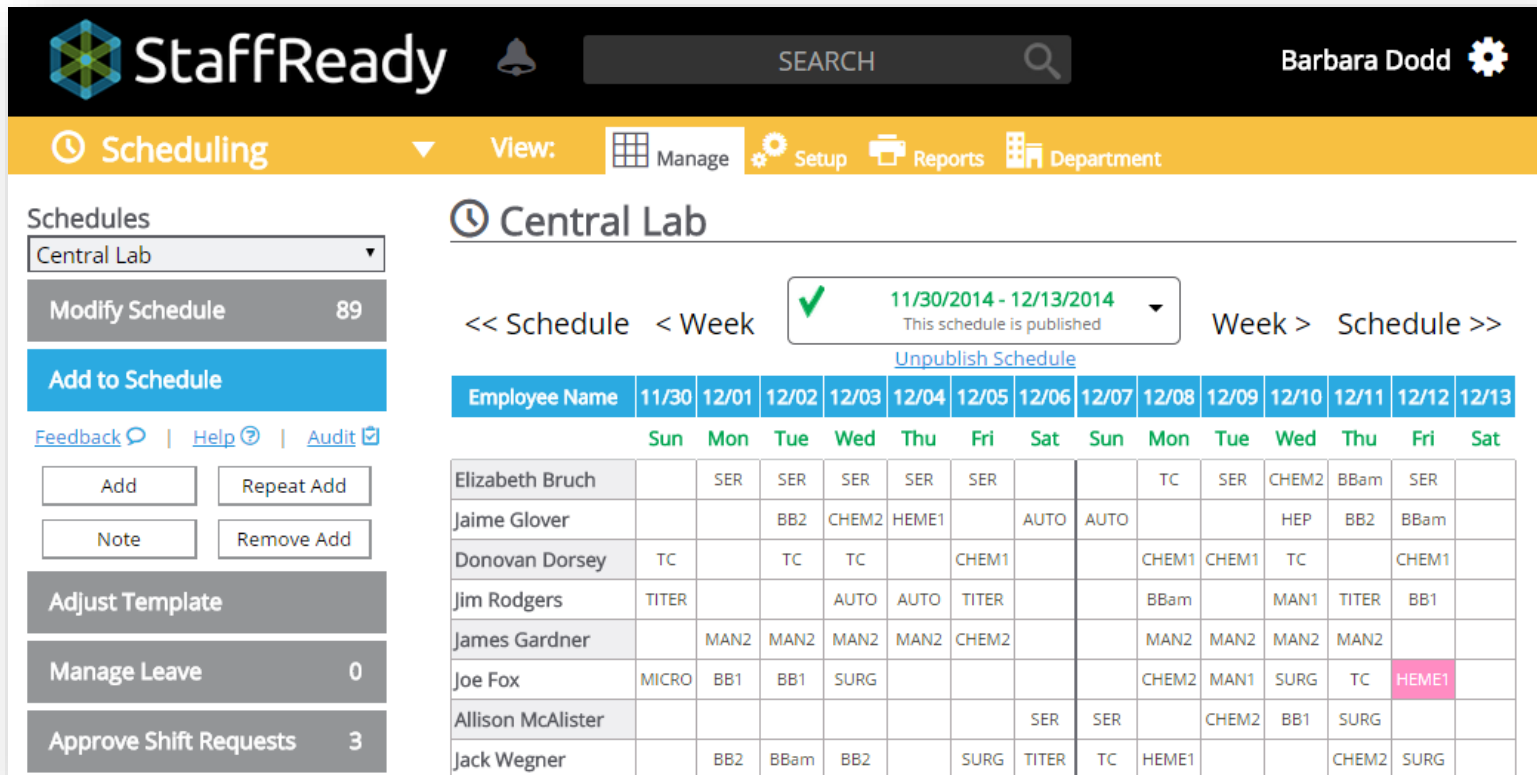


## Scheduling – Manage View

### Add to Schedule Modes

This reference guide provides an overview of each mode from the **Add to Schedule** submenu within the **Manage** View in the StaffReady Scheduling Module. The following process steps and instructional information are provided within this document:

- **Add**
- **Note**
- **Remove Add**
- **Repeat Add**



**StaffReady** | SEARCH | Barbara Dodd

Scheduling | View: Manage | Setup | Reports | Department

Schedules: Central Lab

Modify Schedule 89

Add to Schedule

Feedback | Help | Audit

Add | Repeat Add

Note | Remove Add

Adjust Template

Manage Leave 0

Approve Shift Requests 3

### Central Lab

<< Schedule < Week 11/30/2014 - 12/13/2014 This schedule is published Week > Schedule >>

[Unpublish Schedule](#)

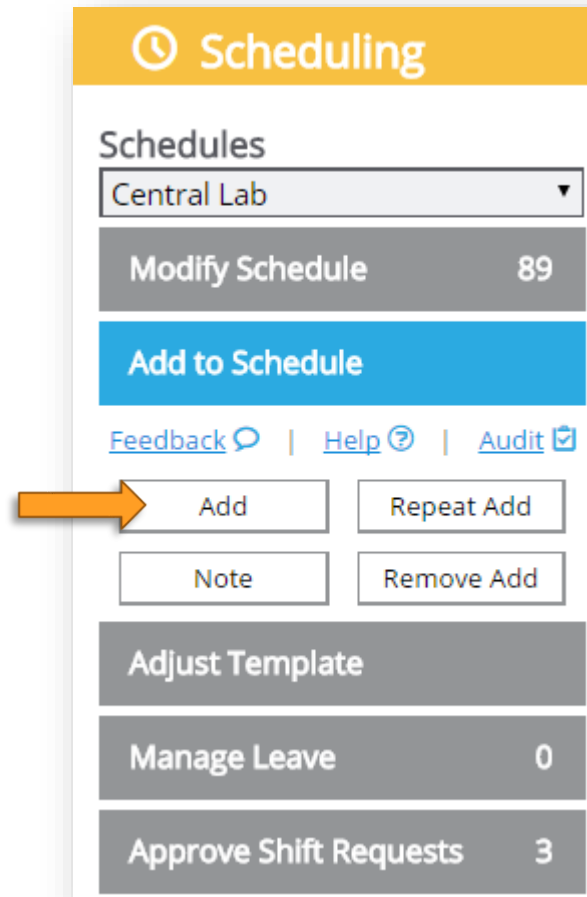
Employee Name	11/30	12/01	12/02	12/03	12/04	12/05	12/06	12/07	12/08	12/09	12/10	12/11	12/12	12/13
	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat
Elizabeth Bruch		SER	SER	SER	SER	SER			TC	SER	CHEM2	BBam	SER	
Jaime Glover			BB2	CHEM2	HEME1		AUTO	AUTO			HEP	BB2	BBam	
Donovan Dorsey	TC		TC	TC		CHEM1			CHEM1	CHEM1	TC		CHEM1	
Jim Rodgers	TITER			AUTO	AUTO	TITER			BBam		MAN1	TITER	BB1	
James Gardner		MAN2	MAN2	MAN2	MAN2	CHEM2			MAN2	MAN2	MAN2	MAN2		
Joe Fox	MICRO	BB1	BB1	SURG					CHEM2	MAN1	SURG	TC	HEME1	
Allison McAlister							SER	SER		CHEM2	BB1	SURG		
Jack Wegner		BB2	BBam	BB2		SURG	TITER	TC	HEME1			CHEM2	SURG	

# Add

Use the Add mode to add ad-hoc shift assignments to the schedule.

## Add Mode

1. Click **Add**.



- Click the day that you wish to add (create) a shift assignment.

### Central Lab

<< Schedule < Week ✓ 11/30/2014 - 12/13/2014  
This schedule is published Week > Schedule >>

[Unpublish Schedule](#)

Employee Name	11/30	12/01	12/02	12/03	12/04	12/05	12/06	12/07	12/08	12/09	12/10	12/11	12/12	12/13
	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat
Elizabeth Bruch		SER	SER	SER	SER	SER			TC	SER	CHEM2	BBam	SER	
Jaime Glover			BB2	CHEM2	HEME1		AUTO	AUTO			HEP	BB2	BBam	
Donovan Dorsey	TC		TC	TC		CHEM1			CHEM1	CHEM1	TC		CHEM1	
Jim Rodgers				AUTO	AUTO	TITER			BBam		MAN1	TITER	BB1	

- Select **Job Description**.
- Select **Assignment**.
- Select **Location**.
- Select **Start** start time.
- Select **Duration**.
- Select **Unpaid Break**.
- Click **Save Changes**.

### Add Shift

Assigned To: Donovan Dorsey      Date: Monday, 12/01/2014

Job Description\* ⓘ: BB1      Assignment\* ⓘ: BB1

Location\* ⓘ: Blood Bank

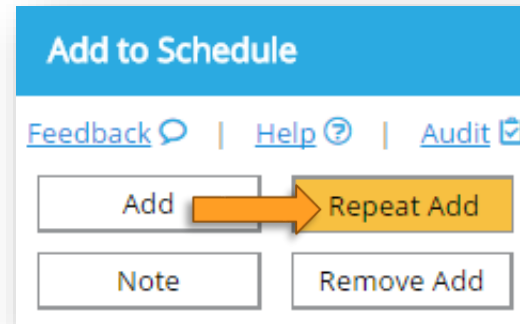
Start\* ⓘ: 7:00      Duration\* ⓘ: 8.50      Unpaid Break\* ⓘ: 30      End: 15:30

## Repeat Add

The **Repeat Add Mode** allows for the creation of the add shift for any employee on the day the add shift was created for, or on any day for the employee that the add shift was created.

### Repeat Add Mode

1. Click **Repeat Add**.



2. Click the day(s) to repeat the add shift.

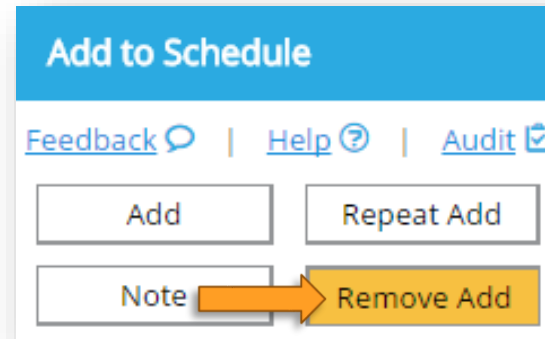
Employee Name	11/30	12/01	12/02	12/03	12/04	12/05	12/06
	Sun	Mon	Tue	Wed	Thu	Fri	Sat
Elizabeth Bruch		SER	SER	SER	SER	SER	
Jaime Glover			BB2	CHEM2	HEME1		AUTO
Donovan Dorsey	TC	BB1	TC	TC		CHEM1	
Jim Rodgers	TITER			AUTO	AUTO	TITER	
James Gardner		MAN2	MAN2	MAN2	MAN2	CHEM2	
Joe Fox	MICRO	BB1	BB1	SURG			
Allison McAlister		BB1					SER

## Remove Add

The **Remove Add** mode allows you to rapidly remove shift assignments created with the **Add** mode and/or **Repeat Add** mode (see preceding section).

### Remove Add Mode

1. Click **Remove Add**.



2. Click the day(s) to remove the add shift.

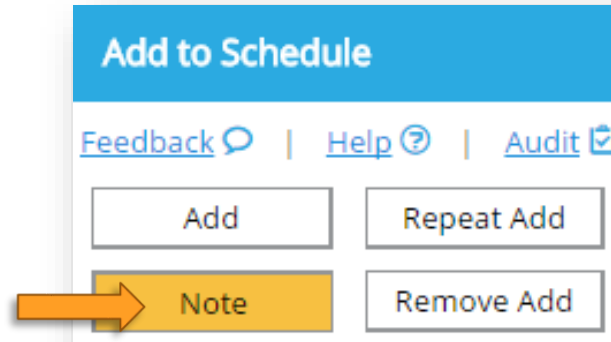
Employee Name	11/30	12/01	12/02	12/03	12/04	12/05	12/06
	Sun	Mon	Tue	Wed	Thu	Fri	Sat
Elizabeth Bruch		SER	SER	SER	SER	SER	
Jaime Glover			BB2	CHEM2	HEME1		AUTO
Donovan Dorsey	TC	BB1	TC	TC		CHEM1	
Jim Rodgers	TITER			AUTO	AUTO	TITER	
James Gardner		MAN2	MAN2	MAN2	MAN2	CHEM2	
Joe Fox	MICRO	BB1	BB1	SURG			
Allison McAlister		BB1					SER

## Note

The **Note** mode allows you to add a note to any day of the schedule period.

### Using the Note Mode

1. Click **Note**.



2. Click the schedule day to add a note.

Employee Name	11/30	12/01	12/02	12/03	12/04	12/05	12/06
	Sun	Mon	Tue	Wed	Thu	Fri	Sat
Elizabeth Bruch		SER	SER	SER	SER	SER	
Jaime Glover			BB2	CHEM2	HEME1		AUTO
Donovan Dorsey	TC	BB1	TC	TC		CHEM1	
Jim Rodgers	TITER			AUTO	AUTO	TITER	
James Gardner		MAN2	MAN2	MAN2	MAN2	CHEM2	
Joe Fox	MICRO	BB1	BB1	SURG			
Allison McAlister							SER

3. Enter **Note Label**.
4. Enter **Note**.
5. Select **Note Color**.
6. Click **Visible To** menu.

The screenshot shows a form titled "Edit Note" with the following fields and values:

- Note Label\*** (with an info icon): Input field containing "Lead".
- Note\*** (with an info icon): Text area containing "Alison McAlister is the technologist this day."
- Note Color\*** (with an info icon): Color selection dropdown showing "339BEA" (blue).
- Visible To\*** (with an info icon): Visibility dropdown showing "All Employees".
- Save Changes**: A button at the bottom of the form.

Orange arrows point to each of these four fields: Note Label, Note, Note Color, and Visible To.

7. Within the **Visible To** menu, click one of the following options:

- **All Employees** (every employee can view the note on their **Calendar** tab and in the **Schedule with Notes** option within the **Reports** tab),
- **Individual Employee** (only the selected employee and schedule managers can view the note on their **Calendar** tab), or
- **Schedule Managers Only** (only schedule managers can view the note on their **Calendar** tab, the **Schedule** tab editor, and in the **Schedule with Notes** option within the **Reports** tab).

8. Click **Save Changes**

