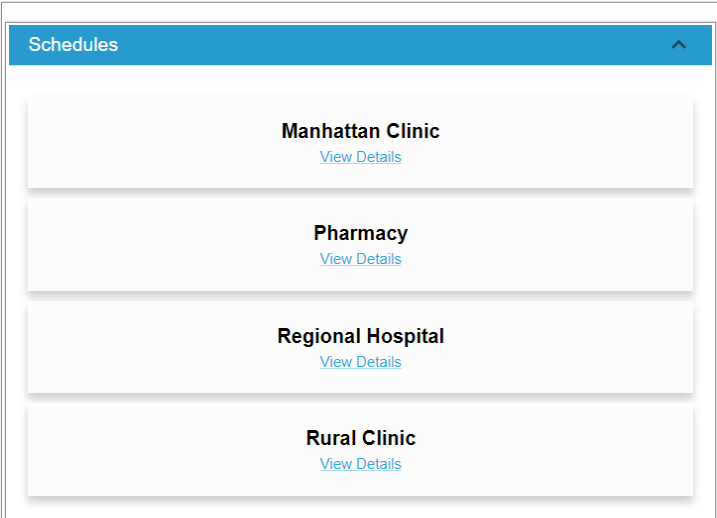


Figure 1

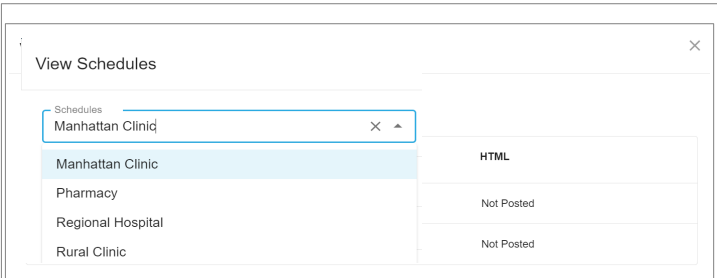


Figure 2



Figure 3

The screenshot shows the StaffReady logo and two buttons: "Generate Portrait PDF" and "Generate landscape PDF". Below is a table with "Schedule Period(s) shown" (08/18/2024 to 08/31/2024) and "Publish Date(s)" (07/03/2024 13:43). The main table is a grid with columns for dates from 8/18 to 8/31 and rows for staff members: Alfonso Sims, Devin Mills, Dominic Payne, Gregory Reid, Latoya McBride, and Marcus Morales. A blue header row for "Tech 1" spans from 8/24 to 8/29.

Printed August, 13, 2024	8/18	8/19	8/20	8/21	8/22	8/23	8/24	8/25	8/26	8/27	8/28	8/29	8/30	8/31
<b>Name</b>	<b>Sun</b>	<b>Mon</b>	<b>Tue</b>	<b>Wed</b>	<b>Thu</b>	<b>Fri</b>	<b>Sat</b>	<b>Sun</b>	<b>Mon</b>	<b>Tue</b>	<b>Wed</b>	<b>Thu</b>	<b>Fri</b>	<b>Sat</b>
Alfonso Sims		T1 Mid	T1 Mid-2	T1 Mid	T1 Mid	T1 Mid-2			T1 Mid	T1 Mid-2	T1 Mid	T1 Mid	T1 Mid-2	
Devin Mills				T1 Night	T1 Night						T2 Early	T1 Night	T1 Night	
<b>Tech 1</b>														
Dominic Payne	T1 Early	T1 Early	T1 Early				T1 Early	T1 Early-2	T1 Early-2	T1 Early	T1 Early			T1 Early
Gregory Reid	T1 Mid	T1 Mid-2	T1 Mid				T1 Mid	T1 Mid	T1 Mid	T1 Mid-2	T1 Mid			T1 Mid
Latoya McBride	T1 Night-W	T1 Night					T1 Night	T1 Night-W	T1 Night-W					
Marcus Morales	T1 Early-2				T1 Early	T1 Early		T1 Early	T1 Early			T1 Early	T1 Early	T1 Early-2

Figure 4

# Submitting a New Leave Request

To submit a new leave request, select the Enter Leave button (Green box, Figure 1) at the top right corner of the menu.

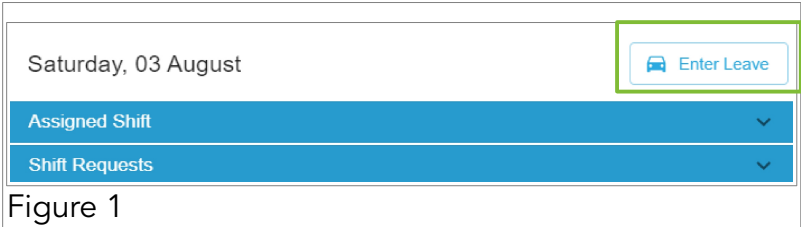


Figure 1

This will open the employee schedule management popup menu. (Figure 2)

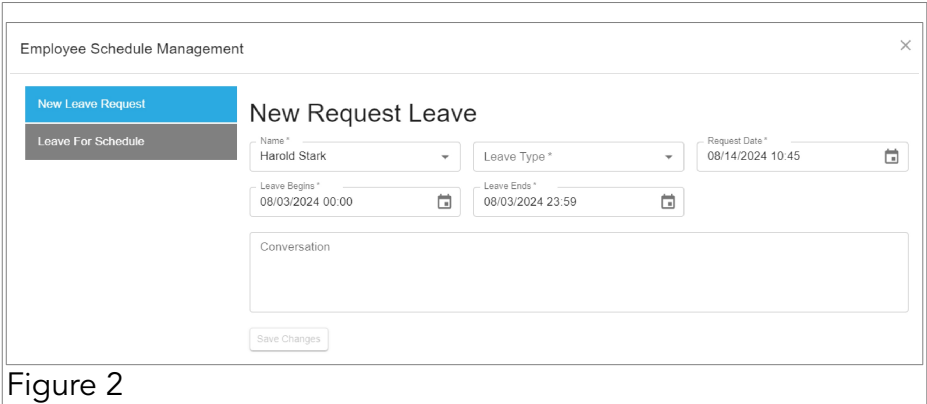


Figure 2

Enter in your start and end dates and the leave type in the leave drop down menu. (Green box, Figure 3)

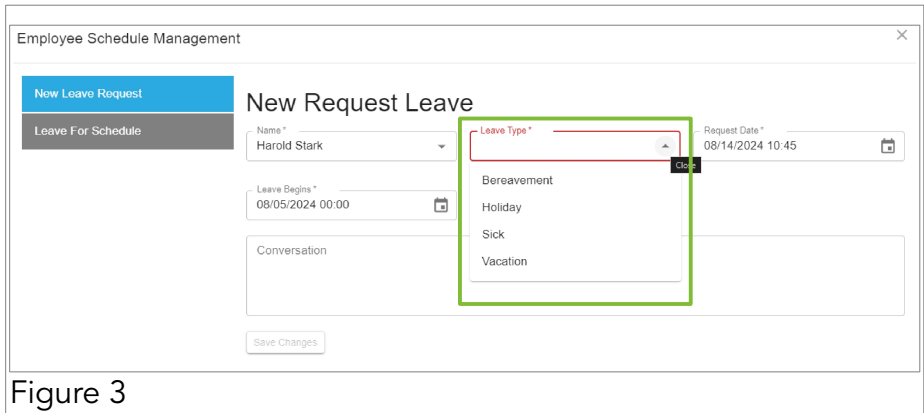


Figure 3

Managers will also be able to switch which employee the request is for.

Selecting the Leave for Schedule tab as a manager will allow you to approve or deny leave requests for any day, not just the day that was initially selected. (Figure 4)

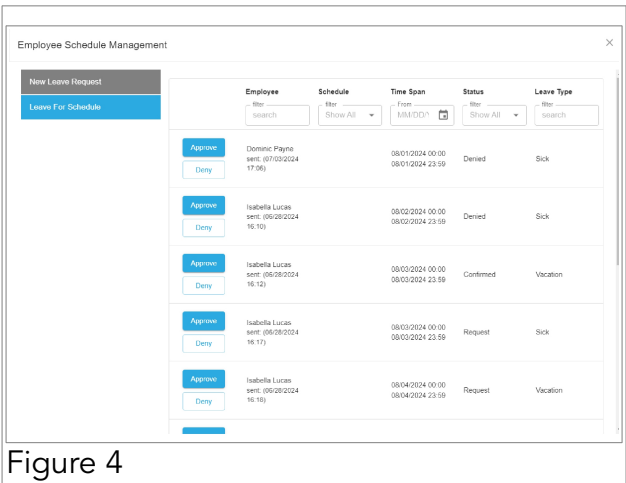


Figure 4

# Resources

---

This concludes the User Guide for the **New Calendar**. 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 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="#">Holiday Setup</a>	<a href="#">PDF Document</a>
<a href="#">Leave Types</a>	<a href="#">PDF Document</a>
<a href="#">Leave Calendar</a>	<a href="#">PDF Document</a>
<a href="#">My Schedules</a>	<a href="#">PDF Document</a>