



Schedule Observers User Guide

Scheduling Module



Introduction

The Schedule Observers feature allows staff read-only access to schedules that they do not manage or are not on themselves. Read-only access allows staff to view schedules but not edit them.

Schedule Observers increases transparency between departments and precludes the need for separate login credentials used solely for viewing other schedules. This flexible feature assists managers in assigning multiple employees to be able to view current and future schedule periods which improves communication.

Once you've mastered the basics of Schedule Observers, you will be able to easily add new schedule observers and save significant time creating and managing schedules.

Other related topics are listed on the Resources page.

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Overview and Setup

Occasionally, you may have the need to set up non-manager personnel as schedule observers. This is useful because it removes potential single point failures from your schedule review process by having multiple people be able to view the schedule aside from schedule managers.

In order to utilize the **Schedule Observers** feature, it will need to be enabled by StaffReady support. **Additionally please note that a standard employee's primary schedule will not be listed on the Welcome screen's Schedules color bar until an administrator or a member of our support team add them as an observer on that schedule. This can be done from the Staff module in the Employees tab with the Observed Schedules color bar or with the Observers color bar in the Setup tab of the Scheduling module.**

The service hours and contact information for the StaffReady customer Support Team are listed below.

Our service hours are Monday through Friday, 6am to 5pm Pacific.

Phone: 1-877-229-5230

[Online Support Form](#)

Setup

Once this feature has been enabled by our Support Team, you should see the **Observers** color-bar appear within the Schedule Setup tab. (Figure 1)

You will be able to set observers for as many schedules as you have access to.

Selecting the **Observers** color-bar will expand it and display the list of employees currently set as observers within that schedule.

By default, no employees are set up as observers.

Select the **Add Observer** button (Figure 2) to open the **Add Employees** menu.

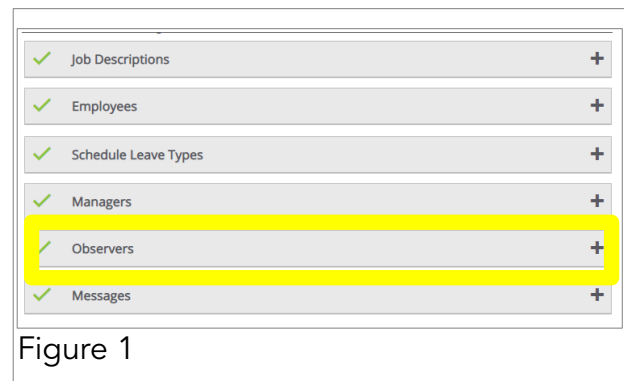


Figure 1

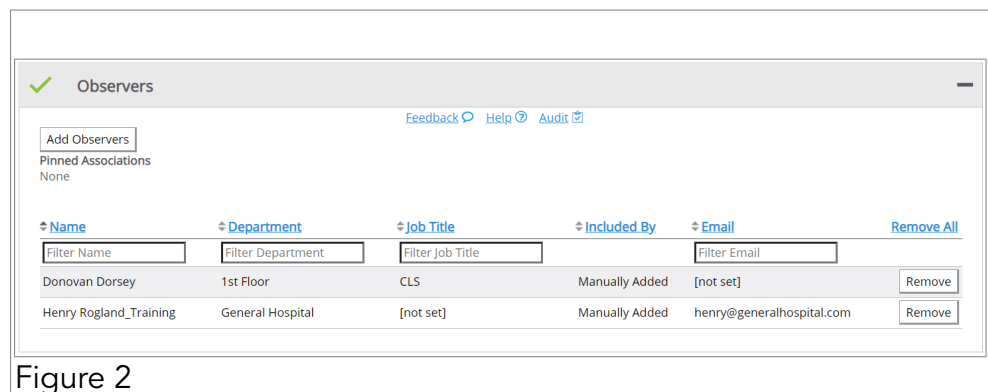


Figure 2

Add Employees Menu

From the **Add Employees** pop-up window (Figure 1), you can search for specific employees that you want to set as schedule observers. You can search by name, department, job title, or by schedule.

Once you have found the employee you wish to add, select the **Add Employee** button (Figure 2).

The employee you selected will now appear below the **Observers** color bar within the **Scheduling Setup** tab.

If you choose to search by department, you can choose to select all employees in that department or search for an individual employee. (Figure 3)

If you wish to remove any or all employees from the observer list being an observer, select the **Remove** button on the appropriate rows or the **Remove All** link to clear the entire list. (Figure 4)

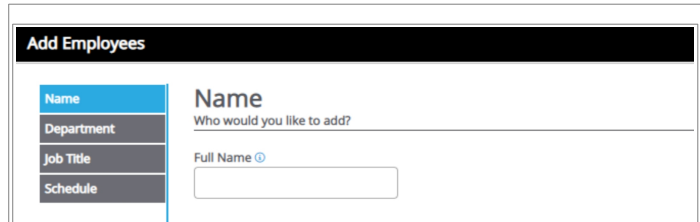


Figure 1

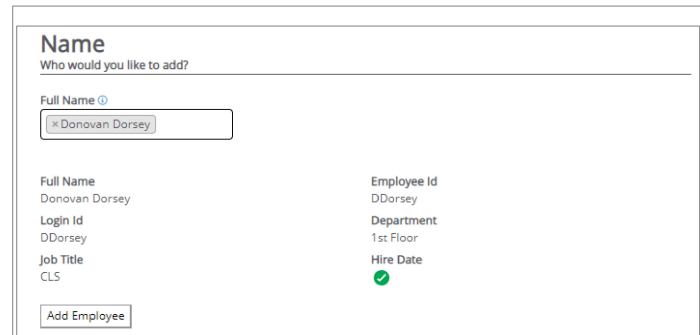


Figure 2

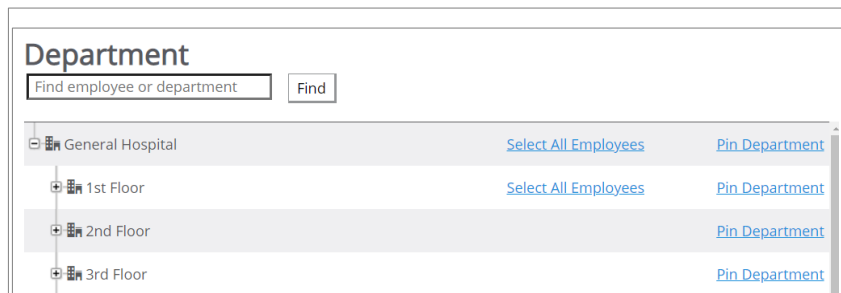


Figure 3

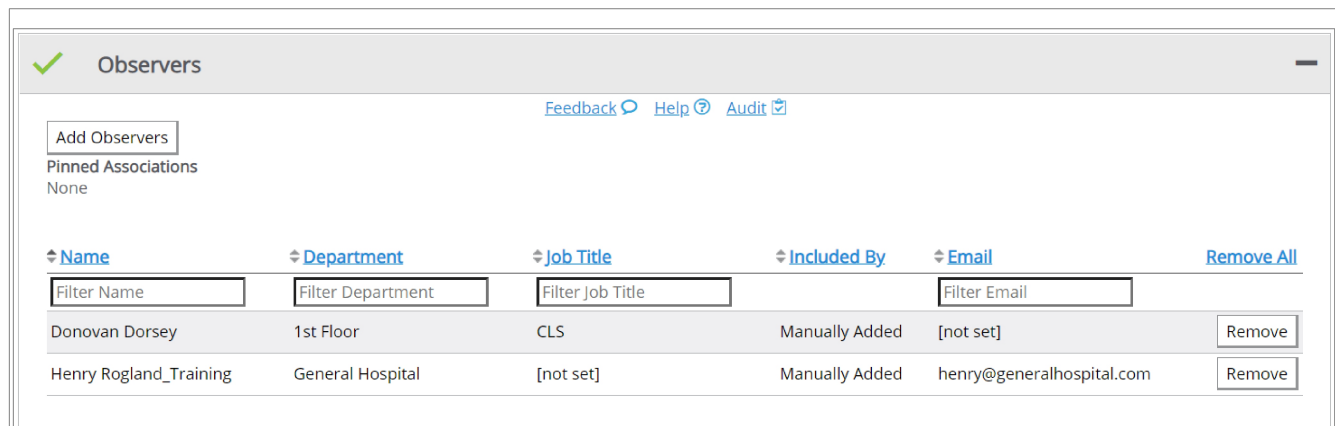


Figure 4

Using Pins

Another time-saving option you can choose when setting up schedule observers is using pins. Pins allow you to preset all employees within a certain department, possessing a certain job title, or who have a set job description as schedule observers. This will also apply to any employee who is added to those categories in the future.

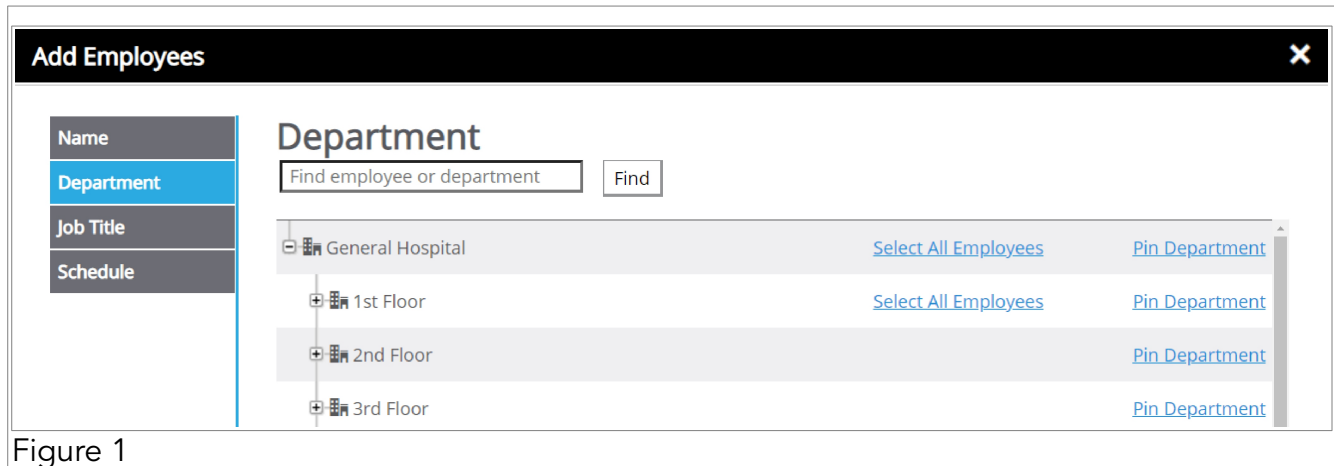


Figure 1

To begin adding employees via any of these options, first navigate to the **Add Employees** pop-up window. Select the **Department** tab and a list of departments that you are able to assign from will appear. Selecting the **Pin Department** link will assign all employees currently part of the department as schedule observers. (Figure 1)

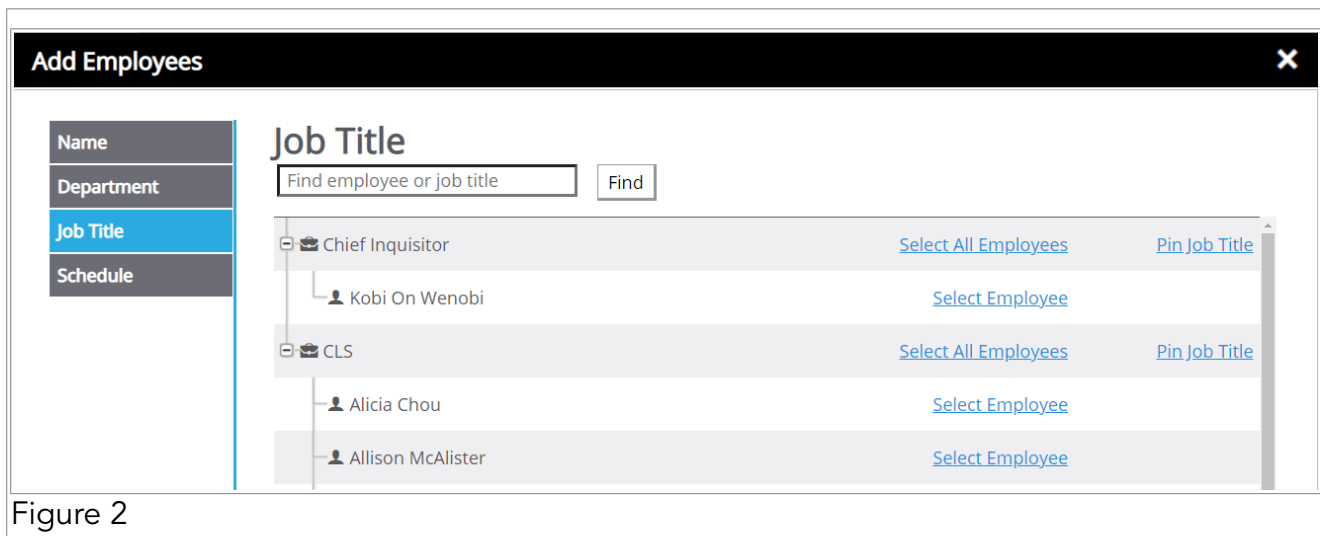


Figure 2

Within the **Job Title** tab (Figure 2), find the job title you wish to assign as an observer. If you want to select specific employees who have that title, select the **Select Employee** link next to their name. Otherwise, select the **Pin Job Title** link to pin all employees as observers.

Using Pins (Continued)

Within the **Schedule** tab, find the job description you wish to have pinned as observers. (Figure 1)

You can choose to pin all descriptions within a schedule or a specific job description. As before you can also choose individual employees within each description. Click the employee you wish to add as a schedule observer. Your pinned observers list will now appear in the observers color bar panel. Once a selection is made, the pop-up will close automatically and revert to the **Setup** tab.

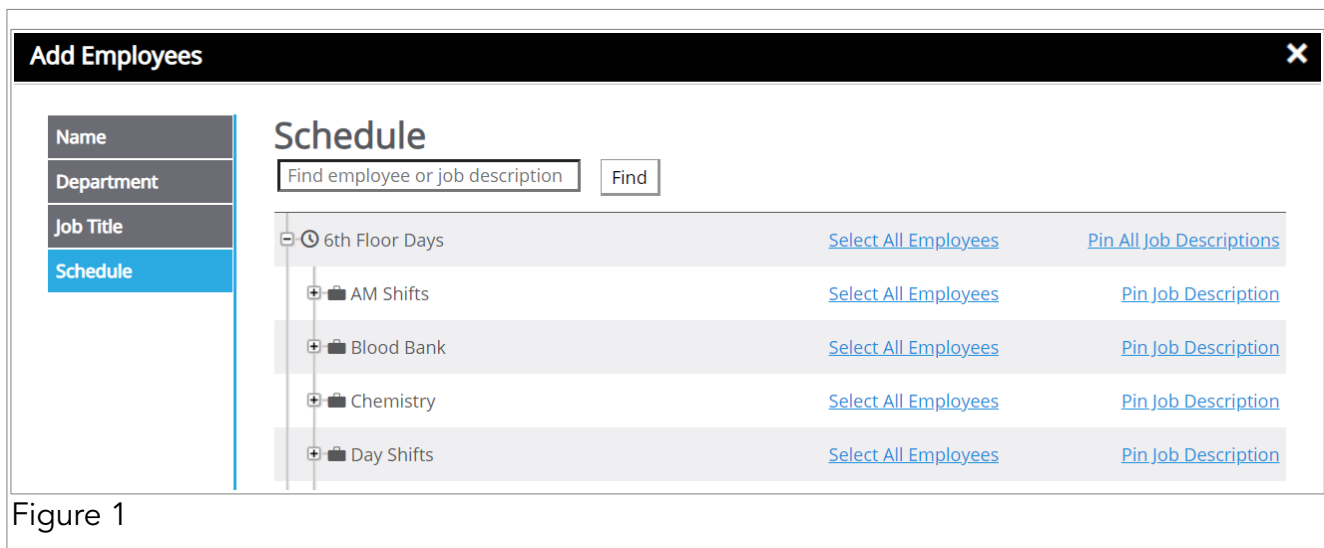


Figure 1

Staff Module

As a schedule admin, you can also set schedule observers from the Staff module. To begin, first navigate to the Staff Module. (Figure 2)

Next, locate the department and then the employee you wish to make a schedule observer. Select their name to display the relevant color bars associated with that employee.

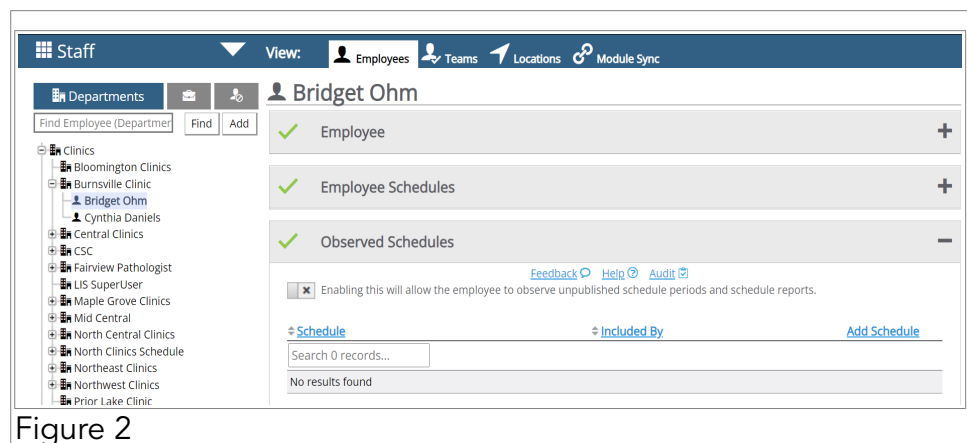


Figure 2

Staff Module (Continued)

Locate the **Observed Schedules** color bar. (Figure 1) By selecting the toggle button, you can allow that employee to observe unpublished schedule periods and schedule reports. By default, this is turned off.

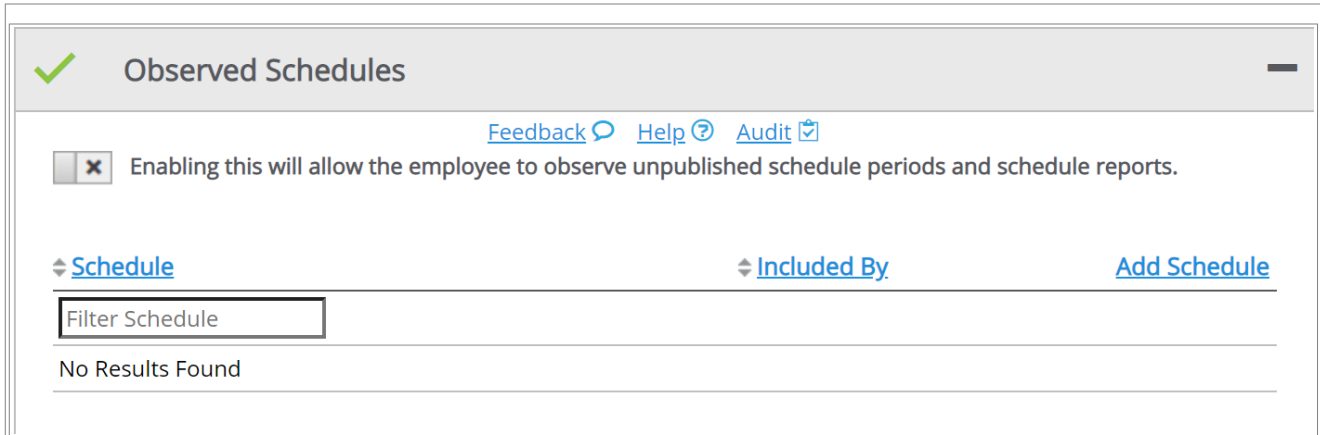


Figure 1

Selecting the **Add Schedule** link will open the **Choose Schedule** pop-up window. (Figure 2) Choose one of the schedules and then select **Save**. (Figure 3)

Added schedules will appear in the **Observed Schedules** color bar. The bar will display how the schedule was added beneath the **Included By** field. Selecting the **Remove** button will remove a schedule from the observed list. (Figure 4)

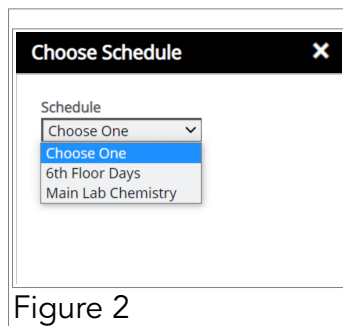


Figure 2

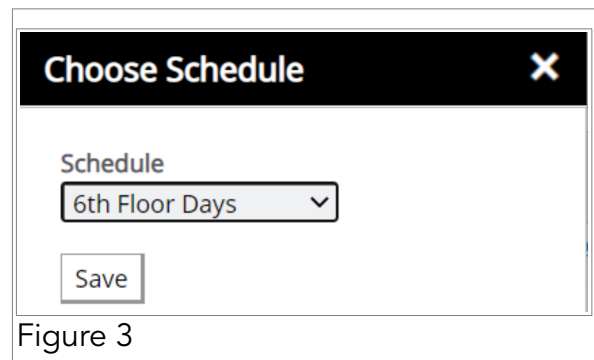


Figure 3

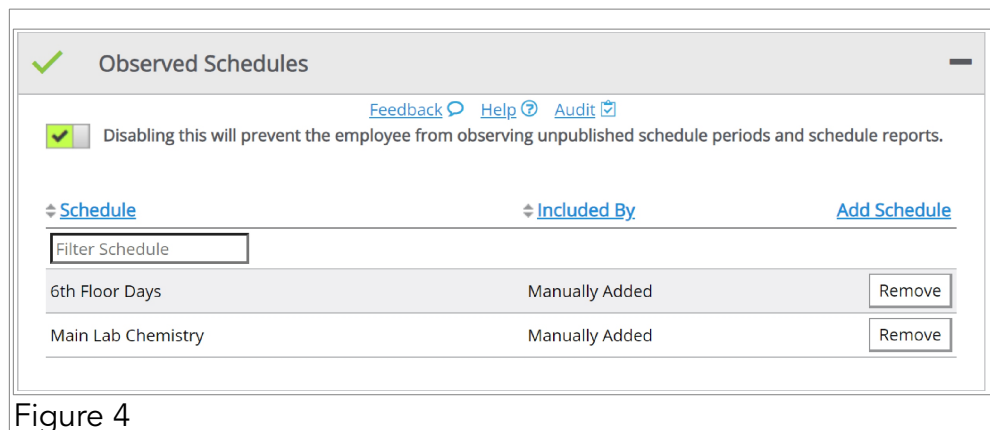


Figure 4

Resources

This concludes the User Guide for setting up **Schedule Observers**. We hope that you have a good grasp 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 option to jump to that topic.

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Schedules Editor	PDF Document
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Grid Dividers	PDF Document
Scheduling Template	PDF Document