
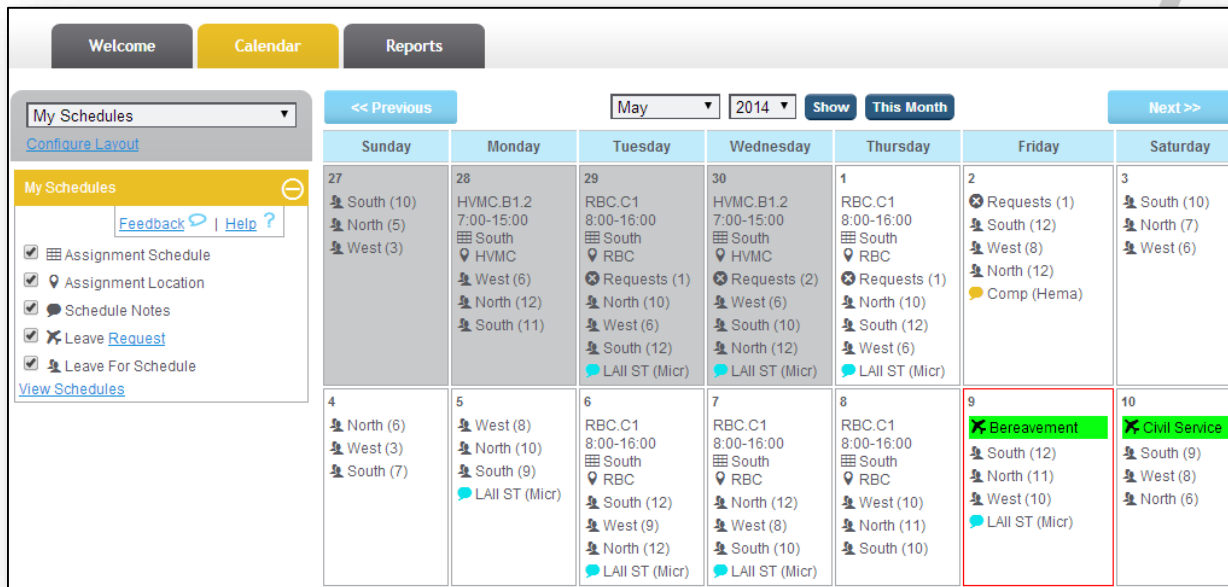


## Calendar Tab

### Overview of the My Schedules Minibar

This reference guide provides a process overview of the **My Schedules** minibar within ScheduleReady 4.5. The following process steps and instructional information are provided within this document

-  Review My Schedule
-  Submit a Shift Request
-  Review Shift and Bid Requests
-  Cancel a Shift Request
-  Accept and Reject Bid Requests
-  Submit Leave Request
-  Edit/Review Existing Leave Request







The screenshot displays the 'My Schedules' minibar in ScheduleReady 4.5. The interface includes a navigation bar with 'Welcome', 'Calendar', and 'Reports' tabs. Below this, there are controls for the current month (May 2014) and buttons for 'Show', 'This Month', and 'Next >>'. The main area is a calendar grid showing shift assignments for each day from Sunday to Saturday. The sidebar on the left, titled 'My Schedules', contains a 'Feedback' and 'Help' link, and a list of filters: 'Assignment Schedule', 'Assignment Location', 'Schedule Notes', 'Leave Request', and 'Leave For Schedule'. The calendar grid shows various shift assignments such as 'South (10)', 'HVMC.B1.2', 'RBC.C1', and 'Requests (1)'. The 9th and 10th of May are highlighted with red boxes, indicating 'Bereavement' and 'Civil Service' respectively.

## Review My Schedule

You can view your schedule, request leave, initiate shift trades with coworkers, bid on open shifts, and see notes posted by schedule managers using the **My Schedules** minibar within the **Calendar** tab. The current calendar month is the default display.

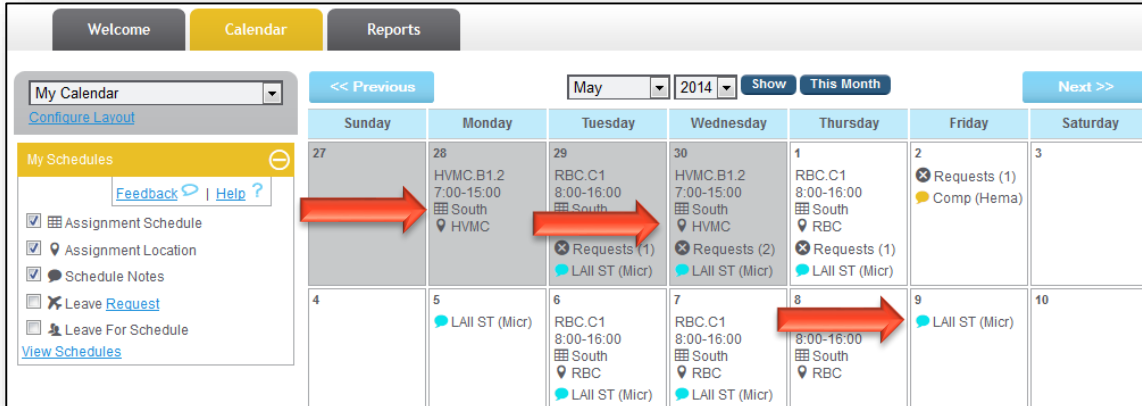
### Review My Schedule

1. Click the **Calendar** tab
2. Click **Previous** to view the previous month.
3. Click **Next** to view the next month.
4. Select the **Assignment Schedule** () check box to view the name of the schedule the shift was assigned from
5. Select the **Assignment Location** () check box to view the locations of scheduled shifts.
6. Select the **Schedule Notes** () check box to view the notes on the schedule.



The screenshot shows the 'Calendar' tab selected. The navigation bar includes '<< Previous', 'May', '2014', 'Show', 'This Month', and 'Next >>'. Red arrows point to the 'Previous' and 'Next' buttons. The calendar grid shows shifts for May 27-31. The 'My Schedules' sidebar on the left has the 'Assignment Schedule' checkbox checked.

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
27	28 HVMC.B1.2 7:00-15:00	29 RBC.C1 8:00-16:00 ⊗ Requests (1)	30 HVMC.B1.2 7:00-15:00 ⊗ Requests (2)	1 RBC.C1 8:00-16:00 ⊗ Requests (1)	2 ⊗ Requests (1)	3
4	5	6 RBC.C1 8:00-16:00	7 RBC.C1 8:00-16:00	8 RBC.C1 8:00-16:00	9	10



The screenshot shows the 'Calendar' tab selected. The navigation bar is the same as the previous screenshot. Red arrows point to the 'Assignment Location' and 'Schedule Notes' checkboxes in the 'My Schedules' sidebar. The calendar grid shows shifts for May 27-31 with more details visible for each shift.

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
27	28 HVMC.B1.2 7:00-15:00 South HVMC	29 RBC.C1 8:00-16:00 South ⊗ Requests (1) LAI ST (Micr)	30 HVMC.B1.2 7:00-15:00 South HVMC ⊗ Requests (2) LAI ST (Micr)	1 RBC.C1 8:00-16:00 South RBC ⊗ Requests (1) LAI ST (Micr)	2 ⊗ Requests (1) Comp (Hema)	3
4	5 LAI ST (Micr)	6 RBC.C1 8:00-16:00 South RBC LAI ST (Micr)	7 RBC.C1 8:00-16:00 South RBC LAI ST (Micr)	8 8:00-16:00 South RBC	9 LAI ST (Micr)	10

7. Click [View Schedules](#) to view and print all schedules employee is associated with.
8. Click the drop down menu to select another schedule if you have access to more than one schedule.

The screenshot shows a web application interface with a calendar view for May 2014. A modal window titled "VIEW SCHEDULES" is open, displaying a table of schedule data. The table has the following columns: First Date, Last Date, HTML, PDF Landscape, and PDF Portrait. The row for the period 05/10/2014 to 05/23/2014 is highlighted in yellow. A red arrow points to the "Schedules" dropdown menu, which is currently set to "North". Another red arrow points to the highlighted row in the table.

First Date	Last Date	HTML	PDF Landscape	PDF Portrait
08/16/2014	08/29/2014	Not Posted	Not Posted	Not Posted
08/02/2014	08/15/2014	Not Posted	Not Posted	Not Posted
07/19/2014	08/01/2014	Not Posted	Not Posted	Not Posted
07/05/2014	07/18/2014	Not Posted	Not Posted	Not Posted
06/21/2014	07/04/2014	Not Posted	Not Posted	Not Posted
06/07/2014	06/20/2014	Not Posted	Not Posted	Not Posted
05/10/2014	05/23/2014			
04/26/2014	05/09/2014			
04/12/2014	04/25/2014			
03/29/2014	04/11/2014			



## Submit a Shift Request

There are three types of shift requests that can be submitted within the **My Schedule** minibar:

1. **Shift trade**: two employees agree to swap one shift assignment for another shift assignment with each other. Shift trade requests are not presented to a schedule administrator for approval until both employees have agreed to the trade in Staff Ready.
2. **Shift give away**: one employee requests for another employee to work his or her assigned shift, without a swap. Shift give away requests are not presented to a schedule administrator for approval until both employees have agreed to the giveaway in StaffReady.
3. **Shift unassign**: one employee requests to be removed from a scheduled shift assignment. The schedule administrator can approve or deny the unassign request as soon as the requesting employee submits it.

### Submit a Shift Trade Request

1. Click the scheduled shift you wish to trade.

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
27	28 HVMC.B1.2 7:00-15:00	29 RBC.C1 8:00-16:00 Requests (1)	30 HVMC.B1.2 7:00-15:00 Requests (2)	1 RBC.C1 8:00-16:00 Requests (1)	2 Requests (1)	3
4	5	6 RBC.C1 8:00-16:00	7 RBC.C1 8:00-16:00	8 RBC.C1 8:00-16:00	9	10
11	12 RBC.C1 8:00-16:00	13 RBC.C1 8:00-16:00	14 RBC.C1 8:00-16:00	15 RBC.C1 8:00-16:00 Requests (1)	16	17

2. Click **Trade shifts with another employee.**

3. Click **Choose the recipient** menu.

4. Click **Choose the day** box.

5. Click **Choose the Shift** menu.

6. Click **Save Changes.**

EMPLOYEE SCHEDULE MANAGEMENT

### SHIFT REQUESTS

WHAT WOULD YOU LIKE TO DO WITH THIS SHIFT?

Unassign shift  
 Give the shift to another employee  
 Trade shifts with another employee

Add a Reason

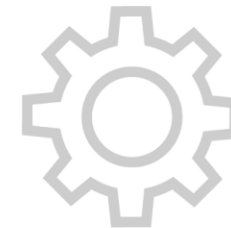
Choose the recipient\* ? Abdirizak Mohamed

Choose the day\* ? 05/14/2014

Choose the shift\* ? TRS.C1.4

Save Changes

Jennifer Peacock	Abdirizak Mohamed	Conflicts
Wed, May 14 RBC.C1 (8:00 - 16:00)	Wed, May 14 TRS.C1.4 (8:00 - 16:00)	Abdirizak Mohamed: The employee is only available to work at the RBC location.
Wed, May 14 RBC.C1 (8:00 - 16:00)	Wed, May 14 TRS.C1.4 (8:00 - 16:00)	Jennifer Peacock: The employee does not have the TRS.C1.4 job description.



## Submit a Shift Give Away Request

### Submit a Shift Give Away Request

1. Click **Give the shift to another employee**.

2. Click **Choose the recipient** menu.

**Note:** The **Conflicts** box describes any conflicts that may disuade the schedule manager from approving your shift give away request.

3. Click **Save Changes**.

EMPLOYEE SCHEDULE MANAGEMENT

**SHIFT REQUESTS**

WHAT WOULD YOU LIKE TO DO WITH THIS SHIFT?

Unassign shift

Give the shift to another employee

Trade shifts with another employee

Add a Reason

Choose the recipient\* ? Abdirizak Mohamed

Jennifer Peacock

Wed, May 14  
RBC.C1 (8:00 - 16:00)

Abdirizak Mohamed

Wed, May 14  
TRS.C1.4 (8:00 - 16:00)

**Conflicts**

Abdirizak Mohamed: The employee is already working the TRS.C1.4 shift during an overlapping time.

Save Changes



## Submit a Shift Unassign Request

### Submit a Shift Unassign Request

1. Click **Unassign Shift**.
2. Click **Save Changes**.

EMPLOYEE SCHEDULE MANAGEMENT

**SHIFT REQUESTS**

WHAT WOULD YOU LIKE TO DO WITH THIS SHIFT?

Unassign shift  
 Give the shift to another employee  
 Trade shifts with another employee

Add a Reason

Jennifer Peacock

Wed, May 14  
RBC.C1 (8:00 - 16:00)

Unassigned Shifts

Conflicts

Save Changes



## Review Shift and Bid Requests

From the **My Schedules** minibar, you can review and change shift trade requests coworkers have submitted to you, monitor shift requests that you have submitted to coworkers and schedule managers, and accept or decline shift bids sent to you by your schedule manager.

Shift requests appear on your schedule calendar with icons that provide a visual representation of the status of shift requests and shift bids.

The following legend defines the meaning of each icon:

- ✔ The submitted shift request has been approved and there are not any outstanding decisions left to be made by you, the coworker involved in the trade, or the schedule manager.
- ⌚ The submitted shift request requires a decision be made either by a coworker or by your schedule manager.
- ! A coworker is waiting for you to decide on a proposed shift trade.
- ! You have a shift bid from your schedule manager that you can either accept or deny.
- ✘ Your shift request has been cancelled.

### Review Shift and Bid Requests

#### 1. Click **Requests**.

The screenshot shows the StaffReady calendar interface. At the top, there are tabs for 'Welcome', 'Calendar', and 'Reports'. Below the tabs, there are navigation buttons: '<< Previous', 'May', '2014', 'Show', 'This Month', and 'Next >>'. The calendar grid shows days from Sunday to Saturday. On the left side, there is a 'My Schedules' sidebar with a 'Feedback | Help ?' link and several checkboxes for 'Assignment Schedule', 'Assignment Location', 'Schedule Notes', 'Leave Request', and 'Leave For Schedule'. A red arrow points to a request icon (a clock with an 'X') on Tuesday, May 13th, which is associated with the 'RBC.C1 8:00-16:00' shift.

2. Click the [Details](#).

**EMPLOYEE SCHEDULE MANAGEMENT**

**REQUEST ACTIVITY (1)**  
Day Chosen: Wednesday, May 14, 2014

**YOUR SCHEDULED SHIFTS**

Status	Shift	Time	Location
Pending Employee Response	RBC.C1	8:00 - 16:00	RBC

**SHIFT REQUEST ACTIVITY**

Status	Summary
Pending Employee Response <a href="#">Details</a>	You want to trade the RBC.C1 (8:00 - 16:00) shift on Wed, May 14 to Blewilvyn Alcain for TRS.G2.2 (15:15 - 20:15) on Wed, May 14 <a href="#">Cancel Request</a>

3. Click the **Close** button

**SHIFT REQUEST ACTIVITY > DETAILS**

Reason for Shift Request:

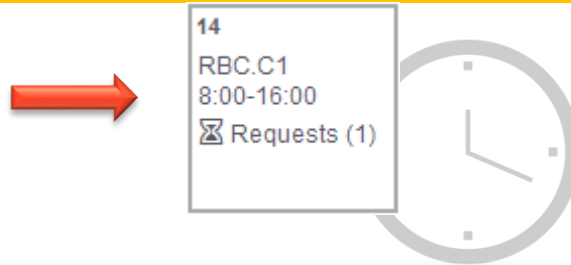
Jennifer Peacock	Blewilvyn Alcain	Conflicts
Wed, May 14 <u>RBC.C1</u> (8:00 - 16:00)	Wed, May 14 TRS.G2.2 (15:15 - 20:15)	Blewilvyn Alcain: The employee is only available to work at the RBC location.
Wed, May 14 RBC.C1 (8:00 - 16:00)	Wed, May 14 <u>TRS.G2.2</u> (15:15 - 20:15)	Jennifer Peacock: The employee does not have the TRS.G2.2 job description.

# Cancel a Shift Request

## Change a Shift Request

1. Click Requests (#).

2. Click Cancel.



EMPLOYEE SCHEDULE MANAGEMENT

**REQUEST ACTIVITY (1)**  
Day Chosen: Wednesday, May 21, 2014

**YOUR SCHEDULED SHIFTS**

Status	Shift	Time	Location
Pending Employee Response	CP.B1.2	7:00 - 15:00	CP.B1.2

**SHIFT REQUEST ACTIVITY**

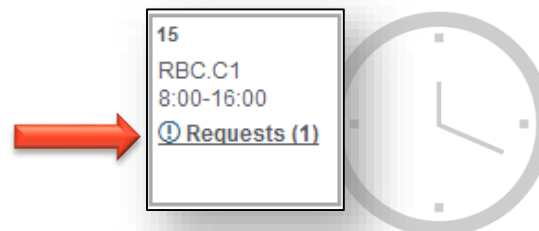
Status	Summary
Pending Employee Response <a href="#">Details</a>	You want to <b>trade</b> the CP.B1.2 (7:00 - 15:00) shift on Wed, May 21 to Plewiten Alcaïn for their shift TRS.C55.1 (8:00 - 13:00) on Wed, May 21 <a href="#">Cancel Request</a>



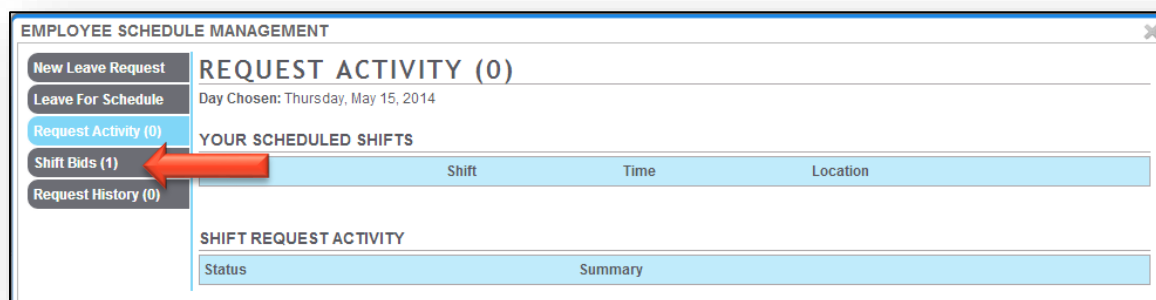
## Accept and Reject Bid Requests

### Accept a Bid Request

1. Click [Requests \(#\)](#).



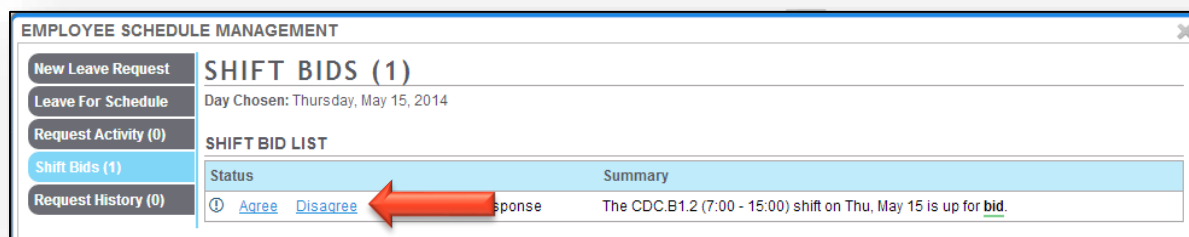
2. Click **Shift Bids**.



3. Click [Agree](#) to accept.

**Note:** Agreeing to work a shift bid does not guarantee that you will be approved to work it.

4. Click [Disagree](#) to decline.



## Submit Leave Requests

### Submit a Leave Request

1. Click [Request](#) or Click on the day in the Calendar that would be the day (or first day) of the leave request.

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
27	28 HVMC.B1.2 7:00-15:00	29 RBC.C1 8:00-16:00 ⊗ Requests (1)	30 HVMC.B1.2 7:00-15:00 ⊗ Requests (2)	1 RBC.C1 8:00-16:00 ⊗ Requests (1)	2 ⊗ Requests (1)	3
4	5	6 RBC.C1 8:00-16:00	7 RBC.C1 8:00-16:00	8 RBC.C1 8:00-16:00	9	10



2. Click **Leave Type** menu.
3. Click **Leave Begins** box.
4. Click **Leave Ends** box.

**NOTE:** To request specific times off within a given day, type the times in the corresponding **time** boxes.

5. Type In the **Reason for Leave/New Note** box.
6. Click **Save Changes**.

**EMPLOYEE SCHEDULE MANAGEMENT**

**NEW LEAVE REQUEST**

**WHAT IS BEING REQUESTED?**

Leave Type\* ?  
Choose One

**WHEN ARE YOU WANTING LEAVE?**

Leave Begins\* ?  
05/12/2014 0 : 00

Leave Ends\* ?  
05/12/2014 23 : 59

Earliest Request Allowed\*  
05/26/2014

**CONVERSATION**

Reason for Leave/New Note ?

**Save Changes** \*Display of this Leave may take several minutes after clicking Save



# Edit/Review Existing Leave Requests

## Edit a Leave Request

1. Select the [leave type](#) link.

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
27	28 HVMC.B1.2 7:00-15:00	29 RBC.C1 8:00-16:00 Requests (1)	30 HVMC.B1.2 7:00-15:00 Requests (2)	1 RBC.C1 8:00-16:00 Requests (1)	2 Requests (1)	3
4	5	6 RBC.C1 8:00-16:00	7 RBC.C1 8:00-16:00	8 8:00-16:00	9 Bereavement	10 Civil Service

2. Make the desired changes to the leave request.

3. Click **Save Changes**.

EMPLOYEE SCHEDULE MANAGEMENT

**EDIT LEAVE REQUEST**

WHAT IS BEING REQUESTED?

Leave Type\*  Status? Request

WHEN ARE YOU WANTING LEAVE?

Leave Begins\*  Earliest Request Allowed\* 05/13/2014

Leave Ends\*

CONVERSATION

JPeacock@Apr 29 2014 4:04:17:717PM