



Welcome to **StaffReady**[™]



2012 Learning Guide Employee

StaffReady

<http://www.staffready.com>



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1 Module One (1): Introduction, Login, and Welcome Tab

1.1 ScheduleReady Overview

Welcome to ScheduleReady!

There are two Modules of training and each one contains an online Tutorial supported by this Learning Guide:

- | | |
|-----------------------|--|
| 1. Module One: | <i>Introduction, Login, and Welcome Tab</i>
(Tutorial 1) |
| 2. Module Two: | <i>Calendar Tab & Reports</i>
(Tutorials 2) |

1.2 Technology Upgrades

Significant upgrades have occurred creating greater ability to access ScheduleReady from multiple locations and devices. Navigation through each product in the StaffReady family of solutions can be done via a touch screen interfaces such as:

- iPad or iPhone
- Droid Smart-phones

ScheduleReady is now accessible from most major Internet browsers such as:

- Internet Explorer
- Firefox
- Google Chrome
- Safari

Additionally, ScheduleReady now has email alerts! Changes to posted schedules that affect you will be emailed directly and immediately to the email address your administrator has set up in the system.



1.3 Login Instructions

I. Open a browser on your desktop

II. Navigate to www.staffready.com

Note: ScheduleReady **cannot** be accessed from www.maplewoodsoftware.com.

III. Click on the Customer Login Link in the upper right hand corner of the StaffReady homepage.

IV. This will take you to the login screen as shown below:

License

Username

Password

[Forgot your password?](#)

V. On this screen, you are asked to enter the following information:

A. License:

B: Username

C. Password:



VI. After logging in, you will have full access to the ScheduleReady software. On your calendar, there will be a Documents link. Click on this link to watch your Tutorials.

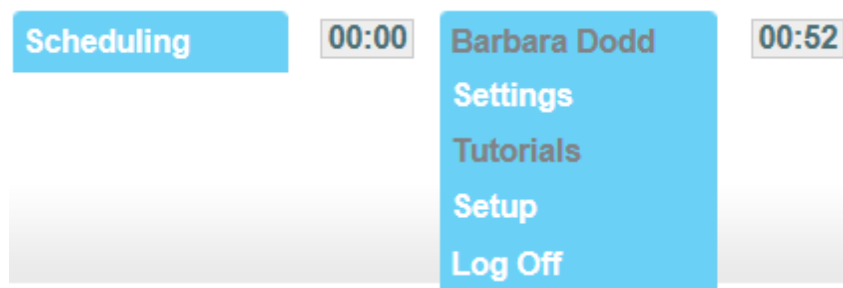
1.4 ScheduleReady Tutorial Access

The Documents link on your calendar provides you with assignments to watch your tutorials and download the Learning Guide. Once you have marked those assignments as complete, you will no longer have access to the Tutorials through this vehicle.

The Tutorials are always available for you to view again via the Control Panel menu at the top of the screen.

To access the ScheduleReady Employee Tutorials:

1. Log onto ScheduleReady through the StaffReady website as described above.
2. Move your cursor over the drop-down menu in the upper right hand corner of the screen with your name on it.



3. Once the drop-down menu has expanded, click on the Tutorials link.
4. Select Staff Tutorial: Training for non-admin users

How do I pause the Tutorial while viewing?

At the bottom of the Tutorial is the player bar. It allows for the pausing and playing of the Tutorial while viewing. Depending on the size of your monitor, you may need to scroll down to see the player bar.





What are the software requirements for watching the ScheduleReady Tutorial??

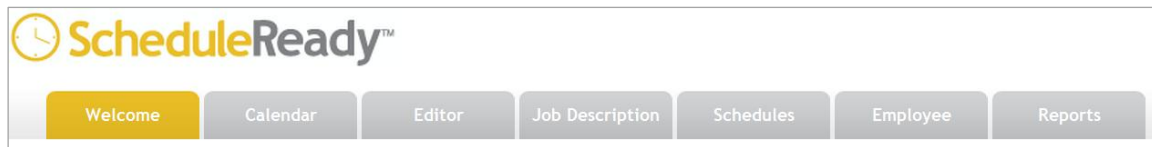
In order to view the ScheduleReady Tutorials, you must have version 9 (or higher) of Adobe Flash downloaded on your computer. Adobe Flash is free to download at <http://get.adobe.com/flashplayer/>

1.5 ScheduleReady Navigation

I. Tabbed Browsing

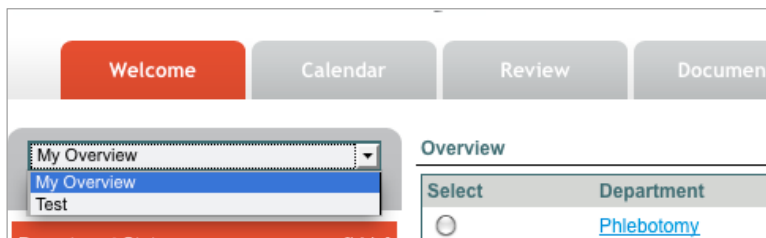
Tabbed browsing is the primary means of navigation between functional groupings within ScheduleReady. Tabbed browsing is intuitive and convenient and allows you to navigate within the software without opening multiple screens. The 'active' tab (the one you are currently working in) will be highlighted in a gold color which is the color theme of ScheduleReady; 'inactive' tabs remain gray.

For example, when you first log into ScheduleReady, you are taken to the Welcome Tab. This is illustrated by the fact that the tab is illuminated. As you navigate to other tabs by clicking on them, those tabs will illuminate in gold so you clearly know where you are currently within the software.



II. Drop-Downs

Drop-downs provide options when you select the down arrow on the right side of the field. Choices unfold beneath the field and you highlight and click the choice to select.



Example 1.a

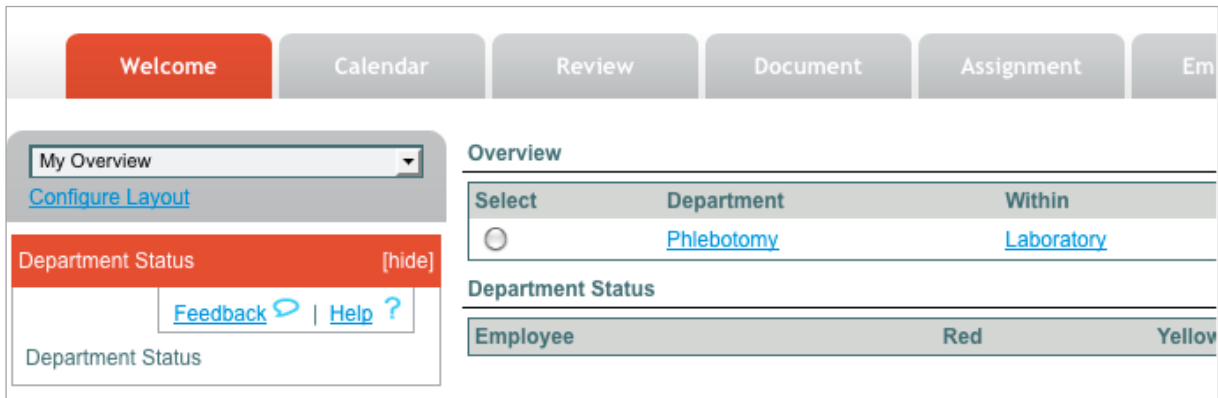
III. Mini Color Bars

Along the left side of the screen on each Tab are a number of mini color bars. When you click on a color bar, it will either expand or contract, changing the content displayed on the screen. This allows you to view varying levels of detail without having to navigate to many different places in the software.



IV. Hyperlinks

Throughout the software, links are provided that will connect you directly to relevant information, move you to another tab or initiate actions you want to conduct. Links are often in drop-downs (Example 1.a) or are words that have a different color, are highlighted or underlined (Example 1.b). They are 'active' and will take you to another location or perform an action when clicked on.



Example 1.b

There are several hyperlinks in Example 1.b including the following:

- [Phlebotomy](#)
- [Laboratory](#)
- [Configure Layout](#)
- [\[hide\]](#)
- [Feedback & Help](#)

Feedback: Launching the Feedback Link from wherever you are in the application launches a direct portal to support for you to be able to ask direct support questions or provide feedback with suggestions on how to improve the software.

Help: The Help Link provides you with built-in help guides that are directly relevant to the area of the software you are in when you launch the Help Link.

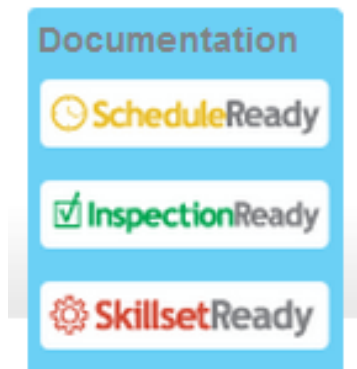
1.6 ScheduleReady Menus and Password Maintenance

In the upper right-hand corner of ScheduleReady is the Product Menu and Control Panel. These menus provide a quick and easy way to access other StaffReady products (if your organization has purchased other products), as well as access to functions that are not utilized day-to-day such as watching tutorials or changing your password.



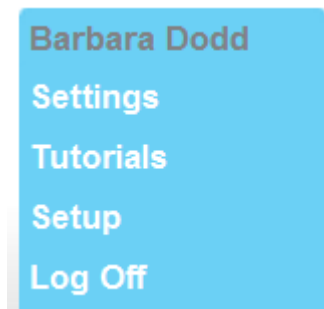
I. PRODUCT MENU

If administrative access has been granted to other StaffReady products, by placing the cursor over the Product Menu, the administrator (Admin) is able to navigate to the other products. Once a selection is made, the screen will seamlessly transition to the new view. The user will know they have switched from one product to another because the logo in the upper left hand corner will update, as will the color scheme of the navigation tabs.



II. CONTROL PANEL MENU – PASSWORD MAINTENANCE

In its resting state, the Control Panel will have the name of the individual currently logged into the system. When you place the cursor over the Control Panel, you can navigate to certain options according to your access settings.



A. Settings: Launching the Settings Menu allows you to change your password and your time style display.

i. Password Change: To change your password, enter the current password into the “Old Password” field and then type the new password into the other two fields shown



below. When complete, select the Change Password button. You will want to change your password after your initial login to the system.

General Settings

Old Password

New Password
Confirm New Password

Change Password

Note: If you forget your password, notify your Administrator to reset.

ii. Time Style: The time style option allows the employee to declare if they prefer their schedule to appear on their Calendar in a 12 hour time style, or in a 24 hour (military time style). If the employee wishes to change the time style, they need to select the alternative time style from the drop-down menu, and then select the Change Time Style button.

Time Style

24 Hour Time

Change Time Style



1.7 ScheduleReady Welcome Tab

After successfully logging into ScheduleReady, you are immediately taken to the Welcome Tab. This screen is designed to provide you an overview of your Shift Trade and Leave Requests.

I. Shift Trades

With the Shift Trades color bar expanded, you will see the current status of any shift trade that you have either initiated or any that you have been asked to respond to.

A. NEW: By selecting this hyperlink, the Give Away Shift window will open and you can initiate a new Shift Trade if you know the date you wish to trade. The details on how to utilize this window are upcoming in Module Two: Calendar Tab.

B. VIEW REASON: If another employee has sent you a Shift Trade request, and if they used the Reason/Note field, this hyperlink will display the note from the other employee.

c. CANCEL: By selecting this hyperlink, you are canceling the Shift Trade entirely.

II. My Leave

When expanded this color bar displays the Your Leave Requests table. This table lists all your leave in the system from today forward and the details about it including the current status.

A. NEW: By selecting this hyperlink, the Edit Leave Request window opens and you can initiate a new leave request.

i. Employee: Hardcoded with your name.

ii. Leave Type: Use drop-down box to select the type.

iii. Leave Priority: use drop-down to select the priority. You may only have one priority 1 or priority 2 leave on the system at any given time; it simply indicates to the administrator a preference/priority. Most leave requests are entered as Normal.



iv. Reason for Leave/New Note: Use this field to further explain the leave if you feel it is important for the Admin to know the reason. For example, “family reunion” or “daughter’s wedding”.

v. Leave Begins: Enter the beginning date or use the calendar to choose a date. Do not enter a beginning time unless your company has a policy to allow partial leave days and you have discussed with your Administrator the use of this feature.

vi. Leave Ends: Enter the ending date or use the calendar to choose a date. Do not enter a beginning time unless your company has a policy to allow partial leave days and you have discussed with your Administrator the use of this feature.

vii. Request Date/Time: Hardcoded and displayed by the system. The user cannot change.

viii. Save Changes: Click here to save your changes and send the request to your Admin.

B. EDIT: By selecting this hyperlink next to an existing Leave Request, the Edit Leave Request Window opens and you can update dates, view status history, or Delete the selected request.



2 Module Two (2): Calendar and Reports Tab

2.1 Calendar Tab

The Calendar Tab of ScheduleReady provides employees access to a number of features depending on how many products of the integrated family of StaffReady products your organization has access to.

The Calendar Tab, as it relates to ScheduleReady specifically, contains detailed information for scheduled shifts for the employee who is logged in, the ability to request shift trades and leave, and the ability to view and/or print complete posted schedules with information for all employees.

I. Schedule Mini Color Bar

For each schedule that an employee resides on, a Schedule Mini Color Bar will be available on the Calendar Tab. When expanded, all shift assignments for posted schedules will appear for the particular expanded color bar. If the employee works on more than one schedule, you can expand both mini color bars and see all the assigned shifts.

A. SHIFT ASSIGNMENT ACTIVE LINK: Shift assignments displaying for past dates will display but will not have an active link. Future shift assignments will have an active link associated with them.

i. Give Away Shift Window: This window will open after clicking on a shift assignment link. This is the primary way that shift assignments are traded between employees.

a. Pick a Day: This field will be populated with the shift assignment date that was selected, so this value will rarely need to be adjusted.

b. Pick a Shift Drop-down Menu: This will contain the shift assignment name that was selected.



c. Give Shift To Drop-down Menu: Use this to select who you are requesting take the shift from you.

d. Reason/Note: Use this field to type a message either to the other employee or the Admin who will review and approve the shift trade.

e. Save Changes: Once entry is complete, click and the shift trade will be waiting for the employee to accept. When/If they choose to accept the proposed shift trade, it will then be forwarded on to the Admin for review. If the shift trade is approved, then the schedule will be automatically updated and an email message will be sent to both employees involved in the shift trade to notify of the approved trade. Conversely, if the shift trade is not approved, a message will be sent out to notify that the shift trade has been declined and all schedules and calendars will remain unchanged.

Note: Remember that email messaging must be defined in the system before auto-messaging will notify employees. If you do not feel you or another employee are receiving anticipated email alerts, please contact your administrator.

B. SCHEDULE MINI-COLOR BAR CHECK BOX OPTIONS: Within the Schedule Mini Color Bar, other pertinent information can be selected and displayed.

i. Show Time Scheduled: Populates the calendar with the start and end time for each shift assignment.

ii. Show Location Scheduled: Populates the calendar with the location of the shift assignment.

iii. Show Rejected Shift Changes: Populates the calendar with those shift trades that were either declined by the employee it was proposed to or denied by the schedule administrator.

iv. View Schedules Active Link: This will launch the View Schedules Window. This will allow each department schedule, which has been made available by the schedule Admin, to be viewed by pay period. Other schedule views are available on the Reports Tab which is covered in the reports training section.



II. My Leave Mini Color Bar

The default view with the My Leave Mini Color Bar expanded is to display all leave requests on the Calendar for the employee.

A. ADD LEAVE AND LEAVE REQUEST ACTIVE LINKS: These same links that trigger windows for the entry, review and modification of leave Requests are available from the Editor Tab and are documented in the previous section of this Learning Guide.

B. SHOW LEAVE REQUESTS: After clicking on this select box within the My Leave Mini Color Bar, your Calendar will display all of the leave requests that have already been submitted by the other employees in your department. By clicking on any particular request link on the Calendar, you will launch the Leave Requests menu. This will let you know what other employees have requested time off ahead of you, and when their requests were submitted.

2.2 Reports Tab

There are a variety of reporting capabilities within ScheduleReady. To begin, navigate to the Reports Tab.

I. Schedule Reports Mini Color Bar

A. SCHEDULE SELECTION DROP-DOWN MENU: in this drop-down, you have the option to select from schedules that you have administrative access to. If you only have access to one schedule, then only the one schedule will be available within the drop-down menu.

B. DATE RANGE: The date range displayed here is two-weeks from the current date. However, schedules can be shown 600 days into the future since that is how ScheduleReady builds out. Once you change the date values (to view either historical or future date ranges), just click on the Refresh Report to update the report view.

B. SELECT REPORT TYPE RADIO BUTTON: To change to the report type you wish to view, select the radio button next to the corresponding report.



C. REPORT DROP-DOWN MENU - HTML v. PDF: The Report drop-down menu is at the top of the report that is currently in view.

i. HTML: The default HTML version resides within the software and does not offer an option for printing.

ii. PDF: By selecting this option, you will be presented with an icon for a format that you can open and save or print.

Note: The Date Range and Radio Button selection options work the same as within the Schedule Reports Mini Color Bar.




3 Appendix



ScheduleReady is one of two products in the StaffReady family of web-based products.

StaffReady is designed to create tremendous efficiencies in the overall process of managing your department. The products within the StaffReady family of solutions include:

 **InspectionReady** Checklist management and document control

 **ScheduleReady** Automated staff scheduling

Each module can be utilized separately or bundled together in a suite of interworking solutions.

Please contact Maplewood Software if you have general questions regarding any of the products in the StaffReady family of solutions.

Maplewood Software

www.staffready.com

Please contact your Implementation Specialist directly if you have a specific question about your StaffReady product deployment.