


Schedules Tab

Add to Schedule Modes

This reference guide provides an overview of each mode from the **Schedules** tab's **Add to Schedule** menu within ScheduleReady 4.5. The following process steps and instructional information are provided within this document:

-  Add
-  Note
-  Remove Add
-  Repeat Add




Scheduling

Welcome
Calendar
Schedules
Administration
Reports

SCHEDULES

Central Lab

<< Schedule

< Week

🔍
10/13/2013 - 10/26/2013
This schedule is locked for editing

Week >

Schedule >>

[Publish Schedule](#)

Employee Name	10/13	10/14	10/15	10/16	10/17	10/18	10/19	10/20	10/21	10/22	10/23	10/24	10/25	10/26
	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat
Maggie Bouchard		BB1		AUTO	AUTO	HEP	AUTO	AUTO			MICRO	TITER	AUTO	
James Gardner					MAN2	MAN2				MAN2	MAN2	MAN2	MAN2	
Elizabeth Bruch	SER		BB1		SER	SER			SER	SER	SER	SER	SER	
Jim Rodgers		BB1	BB1		TITER	CHEM1			AUTO	AUTO	CHEM1		TITER	AUTO
Joe Fox		BB1	MAN1	MAN1	MICRO	AUTO			HEP	CHEM2	CHEM2			TITER

Modify Schedule

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Add to Schedule

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Add

Repeat Add

Note

Remove Add

Add

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

Using the Add Mode

1. In the left navigation pane, click **Add to Schedule**.

The screenshot shows the ScheduleReady interface with the 'Schedules' tab selected. The left navigation pane has 'Add to Schedule' highlighted. The main area displays a calendar grid for the week of 10/13/2013 to 10/26/2013. A red arrow points to the 'Add to Schedule' button in the left pane.

2. Click **Add**.
3. Click the day that you wish to add (create) a shift assignment for.

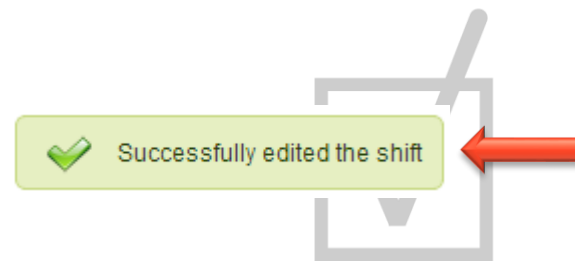
This close-up shows the 'Add to Schedule' modal. The 'Add' button is highlighted with a red arrow. The modal also displays a grid of employee names and dates for the week of 10/13 to 10/19. A red arrow points to the 'Add' button, and another red arrow points to the '10/15' column in the grid.

4. On the the **Job Description** menu, click the job description you wish to use.
5. On the **Assignment** menu, click the assignment you wish to use.
6. On the **Location** menu, click the location you wish to use.
7. On the **Start** menu, click the start time for the new shift.
8. In the **Duration** box, type how long the shift will last.
9. In the **Unpaid Break** box, type how long the unpaid break will last.
10. Click **Save Changes**.

The screenshot shows a web form titled "ADD SHIFT" with a close button in the top right corner. The form contains the following fields and values:

Assigned To	Donovan Dorsey	Date	Monday, 10/14/2013
Job Description*?	BB1	Assignment*?	BB1
Location*?	Blood Bank	Start*?	8:00
		Duration*?	8.50
		Unpaid Break*?	30
		End	30

Red arrows point to the "Assignment*?" dropdown, the "Location*?" dropdown, the "Unpaid Break*?" input field, and the "Save Changes" button.

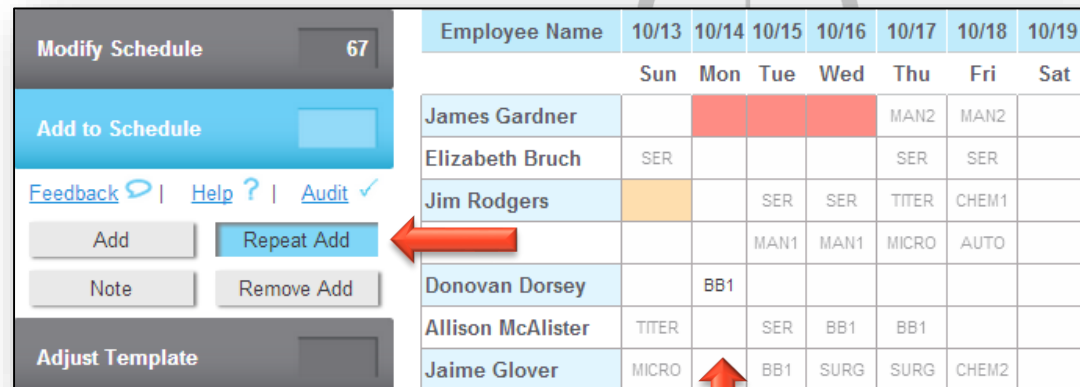


Repeat Add

Using the **Repeat Add Mode**, you can repeat the creation of the add shift for any employee on the day the add shift was created for or for any day for the employee that the add shift was created for.

Using the Repeat Add Mode

1. After you have created a shift assignment using the **Add** mode, click **Repeat Add**.
2. Click the open box(es) where you would like to repeat the adding of the created shift assignment.



Employee Name	10/13	10/14	10/15	10/16	10/17	10/18	10/19
	Sun	Mon	Tue	Wed	Thu	Fri	Sat
James Gardner					MAN2	MAN2	
Elizabeth Bruch	SER				SER	SER	
Jim Rodgers			SER	SER	TITER	CHEM1	
Donovan Dorsey		BB1					
Allison McAlister	TITER		SER	BB1	BB1		
Jaime Glover	MICRO		BB1	SURG	SURG	CHEM2	

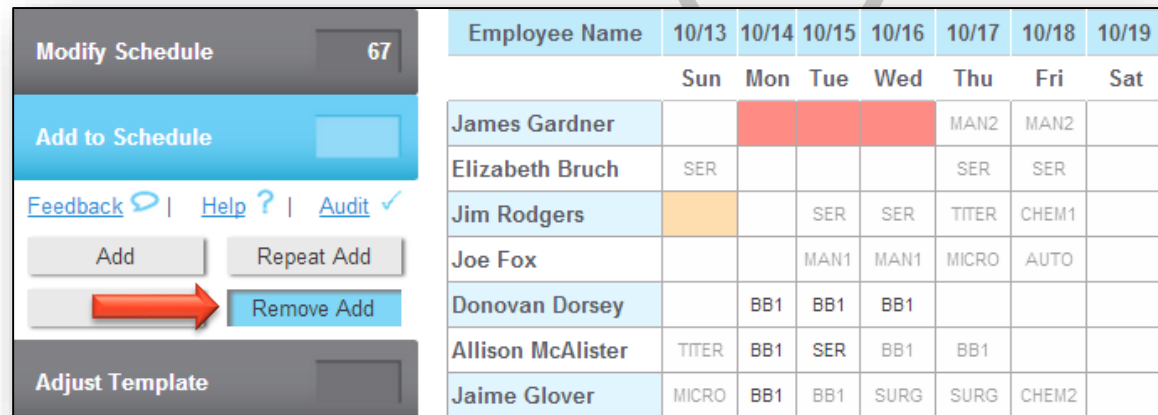


Remove Add

The **Remove Add** mode allows you to rapidly remove shift assignments created with the **Add** mode and/or **Repeat Add** mode (see preceding section). When the **Remove Add** mode is activated, the added shifts stand out from other shift assignments on the schedule. Once the **Remove** action has been saved, it cannot be undone. It is recommended that you use the **Unassign** mode if you are not sure whether or not you will require the shift assignment in question for the current schedule period.

Using the Remove Add Mode

1. Click **Remove Add**.



Employee Name	10/13	10/14	10/15	10/16	10/17	10/18	10/19
	Sun	Mon	Tue	Wed	Thu	Fri	Sat
James Gardner					MAN2	MAN2	
Elizabeth Bruch	SER				SER	SER	
Jim Rodgers			SER	SER	TITER	CHEM1	
Joe Fox			MAN1	MAN1	MICRO	AUTO	
Donovan Dorsey		BB1	BB1	BB1			
Allison McAlister	TITER	BB1	SER	BB1	BB1		
Jaime Glover	MICRO	BB1	BB1	SURG	SURG	CHEM2	



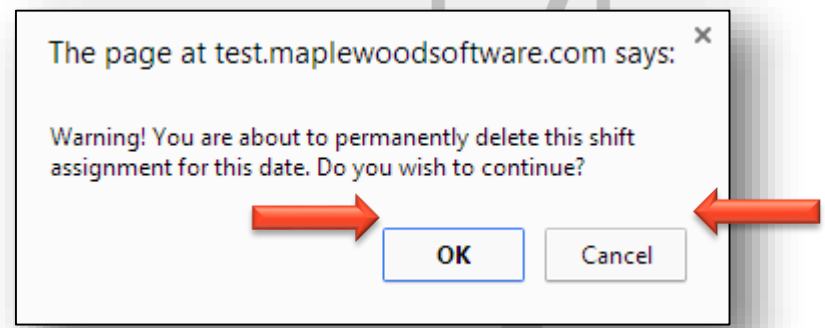
2. On the added shift assignment you wish to remove, click **Remove**.

Employee Name	10/13	10/14	10/15	10/16	10/17	10/18	10/19
	Sun	Mon	Tue	Wed	Thu	Fri	Sat
James Gardner					MAN2	MAN2	
Elizabeth Bruch	SER				SER	SER	
Jim Rodgers			SER	SER	TITER	CHEM1	
Joe Fox			MAN1	MAN1	MICRO	AUTO	
Donovan Dorsey		BB1	BB1	BB1			
Allison McAlister	TITER	BB1	SER	BB1	BB1		
Jaime Glover	MICRO	BB1	BB1	SURG	SURG	CHEM2	

3. To confirm the deletion of the selected shift assignment, click **OK**.

or

To reject the deletion of the selected shift assignment, click **Cancel**.



Note

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

Using the Note Mode

1. In the left navigation pane, click **Add to Schedule**.
2. Click **Note**.
3. Click the assignment you wish to add a note to.
4. In the **Note Label** box, type how you would like the note label to appear on the **Schedule** tab editor.
5. In the **Note** box, type the note that will appear in the **Calendar** tab and the **Schedule with Notes** option within the **Reports** tab.
6. In the **Note Label** menu, click the color that the **Note Label** will be displayed in after selecting the **Notes** option of the **View** menu.

Employee Name	10/13	10/14	10/15	10/16	10/17	10/18	10/19
	Sun	Mon	Tue	Wed	Thu	Fri	Sat
James Gardner					MAN2	MAN2	
Elizabeth Bruch	SER				SER	SER	
Jim Rodgers			SER	SER	TITER	CHEM1	
Joe Fox			MAN1	MAN1	MICRO	AUTO	
Donovan Dorsey		BB1	BB1	BB1			

EDIT NOTE

Note Label* ?
Lead

Note* ?
This employee is the lead for this day.

Note Color* ?
EA83BD

Visible To* ?
All Employees

Save Changes

7. On the **Visible To** menu, click

- **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 Mangers 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**.

EDIT NOTE

Note Label*?

Note*?

Note Color*? EA83BD

Visible To*?
 All Employees
 All Employees
 Individual Employee
 Schedule Managers Only

Save Changes

