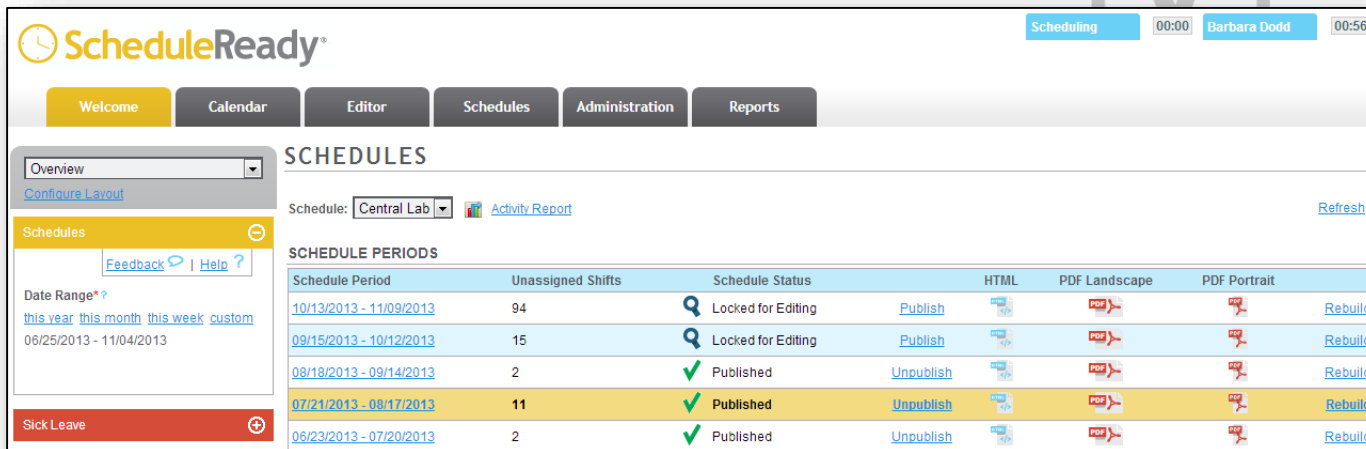


Welcome Tab Schedules Minibar

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

- 🕒 Select a 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 shows the ScheduleReady Schedules Minibar interface. At the top, there is a navigation bar with tabs for Welcome, Calendar, Editor, Schedules, Administration, and Reports. The Schedules tab is active. Below the navigation bar, there is a sidebar with a 'Schedules' section containing a 'Date Range' selector and a 'Sick Leave' section. The main content area displays a table of schedule periods for 'Central Lab'.

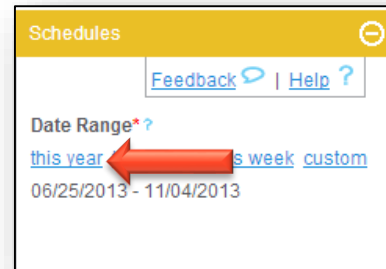
Schedule Period	Unassigned Shifts	Schedule Status	HTML	PDF Landscape	PDF Portrait	Rebuild
10/13/2013 - 11/09/2013	94	Locked for Editing	Publish			
09/15/2013 - 10/12/2013	15	Locked for Editing	Publish			
08/18/2013 - 09/14/2013	2	Published	Unpublish			
07/21/2013 - 08/17/2013	11	Published	Unpublish			
06/23/2013 - 07/20/2013	2	Published	Unpublish			

Select a Date Range for Schedule Periods

The **Date Range** menu within the **Schedules** minibar allows you to quickly change the range of schedule periods displayed within the **Schedule Periods** table. There are three preconfigured options (this year, this month, and this week) and a custom date range option. Among other uses, the custom range is how you view historical schedule periods. You can find the menu options under **Date Range**.

Select a Date Range

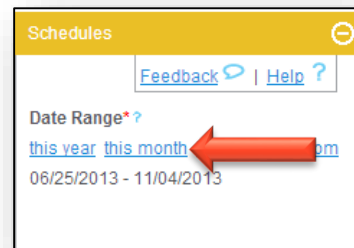
- To display every schedule period for the current calendar year, click [this year](#).



The screenshot shows the 'SCHEDULE PERIODS' table. A red arrow points to the first row, which is highlighted in yellow. The table has columns for 'Schedule Period', 'Unassigned Shifts', 'Schedule Status', 'HTML', 'PDF Landscape', and 'PDF Portrait'.

Schedule Period	Unassigned Shifts	Schedule Status	HTML	PDF Landscape	PDF Portrait
06/25/2013 - 06/25/2013	1	Published	Unpublish	Rebuild	Rebuild
06/26/2013 - 06/26/2013	110	Published	Unpublish	Rebuild	Rebuild
06/27/2013 - 06/27/2013	18	Published	Unpublish	Rebuild	Rebuild
06/28/2013 - 06/28/2013	2	Published	Unpublish	Rebuild	Rebuild
06/29/2013 - 06/29/2013	11	Published	Unpublish	Rebuild	Rebuild
06/30/2013 - 06/30/2013	5	Published	Unpublish	Rebuild	Rebuild
07/01/2013 - 07/01/2013	21	Published	Unpublish	Rebuild	Rebuild
07/02/2013 - 07/02/2013	42	Published	Unpublish	Rebuild	Rebuild
07/03/2013 - 07/03/2013	61	Published	Unpublish	Rebuild	Rebuild
07/04/2013 - 07/04/2013	61	Published	Unpublish	Rebuild	Rebuild
07/05/2013 - 07/05/2013	67	Published	Unpublish	Rebuild	Rebuild
07/06/2013 - 07/06/2013	77	Published	Unpublish	Rebuild	Rebuild
07/07/2013 - 07/07/2013	68	Published	Unpublish	Rebuild	Rebuild
07/08/2013 - 07/08/2013	64	Published	Unpublish	Rebuild	Rebuild
07/09/2013 - 07/09/2013	43	Published	Unpublish	Rebuild	Rebuild
07/10/2013 - 07/10/2013	48	Published	Unpublish	Rebuild	Rebuild
07/11/2013 - 07/11/2013	49	Published	Unpublish	Rebuild	Rebuild
07/12/2013 - 07/12/2013	19	Published	Unpublish	Rebuild	Rebuild
07/13/2013 - 07/13/2013	19	Published	Unpublish	Rebuild	Rebuild
07/14/2013 - 07/14/2013	24	Published	Unpublish	Rebuild	Rebuild

- To display every schedule period that contains a day within the current month, click [this month](#).

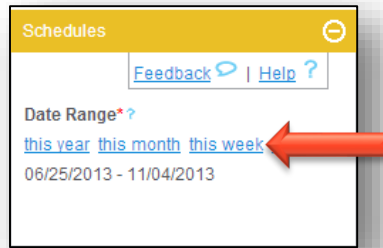


The screenshot shows the 'SCHEDULE PERIODS' table. A red arrow points to the second row, which is highlighted in yellow. The table has columns for 'Schedule Period', 'Unassigned Shifts', 'Schedule Status', 'HTML', 'PDF Landscape', and 'PDF Portrait'.

Schedule Period	Unassigned Shifts	Schedule Status	HTML	PDF Landscape	PDF Portrait
07/21/2013 - 08/17/2013	2	Published	Unpublish	Rebuild	Rebuild
08/23/2013 - 07/20/2013	2	Published	Unpublish	Rebuild	Rebuild

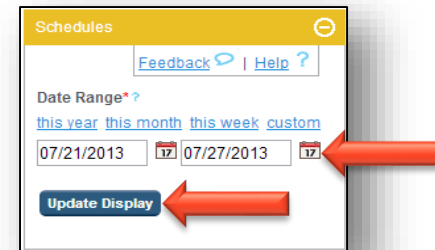
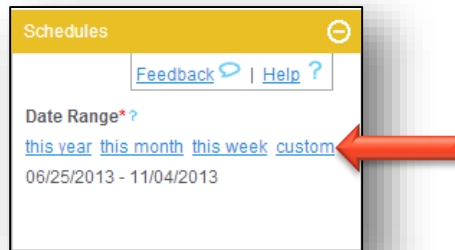


- To display only the current schedule period, click [this week](#)



SCHEDULE PERIODS	Unassigned Shifts	Schedule Status	HTML	PDF Landscape	PDF Portrait	
07/21/2013 - 08/17/2013		Published	Unpublish			Rebuild

- To view a custom beginning and ending date range, click [custom](#).
- In the **Date** boxes, type the beginning and ending dates of the range you would like to view.
- Click **Update Display**.



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

- On the **Schedule** menu, click the schedule you wish to view.

The screenshot shows the ScheduleReady interface with the 'SCHEDULES' menu open. The 'Schedule' dropdown is set to 'Core Lab'. A red arrow points to the dropdown menu.

The screenshot shows the ScheduleReady interface with the 'SCHEDULES' menu open. The 'Schedule' dropdown is open, showing options: 'Central Lab', 'Core Lab', 'Histology', and 'Lab Assistants'. A red arrow points to the 'Core Lab' option.

The screenshot shows the ScheduleReady interface with the 'SCHEDULES' menu open. The 'Schedule' dropdown is set to 'Core Lab'. The 'SCHEDULE PERIODS' table is displayed with the following data:

Schedule Period	Unassigned Shifts	Schedule Status	HTML	PDF Landscape	PDF Portrait	Rebuild
11/03/2013 - 11/16/2013	4	Automatic Build	Publish			
10/20/2013 - 11/02/2013	22	Automatic Build	Publish			
10/06/2013 - 10/19/2013	22	Locked for Editing	Publish			
09/22/2013 - 10/05/2013	22	Locked for Editing	Publish			
09/08/2013 - 09/21/2013	22	Published	Unpublish			
08/25/2013 - 09/07/2013	22	Published	Unpublish			

A red arrow points to the first row of the table.

Access the Schedule Editor

The schedule period links within the **Schedule Periods** table allow for quick access to the schedule editor within the **Schedules** tab.

Schedule Period Links

- To navigate to the schedule editor of the **Schedules** tab, click on the schedule period link you wish to view and/or edit within the editor.

The screenshot shows the ScheduleReady interface with the SCHEDULES tab selected. The SCHEDULE PERIODS table is displayed with the following data:

Schedule Period	Unassigned Shifts	Schedule Status
10/13/2013 - 11/09/2013	94	Locked for Editing
09/15/2013 - 10/12/2013	2	Locked for Editing
08/18/2013 - 09/14/2013	2	Published
07/21/2013 - 08/17/2013	11	Published
06/23/2013 - 07/20/2013	2	Published

The screenshot shows the ScheduleReady interface with the SCHEDULES tab selected. The schedule editor is displayed, showing the calendar grid for the week of 09/15 to 09/23. The 'Schedules' tab is highlighted in the navigation bar. The calendar grid shows the following data:

Unassigned Shifts	09/15 Sun	09/16 Mon	09/17 Tue	09/18 Wed	09/19 Thu	09/20 Fri	09/21 Sat	09/22 Sun	09/23 Mon
OPEN SHIFT									
James Gardner		AUTO	BBem	TITER	BB2	HEME1		BB1	
Elizabeth Bruch		CHEM1	AUTO	AUTO	BB1	MAN1			MAN2 SER
Jim Rodgers		AUTO	SURG	MAN1	MAN1	AUTO			TITER

Schedule Status

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

Automatic Build: The schedule may still be rebuilt overnight by the system. All schedules are in **Automatic Build** until they have a saved edit made in the schedule editor of the **Schedules** tab. The automatic nightly build keeps future schedules up to date with any template changes that are made within your schedule build rules, such as the following:

- Employee availability
- Shift assignment starting time
- Shift assignment names
- Newly added employees
- Changes to enforced rotation and consecutive day settings
- Changes to employee FTE settings

Locked for Editing: A schedule has had one or more saved edits within the schedule editor of the **Schedules** tab. The system automatically changes the schedule status to **Locked for Editing**. 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:

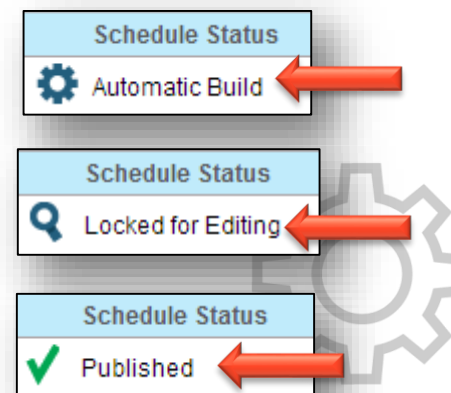
- Leave requests
- Shift trades
- Shift bids
- Sick leave

Note: Never rebuild a schedule period you have been making purposeful edits within. Rebuilding will erase all edits.

Published: A schedule has been published to staff.

Schedule Statuses

Automatic Build
Locked for Editing
Published

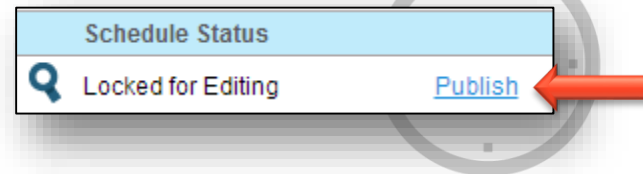


Publish and Unpublish Schedules

You can make a schedule period that has been **Locked for Editing** visible to staff. Once it is **Published**, you can retract it if the need arises.

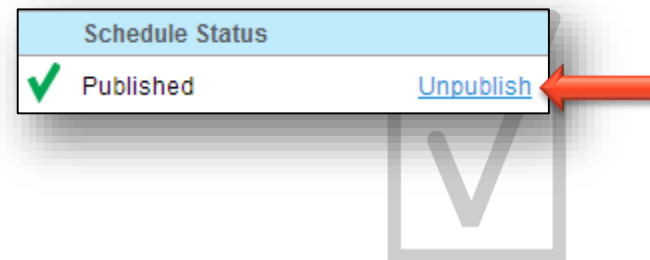
Publish a Schedule

- To make a schedule period visible to staff online, click [Publish](#).



Unpublish a Schedule

- To retract a schedule period so that it is no longer visible online to staff, click [Unpublish](#).



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**. If you have any questions or are unclear about whether or not to rebuild a schedule period, please consult your **Technical Relationship Manger** at **StaffReady**.

Rebuild Schedules

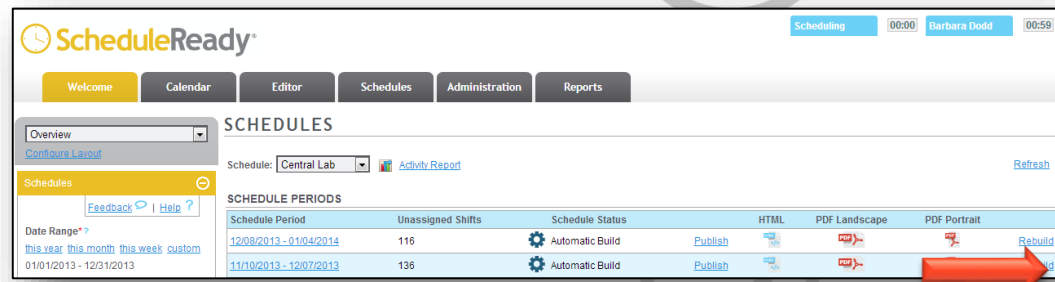
1. Click **Rebuild** to rebuild a schedule to reflect the most recent changes made to the schedule build rules, such as the following:
 - Employee availability
 - Shift assignment starting time
 - Shift assignment names

After clicking **Rebuild**, the schedule status will be **Automatic Build Building**.

The rebuild should take 10–30 seconds.

2. Click **Refresh** to update the screen and see if the schedule period has completed the rebuild process.

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

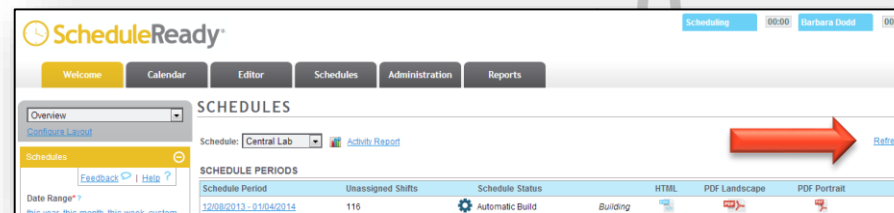


The screenshot shows the ScheduleReady interface with the 'SCHEDULES' section. The 'SCHEDULE PERIODS' table is visible, showing two rows of schedule periods. The second row is selected, and its status is 'Automatic Build'. A red arrow points to the 'Rebuild' button in the table.

Schedule Period	Unassigned Shifts	Schedule Status	HTML	PDF Landscape	PDF Portrait	Rebuild
12/08/2013 - 01/04/2014	116	Automatic Build	Publish			Rebuild
11/10/2013 - 12/07/2013	136	Automatic Build	Publish			Rebuild



The close-up shows the 'Schedule Status' dropdown menu. The 'Automatic Build' option is selected, and the 'Building' option is visible. A red arrow points to the 'Building' option.



The screenshot shows the ScheduleReady interface with the 'SCHEDULES' section. The 'SCHEDULE PERIODS' table is visible, showing two rows of schedule periods. The second row is selected, and its status is 'Automatic Build Building'. A red arrow points to the 'Refresh' button in the table.

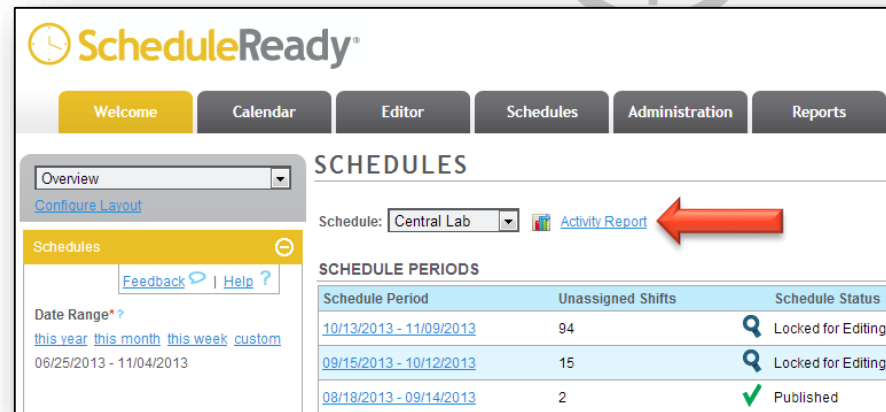
Schedule Period	Unassigned Shifts	Schedule Status	HTML	PDF Landscape	PDF Portrait	Refresh
12/08/2013 - 01/04/2014	116	Automatic Build Building				Refresh

Generate Activity Reports

Activity reports show the usage metrics for schedules that you have administrative access to. The activity ratio metric is useful when trying to determine how often your staff is logging into ScheduleReady because it indicates the overall implementation of ScheduleReady within your system. Higher activity ratio's typically correlate to systems that efficiently use the leave system, transparent communication around the shift bidding process, effective shift trading amongst staff, and a high overall staff awareness of the department schedule and daily events occurring within the schedule environment.

Activity Reports

1. Click [Activity Report](#).



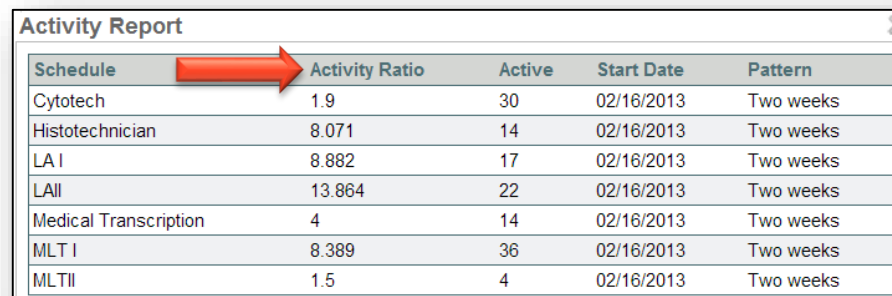
The screenshot shows the ScheduleReady interface. At the top, there are navigation tabs: Welcome, Calendar, Editor, Schedules, Administration, and Reports. Below the tabs, there is a dropdown menu for 'Overview' and a 'Configure Layout' link. The main content area is titled 'SCHEDULES' and includes a 'Schedule:' dropdown set to 'Central Lab' and an 'Activity Report' link, which is pointed to by a red arrow. Below this is a table titled 'SCHEDULE PERIODS' with columns for 'Schedule Period', 'Unassigned Shifts', and 'Schedule Status'.

Schedule Period	Unassigned Shifts	Schedule Status
10/13/2013 - 11/09/2013	94	Locked for Editing
09/15/2013 - 10/12/2013	15	Locked for Editing
08/18/2013 - 09/14/2013	2	Published

An **Activity Report** will be generated for all the schedules you have administrative access to. The activity ratio values can be interpreted as follows.

- 1.0: No use
- 1.1–2.9: Minimal use
- 3.0–5.9: Strong use
- 6.0 + : Very strong use

2. Click the **Close** button .



The screenshot shows a window titled 'Activity Report' with a close button (X) in the top right corner. A red arrow points to the 'Activity Ratio' column header. The table contains the following data:

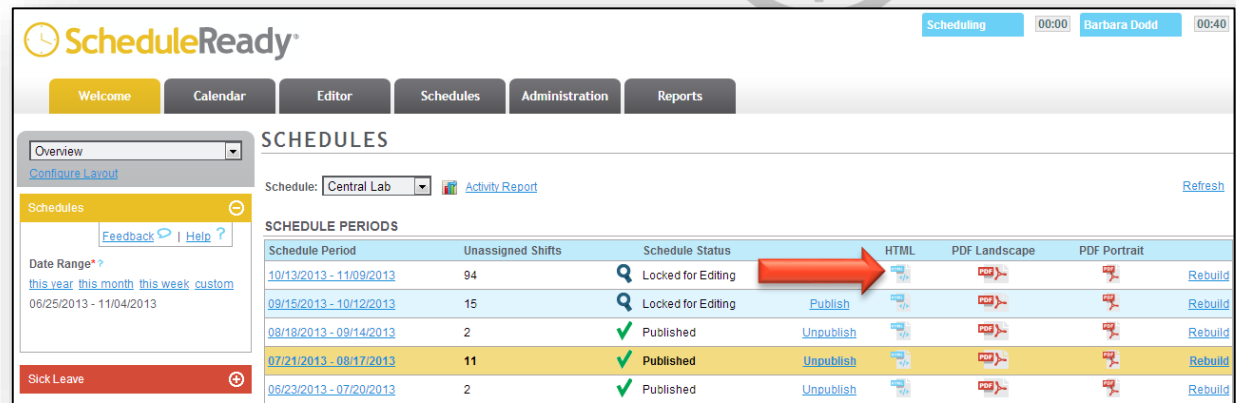
Schedule	Activity Ratio	Active	Start Date	Pattern
Cytotech	1.9	30	02/16/2013	Two weeks
Histotechnician	8.071	14	02/16/2013	Two weeks
LA I	8.882	17	02/16/2013	Two weeks
LAI	13.864	22	02/16/2013	Two weeks
Medical Transcription	4	14	02/16/2013	Two weeks
MLT I	8.389	36	02/16/2013	Two weeks
MLTII	1.5	4	02/16/2013	Two weeks

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** minibar of the **Welcome** tab. 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 starting and ending times, you must click the **Reports** tab and then click **Full Report**.

Schedule Reports

1. In the row for the schedule period you want to compile a report for, Click the **HTML** icon, **PDF Landscape** icon, or **PDF Portrait** icon.



The screenshot shows the ScheduleReady interface with the 'SCHEDULES' section active. The 'SCHEDULE PERIODS' table is displayed with the following data:

Schedule Period	Unassigned Shifts	Schedule Status	HTML	PDF Landscape	PDF Portrait	Rebuild
10/13/2013 - 11/09/2013	94	Locked for Editing				
09/15/2013 - 10/12/2013	15	Locked for Editing				
08/18/2013 - 09/14/2013	2	Published				
07/21/2013 - 08/17/2013	11	Published				
08/23/2013 - 07/20/2013	2	Published	