



Getting Started: A Quick Guide for Managers

Welcome to ScheduleAnywhere! Here is some information and tips to help you get started. In no time, you'll be on your way to streamlining your scheduling, communication and reporting processes, while saving time and money. Join the thousands of businesses that rely on ScheduleAnywhere every day!

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Helpful Resources

- ▶ Look for the “**What is this?**” links in the top right-hand corner of ScheduleAnywhere.
- ▶ View our [video library](#) for new managers.
- ▶ [Schedule a one-on-one meeting](#) with an industry expert.

Have a Question? We're Here to Help!

Call **1-800-874-8801** or [email us](#).

Scheduling Basics

1. Creating Schedules

Once you login, you will notice we have created your first schedule for you; it is called “My Staff Schedule.” You can rename this to anything you would like by going to **Set Up>Schedules** and clicking “My Staff Schedule.” Click the **Add New Schedule** button to create a new schedule. With ScheduleAnywhere, you can create a staff schedule for any group of employees. Employees can appear on more than one schedule and can never be double-booked. An employee must be added to a schedule for the employee to be able to view it.

Each schedule has its own view options, settings, shifts, coverage watches, etc. You can choose to hide the columns you are not going to need. If scheduling duties are shared with other managers, you can select the people who can edit and manage each schedule.

💡 Smart Tip: You can evaluate ScheduleAnywhere with one schedule and one manager.

▶ [Video Link: Setting Up Schedules](#)

2. Setting Up Employees

ScheduleAnywhere makes it easy to add and invite employees to your account. Each employee can have a designated location, department and position. This information is only used to make it easier to add employees to a particular staff schedule. Shifts and shift tags designate any location, department or position on any given day, which will be introduced in Section 4, Setting Up Shifts and Shift Tags.

💡 Smart Tip: You only need a few employees to see what ScheduleAnywhere can do. If you have many employees, we can import them for you. Simply [email us](#) your employee information as an Excel or CSV file. If you have any questions, please contact us!

▶ [Video Link: Setting Up Employees](#)

To Add Employees to Your Account:

- ▶ Go to **Set Up>Company Maintenance>Employees** and click the **Add New Employee** button.
- ▶ On the **General** tab, enter the employee’s first name, last name and primary email address. Employee ID may be required if your account is set to require it. Select their default location, department and position (if needed). All other fields are optional.
 - In the **User Permissions** section, select the permissions you want this employee to have. Note that an employee must have “View Staff Schedules” AND “Submit Schedule Request” if you want the employee to be able to submit swap, cover and general schedule requests.

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- If this employee will be an account administrator or schedule manager, designate these permissions in the **Administrative Permissions** section. An administrator has full access to all information and settings in your ScheduleAnywhere account. A manager only has access to the schedules he/she created or to the schedules that have been shared with that manager. Manager functions can be restricted by going to **Set Up>Company Maintenance>Settings** and clicking the **Restrictions** tab.

Note: If you do not want to invite employees to ScheduleAnywhere at this time, you can skip the Personal tab. The Skills, Hours & Wages and Custom Fields tabs are optional, too.

- ▶ On the **Personal** tab, the employee's login credentials will be autofilled from information entered on the general tab. Employees can login to view staff schedules, submit requests, etc. By default, an employee can always view their personal schedule if they can login.
 - In the **Messaging** section, enter the employee's mobile phone number and carrier if you want to be able to send text messages. Don't worry if you don't know this information, the employee can enter it after they login.
- ▶ The **Skills** tab is only used if you need to ensure proper staffing based on skills, certifications, training, etc. Before a skill expires, managers and employees will get a 90-day expiration notice to help your business remain compliant.
- ▶ The **Hours & Wages** and **Custom Fields** tabs contain additional optional information. Hours and wages are used to see how an employee is being scheduled against their desired number of hours and for estimating labor costs. Custom fields are not used for scheduling, but allow you to store additional information about the employee.

3. Adding Employees to Schedules

To add employees to a schedule, click Schedule on the blue menu bar and select the schedule you want to add employees to. If you set up more than one schedule, a list of schedules will appear in the top right-hand corner of the screen. An employee can be added to more than one schedule.

To Add Employees to a Schedule:

- ▶ Click the **Add** link at the top of the Name column.
 - ▶ Select the employees you want to add to this schedule.
 - ▶ Click the **Add** button.
- 💡 **Smart Tip:** If your employees are not listed in the order you want, don't worry! You can move them around and add dividers to separate groups of employees. Double-click the row number to move an employee. Go to **Edit>Add Divider Row** to add a divider between groups of employees.
- ▶ [Video Link: Adding Employees to Schedules](#)

4. Setting Up Shifts and Shift Tags

You need to define your shifts so employees know when they work. Each schedule has its own set of shifts and shift tags. Shift tags are optional. Shifts communicate when an employee should work (i.e. 7 a.m. - 3 p.m.). Shift tags add details to a shift, such as job, location, department, position, etc. You can also add notes to an employee's daily schedule or add an explanation, which will be covered in Section 6, Scheduling Your Employees.

To Set Up Shifts:

- ▶ Go to **Set Up>Shifts**.
 - ▶ Click the **Add New Shift** button.
 - ▶ Enter a **Name** (i.e. Day, Eve, Night) and **Abbreviation** (i.e. D, E, N). Abbreviations are used when you view 14 days or more. You can also create time off shifts, which indicate when someone cannot work. Time off shifts can be modified to indicate how many paid or unpaid hours someone is to receive.
 - ▶ Enter a **Start Time** and **End Time**. Once a shift has been saved, the start and end time cannot be edited. This is designed to maintain accurate schedule history. You can delete a shift at any time and it will not affect previously scheduled shifts.
 - The following items are optional:
 - Enter a **Labor/Pay Code** if you are integrating ScheduleAnywhere with another system.
 - If you want to add a tag to a shift, select **Yes** or **Required**.
 - Enter a **Break**, if any part of the shift is unpaid (i.e. 30 mins, 60 mins).
 - Select what shift information is shown on the schedule and its color.
 - ▶ Click the **Save** button.
- 💡 **Smart Tip:** A schedule can have an unlimited number of shifts. Employees can work more than one shift on a day and shifts can be back to back (i.e. 7 a.m. - 11 a.m. and then 11 a.m. - 3 p.m.), but they cannot overlap.

To Set Up Shift Tags (Optional):

- ▶ Go to **Set Up>Shift Tags**.
- ▶ Click the **Add New Shift Tag** button.
- ▶ Enter a **Name** (i.e. Location A, Location B) and **Abbreviation** (i.e. LOC A, LOC B).
- ▶ Enter a **Labor/Pay Code** if you are integrating ScheduleAnywhere with another system; otherwise, skip.
- ▶ Click the **Save** button.

5. Setting Up Explanations and Time Off Tags

Explanations are most commonly used for quickly adding simple information to an employee's daily schedule and are optional. Time Off tags are reasons for time off. For consistency in reporting, the same Explanations and Time Off Tags are used across all schedules. If you add or remove an Explanation or Time Off Tag, it will affect all schedules in your account.

Popular Explanations:

- ▶ Call Off
- ▶ Holiday
- ▶ No Show
- ▶ On Call
- ▶ Tardy
- ▶ Training

Popular Time Off Tags:

- ▶ Leave of Absence
- ▶ Medical Leave
- ▶ Military Leave
- ▶ Paid Time Off
- ▶ Parent Leave
- ▶ Sick Leave

💡 **Smart Tip:** Only administrators and users with the "Set Up Explanations and Time Off Tags" permission can edit Explanations and Time Off tags.

To Set Up Explanations (Optional):

- ▶ Go to **Set Up>Company Maintenance>Explanations**.
- ▶ Click the **Add New Explanation** button.
- ▶ Enter a **Name** (i.e. Holiday, Tardy) and **Abbreviation** (i.e. HOL, TAR).
- ▶ Click the **Save** button.

To Set Up Time Off Tags (Optional):

- ▶ Go to **Set Up>Company Maintenance>Time Off Tags**.
- ▶ Click the **Add New Time Off Tag** button.
- ▶ Enter a **Name** (i.e. Leave of Absence, Paid Time Off) and **Abbreviation** (i.e. LOA, PTO).
- ▶ Optional: Enter a **Labor/Pay Code** if you are integrating ScheduleAnywhere with another system.
- ▶ Click the **Save** button.

6. Scheduling Your Employees

You're now ready to start assigning shifts, time off, and other schedule information to your employees. There are several ways to do this.

- ▶ To schedule a single day...
 - Click a single day on the schedule.
 - Pick a shift from the "Select Shift" drop-down menu. This will assign the shift to the employee. If the shift allows or requires tags, a pop-up will appear so you can select a shift tag.
 - Pick an explanation from the "Select Explanation" drop-down menu.
 - You can also add a text note to an employee's schedule using the "Note" field below the "Select Shift" and "Select Explanation" drop-down menus. Be sure to press Enter or click the **Add Note** button to save the note.
 - You can also double-click a single day on the schedule. Use whichever method works best for you.
 - ▶ To schedule multiple days at once...
 - Ctrl+Click multiple days on the schedule and select or enter the schedule information you want to assign to these days and/or employees. Ctrl+Click means holding down the "Ctrl" key on your keyboard while clicking multiple days with your mouse.
 - Go to **Tools>Schedule Multiple** to schedule multiple employees and days in one easy step.
 - ▶ To copy shift rotations or patterns, go to **Tools>Copy Schedule**. You only need to enter a shift pattern or rotation once. You can copy schedules far into the future.
- 💡 **Smart Tip:** You can hide the schedule from employees until you are ready to post it for viewing. To enable this feature, go to **Set Up>Schedules**, select a schedule and click the "Show Employees Posted Schedules Only" checkbox. All schedule information after the posted-through date will not be visible to employees on that schedule. Once the schedule is posted, employees with messaging options in their profile will be sent a text and/or email message that the schedule is posted through the selected date. To edit the posted-through date and notify employees that the schedule is available for viewing, go to the main schedule screen and click the "Post..." link above the date selector. You can also repost a schedule if you have made change to it. This will only notify employees whose schedules have changed.
- ▶ [Video Link: Assigning Shifts, Shift Tags, Explanations and Notes](#)

Getting the Most Out of ScheduleAnywhere

1. Customize Your Schedule

Now that you have a basic understanding of how ScheduleAnywhere works, you are ready to customize the schedule to meet the needs of your business. Here are just a few timesaving features and tools to help you schedule the right employees at the right time and place.

💡 **Smart Tip:** [Schedule a quick online demo](#) with one of our industry experts to learn more about these powerful and timesaving features and other ways ScheduleAnywhere can help you manage your schedules.

🔵 **Coverage Watches:** These rows appear at the bottom of your schedule view and are used to track and calculate specific information in your schedule. For example, they can show you how many employees or hours you have scheduled by shift or day part, or how many employees are not scheduled (available to work) or scheduled time off. You can select the positions, departments, skills, explanations, shifts and tags you want to include. To add a coverage watch to your schedule, go to **Set Up>Coverage Watch**.

💡 **Smart Tip:** Get the optional Manager Dashboard so you can enter an alert range for your coverage watches. If a coverage watch value is outside the acceptable range, you will see an alert on your dashboard and it will be highlighted on the schedule. Try the Manager Dashboard FREE for a month! Call **1-800-874-8801** or [email us](#).

▶ [Video Link: Setting Up Coverage Watches](#)

🔵 **Requirement Rows:** These rows appear on your schedule and allow you to enter a projected daily staffing number (i.e. employees, hours, units, sales, customers, patients, census), which is then used in a coverage watch calculation. A coverage watch, when linked to a requirement row, can show you whether you are properly staffed. For more information, go to **Edit>Add Requirement Row**. To copy requirements, go to **Tools>Copy Requirements**.

▶ [Video Link: Setting Up Requirements](#)

🔵 **Filters and Highlighters:** If you have many employees on a schedule, you can use filters and highlighters to view the employees and information important to you. Filters and highlighters are unique to each schedule. To add a filter or highlighter to your schedule, go to **Set Up>Filters** or **Set Up>Highlighters**.

▶ [Video Link: Setting Up Filters](#)

▶ [Video Link: Setting Up Highlighters](#)

2. Download the Mobile App

Download the FREE ScheduleAnywhere mobile app for either [Android](#) or [iPhone](#) or use the ScheduleAnywhere mobile site. Now you can access and manage staff schedules and employee requests from any mobile device. See who's scheduled, or not scheduled, and make last-minute changes. Simply repost the schedule to instantly notify affected employees.

- ▶ Respond to time-off, cover and swap requests.
- ▶ Find available employees for no-shows.
- ▶ Access daily rosters and staff schedules.
- ▶ Make last-minute changes.
- ▶ Repost schedules to notify employees of shift changes.
- ▶ Fast, easy and convenient!



3. Employee Messaging and Requests

ScheduleAnywhere helps improve communication between you and your employees. You can send outbound email and text messages to individuals, any group of employees or to all employees. Employees can submit time-off and schedule requests to a manager for approval.

- ▶ **Employee Messaging:** Communicate with employees by sending them email and/or text messages. Only employees who have an email address or mobile phone number (and carrier) in the Messaging section of their employee profile can be messaged. To send an employee message, go to **Messages>Send Employee Message**.
- ▶ **Employee Requests:** Your employees can submit time-off and schedule requests (i.e. swap, cover) from the ScheduleAnywhere website and mobile app. Employees must be given permission to view staff schedules and submit requests. To check an employee's permissions, go to **Set Up>Company Maintenance>Employees**, search for an employee, and check their **Permissions** tab.
- ▶ **Smart Tip:** If you want employees to be able to submit swap or cover requests, make sure their regular days off are blank (no shifts, explanations or notes). For employees to be able to swap days, both days must have shifts.

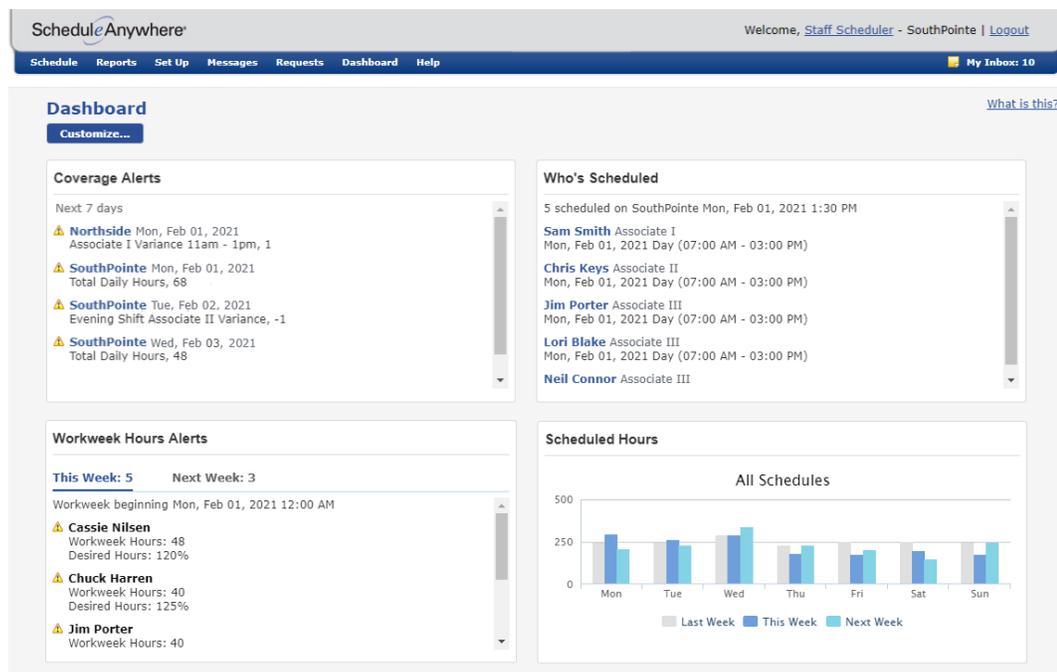
4. Add-Ons

Manager Dashboard

This optional add-on module highlights important scheduling situations and information. The dashboard is a must-have for businesses with compliance requirements or for managers who are responsible for multiple schedules. Customize the Manager Dashboard to show key information. Call **1-800-874-8801** or [email us](#) to try the Manager Dashboard FREE for a month!

▶ [Video Link: Manager Dashboard](#)

- Ensure compliance with coverage alerts.
- Stay on top of requests and messages.
- Review scheduled hours.
- Avoid scheduling employees with expired certifications or skills.
- See who's scheduled at a glance.
- Get alerts for exceeding workweek hours.



Self-Scheduling

Rather than managers assigning shifts to employees, this optional add-on module allows certain employees, usually those who are more tenured, to pick the shifts and days they would like to work. You can automatically control when an employee can login and which dates they are allowed to edit. Call **1-800-874-8801** or [email us](#) for more information!

▶ [Video Link: Self Scheduling](#)