



# Workforce Scheduling Guide

For Employees





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# Scheduling Screen

## 1 My Schedule

Title of the schedule you are currently viewing.

## 2 Today

This button will return the schedule back to the current day if you have used the arrows to moved forward or back in time.

## 3 Schedule View

These buttons allow you to choose your preferred schedule display. Select to view a 'Day', 'Week', 'Fortnight', 'Month' or 'Agenda'. 'Day' shows an individual day, 'Week' shows seven days, 'Fortnight' shows two weeks, and 'Month' shows like a calendar.' Agenda' view shows a more accessible view of shift and activities in a vertical list.

The screenshot shows a scheduling interface for 'My Schedule' from Sunday, March 01, 2020, to Saturday, March 07, 2020. The interface includes a title bar with 'My Schedule' and a 'Set Availability' link. Below the title bar is a navigation bar with a 'Today' button, left and right arrows, a date range, and view options: 'Day', 'Week' (selected), 'Fortnight', 'Month', and 'Agenda'. The main area is a grid with time slots from 5:00 AM to 11:00 AM and days from Sun 01/03 to Sat 07/03. Annotations point to: 1. The 'My Schedule' title; 2. The 'Today' button; 3. The 'Week' view option. The grid shows 'Confirmed - Morning Support for Rachel Bradley' shifts from 7:00 AM to 8:00 AM on Monday, Tuesday, Thursday, and Friday, and an 'Available - Morning Support for Rachel Bradley' shift on Wednesday.

	Sun 01/03	Mon 02/03	Tue 03/03	Wed 04/03	Thu 05/03	Fri 06/03	Sat 07/03
5:00 AM							
6:00 AM							
7:00 AM		Confirmed - Morning Support for Rachel Bradley	Confirmed - Morning Support for Rachel Bradley	Available - Morning Support for Rachel Bradley	Confirmed - Morning Support for Rachel Bradley	Confirmed - Morning Support for Rachel Bradley	
8:00 AM							
9:00 AM							
10:00 AM							
11:00 AM							

# Scheduling Screen

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## Set Availability

You can setup your calendar to show the days and hours you are available to work. This will let your employer know your availability before they set up their schedule.

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## Confirmed Shift

A confirmed shift is one that you have agreed to work by selecting the 'Accept Shift' option. It will change colour once the shift has been accepted.

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## Available Shift

This is a request from your employer showing a shift that is available for you to work. You will need to 'Accept' or 'Decline' this shift. You can get more details about the shift by double clicking on it.

**My Schedule** ⓘ ⊙ Set Availability

Today ◀ ▶ Sunday, March 01, 2020 - Saturday, March 07, 2020 Day **Week** Fornight Month Agenda

	Sun 01/03	Mon 02/03	Tue 03/03	Wed 04/03	Thu 05/03	Fri 06/03	Sat 07/03
5:00 AM							
6:00 AM							
7:00 AM		<b>Confirmed - Morning Support for Rachel Bradley</b>	<b>Confirmed - Morning Support for Rachel Bradley</b>	<b>Available - Morning Support for Rachel Bradley</b>	<b>Confirmed - Morning Support for Rachel Bradley</b>	<b>Confirmed - Morning Support for Rachel Bradley</b>	
8:00 AM							
9:00 AM							
10:00 AM							
11:00 AM							

## Viewing your shift details

### 1 Accept Shift

You can accept a shift that you have been offered by pressing the 'Accept Shift' button.

### 2 Decline Shift

You can decline a shift by pressing the 'Decline Shift' button.

### 3 Cancel

If you are unsure about a shift, you can click the 'Cancel' button. This will take you back to the schedule view. The cancel button does not send any notifications.

The screenshot shows a modal window titled "Viewing your shift details" with a close button (X) in the top right corner. The text inside the modal reads: "The shift starts 04/03/2020 7:00am until 9:00am and occurs once only." Below this text is a list of details:

<b>Employer Name</b>	Rachel Bradley
<b>Title</b>	Morning Support
<b>Pay Component</b>	Ordinary Hours Worked
<b>Shift Address</b>	25 Old House Road, Upper Moutere 7175, New Zealand

At the bottom of the modal, there are three red buttons: "Accept Shift", "Decline Shift", and "Cancel". Each button has a small information icon (i) to its right. Below each button is a red circle containing a white number (1, 2, and 3 respectively) with a red arrow pointing up to the button. The "Accept Shift" button is labeled with a red circle containing the number 1, the "Decline Shift" button with a red circle containing the number 2, and the "Cancel" button with a red circle containing the number 3.

# Setting your availability

## 1 Add Availability

Click to open the 'Set Availability' pop up window to add your availability.

## 2 Availability View

Select to see your availability schedule in a 'Weekly' or 'Monthly' view.

## 3 Availability Slot

Availability slots on your schedule show the date, start and end time as well as the frequency details if your availability is reoccurring on a certain day or week.

The screenshot displays the 'My Availability' interface. At the top right, there is a '+ Add Availability' button (callout 1) and a 'Go Back To My Shifts' button. Below this is a navigation bar with 'Today', navigation arrows, and a date range 'Sunday, January 12, 2020 - Saturday, January 18, 2020'. To the right of the date range are 'Week' and 'Month' view buttons (callout 2). The main area is a calendar grid with columns for days from Sun 12/01 to Sat 18/01 and rows for times from 12:00 AM to 11:00 AM. Three blue availability slots are shown: one on Sun 12/01 from 6:00 AM to 6:30 PM (callout 3), one on Thu 16/01 from 9:00 AM to 6:00 PM, and two on Fri 17/01 and Sat 18/01 from 7:00 AM to 3:00 PM.

## Setting your availability

### 4 Start Date

Start date indicates the day you are available.

### 5 Employer

Check or select the appropriate employer that you are setting your availability for.

### 6 Start Time

This is the start time that you are available for a shift.

### 7 End Time

This is the end time you are available for a shift.

The screenshot shows a 'Set Availability' dialog box with the following fields and callouts:

- 4** points to the **Start Date** field, which contains '02/03/2020'.
- 5** points to the **Employer** dropdown menu, which is set to 'Rachel Bradley'.
- 6** points to the **Start Time** field, which is set to '7:00 AM'.
- 7** points to the **End Time** field, which is set to '4:00 PM'.

Other fields in the form include:

- Repeat**: A dropdown menu set to 'Daily'.
- Repeat every**: A spinner box set to '1' followed by 'day(s)'.
- End**: Radio buttons for 'Never' (selected), 'After 1 occurrence(s)', and 'On 18/01/2020'.
- Buttons**: 'Save' and 'Cancel' buttons at the bottom.

## Setting your availability

### 8 Repeat

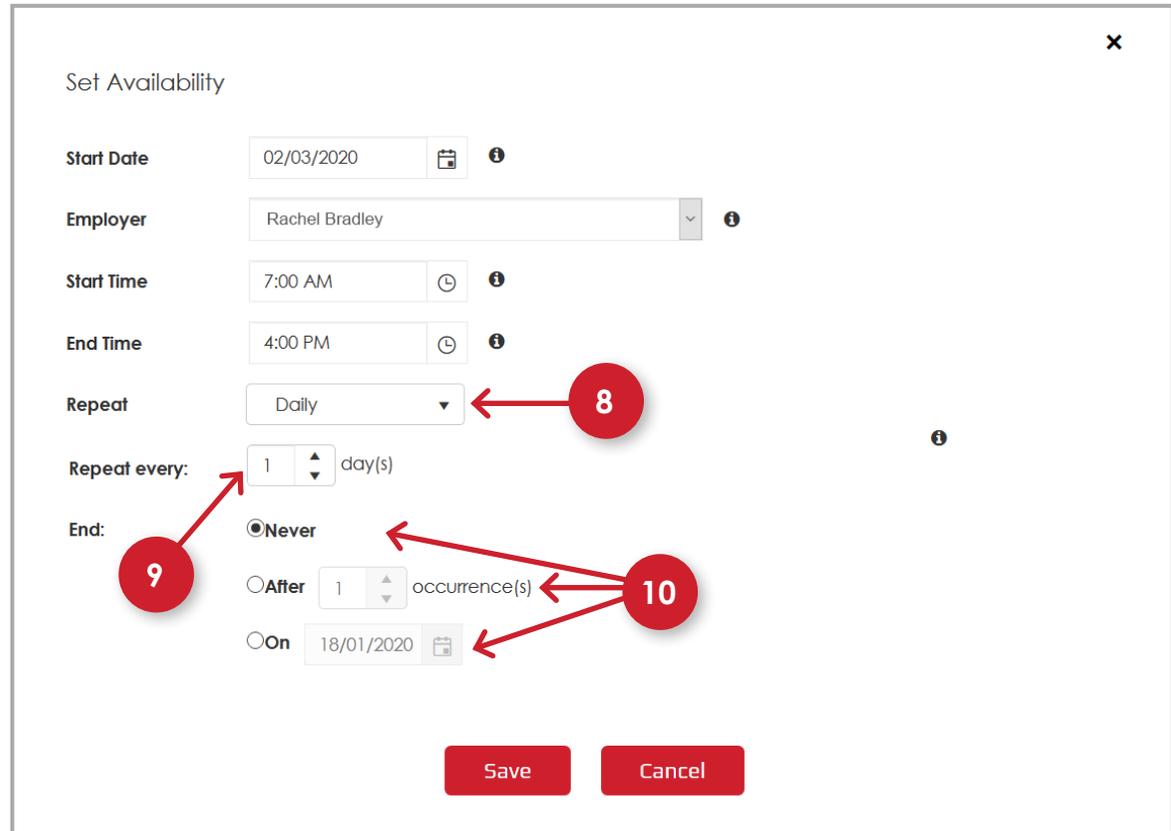
Repeat allows you to choose the frequency of your availability. Choose from 'Daily', 'Weekly', 'Monthly' or 'Yearly'. Please refer to the next page for more details about 'Repeat'.

### 9 Repeat Every

Here you can select the frequency of each repeat.

### 10 End

Use 'End' to select when the repeated availability slot will stop. Selecting 'Never' means it will occur forever. 'After' means you can select a number of repetitions before it ends and 'On' means you can select a specific future date where the availability will end.



The screenshot shows a 'Set Availability' form with the following fields and callouts:

- Start Date:** 02/03/2020
- Employer:** Rachel Bradley
- Start Time:** 7:00 AM
- End Time:** 4:00 PM
- Repeat:** Daily (Callout 8 points to this dropdown)
- Repeat every:** 1 day(s) (Callout 9 points to this spinner)
- End:**  Never (Callout 10 points to this radio button),  After 1 occurrence(s) (Callout 10 points to this spinner),  On 18/01/2020 (Callout 10 points to this date field)
- Buttons:** Save, Cancel

# Setting your availability

## 11 Weekly

You can set your availability to repeat on a weekly basis. Select this option to repeat every week, or every other week. Choose the days of the week to 'Repeat On' if applicable. Choose to set an 'End Date', 'Occurrence' or 'Never' if you would like the availability to be ongoing.

Set Availability

Start Date: 02/03/2020

Employer: Rachel Bradley

Start Time: 7:00 AM

End Time: 4:00 PM

Repeat: Weekly

Repeat every: 1 week(s)

Repeat on:  Mo  Tu  We  Th  Fr  Sa  Su

End:  Never

After 1 occurrence(s)

On 18/01/2020

Save Cancel

## 12 Monthly

Select how often you would like to repeat your availability on a monthly basis, and select the date applicable. Choose to set an 'End Date', 'Occurrence' or 'Never' if you would like the availability to be ongoing.

Set Availability

Start Date: 02/03/2020

Employer: Rachel Bradley

Start Time: 7:00 AM

End Time: 4:00 PM

Repeat: Monthly

Repeat every: 1 month(s)

Repeat on:  Day 18

first Saturday

End:  Never

After 1 occurrence(s)

On 18/01/2020

Save Cancel

## 13 Yearly

Choose this option if your availability is based on certain dates of the year, you can set these annually. Select how often you would like to repeat your annual availability and the applicable date. Choose to set an 'End Date', 'Occurrence' or 'Never' if you would like the availability to be ongoing.

Set Availability

Start Date: 02/03/2020

Employer: Rachel Bradley

Start Time: 7:00 AM

End Time: 4:00 PM

Repeat: Yearly

Repeat every: 1 year(s)

Repeat on:  January 18

first Saturday of January

End:  Never

After 1 occurrence(s)

On 18/01/2020

Save Cancel

# Setting your availability

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## Save Availability

Clicking 'Save' will update your 'Availability Schedule' with the details you have selected.

Set Availability ✕

**Start Date**   

**Employer**   

**Start Time**   

**End Time**   

**Repeat**   

**14** 

## Taking leave

### 1 Mark as Leave

If you are unable to attend a confirmed shift due to a change in circumstance, for example an illness or bereavement, you can mark the shift as sick or bereavement leave. This will be automatically tracked into your timesheet for that fortnight. We recommend you call your employer to ensure they are aware you are now unable to attend.

You must select the pay component from the 'Leave Pay Component' dropdown. Choose the appropriate pay component. If you are unsure, please speak with your employer.

If you have changed your mind and cannot attend a confirmed shift, please contact your employer and let them know. You can then select the pay component from the dropdown menu as 'Leave Without Pay' (LWOP).

### 2 Cancel

Click 'Cancel' to close the selected shift and bring you back to the schedule view.

The shift starts 02/03/2020 7:00am until 9:00am and reoccurs daily until 06/03/2020 ✕

**i** You have accepted this shift

<b>Employer Name</b>	Rachel Bradley
<b>Title</b>	Morning Support
<b>Pay Component</b>	Ordinary Hours Worked
<b>Shift Address</b>	25 Old House Road, Upper Moutere 7175, New Zealand

**Mark as Leave** **i**

**Cancel**

1

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**Manawanui**

**PO Box 83  
Albany Village  
Auckland 0755**

**0508 462 427**

**support@manawanui.org.nz  
www.manawanui.org.nz**

**Facebook manawanuinz  
Twitter @manawanuinz**

 **manawanui**