

OVERVIEW/TIME OFF REQUESTS (2)

SCHEDULE SHIFTS

Today

JANUARY 2022

CSV

PDF

Month

Show

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
						1
2	3 <div>6PM Dinner Shift Long, Donna</div>	4 <div>TOR - McClean, Mateo</div>	5	6 <div>6PM Dinner Shift Sapp, Sean McClean, Mateo</div>	7	8
9	10	11	12	13	14	15
16	17	18 <div>6PM Dinner Shift Mclean, Mateo Kruska, CJ</div>	19 <div>6PM Dinner Shift Sapp, Sean McClean, Mateo</div>	20 <div>6PM Dinner Shift Long, Donna</div>	21	22
23	24	25	26 <div>TOR - McClean, Mateo TOA- Sapp, Sean</div>	27	28	29
30	31					

There are two “tabs” on the Scheduler: Overview/Time Off Requests (which is a calendar that just shows the shifts and the time off requests (if applicable)/approvals. The OWNER/PROPERTY MANAGER/DESIGNATED STAFF can double click a time off request and approve/deny requests (if applicable) and add a comment (SEE PAGE 4). The amount of requests awaiting approval (if applicable) would show next to the Tab title. The “Create Shifts” form is below this calendar), Schedule Shifts (this would open up the scheduler tool). Draft and Published shifts can be double clicked on this calendar to open up the “Schedule Shifts” for that month and make shift swaps/etc. (in the preferences they can change it to week, day, or week before and after).

Create Shifts:

Shift Type*:

Date*:

Start*:

to

End*:

Does Not Repeat

Staff per Shift:

Would want same repeating options that Google Has

This would be a dropdown of 1-200. This would be how many staff are needed/able to be assigned to that shift.

Description:

LIMITED HTML EDITOR



Files:

Upload Files



Shift Files



Save

This is the Scheduler. This is only available to OWNER accounts that have the Staff Module Active. This is the screen that appears when the OWNER/PROPERTY MANAGER/DESIGNATED STAFF Clicks on the “Scheduler” link on the calendar.

SCHEDULE FOR

LIST

“Schedule For” Drop Down will give them options to to create a schedule for a certain period of time: Next Week, Next Two Weeks, Next Month, Custom. “Custom” will give them Starting/Ending Date Options. The shifts for the days selected would then appear below with the amount of slots for staff to be assigned. The slot would have a drop down of staff that are allowed to be assigned that shift and DO NOT have an approved Time Off Request for that Shift Time. A “Blank” selection should also always be available as an option. Above Each day is a tool tip that would list those that have requested off the day. On the right is a list of all the staff, their role, and how many shifts/how many hours they have been assigned for this scheduling period. Shifts will have a checkbox next to them so they can be saved individually as a draft or publish the schedules. This screen can always be returned to in order to switch shifts of scheduled people. Shift spots that are published should have a green color to distinguish that they are published and not in a draft mode. They can also add an additional staff member to the shift or delete a staff spot for a shift by using the add/delete. If all staff spots are deleted for a shift, a message would appear asking if they want to delete that shift.

The Overview Calendar in the Scheduler would show all published and draft schedules (with different colors to designate draft or published). There will be an option to “email shifts” that would automatically email the staff their particular shifts when the “Save as Draft” or “Save as Published” is clicked (the email would designate it as “Draft” or “Published”). “Email Schedule” would email the entire schedule of all the shifts to all the staff when the “Save as Draft” or “Save as Published” is clicked (the email would designate it as “Draft” or “Published”).

☐

SHIFTS:

Monday, November 15

Dinner Shift 5:00PM-9:00PM

☐

McClean, Mateo

☐

Tuesday, November 16

Lunch Shift 10:00AM-2:00PM

☐

Long, Donna

Dinner Shift 5:00PM-9:00PM

☐

☐

Wednesday, November 17

Dinner Shift 5:00PM-9:00PM

☐

☐

☐

Staff:

(shifts/hours)

Kruska, CJ (Cook)	0 / 0
Long, Donna (Waitress)	1 / 4
McClean, Mateo (Cook)	1 / 4
Sapp, Sean (Cook)	0 / 0

E-mail Shifts:

E-mail Schedule:

Save as Draft

Publish

This is the form that appears when the “Time Off Request” Button on the Main Calendar is clicked.



Time Of Request

Light

- ☐ Request Full Days Off
- ☒ Request Times & Repeated Days Off

If “Request Full Days Off” is clicked, then a mini calendar would appear that they can select as many days as they want, write a comment (that would apply to all the days requested) and click “Post Request”. These requests would show in their calendar. While they are pending approval, they can double click the request in their calendar to add/edit individual comments/change it to certain times, or delete it. Once a request is approved, they can only delete the request. In the “Scheduler Settings” there should be an option to “prevent Staff from deleting a Time Off Request After Approval” within a certain time period.

If the “Request Times Off” is selected, the following form would appear. They are only requesting a period of time during a day off, so if a shift falls outside of the approved time off, they can still be scheduled for it.

Date*:

to

Date*:

If “All Day” is checked, then the second “Date” field appears to list an ending date. Please use Google as the model.

☐ All Day

Start*:

to

End*:

Does Not Repeat


This would have the same repeating options as Google. I would want to give them an option to Request and “All Day” event here so they can take advantage of the repeating options in case they need all Sundays off, etc. By Default, “All Day” is not checked.

Comments:

LIMITED HTML EDITOR

Post Request

This is shown when a “TIME OFF REQUEST” is double clicked in the Overview. When it is “Approved” or “Denied” it will automatically send a message to the requester with the Comments and the Decision. The calendar will also be updated.



Time off Request:

{EMPLOYEE}	{DATE}	{TIME}	Total Requests This Month {#}
{DESCRIPTION}			Total Requests This Year {#}

Comments:

LIMITED HTML EDITOR

Deny

Approve

Icon Map:

The following icons are used in this template. They are available in the Google Cloud Folder on this Trello Card: <https://trello.com/c/z2j1yyVR>

While icons may look different in this template, the ones in the Google Drive folder are always the most up-to-date. Almost all icons have a complementing line version. The name is the same with the addition of an “-l” added to the end. If an icon is missing, please let me know—chances are it is in the process of being created!

Calendar-Scheduler: [staff-schedule](#)

Download CSV: [system-download-csv](#)

Download PDF: [system-download-pdf](#)

Print: [system-print](#)

Delete: [system-trashcan](#)

Add: [system-add](#)

Preferences: [system-preferences](#)

Request Time Off: [staff-request-time-off](#)