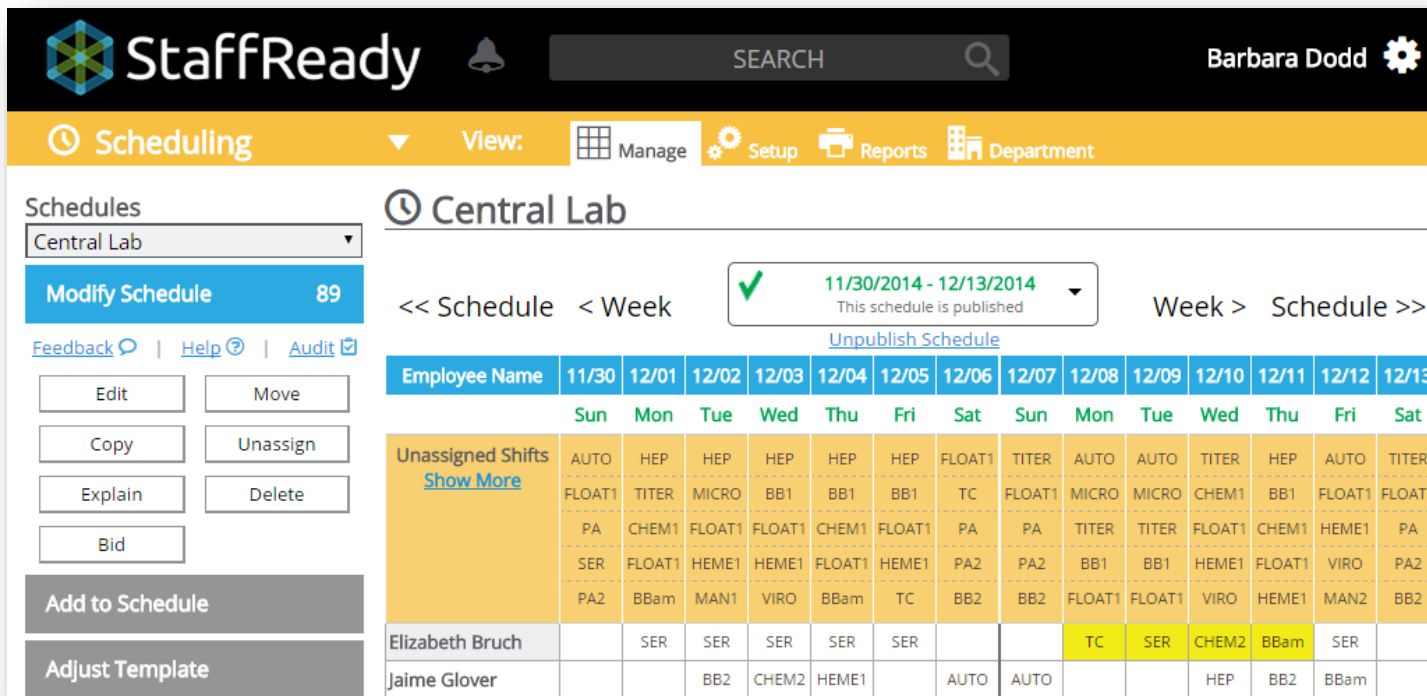


Scheduling – Manage View

Modify Schedule

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

- **Edit**
- **Copy**
- **Explain**
- **Bid**
- **Move**
- **Unassign**
- **Delete**



The screenshot shows the StaffReady Scheduling Manage View for Central Lab. The interface includes a navigation bar with 'Scheduling' and 'View: Manage' options. A sidebar on the left contains a 'Schedules' dropdown set to 'Central Lab' and a 'Modify Schedule' button with a count of 89. Below this are buttons for 'Edit', 'Move', 'Copy', 'Unassign', 'Explain', 'Delete', and 'Bid', along with 'Add to Schedule' and 'Adjust Template' buttons.

The main content area displays the 'Central Lab' schedule for the week of 11/30/2014 - 12/13/2014, which is published. A table shows unassigned shifts for each day of the week, with columns for Employee Name and dates from 11/30 to 12/13. The table includes rows for 'Unassigned Shifts' and individual employees like Elizabeth Bruch and Jaime Glover, with their assigned shifts listed.

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
Unassigned Shifts	AUTO	HEP	HEP	HEP	HEP	HEP	FLOAT1	TITER	AUTO	AUTO	TITER	HEP	AUTO	TITER
	FLOAT1	TITER	MICRO	BB1	BB1	BB1	TC	FLOAT1	MICRO	MICRO	CHEM1	BB1	FLOAT1	FLOAT1
	PA	CHEM1	FLOAT1	FLOAT1	CHEM1	FLOAT1	PA	PA	TITER	TITER	FLOAT1	CHEM1	HEME1	PA
	SER	FLOAT1	HEME1	HEME1	FLOAT1	HEME1	PA2	PA2	BB1	BB1	HEME1	FLOAT1	VIRO	PA2
	PA2	BBam	MAN1	VIRO	BBam	TC	BB2	BB2	FLOAT1	FLOAT1	VIRO	HEME1	MAN2	BB2
Elizabeth Bruch		SER	SER	SER	SER	SER			TC	SER	CHEM2	BBam	SER	
Jaime Glover			BB2	CHEM2	HEME1		AUTO	AUTO			HEP	BB2	BBam	

Edit

Using the Edit Mode

1. Click **Edit**.
2. Click the **shift assignment Id** within the schedule grid that you wish to edit. (The **Edit Shift** window opens.)
3. To change the shift location, select a location on the **Location** menu.

To change the start time of the shift, select a time on the **Start** menu.

To change the duration of the shift, in the **Duration** box, type the new duration of the shift.

To change the duration of the unpaid break, in the **Unpaid Break** box, type the new duration of the break.

4. Click **Save Changes**.

Note: Any potential conflicts with the edits you are making will display in the **Errors** table.

Scheduling View: Manage Setup Department

Schedules Central Lab

Modify Schedule 167

Feedback | Help | Audit

Edit Move

Copy Unassign

Explain Delete

Bid

Add to Schedule

Adjust Template

Manage Leave 0

Approve Shift Requests 0

Central Lab

<< Schedule < Week

Employee Name	12/07	12/08	12/09	12/10	12/11	12/12	12/13
Unassigned Shifts	MICRO	AUTO	HEP	HEP	FLOAT1	MICRO	TITER
	TITER	MICRO	TITER	MICRO	VIRO	TITER	FLOAT1
	FLOAT1	TITER	FLOAT1	FLOAT1	BB2	FLOAT1	PA2
	PA	BB1	BBam	VIRO	CHEM2	BBam	BB2
	PA2	FLOAT1	MAN1		VIRO		PA3
OPEN SHIFT							
Donovan Dorsey		CHEM1	CHEM1	CHEM1	CHEM1		
Elizabeth Bruch		TC	SER	CHEM2	BBam	SER	
Jim Rodgers		BBam		TC	TITER	BB1	
Jaime Glover		AUTO		BB2	TC	MAN1	
Dennis Alvarez		SURG	SURG	HEME1	HEME1	BB1	PA

Edit Shift

Assigned To: Jaime Glover Date: Wednesday, 12/10/2014

Job Description: Blood Bank - Evening Assignment: BB2

Location*: 5th Floor-West

Start*: 14:00 Duration*: 8.50 Unpaid Break*: 30 End: 22:30

Save Changes

Errors: No Errors

Successfully edited the shift

Move

Using the Move Mode

1. Click **Move**.
2. Click the **shift assignment Id** within the schedule grid that you wish to move.

The cell is highlighted grey.

3. Click the cell you want to move the shift assignment to.

The shift assignment is assigned to the selected employee and the **Successfully moved the shift** window appears.

The screenshot shows the 'Scheduling' interface for 'Central Lab'. On the left, the 'Schedules' dropdown is set to 'Central Lab' and the 'Modify Schedule' button shows '167'. The 'Move' button is highlighted in orange. The main grid shows a weekly schedule from 12/07 to 12/13. The cell for 'Jim Rodgers' on 12/08 (BBam) is highlighted in grey. An orange arrow points from the 'Move' button to this cell.

Employee Name	12/07	12/08	12/09	12/10	12/11	12/12	12/13
Unassigned Shifts	MICRO	AUTO	HEP	HEP	FLOAT1	MICRO	TITER
	TITER	MICRO	TITER	MICRO	VIRO	TITER	FLOAT1
	FLOAT1	TITER	FLOAT1	FLOAT1	BB2	FLOAT1	PA2
	PA	BB1	BBam	VIRO	CHEM2	BBam	BB2
	PA2	FLOAT1	MAN1		VIRO		PA3
OPEN SHIFT							
Donovan Dorsey		CHEM1	CHEM1	CHEM1	CHEM1	CHEM1	
Elizabeth Bruch		TC	SER	CHEM2	BBam	SER	
Jim Rodgers		BBam		TC	TITER	BB1	
Jaime Glover	AUTO			BB2	TC	MAN1	
Dennis Alvarez		SURG	SURG	HEME1	HEME1	BB1	PA

The screenshot shows the same 'Scheduling' interface, but the 'Modify Schedule' button now shows '169'. A green notification box at the top right says 'Successfully moved the shift'. The 'Move' button is no longer highlighted. The cell for 'Jim Rodgers' on 12/08 (BBam) is now greyed out. The cell for 'Jaime Glover' on 12/09 (BB2) is highlighted in grey. An orange arrow points from the notification box to the 'Successfully moved the shift' message.

Employee Name	12/07	12/08	12/09	12/10	12/11	12/12	12/13
Unassigned Shifts	MICRO	AUTO	HEP	HEP	FLOAT1	MICRO	TITER
	TITER	MICRO	TITER	MICRO	VIRO	TITER	FLOAT1
	FLOAT1	TITER	FLOAT1	FLOAT1	BB2	FLOAT1	PA2
	PA	BB1	BBam	VIRO	CHEM2	BBam	BB2
	PA2	FLOAT1	MAN1	HEME1	HEME1	VIRO	PA3
OPEN SHIFT							
Donovan Dorsey		CHEM1	CHEM1	CHEM1	CHEM1	CHEM1	
Elizabeth Bruch		TC	SER	CHEM2	BBam	SER	
Jim Rodgers		BBam		TC	TITER	BB1	
Jaime Glover	AUTO		BB2	TC	MAN1		
Dennis Alvarez		SURG	SURG			BB1	PA

Copy

Using the Copy Mode

4. Click **Copy**.
5. Click the **shift assignment Id** within the schedule grid that you wish to copy.

The cell is highlighted grey.

6. Click the cell you want to copy the shift assignment to.

The shift assignment is copied to the selected employee and the **Successfully copied the shift** window appears.

Note: The copy mode only allows you to copy shifts to other employees on the same day as the shift you have selected to copy occurs.

Schedules
Central Lab

Modify Schedule 169

Feedback | Help | Audit

Edit Move

Copy Unassign

Explain Delete

Bid

Add to Schedule

Adjust Template

Manage Leave 0

Approve Shift Requests 0

Central Lab

<< Schedule < Week

Employee Name	12/07	12/08	12/09	12/10	12/11	12/12
	Sun	Mon	Tue	Wed	Thu	Fri
Unassigned Shifts Show More	MICRO	AUTO	HEP	HEP	FLOAT1	MICRO
	TITER	MICRO	TITER	MICRO	VIRO	TITER
	FLOAT1	TITER	FLOAT1	FLOAT1	BB2	FLOAT1
	PA	BB1	BBam	VIRO	CHEM2	BBam
	PA2	FLOAT1	MAN1	HEME1	HEME1	VIRO
OPEN SHIFT						
Donovan Dorsey		CHEM1	CHEM1	CHEM1	CHEM1	CHEM1
Elizabeth Bruch		TC	SER	CHEM2	BBam	SER
Jim Rodgers				TC	TITER	BB1
Jaime Glover	AUTO	BBam		BB2	TC	MAN1
Dennis Alvarez		SURG	SURG			BB1

Schedules
Central Lab

Modify Schedule 169

Feedback | Help | Audit

Edit Move

Copy Unassign

Explain Delete

Bid

Add to Schedule

Adjust Template

Manage Leave 0

Approve Shift Requests 0

Central Lab

<< Schedule < Week

Successfully copied the shift

Employee Name	12/07	12/08	12/09	12/10	12/11	12/12
	Sun	Mon	Tue	Wed	Thu	Fri
Unassigned Shifts Show More	MICRO	AUTO	HEP	HEP	FLOAT1	MICRO
	TITER	MICRO	TITER	MICRO	VIRO	TITER
	FLOAT1	TITER	FLOAT1	FLOAT1	BB2	FLOAT1
	PA	BB1	BBam	VIRO	CHEM2	BBam
	PA2	FLOAT1	MAN1	HEME1	HEME1	VIRO
OPEN SHIFT						
Donovan Dorsey		CHEM1	CHEM1	CHEM1	CHEM1	CHEM1
Elizabeth Bruch		TC	SER	CHEM2	BBam	SER
Jim Rodgers				TC	TITER	BB1
Jaime Glover	AUTO	BBam		BB2	TC	MAN1
Dennis Alvarez		SURG	SURG			BB1

Unassign

Using the Unassign Mode

1. Click **Unassign**.
2. Click the **shift assignment Id** within the schedule grid that you wish to unassign.

Schedules
Central Lab

Modify Schedule 170

Feedback | Help | Audit

Edit Move

Copy **Unassign**

Explain Delete

Bid

Add to Schedule

Adjust Template

Manage Leave 0

Approve Shift Requests 0

Central Lab

<< Schedule < Week

Employee Name	12/07	12/08	12/09	12/10	12/11	12/12
	Sun	Mon	Tue	Wed	Thu	Fri
Unassigned Shifts Show More	MICRO	AUTO	HEP	HEP	FLOAT1	MICRO
	TITER	MICRO	TITER	MICRO	VIRO	TITER
	FLOAT1	TITER	FLOAT1	FLOAT1	BB2	FLOAT1
	PA	BB1	BBam	VIRO	CHEM2	BBam
	PA2	FLOAT1	MAN1	TC	HEME1	VIRO
OPEN SHIFT						
Donovan Dorsey		CHEM1	CHEM1	CHEM1	CHEM1	CHEM1
Elizabeth Bruch		TC	SER	CHEM2	BBam	SER
Jim Rodgers		CHEM1			TITER	BB1
Jaime Glover	AUTO	BBam		BB2	TC	MAN1
Dennis Alvarez		SURG	SURG			BB1

- The selected cell is now empty.
- The selected shift is now in the **Unassigned Shifts** grid.
- The **Successfully unassigned shift** window appears.

Schedules
Central Lab

Modify Schedule 171

Feedback | Help | Audit

Edit Move

Copy **Unassign**

Explain Delete

Bid

Add to Schedule

Adjust Template

Manage Leave 0

Approve Shift Requests 0

Central Lab

<< Schedule < Week

Employee Name	12/07	12/08	12/09
	Sun	Mon	Tue
Unassigned Shifts Show More	MICRO	AUTO	HEP
	TITER	MICRO	TITER
	FLOAT1	TITER	FLOAT1
	PA	BB1	BBam
		CHEM1	MAN1
OPEN SHIFT			
Donovan Dorsey		CHEM1	CHEM1
Elizabeth Bruch		TC	SER
Jim Rodgers			
Jaime Glover	AUTO	BBam	
Dennis Alvarez		SURG	SURG

Successfully unassigned the shift

Delete

Once a deletion has been confirmed, it cannot be undone. If you are not sure whether or not you will require the shift assignment in question for the current schedule period, we recommend that you use the **Unassign** mode described above.

Using the Delete Mode

1. Click **Delete**.
2. Click the **shift assignment Id** within the schedule grid that you wish to delete.

Schedules
Central Lab

Modify Schedule 172

Feedback | Help | Audit

Edit Move

Copy Unassign

Explain Delete

Bid

Add to Schedule

Adjust Template

Manage Leave 0

Approve Shift Requests 0

Central Lab

<< Schedule < Week

Employee Name	12/07	12/08	12/09	12/10
	Sun	Mon	Tue	Wed
Unassigned Shifts Show More	MICRO TITER FLOAT1 PA PA2	AUTO MICRO TITER BB1 CHEM2	HEP TITER FLOAT1 BBam MAN1	HEP MICRO FLOAT1 VIRO TC
OPEN SHIFT				
Donovan Dorsey		CHEM1	CHEM1	CHEM1
Elizabeth Bruch		TC	SER	CHEM2
Jim Rodgers				
Jaime Glover	AUTO	BBam		BB2
Dennis Alvarez		SURG	SURG	

3. Click **OK** to confirm deletion

Or

Click **Cancel** to cancel the deletion.

- The selected cell is now empty.
- The **Successfully deleted shift** window appears.

Warning! You are about to permanently delete this shift assignment for this date. Do you wish to continue?


OK Cancel

Successfully deleted the shift

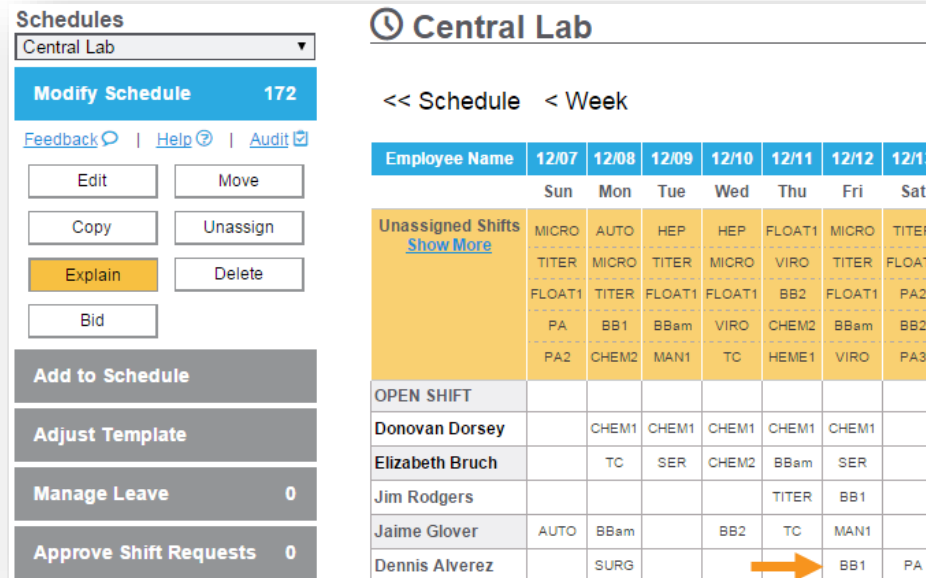
Explain

Using the Explain Mode

1. Click **Explain**.
2. Click the **shift assignment Id** within the schedule grid that you would like an explanation for.

The **Explain Shift Assignment** window displays the employees that the automatic schedule build attempted to schedule. The  icon represents the employee that was ultimately assigned the shift.

3. On the **More Information** menu, click an employee name to view why other employees were not scheduled.



Schedules
Central Lab

Modify Schedule 172

Feedback | Help | Audit

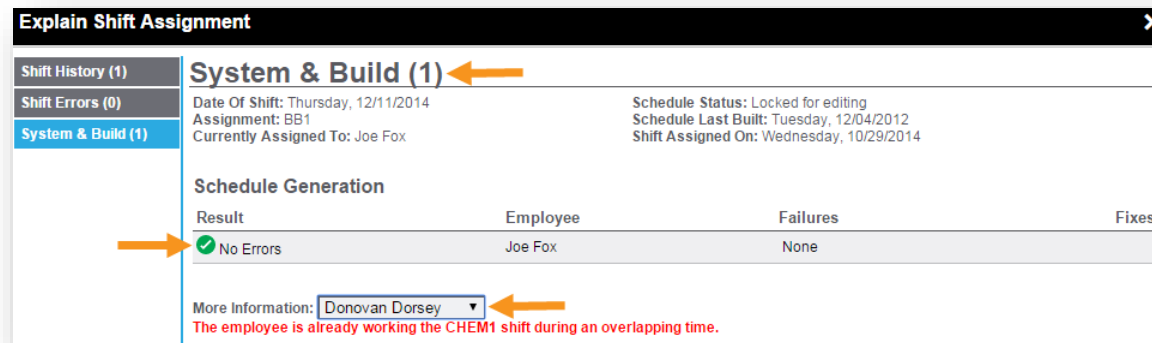
Edit Move
Copy Unassign
Explain Delete
Bid

Add to Schedule
Adjust Template
Manage Leave 0
Approve Shift Requests 0

Central Lab

<< Schedule < Week

Employee Name	12/07	12/08	12/09	12/10	12/11	12/12	12/13
	Sun	Mon	Tue	Wed	Thu	Fri	Sat
Unassigned Shifts Show More	MICRO	AUTO	HEP	HEP	FLOAT1	MICRO	TITER
	TITER	MICRO	TITER	MICRO	VIRO	TITER	FLOAT1
	FLOAT1	TITER	FLOAT1	FLOAT1	BB2	FLOAT1	PA2
	PA	BB1	BBam	VIRO	CHEM2	BBam	BB2
	PA2	CHEM2	MAN1	TC	HEME1	VIRO	PA3
OPEN SHIFT							
Donovan Dorsey		CHEM1	CHEM1	CHEM1	CHEM1	CHEM1	
Elizabeth Bruch		TC	SER	CHEM2	BBam	SER	
Jim Rodgers					TITER	BB1	
Jaime Glover	AUTO	BBam		BB2	TC	MAN1	
Dennis Alvarez		SURG				BB1	PA



Explain Shift Assignment

Shift History (1)
Shift Errors (0)
System & Build (1)

System & Build (1)

Date Of Shift: Thursday, 12/11/2014
Assignment: BB1
Currently Assigned To: Joe Fox

Schedule Status: Locked for editing
Schedule Last Built: Tuesday, 12/04/2012
Shift Assigned On: Wednesday, 10/29/2014

Schedule Generation

Result	Employee	Failures	Fixes
✓ No Errors	Joe Fox	None	

More Information: Donovan Dorsey
The employee is already working the CHEM1 shift during an overlapping time.

4. Click the **Shift History** side tab to view all of the changes the shift assignment has undergone since the automatic system build.

In the **Assignment Actions** table, you can view each change to the shift assignment.

- Who made the change
- Which employee is affected by the change
- Type of change made
- Date and time the change was made

5. Click the **Close** button



The screenshot shows a window titled "Explain Shift Assignment" with a close button (X) in the top right corner. On the left, there is a sidebar with three tabs: "Shift History (1)", "Shift Errors (0)", and "System & Build (1)". The "Shift History (1)" tab is selected, and an orange arrow points to it. The main content area displays the following information:

Shift History (1)

Date Of Shift: Thursday, 12/11/2014
Assignment: BB1
Currently Assigned To: Joe Fox

Schedule Status: Locked for editing
Schedule Last Built: Tuesday, 12/04/2012
Shift Assigned On: Wednesday, 10/29/2014

Assignment Actions

Order	Employee	Time	Location	Command	Changed By	Change Date
1	Joe Fox	7:00 - 15:30	Blood Bank	Assign	System Build	10/29/2014 02:20

An orange arrow points to the "Change Date" column header in the table.

Bid

In the **Bid Mode**, you can put shift assignments in the **Unassigned Shifts** grid out for staff to bid on. Once a shift bid has been created, bid recipients can accept or deny it. For information on how employees accept and deny shift bids, please consult the **My Schedule** reference guide in the **Calendar** view.

Using the Bid Mode

1. Click **Bid**.
2. In the **Unassigned Shifts** grid, click the **shift assignment Id** you would like post to staff to bid upon.
3. In the **New Shift Bid** window, you can remove and add employees to the bid recipients list.

To filter out employees who are not available for the shift assignment, click **Available**.

To filter out employees who would receive overtime if they were to work the shift assignment, click **No Overtime**.

To filter out employees who do not have the required skill level for the shift assignment, click **Skill Level**.

To filter out employees who are not qualified to work the shift assignment, click **Qualified**.

To remove all filters, click **Clear Filters**.

Employee Name	12/07	12/08	12/09	12/10	12/11	12/12
	Sun	Mon	Tue	Wed	Thu	Fri
Unassigned Shifts	MICRO	AUTO	HEP	HEP	FLOAT1	MICRO
	TITER	MICRO	TITER	MICRO	VIRO	TITER
	FLOAT1	TITER	FLOAT1	FLOAT1	BB2	FLOAT1
	PA	BB1	BBam	VIRO	CHEM2	BBam
	PA2	CHEM2	MAN1	TC	HEME1	VIRO

New Shift Bid

Job Description: Press Assistant
Assignment: PA
Date: Sunday, 12/07/2014
Time: 8:00 - 12:00
Location: 3rd Floor- Main

Create Shift Bid

Recipient Filters: Available No Overtime Skill Level Qualified Clear Filters (2)

Undo Adds/Removes (0) Remove All

Bid Recipients

Allison McAlister	Remove
Jack Wegner	Remove
Joel Gabriel	Remove

In the row of any employee you wish to remove, click **Remove**.

To add an employee, click **Add**.

To remove all employees, click **Remove All**.

To undo any adding or removing of employees since the current **New Shift Bid** window was opened, click **Undo Adds/Removes (#)**.

4. Once you develop a final bid recipient list, click **Create Shift Bid**.

The screenshot shows the 'New Shift Bid' window with the following details:

- Job Description:** Press Assistant
- Assignment:** PA
- Date:** Sunday, 12/07/2014
- Time:** 8:00 - 12:00
- Location:** 3rd Floor- Main

Buttons and actions shown:

- Create Shift Bid** (button, arrow points left)
- Recipient Filters:** Available (green), No Overtime (green), Skill Level (white), Qualified (white), Clear Filters (2) (blue link)
- Undo Adds/Removes (0)** (blue link, arrow points right)
- Remove All** (blue link, arrow points down)
- Add** (blue link, arrow points right)
- Remove** (blue link, arrow points right) - shown for Allison McAlister, Jack Wegner, and Joel Gabriel