



Quick Reference Guide

TERMINOLOGY	2
ICONS	3
SCREENS	4
SETTINGS	4
SCHEDULE	4
CLIENT SCHEDULE	4
AVAILABILITY	4
WORKING HOURS	4
TEXT VIEW	5
FEW CLICK SCHEDULING	5
TASKS	5
MANAGE LEAVE	5
CLIENTS	5
REPORTS	6
PAYROLL & CHARGES	6
LICENSES	6

Terminology

Scheduler – Typically management - someone that writes schedules. Schedulers have full access to the system including all possible editing capabilities.

Non Scheduler – Staff member. They cannot edit schedules and are restricted to what you would expect them to be allowed to do. They do have some control, like the ability to enter their own but not others' availability.

Shift – A period of time for which an employee is working.

Visit – A period of time for which a visit to a client is scheduled.

Shift and Visit – A period of time for which a visit is scheduled where the employee has been assigned.

Client Visit Scheduling – Writing schedules that not only have employees and shift times but have clients too. The shifts involve a visit to a client. Home care companies and similar can have a mixture of client visit shifts and non client visit shifts.

Icons

Typically graphical buttons are used instead of textual. The icon indicates what they do. All icon buttons have popup text explaining what they do if you hover the mouse over them.



View large screen help video



View small screen help video (still decent quality)



Save (always remember to click the tick) or process (e.g. generate report)



Delete, remove or deny



Hide part of page or close calendar popup



Show hidden part of page, open calendar popup or add (e.g. Add extra input boxes to the screen)



Usually means show previous week, sometimes means move item to left column



Usually means show next week, sometimes means move item to right column



Copy shifts from previous week



Copy shifts from previous week but leave the employees unspecified



View notes

Screens

Settings – The settings screen is the place to start when you first use the software. Here you can change application wide variables. Perhaps the most important settings are locations, roles and duties. It is difficult to change these after you begin to properly use On Schedule as historical schedules must always stay valid. An important point to remember is that all staff must have a location and role to be used in the system. It's best to contact us for initial setup advice so we can walk you through the settings screen. Note, for the demos, the settings have already been filled for you.

Schedule – This is the graphical timeline view of the system – the mouse moving, sizing and creating shifts. Here you get an overview of a whole week at once. You can do most of your scheduling in this screen but there are other screens with more standard methods for inputting data if you prefer. This place is ideal for making quick adjustments to schedules, maybe after you have used the automated few click scheduling system to initially write your rota.

Note you can view but not input absence or notes in the schedule and client schedule screens. They can be inserted in the working hours and clients screens.

Client Schedule – The client schedule is similar to the schedule screen except it is mainly for viewing and editing client visits not employee shifts. Of course these two are sometimes the same thing. For client visit schedulers, the alternative clients screen is the best place to enter visits. The client schedule screen is good for getting an overview and for making quick adjustments to already created schedules. Non client visit schedulers will never need to use the clients or client schedule screens.

Note you can view but not input cancellations in the client schedule screen. They can be inserted in the clients screen.

Availability – Entering staff availability takes sometime if one person is adding it for all staff. It's best to let each employee enter it themselves. Non schedulers can only enter their own availability, schedulers can enter everyone's. You can repeat availability so you only have to enter it once if it never changes. You enter leave in the availability screen too.

Working Hours – The working hours screen enables more standard ways of entering shifts (normal web input controls). It's perhaps inferior to the schedule screens, clients screen, few click scheduling screen and text view screen for this purpose. However it is the only place you can enter absence. It's good for adding notes to shifts to be displayed throughout the application. Another good feature is the ability to copy a single employee's shifts from the most recent appropriate week. Finally, it provides a quick way to delete a single employee's shifts for the week. Client visit schedulers may rarely use this screen as you cannot enter the client for shifts like you can in the clients screen.

Text View – The main purpose of this screen is to display a list of shifts or visits in text format. It has an employee total hours table at the top and an email shifts to staff button. The shift list, table and staff to email list can be filtered by date, location, employee and client. It's designed to be used both with a normal screen and a small mobile phone screen. If you don't like trees you can also print it and place it on your office wall. It's good as a handout to staff if they need a list of people their visiting during the week. All from your mobile phone or normal computer you can reassign shifts, open shifts for bidding, accept shifts opened for bidding and email staff their shifts with a single click.

Few Click Scheduling – This is the automated system for allocating staff to a weekly schedule with a few clicks. It requires some pre processing. Client visit schedulers must enter all the visits (employees can be left unspecified) and non client visit schedulers must create a template. The same template can be used each week. Both parties must also have staff availability times entered in to the system. In the final step it provides you with a list of shifts with what it thinks are the best people to work, based on employee availability, employee ratings, employees' requests for day and week, typical length of a working day and week, distance between shifts, overtime barriers for each employee, employee roles and locations. For client visit schedulers it uses current geographical locations of visitors to determine appropriate shifts, matching visitors to clients which are close by. It also attempts achieve continuity of visitors (first choice will be the most frequent visitor). Client required attributes percentages are compared to employee attributes percentages to aid decisions. The best and most unique feature is you can now alter the decisions it made with dropdown boxes allowing selection of more appropriate staff members. These final tweaks are aided by the colour coding of the staff members in the selection boxes, indicating how suitable each selection would be.

Tasks – In this screen is a filterable list of shifts like the text view screen. Here, however, as a scheduler, you can add tasks linked to shifts. In the same screen non schedulers are restricted to marking the task as complete or incomplete.

Manage Leave – This is the second stage of the two step system for entering leave. First the staff member requests leave in the availability screen then the scheduler can approve or deny it in the manage leave screen. With all these actions emails are sent to the appropriate parties. The manage leave screen is colour coded to aid decisions.

Clients – Non client visit schedulers can ignore this one. For home care companies and similar this is where most of the scheduling is usually done. Here you add clients and enter their personal details. You can add notes, documents (care plans etc) and required visitor attributes. Most client screen time will be spent editing visits (writing schedules). It's a two step process, enter the visit first then assign the staff member. The assignment of staff can be left to the automated few click scheduling system or bidding system. If assigning staff manually, this screen allows you to select from colour coded drop down lists of staff members in the available and unavailable columns. The colours provide a simple to understand but powerful way of aiding decisions. Visits can be

cancelled and notes linked to shifts can be added here. There are also totals tables for hours by employee.

Reports – As the title suggests this is where you get the stats. All reports are in graphical format, either a bar chart or line graph over time. They can be filtered by date, location, employee, client, role and duty providing many angles to view the data from. Note that only the appropriate filters appear on the page when you select a report type. Additional reports do not take long to for us to write. If we are missing one don't hesitate to ask for it.

Payroll & Charges – Calculate wages and client charges here. Again it's filterable by location employee and client. Wages and client charges can be calculated by role, employee, duty and client. You can have a single cost category or several categories; each adding to the cost based on the type of shift and employees/clients involved. The values per hour can change over time. Break times, on call shifts and cancellations can also be taken in to account.

Licenses – Company growing? You can add extra sets of 25 employees here.