



# Schedules Editor User Guide

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Scheduling Module



## Introduction

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This User Guide will provide an overview of the Schedules Editor including layout, button functions, navigation, schedule status, and associated data tools.

The Schedules Editor allows you to view schedules in a condensed, flexible layout grid. In the grid, you will be able to edit, manage and publish schedules that have been auto-generated by the software using custom templates that you design and manage. Using the Schedules Editor, you will also be able to manage all requested employee leave and shift requests.

The Schedules Editor saves significant time in managing and editing schedules previously handled using manual methods such as paper and spreadsheets. Significant time is also saved managing leave, eliminating paper forms, emails, phone calls and in-office visits.

Once you've mastered the basics of the Schedules Editor, you will be able to easily navigate our software and seamlessly edit schedules to meet your scheduling needs. Other associated topics related to the Schedule Editor, including Templates, are listed on the Resources Page.

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## Manage Tab

The **Manage** tab (Figure 1) is the quickest way to view schedules and perform quick edits within a specific pay period. It allows you to modify existing schedules within the **Schedules Editor** for as many schedules as you have permissions to view.

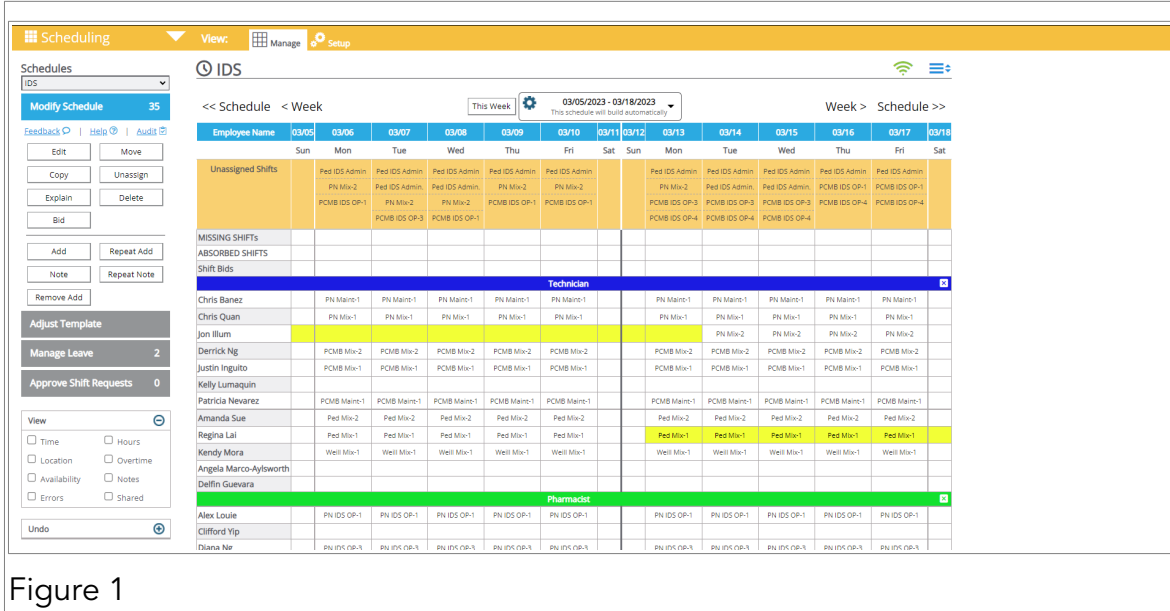


Figure 1

Within the **Schedules Editor**, you will be able to filter the grid (Figure 2) to highlight or exclude specific personnel, departments or schedules, adjust templates, and manage leave and shift requests. Note that the information under each shift changes depending on which filter(s) is selected. Filters are discussed on page 3 of this guide.

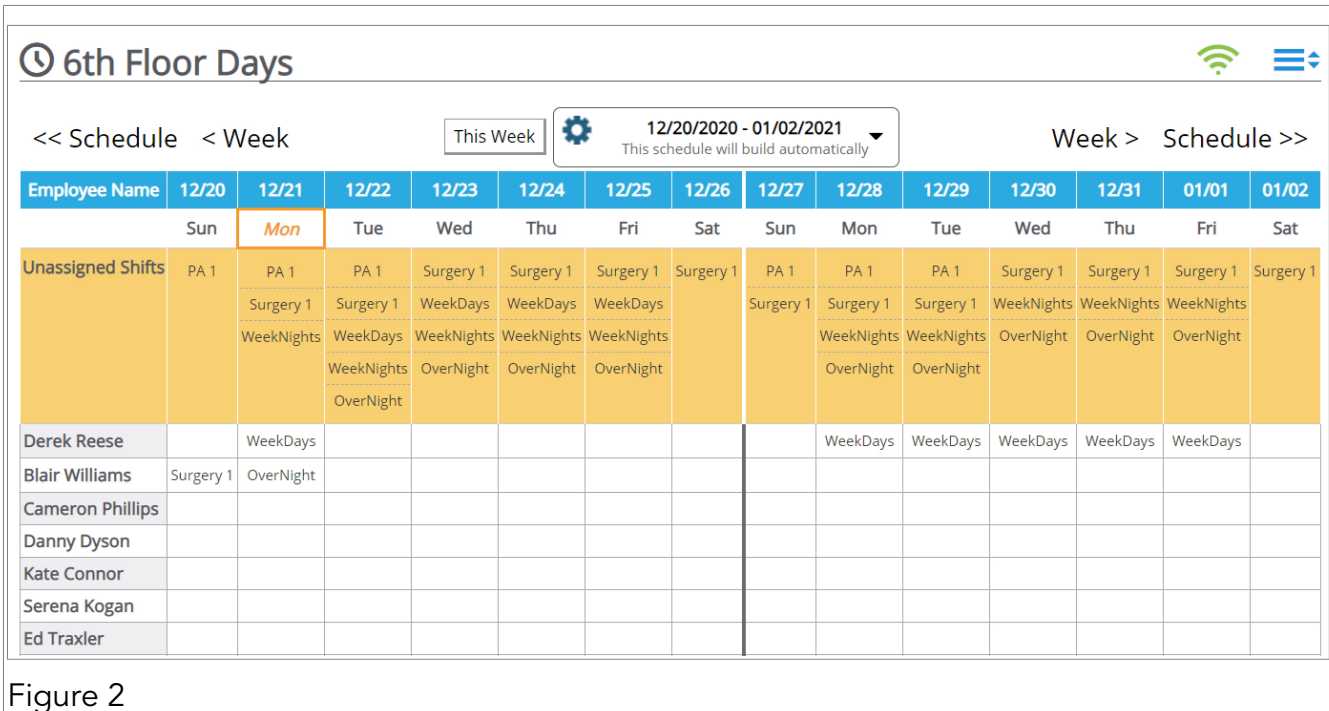
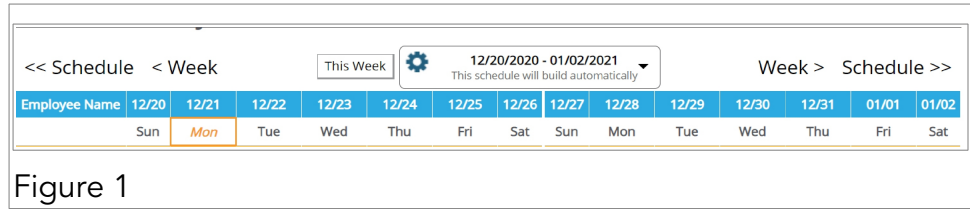


Figure 2

## Scheduling View Filters

The **Scheduling View Filters** are used for to refine your search parameters when viewing shifts. Selecting or deselecting a button makes that filter active or inactive.

Use the **Schedule Period** filters at the top of the page to select which calendar dates you would like to view and edit.

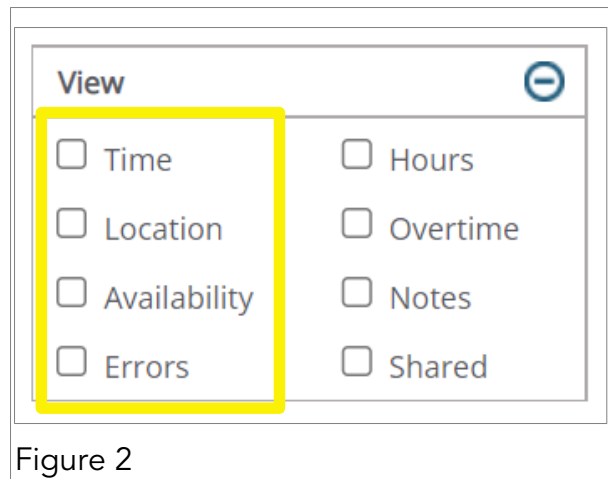


Select the **Time** filter to view the start and end times for each shift.

Select the **Location** filter to view the department (Location) assigned to each shift.

Select the **Availability** filter to view the time and location that each employee is available to work.

Select the **Errors** filter to display an icon next to any shift which violates the rules determined in the Scheduling Setup tab. Hovering over the icon will display details about the rule violation.

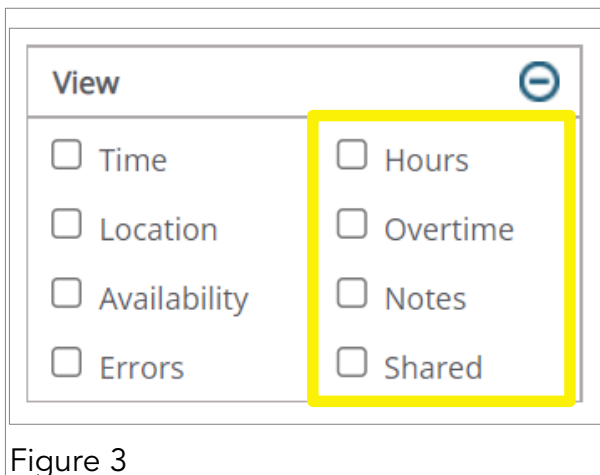


Select the **Hours** filter to display how many hours each employee will have worked at the end of each assigned shift.

Select the **Overtime** filter to highlight any employees assigned to work overtime as well as any shift(s) that will accrue overtime hours.

Select the **Notes** filter to highlight any cells which have Notes assigned. Hovering over a Note will display its full text.

Select the **Shared** filter to highlight any employees who are scheduled across multiple schedules.



## Modify Schedule Features

The **Modify Schedule Menu** is the best tool for quickly making edits to an existing schedule. This is great for when you need to make a change that only applies to a certain pay period and not to an entire template. Selecting or deselecting a button makes that function active or inactive.

Select a button in the **Modify Schedule Menu** to enable the filter and then select the shifts within the grid editor to perform the desired action.

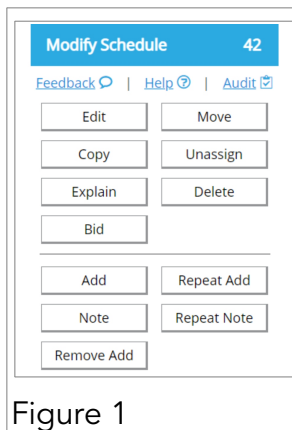


Figure 1

Select **Edit** and a shift assignment to update any details of that shift including location, start time, duration, and the length of any unpaid break period.

Select **Move** and then a shift in the editor grid and then select the cell for the new employee to assign the shift to. Note: The move action also allows you to assign and unassign shifts from the Unassigned Shifts list at the top of the grid.

Select **Copy**, select a shift in the editor grid, and then select the cell where you would like to assign the new copy of the shift.

Select **Unassign** and then selecting an assigned shift will remove the shift from the assigned employee and move it into the 'Unassigned Shifts' list.

Select **Delete** and then a shift to permanently remove the selected shift from the calendar grid. Note: Deleting a shift cannot be undone. To re-create a deleted shift, use the **Add** or **Copy** function.

Select **Bid** and then an unassigned shift to open the Shift Bids interface and select which employees will be asked to bid on the shift.

Select **Add** and then select a cell to create a new shift. This will open the 'Add Shift' interface where you can select the **Job Description, Shift Assignment, Location, Start Time, Duration, and Unpaid Break** period for the new shift. Select **Repeat Add** to add new copies of the last shift created with the **Add** feature.

Select **Remove Add** and then select any shift that was created using **Add, Repeat Add** or **Copy** to delete it.

Select **Note** and then a cell to create a new note. This will open the **Add Note** interface where you can enter a name and text for the note, who is able to view the note (all employees, just the selected employee, or only managers of the selected schedule). Use Repeat Note to create additional copies of the last created note. This functions similarly to **Repeat Add** for manually created shifts.

### Using the Explain Tool

Select the explain button to view the history of a shift. You will be able to view how the shift was created, all actions taken on the shift, any errors which occurred and why the shift was or was not assigned to an employee.

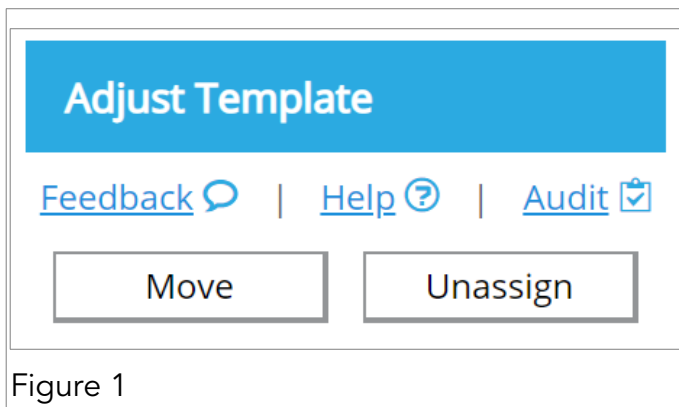
## Adjust Template

In some circumstances, you may occasionally need to make an adjustment to a schedule template which our software uses to automatically build schedules for you.

The two functions that are included in this section are the **Move** or **Unassign** buttons. (Figure 1)

Selecting the template **Move** feature allows you to reassign Template shifts to employees.

Select **Unassign** and then select an assigned shift to remove it from the Schedule Template. Note: If unassigned, the shift will appear under the Unassigned Shifts heading at the top of the template page. (Figure 2)



**Note:** The Scheduling Template is an advanced feature which requires enablement by StaffReady Support prior to use. Before utilizing this feature, please read our Scheduling Template Training guide or contact our support team for assistance.

Figure 1

🕒 6th Floor Days 📶 ☰

Editing Template 📅 Week 1 - Week 2  
Editing template shifts Editing Template

Employee Name	12/20	12/21	12/22	12/23	12/24	12/25	12/26	12/27	12/28	12/29	12/30	12/31	01/01	01/02
	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat
Unassigned Shifts	PA 1	PA 1	PA 1	Surgery 1	Surgery 1	Surgery 1	Surgery 1	PA 1	PA 1	PA 1	Surgery 1	Surgery 1	Surgery 1	Surgery 1
	Surgery 1	Surgery 1	Surgery 1	WeekDays	WeekDays	WeekDays	Surgery 1	Surgery 1	Surgery 1	Surgery 1	WeekDays	WeekDays	WeekDays	Surgery 1
		WeekDays	WeekDays	WeekNights	WeekNights	WeekNights			WeekDays	WeekDays	WeekNights	WeekNights	WeekNights	
		WeekNights	WeekNights	OverNight	OverNight	OverNight			WeekNights	WeekNights	OverNight	OverNight	OverNight	

Figure 2

## Manage Leave Requests

If you have supervisor permissions, you will need to occasionally respond to **Leave Requests**. StaffReady's scheduling module makes responding to requests easy, displays them on the calendar and takes requests into account when auto building schedules so nothing gets missed.

The **Manage Leave** menu (Figure 1) allows you to create, edit, approve, deny, and delete **Leave** or **Sick Requests**. **Leave** and **Shift Requests** are highlighted on the schedule editor grid, using colors preset in the **Scheduling Setup** tab.

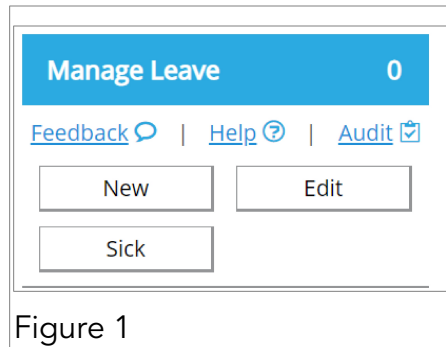


Figure 1

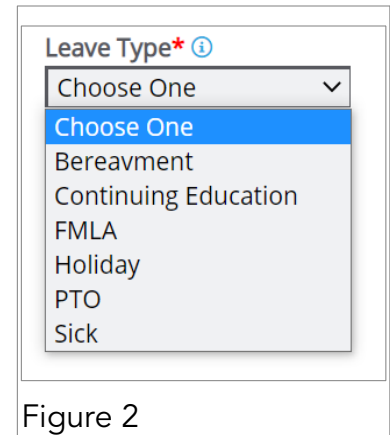


Figure 2

Select the **New** button then select the cell corresponding to the employee and date that the Leave should begin. This opens the Leave Request pop up menu (Figure 2 & 3) where you can enter the details of the new **Leave Request**.

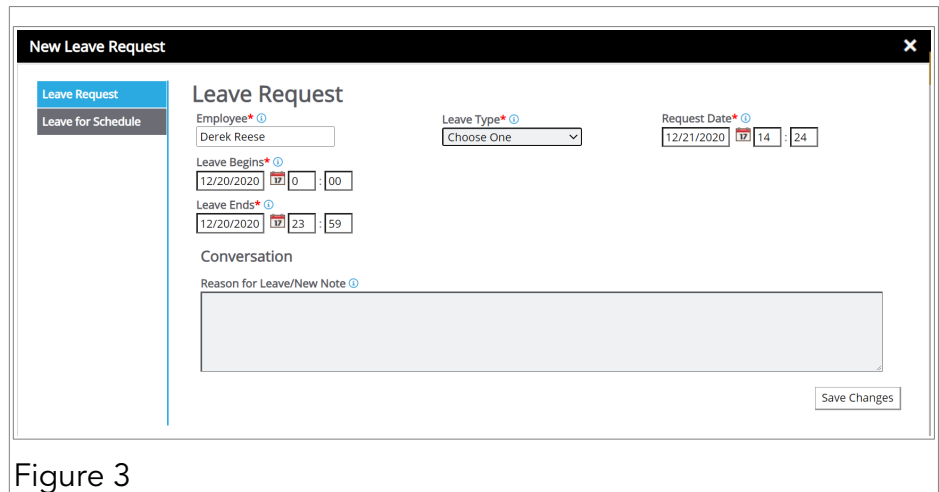


Figure 3

Select the **Edit** button, then select an existing Leave Request in the list or editor grid. This allows you to update the details of the selected **Leave Request**.

Select the **Sick** button, then select the cell for the appropriate employee and date to open the **Sick Leave** pop up menu. (Figure 4) This will allow you to assign **Sick Leave** to the employee, and reassign any shifts assigned to them to another employee. You can also set the date range for the sick leave request.

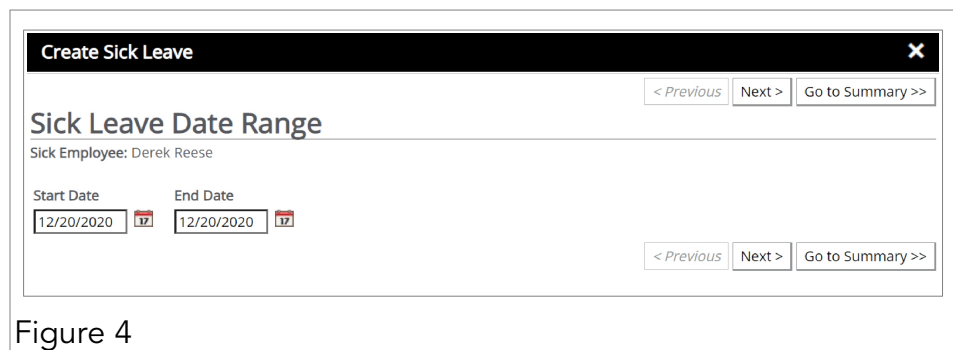


Figure 4

## Shift Requests

The **Shift Request** features functions much the same as leave requests. By accessing this screen you will be able to easily view and respond to employee requests for shift changes such as trades, giveaways, or requests for the shift to be unassigned to a given employee.

The **Approve Shift Requests** menu allows you to view, approve, and deny employees' **Shift Trade**, **Shift Giveaway**, and **Shift Unassign** requests, and approve any open **Shift Bids** on the schedule.

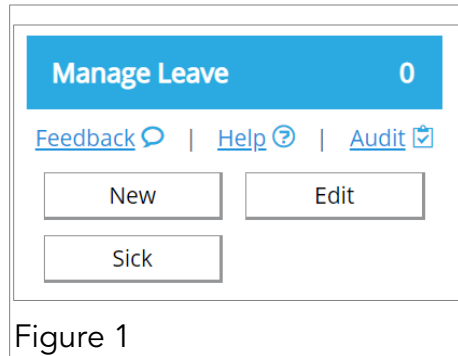


Figure 1

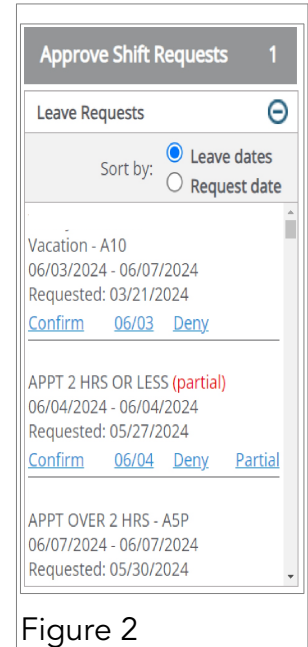


Figure 2

Select **Requests** (Figure 1) to open the **Shift Requests** list (Figure 2) and highlight any open **Shift Trade** and **Giveaway** requests in the editor grid. Select any request in the list or the grid to open the approve shift change window, view details, and approve or deny the request.

Select **Unassign** to view, approve, or deny any **Shift Unassign** requests on the schedule.

Select **Bids** to view any open **Shift Bids** on the schedule. You can view who has agreed or rejected the shift bid and approve the bid to automatically assign the shift to any employee who agreed.

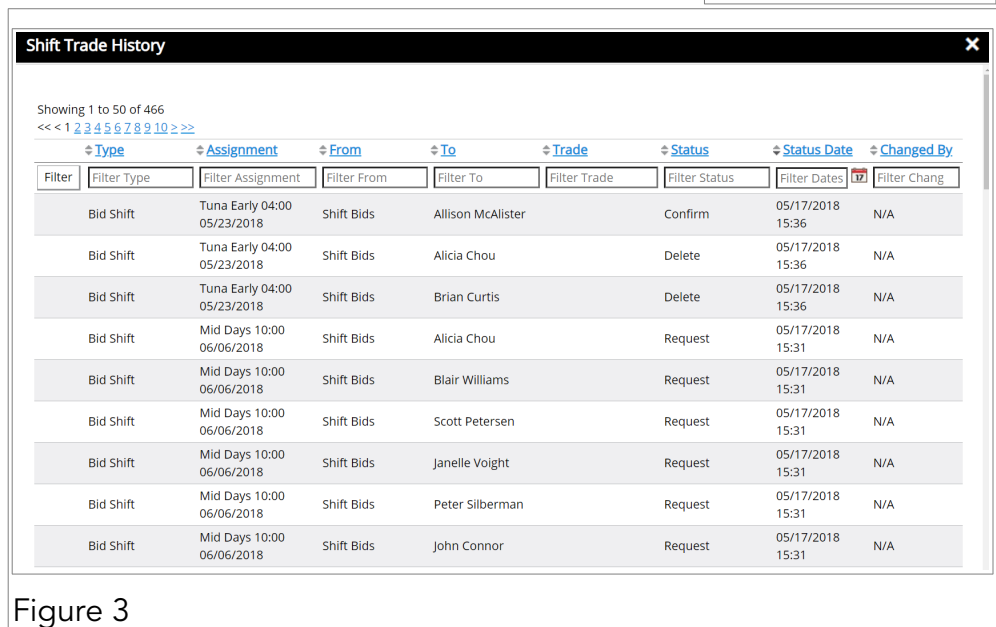


Figure 3

## Scheduling Menu: Additional Tools

While **Manage** is the primary tool you will utilize within **Scheduling**, you will occasionally need to utilize other features to setup new job descriptions and employees and generate reports based on currently created schedules. These are covered in greater detail in separate guides but a brief summary of each is included below.

While they fall outside the purview of this document, it's important to know the location and purpose of the other tools in the **Scheduling Menu** available within the **Manage View Editor** module.

By selecting **Setup**, you can make changes to job descriptions, employees, shift cycles, leave types, managers and messaging settings for as many departments as you have access to. **(Figure 1)**

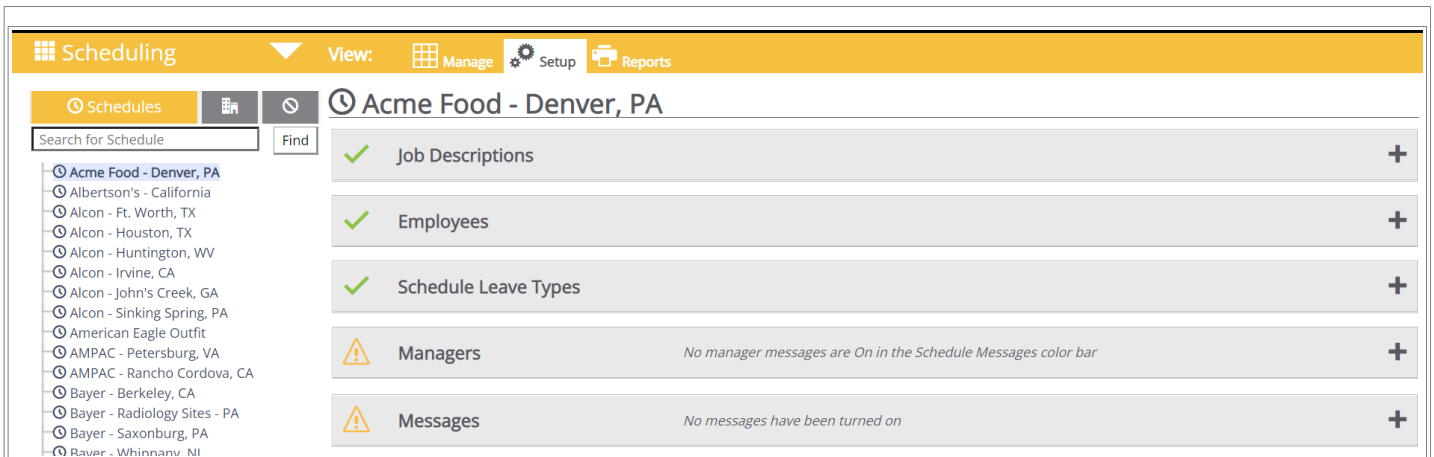


Figure 1

Report generation is covered in the [Reports Dashboard user guide](#).

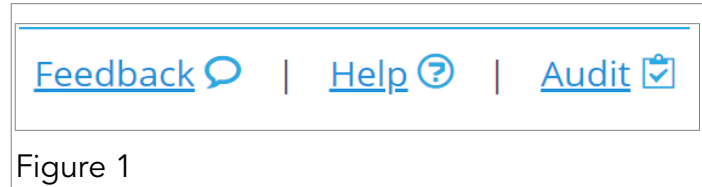


Figure 2

## Help Links and Auditing Feature

Here at StaffReady we tremendously value all feedback we receive. If you had a positive or negative experience, we want to hear about it. We offer a number of avenues for accessing our help resources both in document and video instruction as well as our learning center.

To streamline this process for you, StaffReady includes built in tools for **Feedback**, **Help**, and **Audit (Figure 1)** functionality throughout the interface.



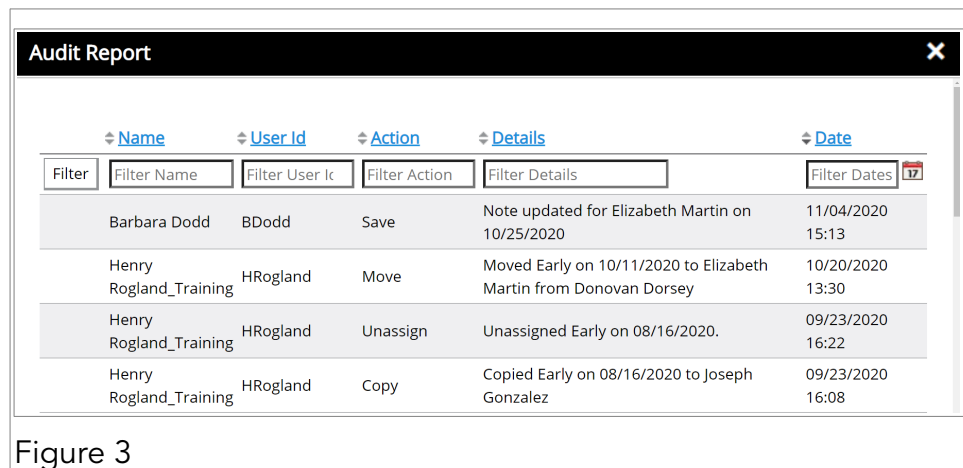
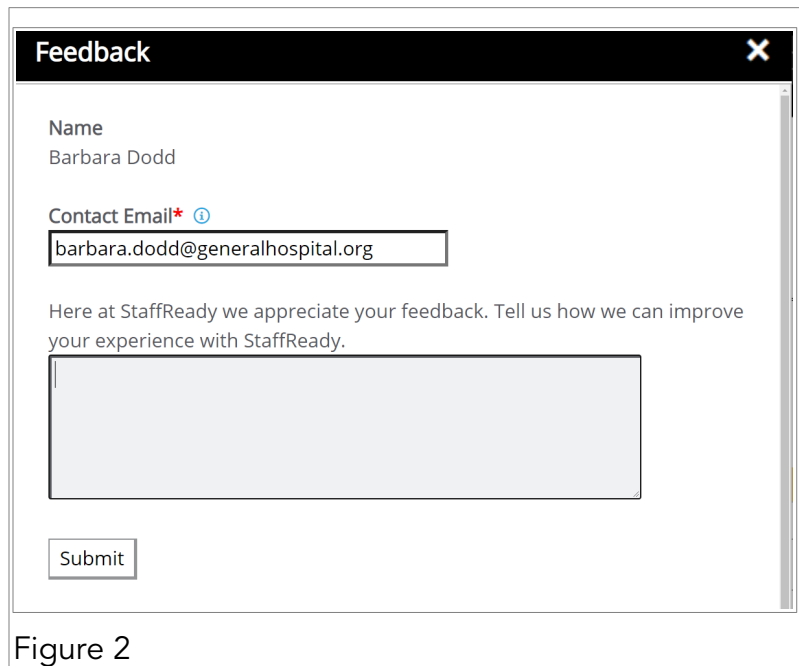
Select the **Feedback** link (**Figure 2**) to create a new Customer Support case. Enter your contact information and a brief description of any questions, problems, or comments, and our Customer Support team will respond promptly to your request.

Select the **Help** link to view all User Guides related to the StaffReady module you are working with.

The **Audit** feature will always pertain directly to the section of the module that you are currently in.

Select the **Audit** link to view a detailed list (**Figure 3**) of the last 10,000 actions taken in the selected area of StaffReady, including what action was taken, which user account performed it, and when it occurred.

This is useful for troubleshooting errors that occur during the schedule building process if it is done manually.



## Resources

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This concludes for the **Schedules Editor** User Guide. We hope that you have a better understanding 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="#">Modify Schedule Menu</a>	<a href="#">PDF Document</a>
<a href="#">Reports Dashboard</a>	<a href="#">PDF Document</a>
<a href="#">Grid Dividers</a>	<a href="#">PDF Document</a>
<a href="#">Manage Leave and Shift Trade Requests</a>	<a href="#">PDF Document</a>