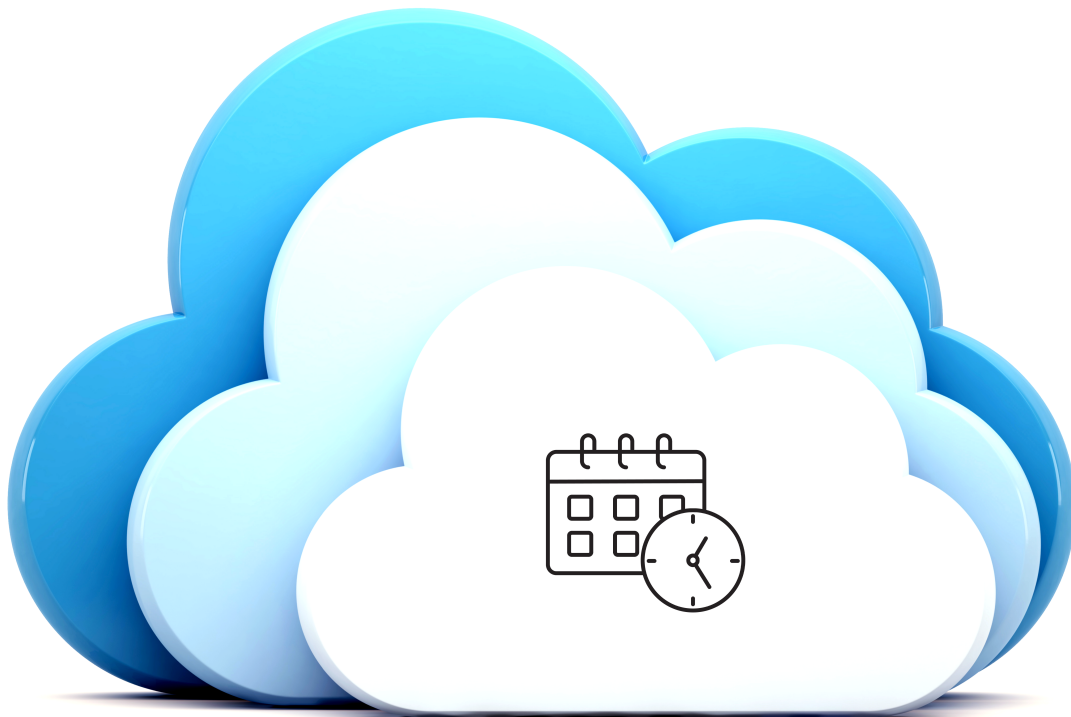




# Shift Bids and Bulk Shift Bids User Guide

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## Scheduling Module



## Introduction

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This user guide will cover the utilization and creation of shift bids and bulk shift bids within the Scheduling module. It will also cover how to create a shift bid team and assign employees to it.

Shift bids are used to put an unassigned shifts up for all or select employees to claim based on your predetermined criteria such as seniority or availability.

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# Create a Shift Bid Request

To create a shift bid for an unassigned shift, first navigate to the Manage tab of the Scheduling module. (Figure 1)

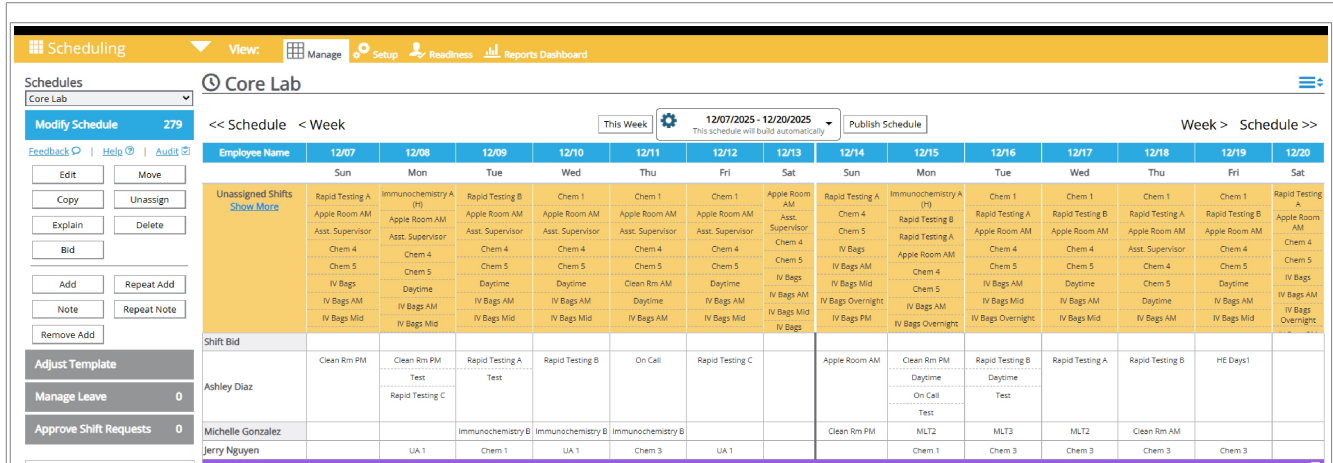


Figure 1

Next, select the Bid button from the Schedule Editor menu. (Green box, Figure 2)

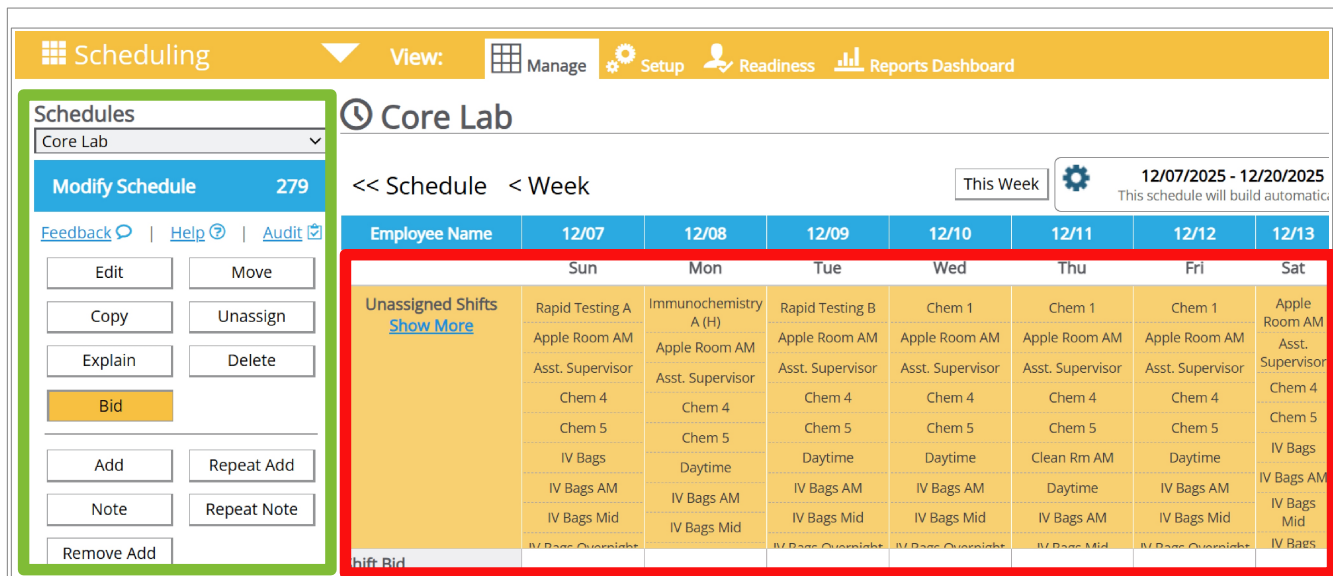


Figure 2

Next, select any of the shifts in the Unassigned Shifts section (Red box, Figure 2) to open the New Shift Bid window.

## Adding Employees to the Shift Bid

The New Shift Bid window will allow you to create a new shift bid for a shift of your choice, add employees who the bid will be sent out to, or create a preset team of employees for the bid to be sent out to.

To add employees to your bid request, select the **Add** link. (Green box, Figure 1)

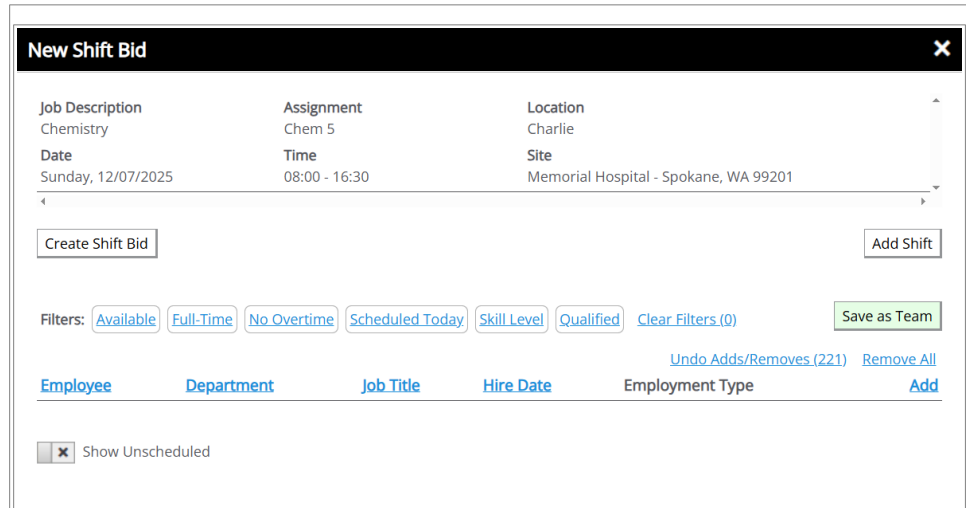


Figure 1

This will open the New Shift Bid > Add to Recipient List menu. (Figure 2)

From here, you can choose individual employees to add to the bid from the employee dropdown menu. (Green box, Figure 3)

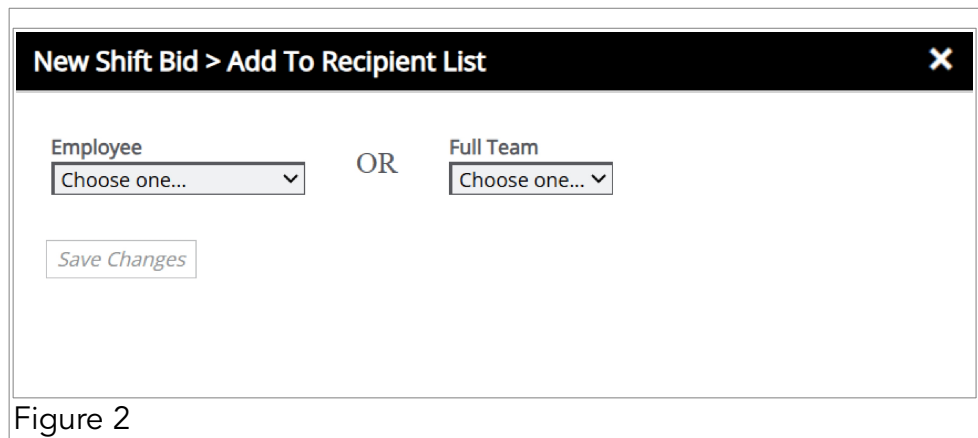


Figure 2

If you have any set up, you can also select a team from the Team dropdown menu. (Red box, Figure 3)

We will cover setting up a team on a later page.

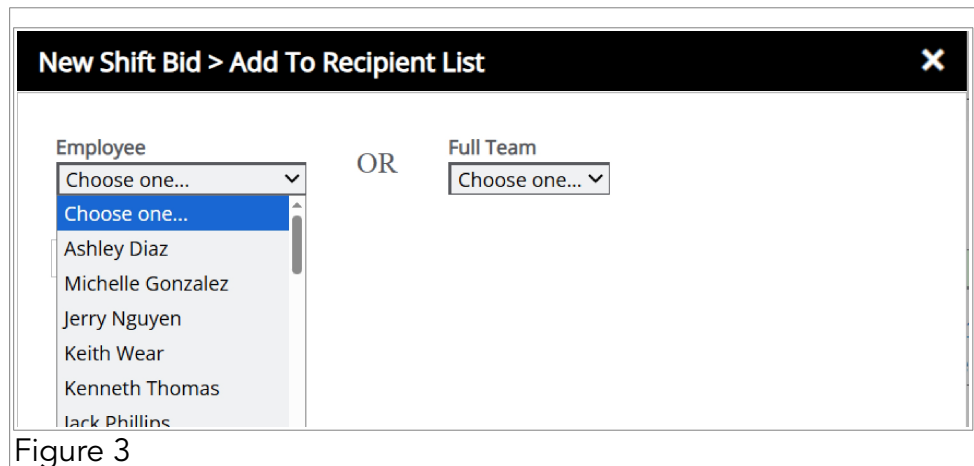


Figure 3

## Finalizing the Shift Bid

Once you've selected your employees, you can also add additional shifts to the bid if you want.

To do this select the Add Shift button. (Green box, Figure 1)

This will open the New Shift Bid > Add Shifts menu. (Figure 2)

Select the checkbox next to any shifts you want to add and then close the window.

The New Shift Bid window will update with your selections.

To publish your shift bid request, select the Create Shift Bid button. (Red box, Figure 1)

This will complete the process.

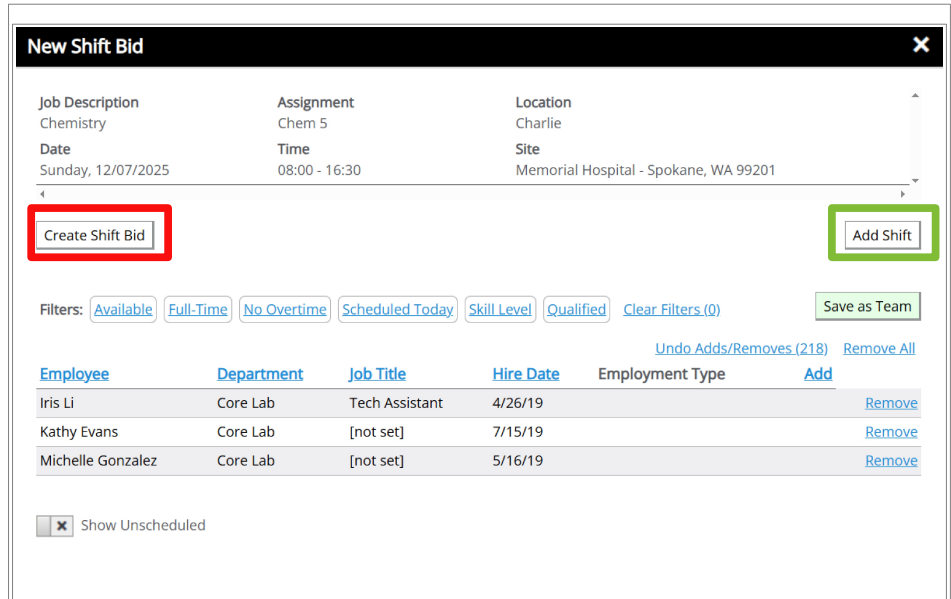


Figure 1

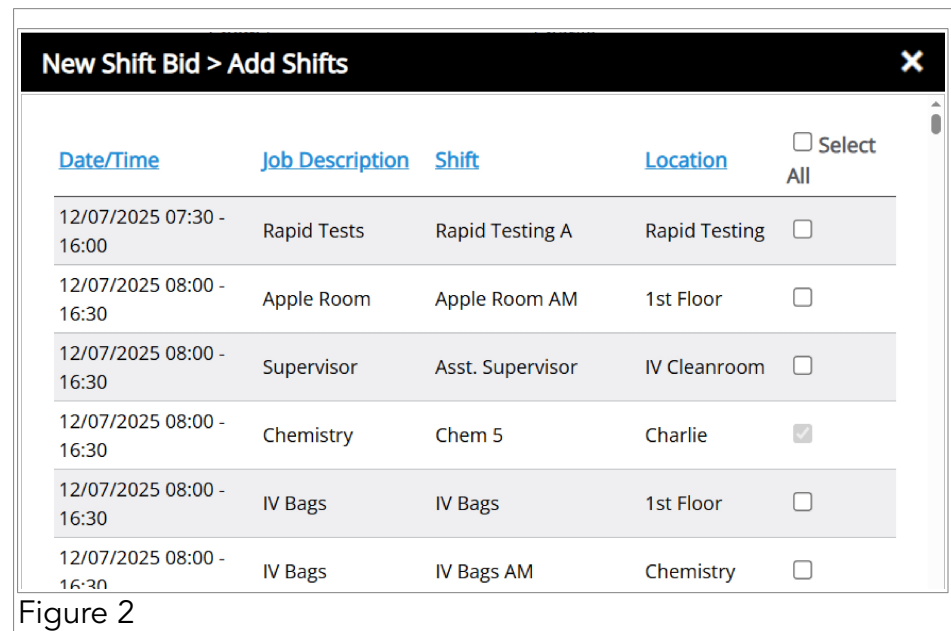


Figure 2

## Creating a Shift Bid Team

To create a Shift Bid team, first select employees of your choice as described in previous steps.

Once you've selected all employees, select the **Save as Team** button. (Green box, Figure 1)

This will open the **Save as Team** menu. (Figure 2)

Enter a team name (required) and a team description if applicable and then select the **Save Changes** button.

Once the team is created, you will be able to select it from Add to Recipients menu by selecting the full team dropdown menu and then selecting the team. (Figure 3)

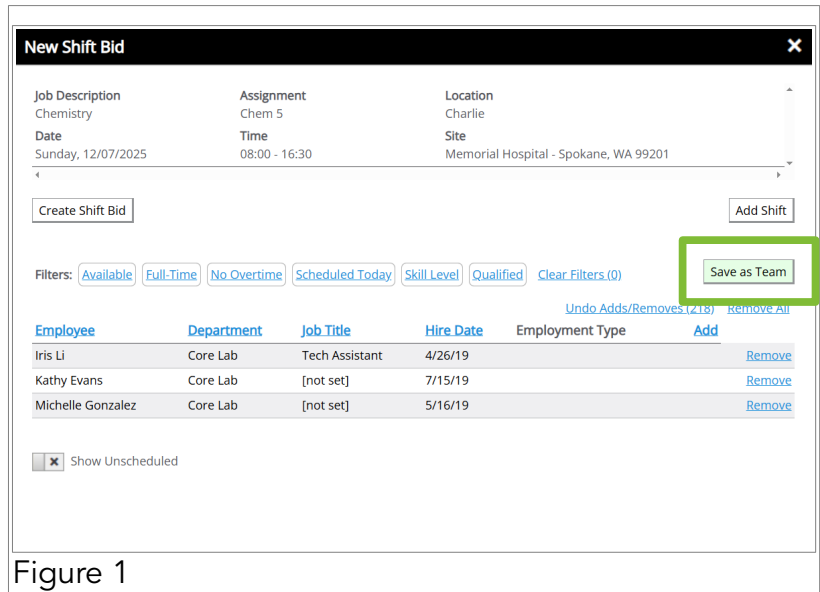


Figure 1

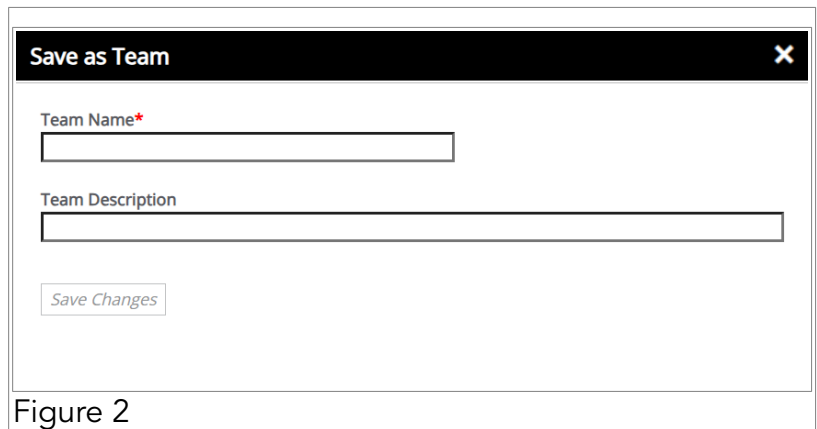


Figure 2

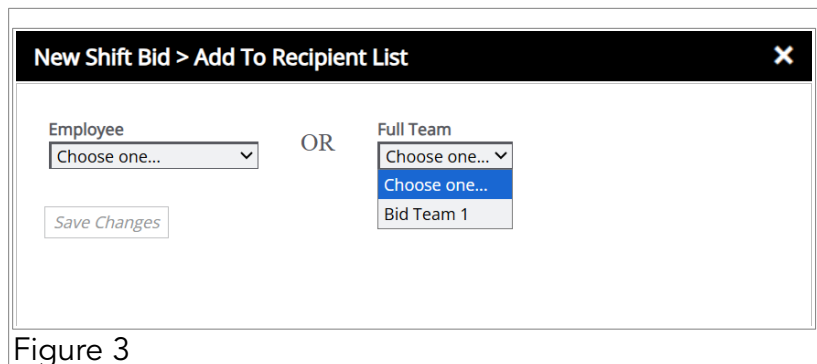


Figure 3

## Creating or Editing a Team from the Staff Module

You can also create or edit a bid team from within the Staff Module.

To do this, first navigate to the Staff Module and then select the Teams tab. (Figure 1)

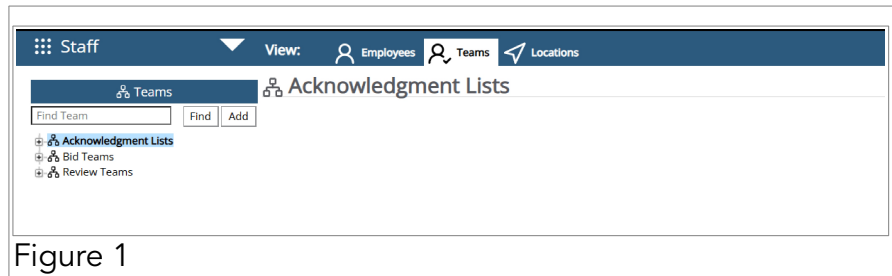


Figure 1

Next, select the Bid Teams tree to expand it and then select the Schedule you want to create a bid team for. (Green box, Figure 2)

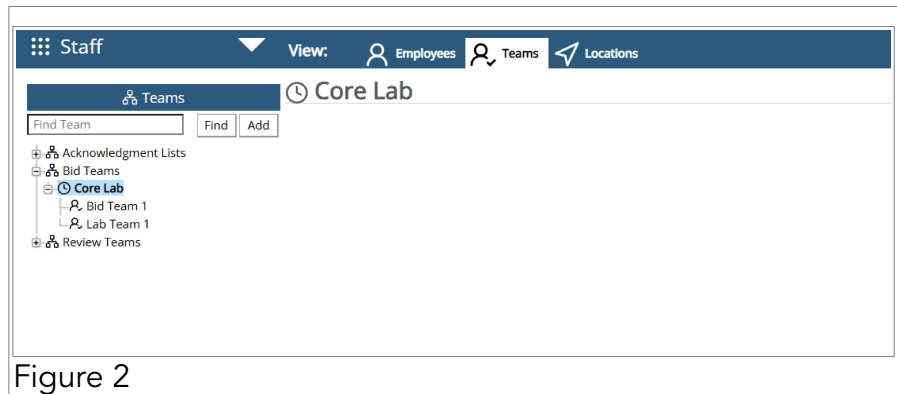


Figure 2

Select the **Add** button. (Red box, Figure 2)

This will open the Add Team or Folder menu.

Select the Team tab and then enter a Team Name and description if applicable.

Select the **Save Changes** button when you are finished.

**Note:** You must select a schedule first before creating a team otherwise the process will not work.

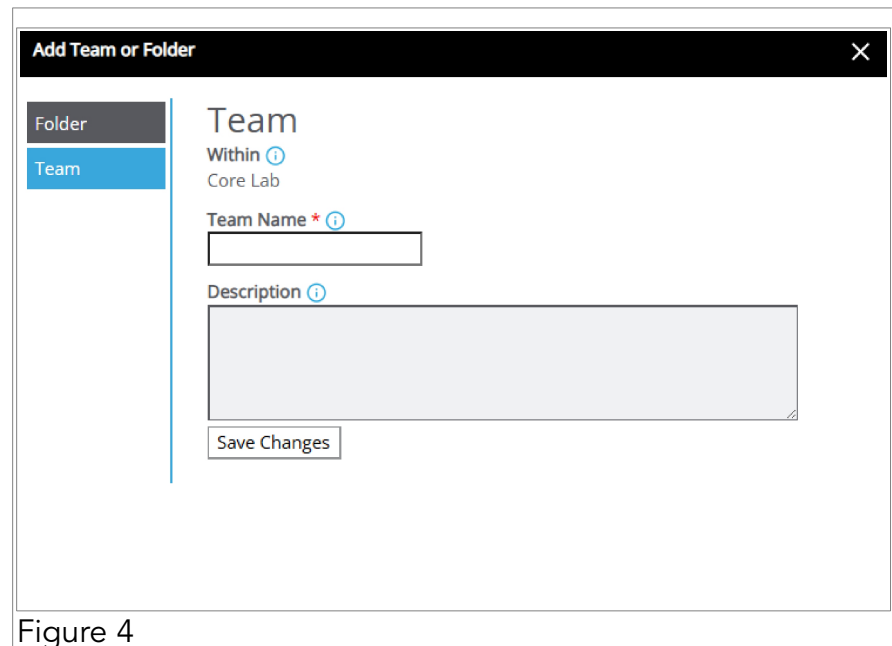


Figure 4

## Adding and Editing Bid Teams from the Staff Module

Once your team is created, you will be able to view the Team and Team Members color bars. **(Figure 1)**

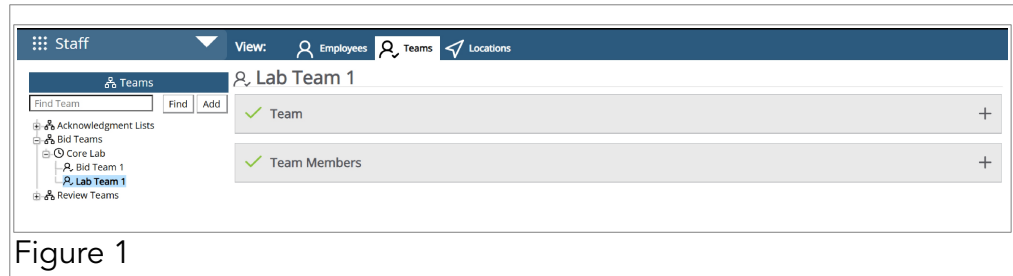


Figure 1

Select the team color bar to expand it. **(Figure 2)**

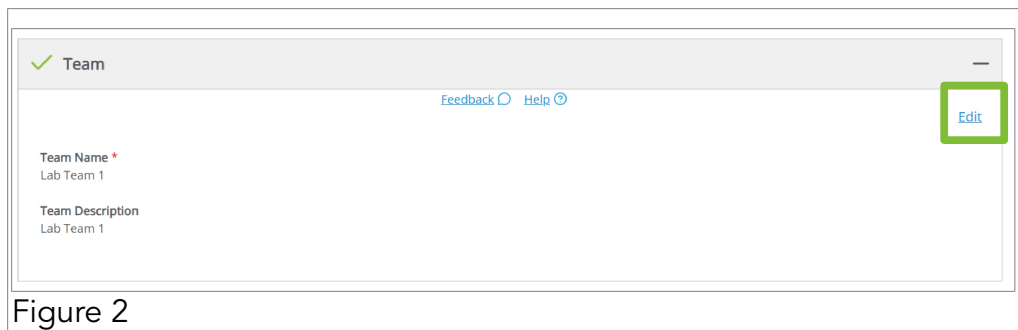


Figure 2

From here, you will be able to edit the team information such as the team name or team description by selecting the edit link. **(Green box, Figure 2)**



Figure 3

This will expand the color bar and you will be able to edit the fields. **(Figure 3)**

## Adding Employees to Bid Teams from the Staff Module

Select the Team Members color bar to expand it. (Figure 1)

From here you can add employees or remove them or remove all of them.

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

Search for the employee you want using their name or any of the filters in the menu.

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

Search for the employee you want using their name or any of the filters in the menu.

Once you've selected your employee, select the **Add to Team** button to conclude the addition. (Green box, Figure 3)

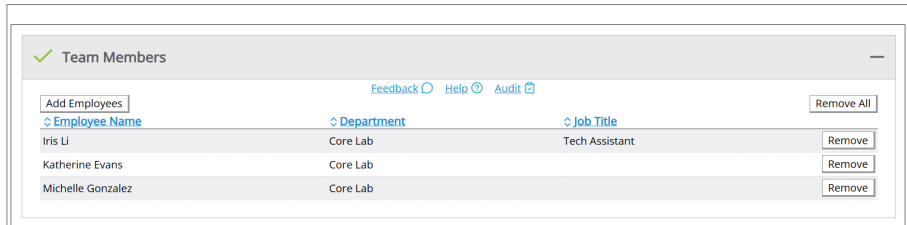


Figure 1

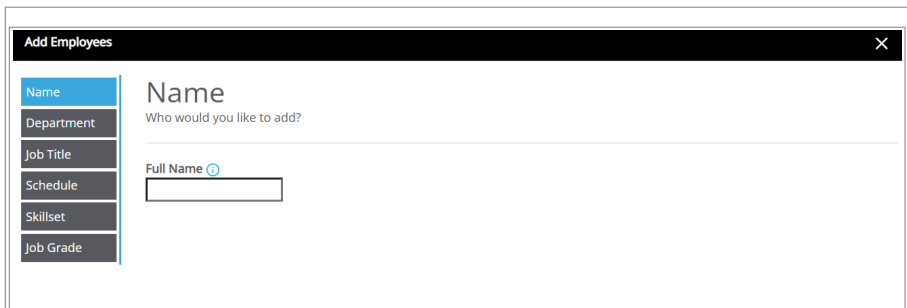


Figure 2

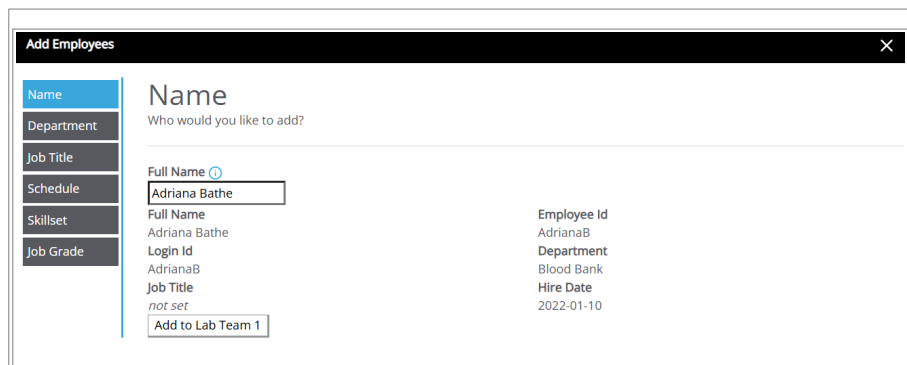


Figure 3