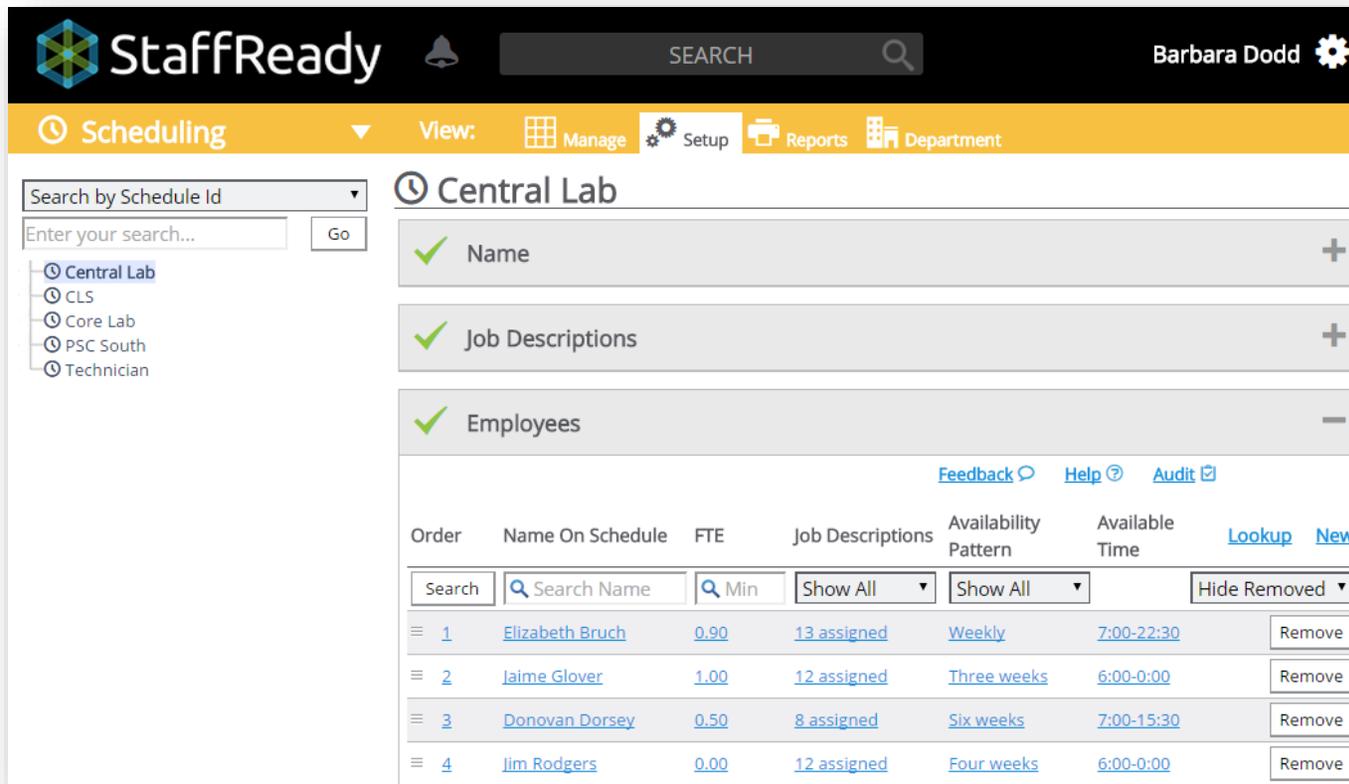


## Setup View – Employee Color Bar

### Add New Employees

This reference guide provides a process overview of **How to Add New Employees** within the **Employee** Color Bar in the StaffReady Scheduling Module. The following process steps and instructional information are provided within this document:

- Add new employees



The screenshot displays the StaffReady Scheduling interface. The top navigation bar includes the StaffReady logo, a search bar, and the user name 'Barbara Dodd'. Below the navigation bar, the 'Scheduling' tab is active, and the 'View:' menu shows 'Manage', 'Setup', 'Reports', and 'Department'. The main content area is titled 'Central Lab' and features a search bar for 'Search by Schedule Id'. A list of departments is shown on the left, including 'Central Lab', 'CLS', 'Core Lab', 'PSC South', and 'Technician'. The 'Employees' section is expanded, showing a table of employees with the following data:

Order	Name On Schedule	FTE	Job Descriptions	Availability Pattern	Available Time	Lookup	New
1	<a href="#">Elizabeth Bruch</a>	0.90	<a href="#">13 assigned</a>	<a href="#">Weekly</a>	<a href="#">7:00-22:30</a>	<a href="#">Remove</a>	
2	<a href="#">Jaime Glover</a>	1.00	<a href="#">12 assigned</a>	<a href="#">Three weeks</a>	<a href="#">6:00-0:00</a>	<a href="#">Remove</a>	
3	<a href="#">Donovan Dorsey</a>	0.50	<a href="#">8 assigned</a>	<a href="#">Six weeks</a>	<a href="#">7:00-15:30</a>	<a href="#">Remove</a>	
4	<a href="#">Jim Rodgers</a>	0.00	<a href="#">12 assigned</a>	<a href="#">Four weeks</a>	<a href="#">6:00-0:00</a>	<a href="#">Remove</a>	

# Add New Employee

## Add New Employee

1. Click the **Employees** color bar.

2. Click on **New**.

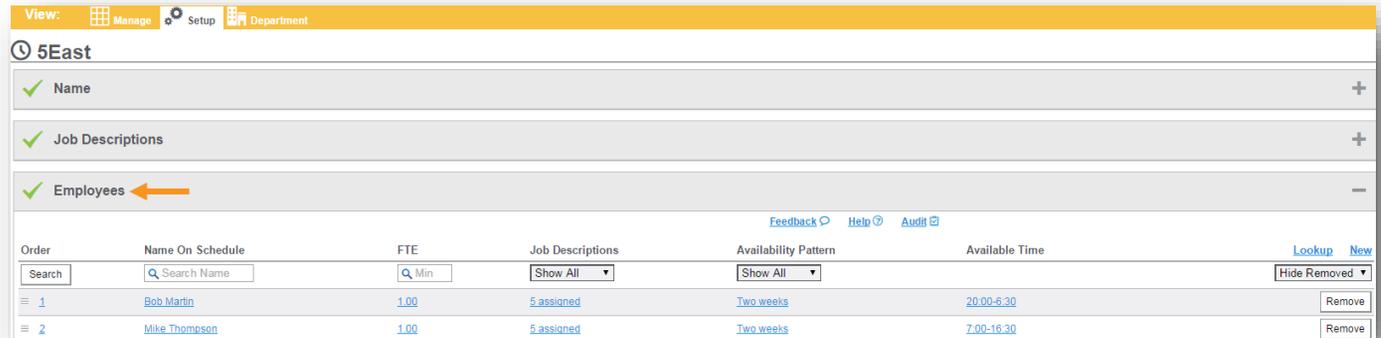
3. In the **Full Name** box, type the employee's name.

**Note:** If you add an employee that already exists within the software, the employee's name will auto-fill as you type and you can click on it.

4. In the **Login Id** box, type the value for the employee's username (e.g., employee id).

**Note:** Leave the box blank for the Login Id to be the employee's first initial and last name.

5. Click **Next**.



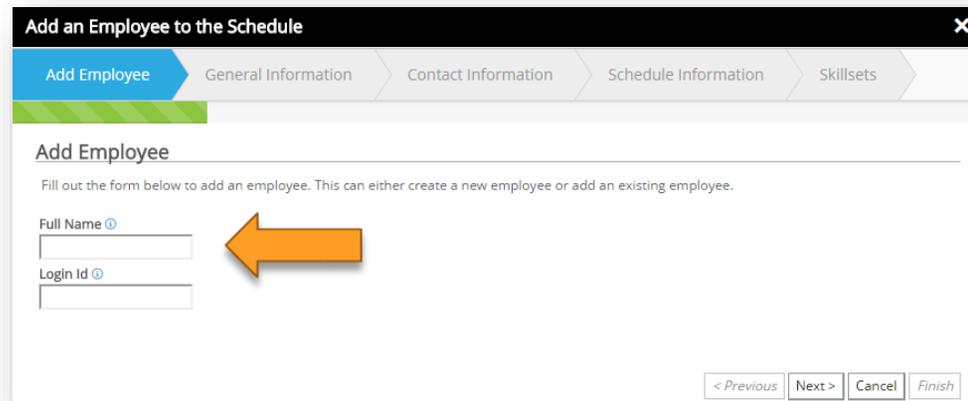
The screenshot shows the '5East' software interface. At the top, there are navigation icons for 'Manage', 'Setup', and 'Department'. Below this, the '5East' title is displayed. A sidebar on the left has three expandable sections: 'Name', 'Job Descriptions', and 'Employees'. The 'Employees' section is expanded and highlighted with an orange arrow. Below the sidebar is a table with columns: 'Order', 'Name On Schedule', 'FTE', 'Job Descriptions', 'Availability Pattern', and 'Available Time'. There are search boxes for 'Search Name' and 'Min', and dropdown menus for 'Show All' under 'Job Descriptions' and 'Availability Pattern'. The table contains two rows of employee data. A 'New' button is visible in the top right corner of the table area.

Order	Name On Schedule	FTE	Job Descriptions	Availability Pattern	Available Time	Lookup	New
1	Bob Martin	1.00	5 assigned	Two weeks	20:00-6:30	Remove	
2	Mike Thompson	1.00	5 assigned	Two weeks	7:00-16:30	Remove	



This screenshot is a zoomed-in view of the table from the previous screenshot. The 'New' button in the top right corner is highlighted with an orange arrow. The table shows the 'Name On Schedule' column with a search box, the 'FTE' column with a search box, and the 'Job Descriptions' and 'Availability Pattern' columns with 'Show All' dropdown menus. The 'Available Time' column shows '20:00-6:30' and '7:00-16:30'. A 'Remove' button is visible at the end of each row.

Name On Schedule	FTE	Job Descriptions	Availability Pattern	Available Time	New
Search Name	Min	Show All	Show All	Hide Removed	
Bob Martin	1.00	5 assigned	Two weeks	20:00-6:30	Remove



The screenshot shows a dialog box titled 'Add an Employee to the Schedule'. It has a progress bar at the top with five steps: 'Add Employee', 'General Information', 'Contact Information', 'Schedule Information', and 'Skillsets'. The 'Add Employee' step is currently active. Below the progress bar, the title 'Add Employee' is displayed. A message reads: 'Fill out the form below to add an employee. This can either create a new employee or add an existing employee.' There are two input fields: 'Full Name' and 'Login Id'. An orange arrow points to the 'Full Name' field. At the bottom right, there are four buttons: '< Previous', 'Next >', 'Cancel', and 'Finish'.

6. If you need to change any of the employee information in the **Login Id, Require Change By, Hire Date, Department, Employee Id, or Full Name** boxes, type those changes now.

7. Click **Next**.

8. Click the “Edit” links to add a Primary Email and Primary Phone Number.

The screenshot shows the 'Add an Employee to the Schedule' form with the 'General Information' tab selected. The form contains the following fields:

Login Id*	Password*	Require Change By*
SSmith	quality	10/10/2026
Employee Id*	Department*	Hire Date*
SSmith	Medical Center	10/10/2016
Full Name*		
Steve Smith		

An orange arrow points to the 'Require Change By' field. At the bottom right, there are buttons for '< Previous', 'Next >', 'Cancel', and 'Finish'.

The screenshot shows the 'Add an Employee to the Schedule' form with the 'Contact Information' tab selected. The form contains the following fields:

Primary Email
No Email Address
Primary Phone Number
No Phone Number

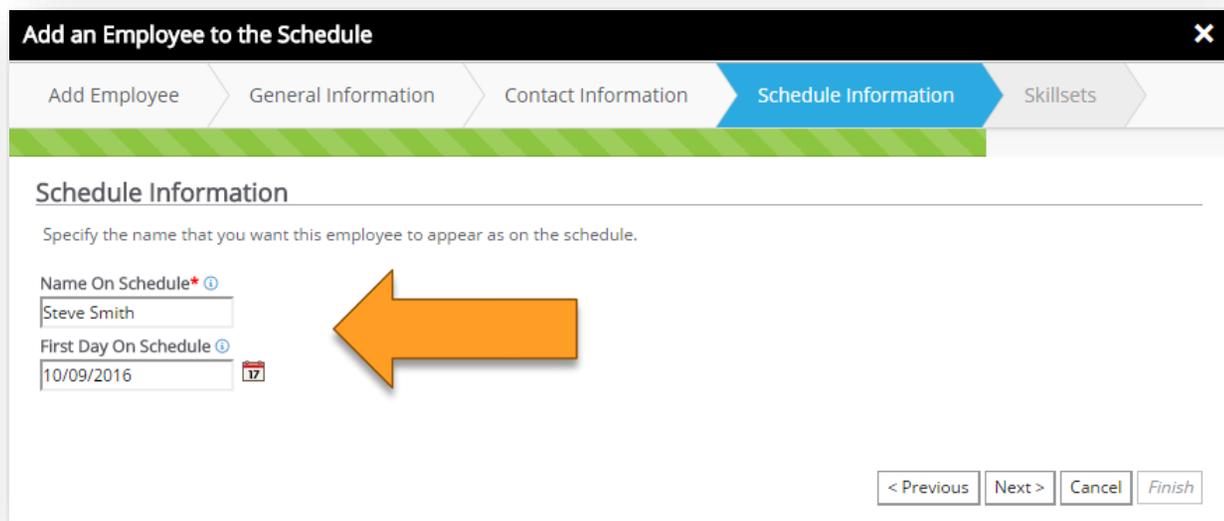
An orange arrow points to the 'Edit' link next to the 'No Email Address' dropdown. At the bottom right, there are buttons for '< Previous', 'Next >', 'Cancel', and 'Finish'.

9. Specify the name that you want this employee to appear on the schedule in the **Name on Schedule** box.

10. In the **First Day on Schedule** box put the date you would like the employee to appear on schedule.

**Note:** If you put a future date in the **First Day on Schedule** box, employee's availability will not be able to be set until the date chosen.

11. Click **Finish**.



The screenshot shows a web application window titled "Add an Employee to the Schedule" with a close button (X) in the top right corner. The window has a navigation bar with five tabs: "Add Employee", "General Information", "Contact Information", "Schedule Information" (which is highlighted in blue), and "Skillsets". Below the navigation bar is a green decorative bar. The main content area is titled "Schedule Information" and contains the instruction "Specify the name that you want this employee to appear as on the schedule." There are two input fields: "Name On Schedule\*" with a help icon (i) and a text input containing "Steve Smith"; and "First Day On Schedule" with a help icon (i) and a date input containing "10/09/2016" and a calendar icon. A large orange arrow points from the right towards the "Name On Schedule" field. At the bottom right of the form are four buttons: "< Previous", "Next >", "Cancel", and "Finish".