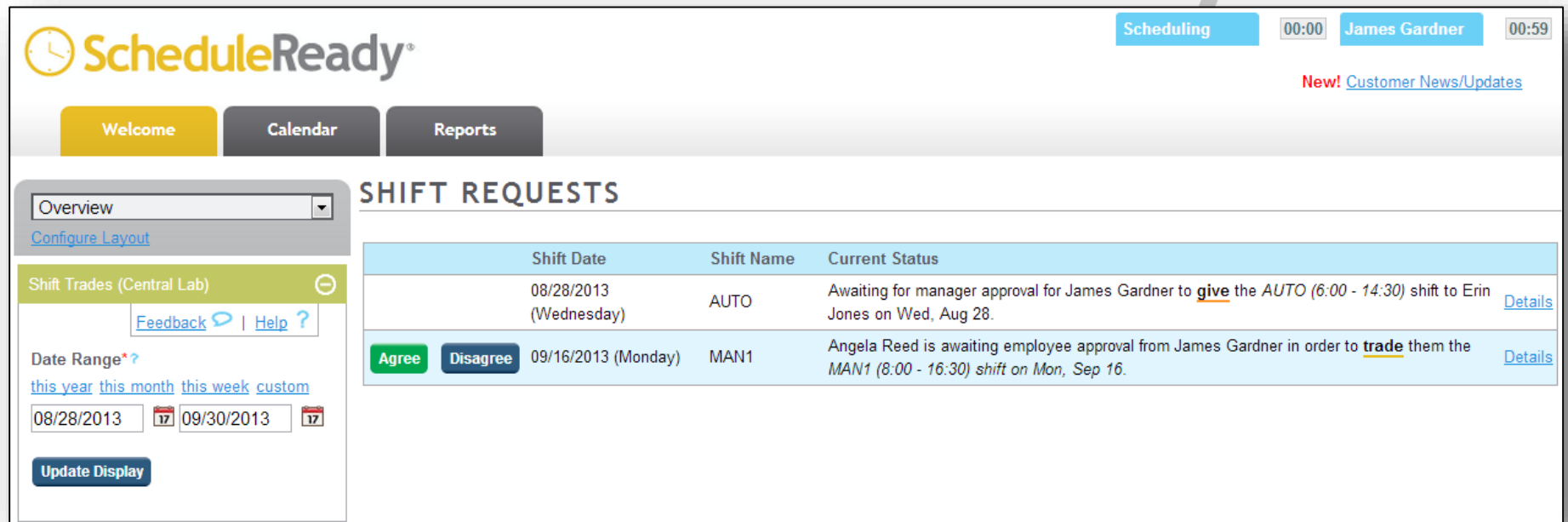
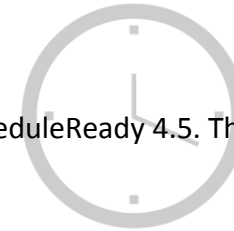


Welcome Tab Shift Trades Minibar

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:

- 1 Select a date range for the shift trade(s)
- 2 Agree or disagree to shift requests
- 3 Anatomy of the **Details** window within the **Shift Trades** minibar



The screenshot shows the ScheduleReady interface. At the top, there is a navigation bar with 'Scheduling', '00:00', 'James Gardner', and '00:59'. Below this is a 'Welcome' tab and a 'Calendar' tab. The main content area is titled 'SHIFT REQUESTS' and contains a table with the following data:

Shift Date	Shift Name	Current Status
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
09/16/2013 (Monday)	MAN1	Angela Reed is awaiting employee approval from James Gardner in order to trade them the <i>MAN1 (8:00 - 16:30) shift on Mon, Sep 16</i> . Details

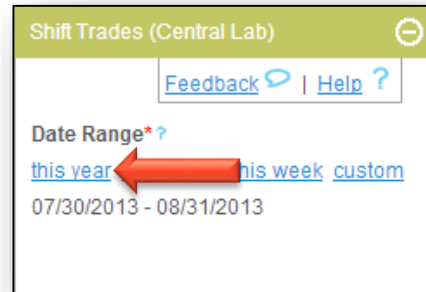
On the left side of the screenshot, there is a 'Shift Trades (Central Lab)' minibar. It includes a 'Date Range*' section with options for 'this year', 'this month', 'this week', and 'custom'. The date range is set to '08/28/2013' to '09/30/2013'. There are also 'Feedback' and 'Help' links, and an 'Update Display' button.

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](#).



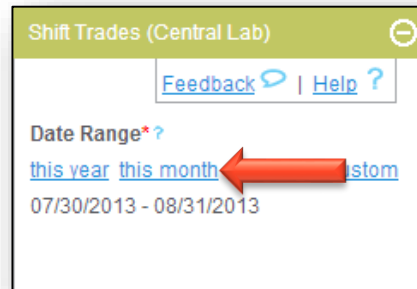
Shift Trades (Central Lab) Feedback | Help ?

Date Range* ?

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

07/30/2013 - 08/31/2013

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



Shift Trades (Central Lab) Feedback | Help ?

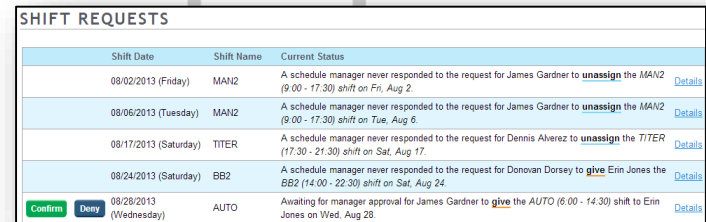
Date Range* ?

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

07/30/2013 - 08/31/2013




	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




	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 Erin Jones the BB2 (14:00 - 22:30) shift on Sat, Aug 24.	Details
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 display shift trades that occur during the current week, click [this week](#).

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

Shift Trades (Central Lab) 

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

Date Range* ?

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


07/30/2013 - 08/31/2013


LEAVE REQUESTS

Status:


[Confirm All](#) [Deny All](#)

	Employee	Status	Leave Dates	Type	Requested	New
Confirm Deny	Brian Curtis	Request	08/26/2013 - 08/26/2013	PTO	08/26/2013 10:03	Edit
Confirm Deny	James Gardner	Request	08/26/2013 - 08/26/2013	PTO	08/24/2013 10:43	Edit


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](#)

[Update Display](#) 



Agree and Disagree to Requests within the Shift Trade Menu

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 Staff Ready. 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.

Agree to a Shift Trade Request

- In the row of the trade you wish to accept, click **Agree**.

SHIFT REQUESTS			
Shift Date	Shift Name	Current Status	
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
09/16/2013 (Monday)	MAN1	Angela Reed is awaiting employee approval from James Gardner in order to trade them the MAN1 (8:00 - 16:30) shift on Mon, Sep 16.	Details

Agree



Disagree with s Shift Trade Request

- In the row of the trade you do *not* wish to accept, click **Disagree**.

SHIFT REQUESTS

Shift Date	Shift Name	Current Status
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
<input type="button" value="Agree"/> <input type="button" value="Disagree"/>	Monday) MAN1	Angela Reed is awaiting employee approval from James Gardner in order to trade them the MAN1 (8:00 - 16:30) shift on Mon, Sep 16. Details

Cancel an Agree or Disagree Decision for a Shift Trade Request

- In the row of the trade you wish to change you mind about, click **Cancel**.

SHIFT REQUESTS

Shift Date	Shift Name	Current Status
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
<input type="button" value="Cancel"/>	Tuesday) MAN2	James Gardner wants to unassign the MAN2 (9:00 - 17:30) shift on Tue, Sep 10. Details
<input type="button" value="Agree"/> <input type="button" value="Disagree"/>	09/16/2013 (Monday) MAN1	Angela Reed is awaiting employee approval from James Gardner in order to trade them the MAN1 (8:00 - 16:30) shift on Mon, Sep 16. 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 agree or disagree to shifts trade 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](#).

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

2. Click the **Close** button .

SHIFT REQUESTS			
Shift Date	Shift Name	Current Status	
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
<input type="button" value="Agree"/> <input type="button" value="Disagree"/>	09/16/2013 (Monday)	MAN1	Angela Reed is awaiting employee approval from James Gardner in order to trade them the MAN1 (8:00 - 16:30) shift on Mon, Sep 16. Details

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.