Quick Reference Guide

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.

Restricted User – Access is controlled by user access group privileges defined by the user. Each restricted user can be anything from less than non scheduler access to almost full schedulers. The controlled resources are pages, employees and clients each of these can be visible, inaccessible or editable.

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 / Place Visit Scheduling – Writing schedules that not only record employees with the shift times but record clients or places too. The shifts involve a visit to a client or place. You can have a mixture of client visit shifts, place visit shifts and non visit shifts.

Icons

Typically icon buttons are used instead of textual. 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 and further info

Open shift swapping panel

Open tasks panel (a red tick means there are incomplete tasks)

Screens

Settings – The settings screen is the place to start when you first use the software. Here you can change application wide variables. The most important settings are employees, locations, roles and duties. It is difficult to change locations, roles and duties 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.

Employee Timeline – 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 getting an overview or making quick adjustments to schedules, maybe after you have used the automated few click scheduling system to initially write your rota.

Client / Place Timeline – The client / place schedule is similar to the schedule screen except it is mainly for viewing and editing client or place visits not employee shifts. Of course these two are sometimes the same thing.

Availability – Entering staff availability takes sometime if one scheduler 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.

Scheduling Centre – Your one stop shop where you can do all of your scheduling. The advantage of this screen over the timeline views is it's on "rails". Suitable employees for shifts are colour coded and the page restricts what can be entered, not leaving you the freedom to make mistakes. The colours provide a simple to understand but powerful way of aiding decisions. The timeline screens have the same constraints but only tell you that you have something wrong when you click the save button. Visits can be cancelled and notes and tasks linked to shifts can be added here. It also has an employee total hours table and an email shifts to staff button. This page can be filtered by date, location, employee and client, role and duty. The filtered pages are good as a handout to staff if they need a list of people their visiting during the week or for clients wanting to know who's visiting (the print version looks very different to what's on screen). It's designed to be used both with a normal screen and a small mobile phone screen. All from your mobile phone or normal computer you can edit and 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 / place visit schedulers must enter all the visits (employees can be left unspecified) and non client / place 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, employee 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.

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 / Places – Non client / place visit schedulers can ignore this one. Here you add clients or places and enter their details such as addresses, notes, documents or any fields you choose to place on the user defined form.

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, place, 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.