View Tab – Viewing Schedule

Legend – In the upper right hand corner there will be a legend with two icons

1. Locked: means that a shift was requested that day and approved
2. Note: the shift assignment has a note from an administrator attached to it; the note can be viewed by hovering over the assignment

Selecting a Date Range- The default is always the current week with Monday as the start date

- Choose the start date by clicking in the box and selecting a date on the calendar
- Choose the range you wish to see using the drop down boxes
- Choose the View By drop down box you wish to use

Once you've made your selections, click "Go"

Staff Box

- Click above the drop down box to add a new staff filter, to edit the filter and to delete the filter.
- The drop down box allows you to select the Staff filter you wish to print, export, or view on the screen.
- Next to each staff are three icons:
    - Highlight: when turned on, the person of interest will appear throughout the schedule in a bright blue color
    - Show: shows that person on the scheduling screen. The icon at the top of the list will show all
    - Hide: hides that person on the scheduling screen. The icon at the top of the list will hide all.
- If you'd like to bring the entire schedule, choose the "All Staff" staff filter

Task Box

- The filters and show/hide icons work the same as in the staff box

Swap Tab

Entering Swaps

- To move a task to another staff member you can click on a task and drag it to the person you'd like to swap with or use the button next to the task you wish to trade.
- Click the Submit Swap button in the top left corner, the swap will immediately appear on the schedule with the pending symbol

Viewing Swaps that Have Been Made

- Swap Summary – Shows the swaps that you have made since being logged into the system
- Swaps Pending My Approval – Shows all swaps that require your attention. This is where you will go to approve or reject a swap between yourself and another staff member.
- My Swap History- Shows all swaps you have ever made including those that are pending and approved

Request Tab

Entering Requests

- Click in the cell associated with your name on the specified date. A box will appear listing all of the tasks that you can request
- Click on the task you are trying to add
- If the requested is allowed, it will appear on the schedule with the pending symbol

Viewing Requests that You Have Made

- Request Summary- Shows the requests that you have made since being logged in to the system
- My Request History – Shows all requests you have made, including those that are pending or approved
    - Each request will describe if it is an addition or removal, what date the request is for, a note field that will allow you to send a short note for the admin, the status of the request
    - If the request is still pending, the option to cancel the request will also be show
- My Request Limits- you will be able to see how many requests you have made as well as how many you are allowed to make