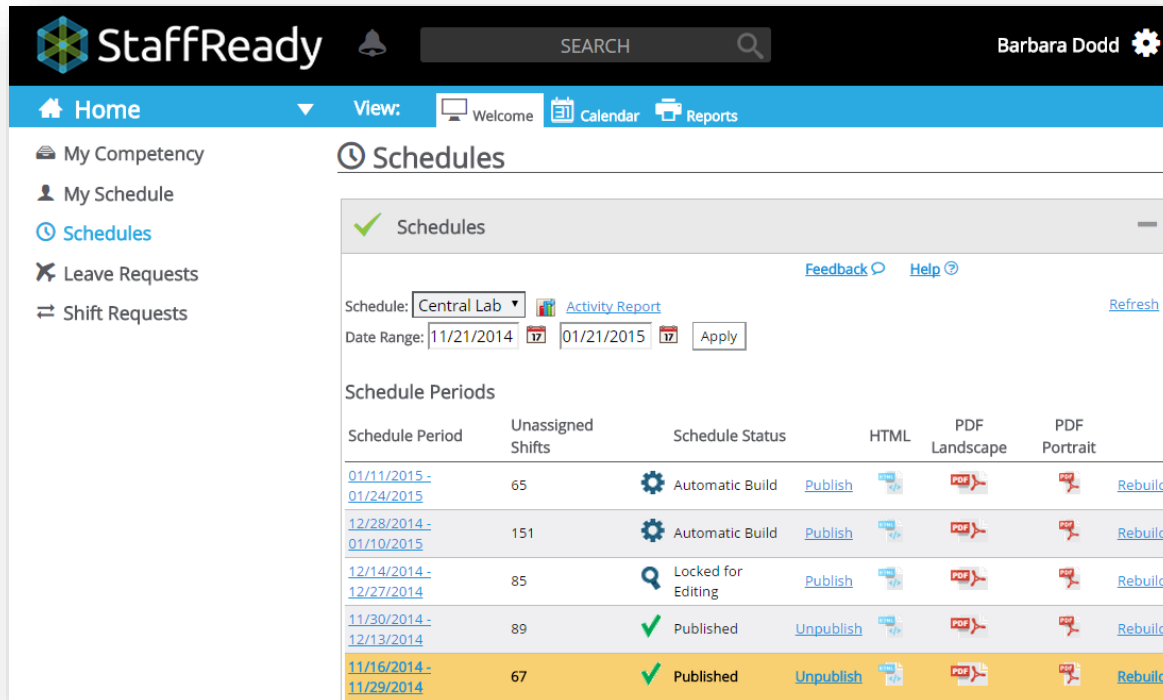


Welcome View

Schedules Colorbar

This reference guide provides a comprehensive overview of the **Schedules** submenu within the **Welcome** view in the StaffReady Scheduling Module. The following process steps and instructional information are provided within this document:

- **Adjust Date Range for Schedule Periods**
- **Change Schedule View**
- **Access the Schedule Editor**
- **Schedule Status Explanation**
- **Publish and Unpublish Schedules**
- **Rebuild Schedules**
- **Generate Activity Reports**
- **Generate Schedule Reports**



The screenshot displays the StaffReady Schedules interface. The top navigation bar includes the StaffReady logo, a search bar, and the user name Barbara Dodd. The main content area is titled "Schedules" and features a sidebar with navigation options: Home, My Competency, My Schedule, Schedules (selected), Leave Requests, and Shift Requests. The Schedules section includes a "Schedule:" dropdown menu set to "Central Lab", an "Activity Report" icon, and a "Date Range:" field with dates "11/21/2014" and "01/21/2015" and an "Apply" button. Below this is a table of "Schedule Periods" with the following data:

Schedule Period	Unassigned Shifts	Schedule Status	HTML	PDF Landscape	PDF Portrait
01/11/2015 - 01/24/2015	65	Automatic Build	Publish	PDF	PDF
12/28/2014 - 01/10/2015	151	Automatic Build	Publish	PDF	PDF
12/14/2014 - 12/27/2014	85	Locked for Editing	Publish	PDF	PDF
11/30/2014 - 12/13/2014	89	Published	Unpublish	PDF	PDF
11/16/2014 - 11/29/2014	67	Published	Unpublish	PDF	PDF

1 | Adjust Date Range for Schedule Periods

Adjust Date Range for Schedule Periods

1. Change beginning and/or ending date.
2. Click **Apply**.

The screenshot shows the 'Schedules' interface. At the top, there is a 'Schedule:' dropdown menu set to 'Central Lab'. Below it, there are two date input fields: the first contains '11/21/2014' and the second contains '01/21/2015'. An orange arrow points to the first date field, and another orange arrow points to the 'Apply' button. To the right of the date fields is an 'Apply' button. Above the date fields, there are links for 'Feedback' and 'Help', and a 'Refresh' link on the far right. Below the date fields is a 'Schedule Periods' table.

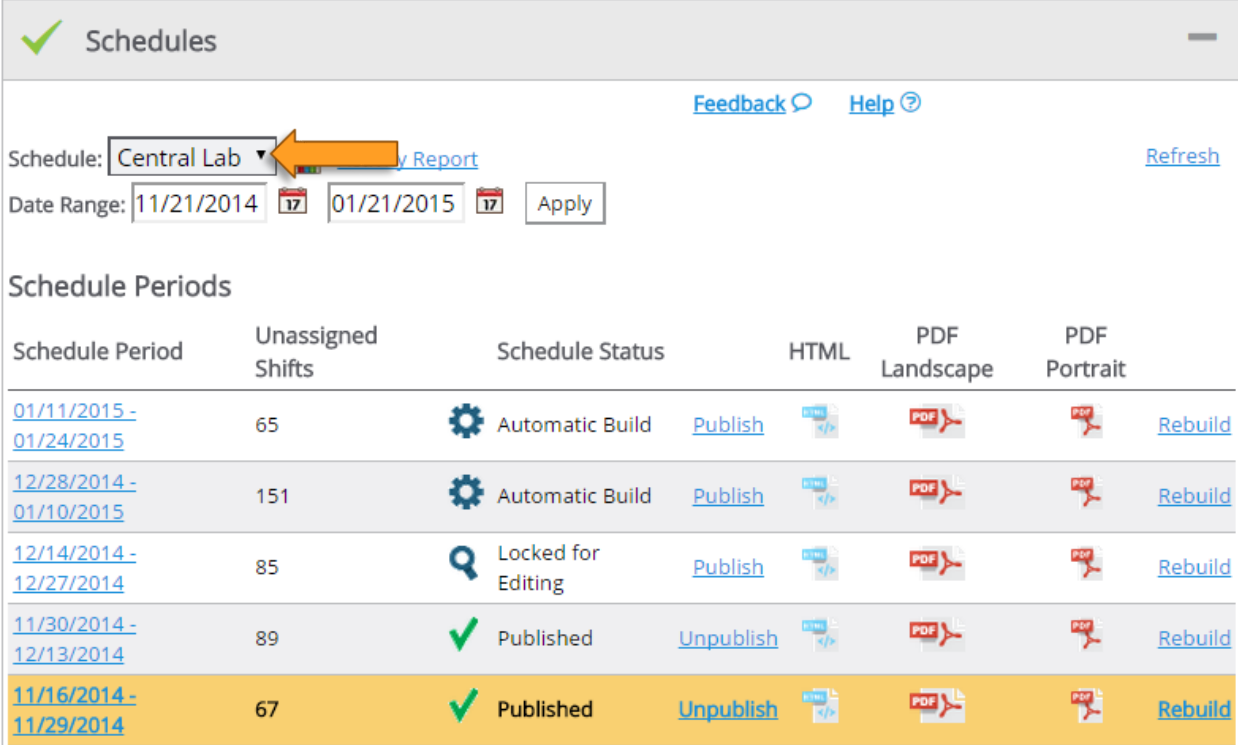
Schedule Period	Unassigned Shifts	Schedule Status	HTML	PDF Landscape	PDF Portrait	
01/11/2015 - 01/24/2015	65	Automatic Build	Publish			Rebuild
12/28/2014 - 01/10/2015	151	Automatic Build	Publish			Rebuild
12/14/2014 - 12/27/2014	85	Locked for Editing	Publish			Rebuild
11/30/2014 - 12/13/2014	89	Published	Unpublish			Rebuild
11/16/2014 - 11/29/2014	67	Published	Unpublish			Rebuild

2 | Change Schedule View

The information displayed in the **Schedule Periods** table corresponds to the selection displayed in the **Schedule** menu. If you have administrative access to more than one schedule, you can view different schedules using the **Schedule** menu.

Change Schedule View

1. Click **Schedule**.



The screenshot shows the 'Schedules' interface. At the top, there is a green checkmark and the title 'Schedules'. Below the title, there are links for 'Feedback' and 'Help'. The 'Schedule' dropdown menu is set to 'Central Lab', with an orange arrow pointing to it. Below the dropdown, there is a 'Date Range' section with two date pickers: '11/21/2014' and '01/21/2015', both with a calendar icon and a '17' in a red box. An 'Apply' button is to the right of the date pickers. A 'Refresh' link is in the top right corner. Below the controls is the 'Schedule Periods' table.

Schedule Period	Unassigned Shifts	Schedule Status	HTML	PDF Landscape	PDF Portrait	
01/11/2015 - 01/24/2015	65	Automatic Build	Publish			Rebuild
12/28/2014 - 01/10/2015	151	Automatic Build	Publish			Rebuild
12/14/2014 - 12/27/2014	85	Locked for Editing	Publish			Rebuild
11/30/2014 - 12/13/2014	89	Published	Unpublish			Rebuild
11/16/2014 - 11/29/2014	67	Published	Unpublish			Rebuild

2. Select **Schedule**.

✓ Schedules [Feedback](#) [Help](#)

Schedule: **Central Lab** [Activity Report](#) [Refresh](#)

Date Range:

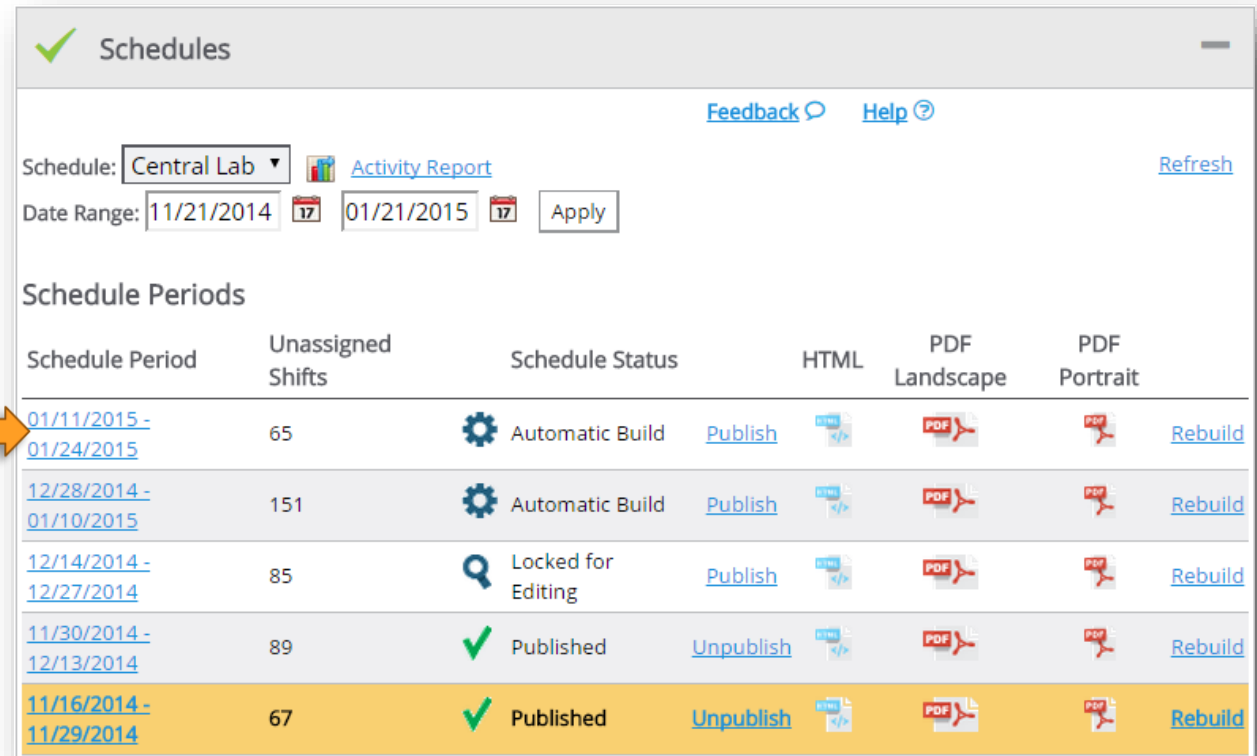
Schedule Period	Unassigned Shifts	Schedule Status	HTML	PDF Landscape	PDF Portrait	
01/11/2015 - 01/24/2015	65	Automatic Build Publish				Rebuild
12/28/2014 - 01/10/2015	151	Automatic Build Publish				Rebuild
12/14/2014 - 12/27/2014	85	Locked for Editing Publish				Rebuild
11/30/2014 - 12/13/2014	89	Published Unpublish				Rebuild
11/16/2014 - 11/29/2014	67	Published Unpublish				Rebuild

3 | Access the Schedule Editor

The schedule period links within the **Schedule Periods** table allow for quick access to the **Manage** View within the **Schedules** module.

Access the Schedule Editor

1. Click [Schedule Period](#) link.



The screenshot displays the 'Schedules' module interface. At the top, there is a header with a green checkmark and the title 'Schedules'. Below the header, there are controls for 'Schedule: Central Lab', 'Activity Report', and 'Date Range: 11/21/2014 to 01/21/2015'. A 'Refresh' button is located on the right. The main content area is titled 'Schedule Periods' and contains a table with the following columns: 'Schedule Period', 'Unassigned Shifts', 'Schedule Status', 'HTML', 'PDF Landscape', and 'PDF Portrait'. The table lists several schedule periods, with the first row highlighted in yellow and an orange arrow pointing to its 'Schedule Period' link.

Schedule Period	Unassigned Shifts	Schedule Status	HTML	PDF Landscape	PDF Portrait
01/11/2015 - 01/24/2015	65	Automatic Build	Publish		
12/28/2014 - 01/10/2015	151	Automatic Build	Publish		
12/14/2014 - 12/27/2014	85	Locked for Editing	Publish		
11/30/2014 - 12/13/2014	89	Published	Unpublish		
11/16/2014 - 11/29/2014	67	Published	Unpublish		

4 | Schedule Status

A schedule has one of three different statuses at any given time as displayed in the **Schedule Periods** table of the **Schedules** color bar.

Automatic Build: Allows schedules to be rebuilt overnight by the system. Schedules are in Automatic Build until they have a saved edit made within the schedule editor. The automatic nightly build keeps future schedules up-to-date with changes made to schedule build rules, such as:

- Employee availability
- Shift assignment starting time
- Newly added employees
- Changes to employee FTE settings

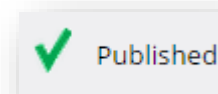
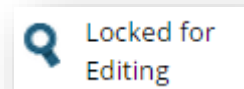
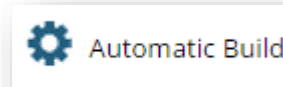
Locked for Editing: A schedule has had one or more saved edits within the schedule editor. Once a schedule period enters Locked for Editing, any further changes to the schedule period must be done manually within the schedule editor. The only changes that can be made once a schedule enters Locked for Editing are those that require administrative approval, such as:

- Leave requests
- Shift trades
- Shift bids

Published: A schedule has been published to staff.

Schedule Statuses

- **Automatic Build**
- **Locked for Editing**
- **Published**

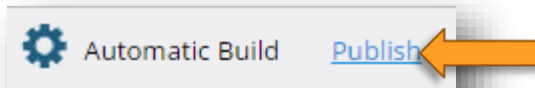


5 | Publish and Unpublish Schedules

You can make a schedule period that has been **Locked for Editing** visible to staff, by publishing that schedule period.

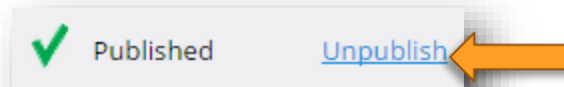
Publish a Schedule

1. Click [Publish](#).



Unpublish a Schedule

1. Click [Unpublish](#).



6 | Rebuild Schedules

A schedule period can be manually rebuilt to reflect recent changes made to the schedule build rules. However, if the status is **Locked for Editing** or **Published**, this will erase any edits that have been made to the schedule period in question. Unless you are prepared to lose *all* schedule edits made to that schedule period and you are intending to start the entire schedule editing process over, *never* rebuild a schedule that is **Locked for Editing** or **Published**.

Rebuild Schedules

1. Click **Rebuild**.
2. Click **Refresh**, to update screen and see if schedule rebuild is complete.

Note: A manual rebuild has the same effect as the nightly schedule rebuild.

The screenshot shows the 'Schedules' interface. At the top, there is a 'Schedule:' dropdown menu set to 'Central Lab' and an 'Activity Report' link. Below that is a 'Date Range:' section with two date pickers: '11/21/2014' and '01/21/2015', followed by an 'Apply' button. A 'Refresh' link is highlighted with an orange arrow. The main section is a table titled 'Schedule Periods' with columns: 'Schedule Period', 'Unassigned Shifts', 'Schedule Status', 'HTML', 'PDF Landscape', and 'PDF Portrait'. The table contains five rows of schedule periods. The first row, '01/11/2015 - 01/24/2015', is highlighted in yellow and has a 'Rebuild' button highlighted with an orange arrow. The second row, '12/28/2014 - 01/10/2015', has a 'Rebuild' button. The third row, '12/14/2014 - 12/27/2014', has a 'Rebuild' button. The fourth row, '11/30/2014 - 12/13/2014', has a 'Rebuild' button. The fifth row, '11/16/2014 - 11/29/2014', is highlighted in yellow and has a 'Rebuild' button.

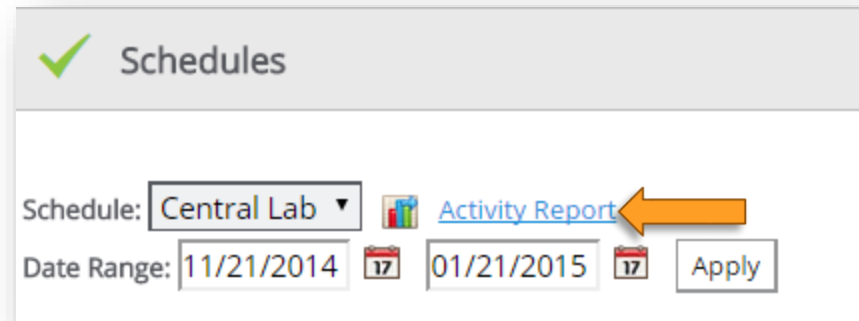
Schedule Period	Unassigned Shifts	Schedule Status	HTML	PDF Landscape	PDF Portrait	
01/11/2015 - 01/24/2015	65	Automatic Build	Publish			Rebuild
12/28/2014 - 01/10/2015	151	Automatic Build	Publish			Rebuild
12/14/2014 - 12/27/2014	85	Locked for Editing	Publish			Rebuild
11/30/2014 - 12/13/2014	89	Published	Unpublish			Rebuild
11/16/2014 - 11/29/2014	67	Published	Unpublish			Rebuild

7 | Generating Activity Report

Activity reports show the usage metrics for how often your staff is logging into StaffReady Scheduling module.




Activity Reports

1. Click **Activity Report**.



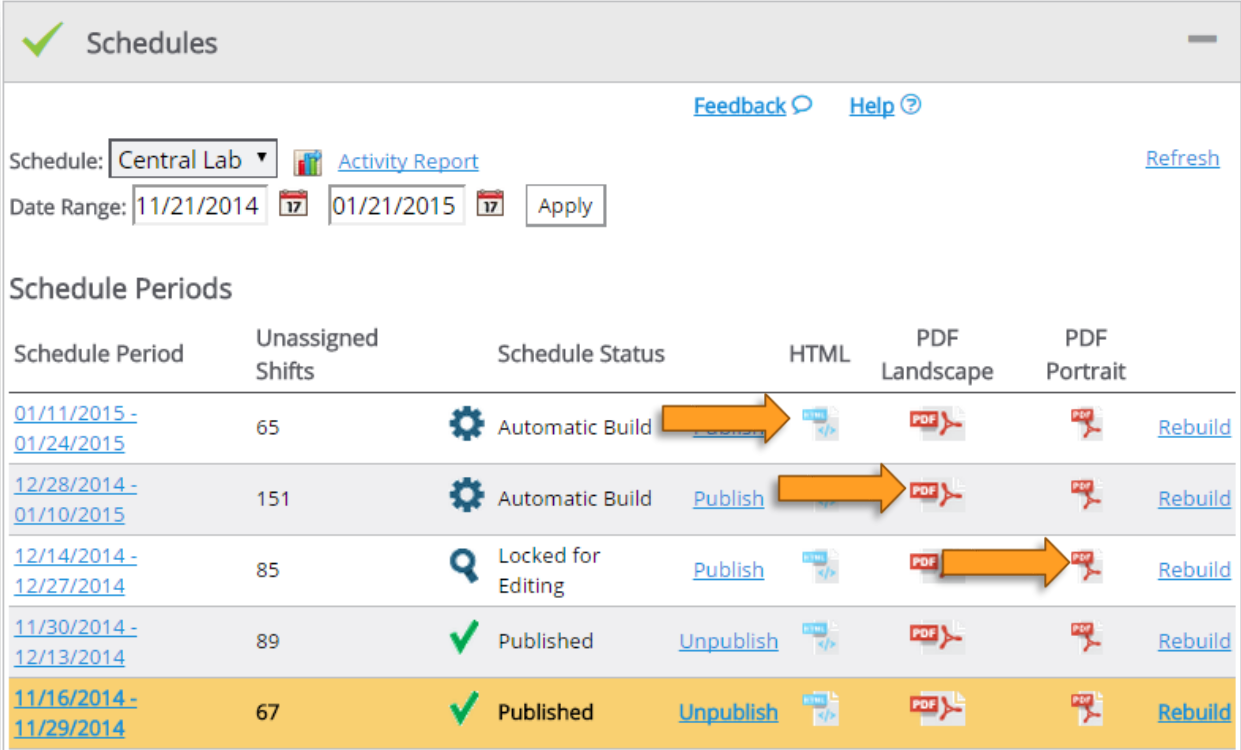
The screenshot shows a window titled "Schedules" with a green checkmark icon. Below the title bar, there are two rows of controls. The first row contains a "Schedule:" label, a dropdown menu with "Central Lab" selected, a small bar chart icon, and a blue link labeled "Activity Report" which is pointed to by an orange arrow. The second row contains a "Date Range:" label, two date input fields with calendar icons (the first contains "11/21/2014" and the second contains "01/21/2015"), and an "Apply" button.

8 | Generate Schedule Reports

You can compile a schedule report based on the schedule period it is selected from, and only listing the shift assignments by employee directly from the **Schedules** submenu in the **Welcome** view. The HTML  option provides a read-only view of the schedule. The PDF Landscape  and PDF Portrait  options generate a PDF that can be saved and/or printed after it is displayed. If you wish to generate a schedule report with start and end times of shifts, you must go to **Reports** view and click **Full Report**.

Schedule Reports

1. Click the **HTML**  icon
2. **PDF Landscape**  icon
3. **PDF Portrait**  icon.



The screenshot shows the 'Schedules' interface. At the top, there's a 'Schedules' header with a green checkmark. Below it, there are controls for 'Schedule: Central Lab' and 'Date Range: 11/21/2014 - 01/21/2015'. There are also links for 'Feedback', 'Help', and 'Refresh'. The main content is a table titled 'Schedule Periods' with columns for 'Schedule Period', 'Unassigned Shifts', 'Schedule Status', 'HTML', 'PDF Landscape', 'PDF Portrait', and 'Rebuild'. The table lists five schedule periods. The last row, '11/16/2014 - 11/29/2014', is highlighted in yellow. Orange arrows point to the HTML, PDF Landscape, and PDF Portrait icons for the first three rows.

Schedule Period	Unassigned Shifts	Schedule Status	HTML	PDF Landscape	PDF Portrait	Rebuild
01/11/2015 - 01/24/2015	65	Automatic Build				Rebuild
12/28/2014 - 01/10/2015	151	Automatic Build	Publish			Rebuild
12/14/2014 - 12/27/2014	85	Locked for Editing	Publish			Rebuild
11/30/2014 - 12/13/2014	89	Published	Unpublish			Rebuild
11/16/2014 - 11/29/2014	67	Published	Unpublish			Rebuild