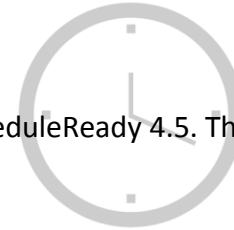


Welcome Tab Shift Trades Minibar

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

- 🕒 Select a date range for shift trades
- 🕒 Approve and deny shift requests
- 🕒 Anatomy of the **Details** window within the **Shift Trades** minibar




The screenshot shows the ScheduleReady interface. At the top right, there are navigation elements: "Scheduling" (highlighted in blue), "00:00", "Barbara Dodd", and "00:59". Below this is a "New! Customer News/Updates" link. A horizontal menu contains "Welcome" (highlighted in yellow), "Calendar", "Schedules", "Administration", and "Reports".

The main content area is titled "SHIFT REQUESTS". On the left is a sidebar with a dropdown menu set to "Overview" and a "Configure Layout" link. Below this are several menu items with expand/collapse icons: "Schedules" (yellow), "Sick Leave" (red), "Leave Requests (Central Lab)" (blue), and "Shift Trades (Central Lab)" (green, currently expanded). The "Shift Trades" section includes a "Feedback" link, a "Help" link, and a "Date Range" selector with options for "this year", "this month", "this week", and "custom". The date range is currently set from 08/28/2013 to 09/30/2013.

The main table displays the following shift requests:


	Shift Date	Shift Name	Current Status	
Confirm Deny	08/28/2013 (Wednesday)	AUTO	Awaiting for manager approval for James Gardner to give the <i>AUTO (6:00 - 14:30)</i> shift to Erin Jones on Wed, Aug 28.	Details
Confirm Deny	09/04/2013 (Wednesday)	SER	Awaiting for manager approval for Elizabeth Bruch to give the <i>SER (9:00 - 17:30)</i> shift to Kelly Webb on Wed, Sep 4.	Details
Confirm Deny	09/05/2013 (Thursday)	FLOAT1	Awaiting for manager approval for Joel Gabriel to trade the <i>FLOAT1 (7:00 - 15:30)</i> shift to Angela Reed on Thu, Sep 5.	Details
Confirm Deny	09/10/2013 (Tuesday)	CHEM1	Awaiting for manager approval for Angela Reed to give the <i>CHEM1 (7:00 - 15:30)</i> shift to Hilary Dionne on Tue, Sep 10.	Details
Confirm Deny	09/18/2013 (Wednesday)	AUTO	Awaiting for manager approval for Elizabeth Bruch to give the <i>AUTO (6:45 - 15:15)</i> shift to Angela Reed on Wed, Sep 18.	Details
Confirm Deny	09/19/2013 (Thursday)	MICRO	Awaiting for manager approval for Donovan Dorsey to give the <i>MICRO (6:00 - 14:30)</i> shift to Erin Jones on Thu, Sep 19.	Details

Select a Date Range for Shift Trades

The **Date Range** menu within the **Shift Trades** minibar allows you to quickly change the dates of shift trades displayed within the **Shift Trades** 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 shift trades. You can find the menu options under **Date Range**.

Select a Date Range

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



Shift Trades (Central Lab) Feedback | Help ?

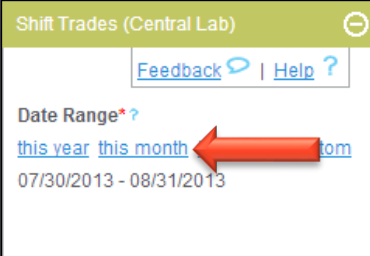
Date Range* ?

[this year](#) [this week](#) [custom](#)

07/30/2013 - 08/31/2013

Shift Date	Shift Name	Current Status	
07/03/2013 (Wednesday)	AUTO	A schedule manager never responded to the request for OPEN SHIFT to give Ein Jones the AUTO (6:00 - 14:30) shift on Wed, Jul 3.	Details
07/03/2013 (Wednesday)	VIRO	A schedule manager never responded to the request for OPEN SHIFT to give Kelly Webb the VIRO (8:00 - 16:30) shift on Wed, Jul 3.	Details
07/04/2013 (Thursday)	AUTO	A schedule manager never responded to the request for OPEN SHIFT to give Dan Steiner the AUTO (6:00 - 14:30) shift on Thu, Jul 4.	Details
07/04/2013 (Thursday)	VIRO	A schedule manager never responded to the request for OPEN SHIFT to give Wesley Korr the VIRO (8:00 - 16:30) shift on Thu, Jul 4.	Details
07/05/2013 (Friday)	HEME1	A schedule manager never responded to the request for OPEN SHIFT to give Wesley Korr the HEME1 (17:00 - 15:30) shift on Fri, Jul 5.	Details
07/05/2013 (Friday)	HEP	A schedule manager never responded to the request for OPEN SHIFT to give Sharon Cherop the HEP (6:00 - 14:30) shift on Fri, Jul 5.	Details

- To display every shift trade that contains a date within the current month, click [this month](#).



Shift Trades (Central Lab) Feedback | Help ?


Date Range* ?


[this year](#) [this month](#) [tom](#)

07/30/2013 - 08/31/2013


Shift Date	Shift Name	Current Status	
08/02/2013 (Friday)	MAN2	A schedule manager never responded to the request for James Gardner to unassign the MAN2 (9:00 - 17:30) shift on Fri, Aug 2.	Details
08/06/2013 (Tuesday)	MAN2	A schedule manager never responded to the request for James Gardner to unassign the MAN2 (9:00 - 17:30) shift on Tue, Aug 6.	Details
08/17/2013 (Saturday)	TITER	A schedule manager never responded to the request for Dennis Alvarez to unassign the TITER (17:30 - 21:30) shift on Sat, Aug 17.	Details
08/24/2013 (Saturday)	BB2	A schedule manager never responded to the request for Donovan Dorsey to give Ein Jones the BB2 (14:00 - 22:30) shift on Sat, Aug 24.	Details
08/28/2013 (Wednesday)	AUTO	Awaiting for manager approval for James Gardner to give the AUTO (6:00 - 14:30) shift to Erin Jones on Wed, Aug 28.	Details

- To display shift trades that occur during the current week, click [this week](#).

Shift Trades (Central Lab) 

[Feedback](#)  | [Help ?](#)

Date Range*?

[this year](#) [this month](#) [this week](#) 


07/30/2013 - 08/31/2013


SHIFT REQUESTS

Shift Date	Shift Name	Current Status
Confirm Deny 08/28/2013 (Wednesday)	AUTO	Awaiting for manager approval for James Gardner to give the AUTO (6:00 - 14:30) shift to Erin Jones on Wed, Aug 28. Details




- 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**.


Shift Trades (Central Lab) 


[Feedback](#)  | [Help ?](#)

Date Range*?

[this year](#) [this month](#) [this week](#) [custom](#) 




07/30/2013 - 08/31/2013


Shift Trades (Central Lab) 

[Feedback](#)  | [Help ?](#)

Date Range*?

[this year](#) [this month](#) [this week](#) [custom](#)

07/30/2013  08/31/2013  

[Update Display](#) 



Approve and Deny Requests within the Shift Trade Minibar

There are three types of shift trade requests that employees can submit to schedule administrators for review:

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 StaffReady. The shift trade request appears in the Shift Trades table with a [trade](#) icon.
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 give away in StaffReady. A shift give away request appears in the Shift Trades table with a [give](#) icon.
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. A shift unassign request appears in the Shift Trades table with a [unassign](#) icon.

Approve Shift Trade Requests

- In the row of the trade you wish to approve, click [Confirm](#).

SHIFT REQUESTS			
	Shift Date	Shift Name	Current Status
Confirm	08/28/2013 (Wednesday)	AUTO	Awaiting for manager approval for James Gardner to give the AUTO (6:00 - 14:30) shift to Erin Jones on Wed, Aug 28. Details
Confirm Deny	09/04/2013 (Wednesday)	SER	Awaiting for manager approval for Elizabeth Bruch to give the SER (9:00 - 17:30) shift to Kelly Webb on Wed, Sep 4. Details
Confirm Deny	09/05/2013 (Thursday)	FLOAT1	Awaiting for manager approval for Joel Gabriel to trade the FLOAT1 (7:00 - 15:30) shift to Angela Reed on Thu, Sep 5. Details
Confirm Deny	09/10/2013 (Tuesday)	CHEM1	Awaiting for manager approval for Angela Reed to give the CHEM1 (7:00 - 15:30) shift to Hilary Dionne on Tue, Sep 10. Details
Confirm Deny	09/18/2013 (Wednesday)	AUTO	Awaiting for manager approval for Elizabeth Bruch to give the AUTO (6:45 - 15:15) shift to Angela Reed on Wed, Sep 18. Details
Confirm Deny	09/19/2013 (Thursday)	MICRO	Awaiting for manager approval for Donovan Dorsey to give the MICRO (6:00 - 14:30) shift to Erin Jones on Thu, Sep 19. Details

Deny Shift Trade Requests

- In the row of the trade you wish to reject, click [Deny](#).

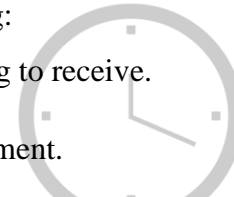
SHIFT REQUESTS			
	Shift Date	Shift Name	Current Status
Confirm Deny	09/03/2013 (Wednesday)	AUTO	Awaiting for manager approval for James Gardner to give the <i>AUTO</i> (6:00 - 14:30) shift to Erin Jones on Wed, Aug 28. Details
Confirm Deny	09/04/2013 (Wednesday)	SER	Awaiting for manager approval for Elizabeth Bruch to give the <i>SER</i> (9:00 - 17:30) shift to Kelly Webb on Wed, Sep 4. Details
Confirm Deny	09/05/2013 (Thursday)	FLOAT1	Awaiting for manager approval for Joel Gabriel to trade the <i>FLOAT1</i> (7:00 - 15:30) shift to Angela Reed on Thu, Sep 5. Details
Confirm Deny	09/10/2013 (Tuesday)	CHEM1	Awaiting for manager approval for Angela Reed to give the <i>CHEM1</i> (7:00 - 15:30) shift to Hilary Dionne on Tue, Sep 10. Details
Confirm Deny	09/18/2013 (Wednesday)	AUTO	Awaiting for manager approval for Elizabeth Bruch to give the <i>AUTO</i> (6:45 - 15:15) shift to Angela Reed on Wed, Sep 18. Details
Confirm Deny	09/19/2013 (Thursday)	MICRO	Awaiting for manager approval for Donovan Dorsey to give the <i>MICRO</i> (6:00 - 14:30) shift to Erin Jones on Thu, Sep 19. Details



Anatomy of the Details Window within the Shift Trade Minibar

The **Details** window within the **Shift Trade** minibar is useful when evaluating whether to approve shift trades and shift give away requests. It provides a visual representation of the shift request and describes any conflicts that may arise from the shift trade or give away. Some examples of shift request conflicts that the system may communicate to you include the following:

- The employee does not have the job description for the shift assignment they are attempting to receive.
- The trade would generate overtime for an employee.
- The employee is not available on the day he or she is attempting to receive the shift assignment.



Shift Trade Requests Details

1. In the row of the trade you wish to get more information on, Click [details](#).

SHIFT REQUESTS				
	Shift Date	Shift Name	Current Status	
Confirm Deny	08/28/2013 (Wednesday)	AUTO	Awaiting for manager approval for James Gardner to give the AUTO (6:00 - 14:30) shift to Erin Jones on Wed, Aug 28.	Details
Confirm Deny	09/04/2013 (Wednesday)	SER	Awaiting for manager approval for Elizabeth Bruch to give the SER (9:00 - 17:30) shift to Kelly Webb on Wed, Sep 4.	Details
Confirm Deny	09/05/2013 (Thursday)	FLOAT1	Awaiting for manager approval for Joel Gabriel to trade the FLOAT1 (7:00 - 15:30) shift to Angela Reed on Thu, Sep 5.	Details
Confirm Deny	09/10/2013 (Tuesday)	CHEM1	Awaiting for manager approval for Angela Reed to give the CHEM1 (7:00 - 15:30) shift to Hilary Dionne on Tue, Sep 10.	Details
Confirm Deny	09/18/2013 (Wednesday)	AUTO	Awaiting for manager approval for Elizabeth Bruch to give the AUTO (6:45 - 15:15) shift to Angela Reed on Wed, Sep 18.	Details
Confirm Deny	09/19/2013 (Thursday)	MICRO	Awaiting for manager approval for Donovan Dorsey to give the MICRO (6:00 - 14:30) shift to Erin Jones on Thu, Sep 19.	Details

The **Details** provides an illustration of the proposed trade and a description of any conflicts that may adversely impact the schedule.

2. Click the **Close** button .

TRADE ACTIVITY > DETAILS		
James Gardner	Elizabeth Bruch	Conflicts
Tue, Jul 30 VIRO (8:00 - 16:30)	Tue, Jul 30 SER (9:00 - 17:30)	Elizabeth Bruch: The employee does not have the Virology job description.
Tue, Jul 30 VIRO (8:00 - 16:30)	Tue, Jul 30 SER (9:00 - 17:30)	James Gardner: The employee does not have the Serology job description.