



Scheduling Core User Training

Hello and welcome to our video overview of StaffReady Scheduling! Today we'll review the various features available to Core Users as you view and manage your schedule needs within StaffReady. (If you are a Schedule Administrator who will also be creating or managing schedules, please contact our Support team to receive additional access and training.)

Today's training will cover several ways that you can view a published schedule, how to submit leave requests for time off, how to request changes to an assigned shift, and how to update your email settings.

StaffReady is accessible at any time from our website, www.StaffReady.com. Here you'll see the green login button in the upper righthand corner. Enter your StaffReady License ID, which will be provided by your Schedule Manager, along with your Username and Password. If you've forgotten your password, you can reset it from the Forgot Password link. However, if your password has expired, or you have any other trouble logging in, please contact your Schedule Manager.

Once you're successfully logged in, navigate to your Calendar. Here you can see your personal assignments from all of your Published Schedules. These buttons across the top allow you to go to the previous or next month or use the dropdowns to select something specific.

Your basic view shows the name of the job and the times that you're expected to work. But we also have some additional views available with these checkboxes over here on the left. If you're on more than one schedule, this first checkbox will show you the name of the Schedule that goes with this assignment. The next checkbox will show the Location attached to the assignment. We also have a place for Schedule Notes. You can see a note popped up right here, and if you hover your mouse over the note, the details become visible. So, if your manager uses the Notes feature, make sure to keep this checkbox on.

Your StaffReady schedule can be forwarded out to an external calendar on your personal computer or phone. You can enable this feature from your Settings, up here by the gear icon and your name in the top right corner. This is where you can change your password... and down at the bottom is a place for External Calendar. When you click the checkbox it will give you a link that you can copy and paste into your particular Calendar Client. In most cases, if you try to set up a "subscription" type of calendar, there will be an obvious place to paste your link to start receiving updates. Then if your manager makes a change to your published schedule, it will be reflected immediately here on your StaffReady calendar, and it will also update whenever your external calendar refreshes; usually within a few minutes, if you're connected to the internet.

The next thing to look at is how to view the full schedule. You see your own assignments here, but if you want to see everyone's assignments, there are 2 places to look. The first is here on our left sidebar again with the View Schedules link.

- You can only see schedules that have been published: PDF portrait or landscape, or HTML.
- You have a view of the full schedule for this particular schedule period.
- The HTML version opens the schedule in a Webpage.
- If you're on more than one schedule or you have access to view additional schedules, you can also view them here. This dropdown at the top allows you to choose which schedule to see.

If you want a little more flexibility in what you print, we'll go to the second way to view your schedule – the Reports Dashboard.

- You can choose which schedule you'd like to view here, and then you can set the date range you'd like to view.
- The date range defaults to the current month, but you can select particular dates, or choose one of the quick links (I'll choose "this week") and then click "Apply" to refresh with your selections.
- The various checkboxes here can enhance your view and there are several options to print. If you'd like to include the shift times you can choose the "Report with Time PDF"...
- The Excel option will display whatever is showing here, so by selecting the Time checkbox and then Excel, a spreadsheet will automatically download.

Next we'll take a look at how to request time off. You can use this Leave checkbox to choose whether or not to see your leave requests here on your calendar, and you can click on a particular Leave Request to see its details. If you'd like to see everybody ELSE'S leave requests, that's here with the Leave for Schedule checkbox. By clicking on one of the links, I can see the list of people who have requested time off, as well as whether or not their request has been approved. And here across the top you have various filters and can adjust the time span you see. This information can be helpful when planning out your own leave requests.

To make a new leave request, simply click on the calendar day and the New Leave Request form will open. Now, you'll notice over here on the left, we have another version of that Leave for Schedule, so you can check to see if anyone has requested this day off, right from within this form. The date is filled in already, but you can change or extend that here. For partial-day leave requests, you can enter the specific times you'll be out. For full days you can ignore the time entries. Then select your Leave Type from this dropdown here. This list is customized for your license, so you'll have familiar choices that your Schedule Manager has set up. You may find an Availability option, which allows staff members to skip the emailed communication of days they're available to work, and instead alert the Schedule Manager directly on the schedule within StaffReady. Once you've selected the appropriate Leave Type, a note down here is optional, and then Save Changes. You can see the new leave request popping up right here and it has also been sent to the Schedule Manager for approval.

Going back to our Welcome screen, where we landed when we first logged in, the My Schedule section here on the left shows 2 color bars, "My Leave" and "My Shift Requests." Click anywhere on the gray bar to expand it and you'll see all of your upcoming Leave or Shift Requests in a tidy list.

You have the option to request changes to your assignments: perhaps you want to trade with another person or have found someone to cover your shift. You can request that from the Calendar again, where you will click *directly on the assignment that you want to change*. This feature is not available for unpublished schedules because you must click directly on the assignment link to request a shift change. This is a common mistake: if you click somewhere else in the box, only the New Leave Request form will open up. But by clicking directly on the assignment, you will access the additional Shift Request page.

There are 3 request options. You can ask that it simply be Unassigned; including a reason here is optional. If someone else has agreed to cover your assignment that day, choose Give and then select that person from the dropdown. If you'd like to trade assignments with someone, choose Trade, select your coworker from the dropdown, and if necessary change the date. For example, I want to trade my weekend assignment with Yvette Jackson for the previous weekend; when I choose the right date I see that my Fill job on the 21st will go to her and her Fill job on the 14th will go to me. You can ignore this Conflicts section. When I click "Save Changes" a Request icon pops up on my calendar and Yvette will be notified on her calendar too. She'll have to agree to the trade before it forwards along to a manager for approval.

If someone has requested something of *you*, whether it's a shift trade or perhaps your manager has sent out an open shift assignment as a bid, you'll see a Request link with a little exclamation point. When you click on it you can simply agree or disagree – this response format is the same for the Request Activity section between employees or a manager's Shift Bid here on the left. If you agree, the assignment still needs to be approved by your manager before going into effect.

The last topic is how to adjust your email settings. If your Schedule Manager has enabled "Messages," you will receive relevant email notifications for things like changes to your schedule, leave confirmation, or shift request status. From the gear icon in the upper right you can set multiple email addresses. Each email address has its own settings where you can select which types of messages to receive on which days of the week, and also which email address to designate as the primary one. Don't forget to Save Changes.

If you are not receiving any emails from StaffReady, check your junk mail or spam folder first, then double check here for typos in your email address, and if neither of those solve the problem, reach out to your Schedule Manager. To edit or remove an email address, you must first add a new one and update its settings. StaffReady will not let you remove an email address until another one is in place to receive your messages.

This concludes our Core User Training. If you have any follow up questions, please ask your Schedule Manager or check out our User Guide Directory found in the Settings/Gear icon. Thank you for using StaffReady Scheduling!