Shiftboard Worker Guide

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General Navigation:

Overview

Shiftboard uses top and left navigation bars to give you access to your dashboard, account information, calendar, and more. You may have some or all of the menu options shown below depending on how your site is configured. For example, if your site is not set up to use the timeclock functionality, you will not see the timeclock icon.

Top navigation bar

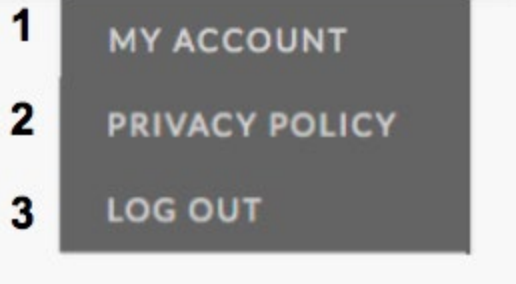1.
    Logo—Clicking the logo displays your dashboard.
2. Clock in/out—Opens the Clock In/Out page.
3. Name—Shows your name and avatar.
4. Avatar—Click the avatar to view the drop-down menu.

Avatar drop-down menu

You may have some or all of the menu options shown below depending on how your site is configured:

1. +
   My account—Takes you to your account page where you can update your contact
   information, notification preferences, PIN, and password.
2. Privacy policy—Allows you to read and accept Shiftboard's privacy policy.
3. Log out—Logs you out of Shiftboard.

Left navigation bar

When you log in to Shiftboard, you will be on the Dashboard page, which provides a quick view
of shifts assigned to you this week, along with your site news. You can navigate to the full
schedule to see additional information about your assigned shifts. If your site is configured to

allow picking up shifts, you will be able to view open shifts on the schedule. See more details on the Dashboard and Schedule pages.

- ● Left navigation bar
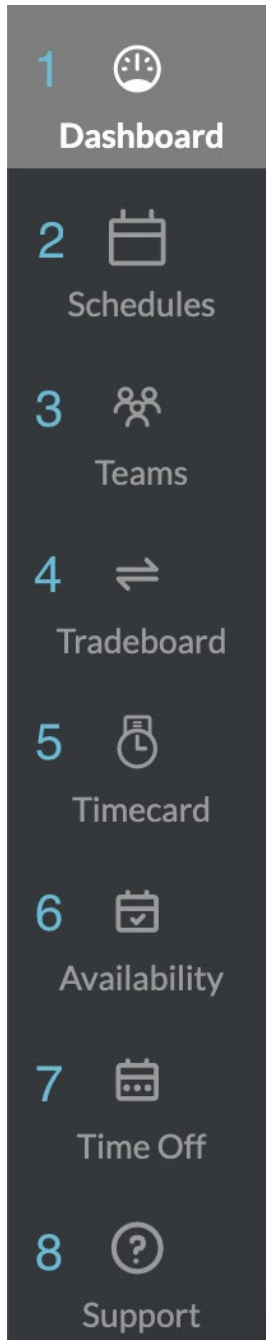
1. +
Dashboard—Opens your dashboard that shows assigned shifts for the week and your site news.
2. Schedules— Shows you all your assigned shifts and any shifts that are available / open.
3. Teams—Opens a page with information about your workgroup(s)/team(s).
Note: if your workgroup name is not Team, you will see your workgroup name.
4. Tradeboard - Displays offered and completed shift trades.
5. Timecard—Takes you to the Timecard page where you can view timecards.
6. Availability—Add to and view your availability.
7. Time off—Allows you to submit a time-off request, and lists your requested and approved time off.
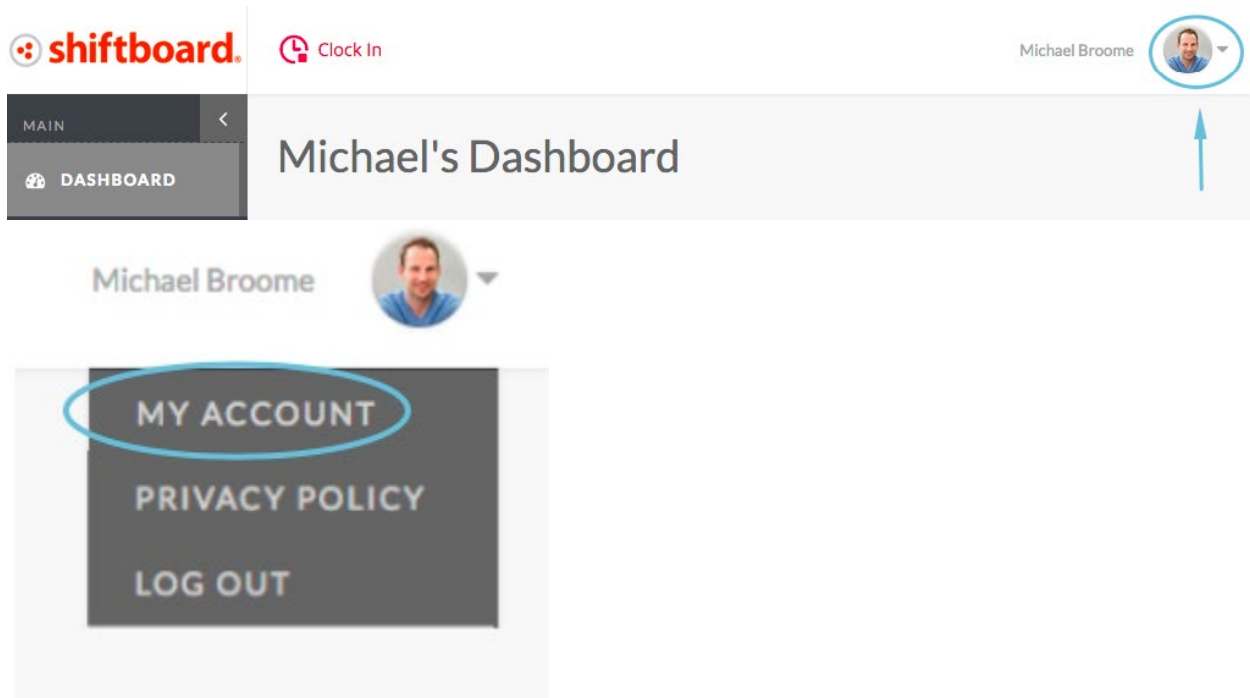8. Support - Takes you to our Support site with documentation and videos.
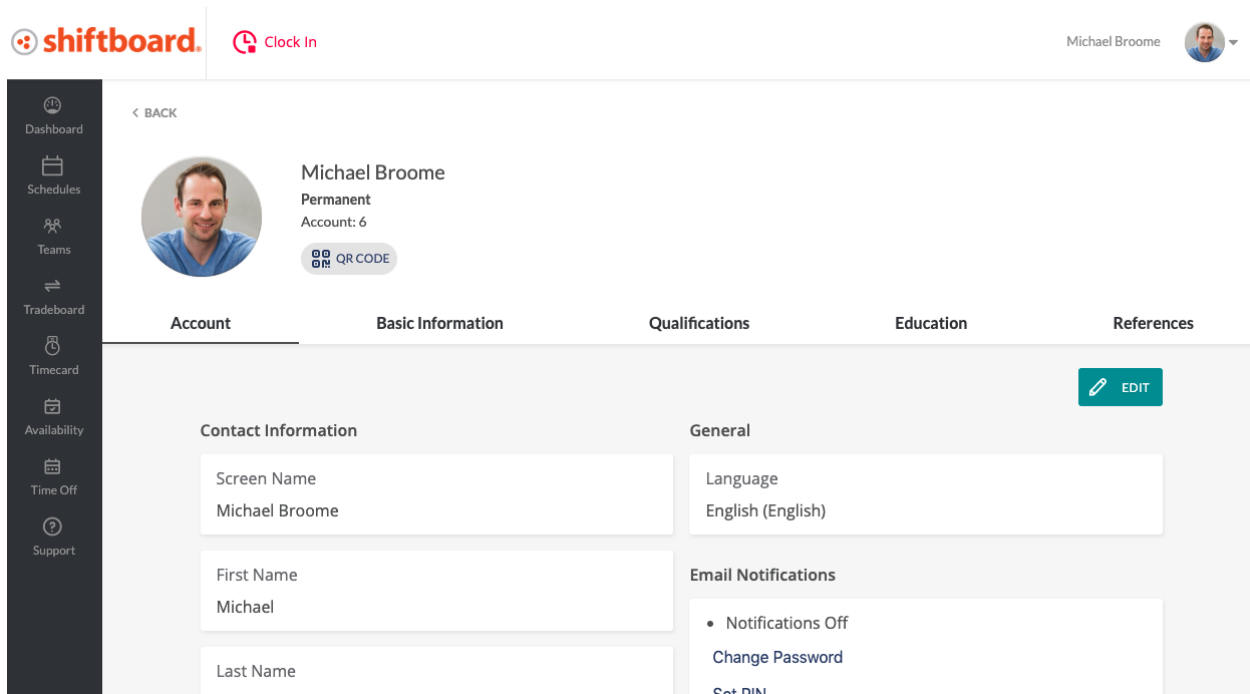
My Account

My Account

The My Account page lists a person's Shiftboard account information, and allows users to set a PIN number and change password.

Viewing my account

To view the My Account page, click the arrow to the right of your avatar, then choose My Account from the drop-down menu:

The My Account page has a minimum of one tab, but may have multiple tabs depending on your site configuration. All sites will have an Account tab.

Account Tab

The Account tab includes Shiftboard account information, including avatar, name, ID number, contact information, language preferences, notification preferences, and more:

To edit your information, click inside a field to highlight the field, make changes, then click Save at the bottom of the screen. After clicking Save, a message will appear briefly at the top of your screen confirming that your account information was updated.

Profile Fields

Depending on your site configuration, you may have access to additional tabs in your Account. Click on the tab and select Edit to make changes to profile fields. Then, select save.

Set PIN and Password

Pin:

On the account page, The Set PIN area allows you to create or change a personal identification number (PIN) for account access to IVR and similar services:

To set your PIN, enter a number between four and eight characters long, using only numbers (0-9), and then click Update.
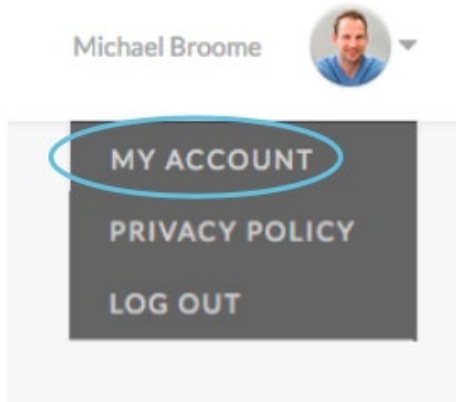
Updating Contact Information

Overview

In Shiftboard, each person has an account, which includes avatar, name, contact information, language preferences, notification preferences, and more.
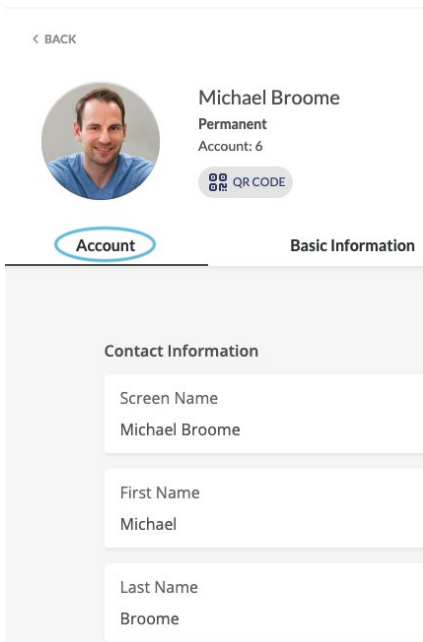
How to update contact information

To update your contact information, click the arrow to the right of your avatar, then choose My Account from the drop-down menu:

Select the Account tab:

To edit your information, click edit, make changes, then click Save at the bottom of the screen:

Michael Broome
Permanent
Account: 6

QR CODE

| Account | Basic Information |

Contact Information

Screen Name

Michael Broome

First Name

Michael

Save   Cancel

After clicking Save, a message will appear briefly at the top of your screen confirming that your account information was updated.

Changing Passwords

Overview

After you have registered with Shiftboard, a temporary password will be sent in a welcome letter with instructions for logging into the account for the first time. Once logged in to the Shiftboard site, you can change your password.

How to change your password

Click the arrow to the right of your avatar, then choose My Account from the drop-down menu:
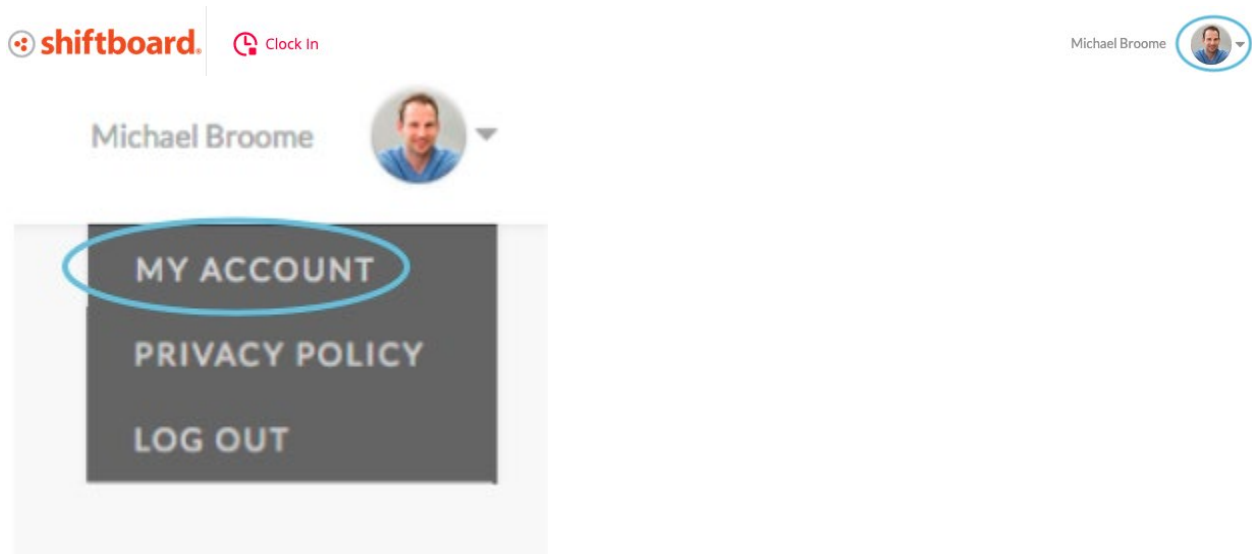
Click Change Password from the Account tab:
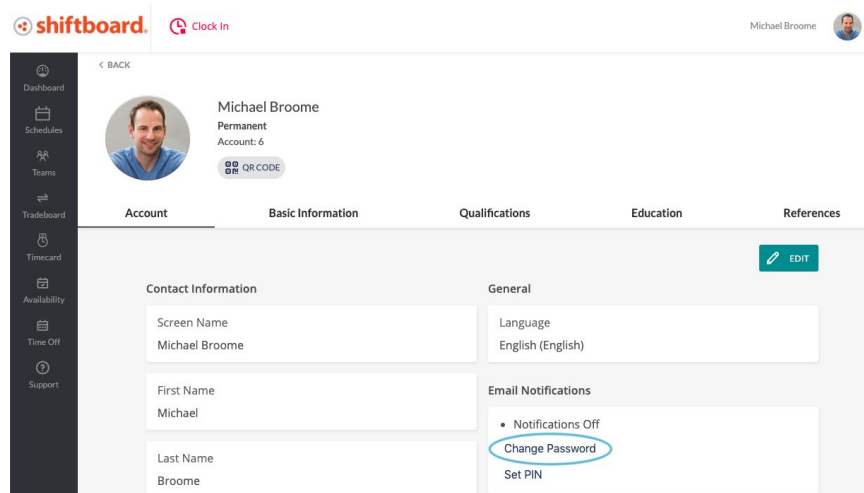
Enter your current password, a new password, and click Update:

A message will appear briefly at the top of your screen confirming that your password was changed.

Dashboard

Overview

The Dashboard provides quick access to information and tools that are frequently viewed and used, such as your schedule, news, and the Add Shift and Bulk Update tools (if your permission level allows).

Using the dashboard

Week at a glance shows the shifts you are assigned to work:

For the latest news, see the News section:

Rachel's Dashboard

Week at a glance

|		January 6th 2019 – January 12th 2019				
SUN - 06	MON - 07	TUE - 08	WED - 09	THU - 10	FRI - 11	SAT - 12
No items found for this day.	No items found for this day.	No items found for this day.	No items found for this day.	No items found for this day.	No items found for this day.	Production Managers 7am - 6pm

News

To access the Add Shifts and Bulk Update tools, click the plus sign in the lower right corner of the screen (if your permission level allows you to utilize those tools):

Shifts Overview

Overview

This article shows the four ways that you can be scheduled for a shift depending on how your site is configured.

1. You can be assigned to a shift by your manager or a scheduler.
2. You can pick up open shifts.
3. You can put your name on a sign-up list and then your manager assigns shifts based on the sign-up list.
4. You can take shifts from the tradeboard.
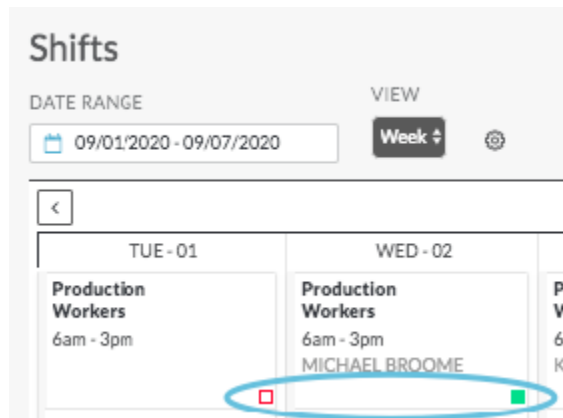
Shifts are assigned

Managers are able to assign shifts to people on their team(s). This is one of the most common ways that shift assignments are made. Managers can assign shifts at the time the shift is being created, edited, or viewed. See Assigning Shifts.

Shifts are available for pick-up

People can pick up open shifts from the schedule, which lets you decide which shifts you want to work. Shiftboard automatically checks that you are a member of the correct team, that there are no schedule conflicts, that you have all the needed credentials, and that you don't pick up shifts that would put you in overtime. See Pick-Up a Shift.

Shifts are published with a sign-up list

As shifts are created they can be designated to include a sign-up list. When the shifts are published, no one will be assigned to the shift, and people can add their name to the sign-up list for the shifts that they want to work. The manager can then use the sign-up list for shift assignments. See Sign-Up Lists.

Shifts are taken from the tradeboard

When Tradeboard is enabled in the site settings, people are allowed to post their assigned shifts for trade, so that someone else can take the shift. See Tradeboard.

Pick Up a Shift

Overview

Shifts can be published with people already assigned or they can be published for pick up by team members. You can only pick up shifts that don't conflict with shifts that you have previously picked up or already have assigned to you.

This article explains how to pick up a shift from the calendar.

How to pick up a shift

One of the most common ways for people to get shifts is to pick up open shifts from the calendar.

To pick up and an open shift, navigate to the calendar (Schedules), and then click on the open shift that you want to take. Open shifts are indicated by a white square with a red outline in the lower right corner:
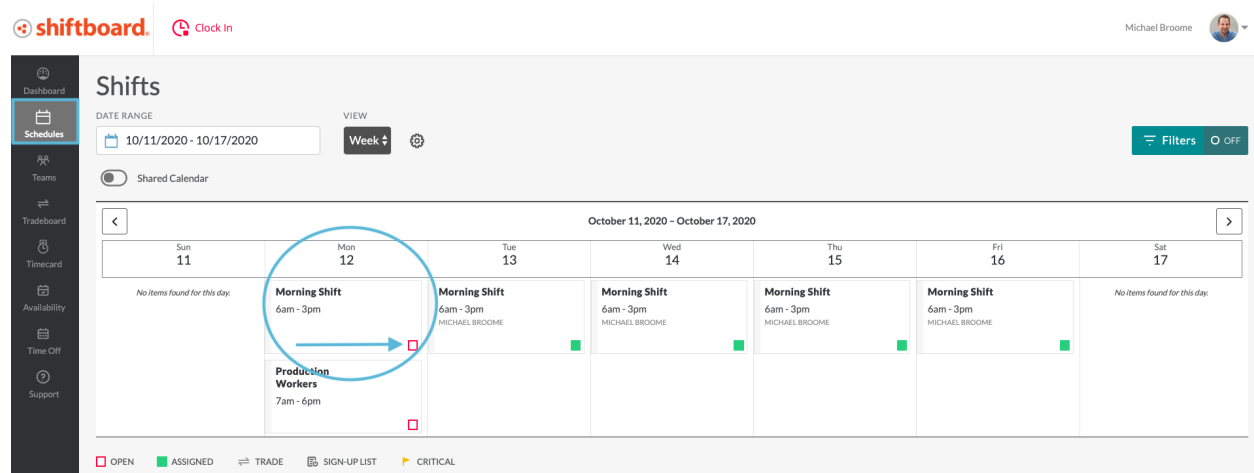
On the Shift Details page, click Take Shift, then click Take Shift again on the confirmation screen:
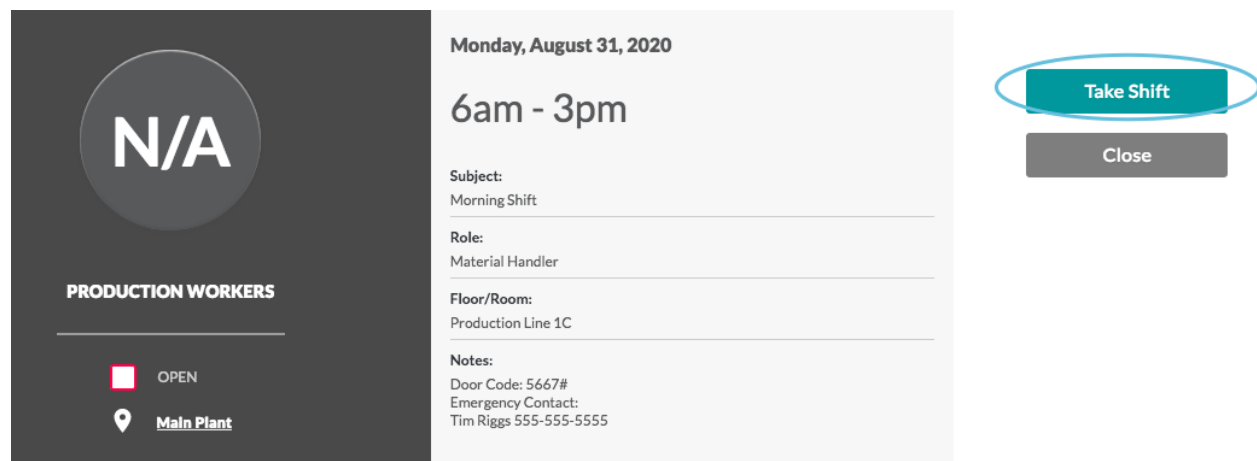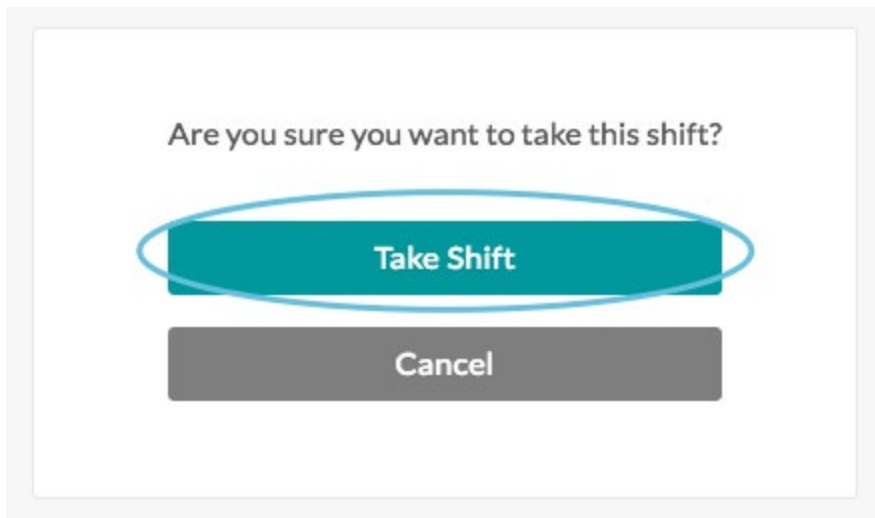
Are you sure you want to take this shift?

Take Shift

Cancel

You will be returned to the Shift Details page where you can click Close to return to the calendar. The calendar will now list your name below the shift time, and there will be a green square in the lower right corner indicating that the shift is assigned:

Shifts

DATE RANGE

📅 08/31/2020 - 09/06/2020

VIEW

Week ▾   ⚙

<   **August 31st 2020 – September**

MON - 31	TUE - 01	WED - 02	THU - 03
Production Workers	**Production Workers**	**Production Workers**	**Production Workers**
6am - 3pm	6am - 3pm	6am - 3pm	6am - 3pm
MICHAEL BROOME	MICHAEL BROOME	MICHAEL BROOME	MICHAEL BROOME

☐ OPEN   🟩 ASSIGNED   ⇌ TRADE   🗒 SIGN-UP LIST   ⚑ CRITICAL

Sign Up List Shifts

Overview

At your manager's discretion, shifts can be created with a Sign-Up List. When the shifts are published, no one is assigned to the shift. Instead, a sign-up list is created, and you can add your name to the list for the shifts that you want to work. If you are chosen from the list and assigned to the shift, the shift will appear on your schedule and you will be notified that you have been assigned a shift.

Add your name to a sign-up list

To add your name to a sign-up list, navigate to the calendar (Schedules > Shifts) and click on a shift displaying the sign-up list icon:

Shifts

DATE RANGE

📅 08/31/2020 - 09/06/2020

VIEW

Week ▾

‹

MON - 31	TUE - 01
Production Workers 6am - 3pm	**Production Workers** 6am - 3pm MICHAEL BROOME

On the Shift Details page, click Sign-Up List:

Monday, August 31, 2020

N/A

6am - 3pm

PRODUCTION WORKERS

Subject:
Morning Shift

Role:
Material Handler

Floor/Room:
Production Line 1C

Notes:
Door Code: 5667#
Emergency Contact:
Tim Riggs 555-555-5555

☐ OPEN

📍 **Main Plant**

Sign-Up List

Close

On the Sign-Up page, you can add an optional message to your manager, then click Sign Up:

After clicking Sign Up, you will be returned to the calendar and a message will appear briefly at the top of the screen notifying you that you have been added to the sign-up list.

Removing your name from a sign-up list

To remove your name from a sign-up list, click on the shift:

Shifts

DATE RANGE

📅 08/31/2020 - 09/06/2020

VIEW

Week ▾

<

MON - 31	TUE - 01
Production Workers 6am - 3pm	**Production Workers** 6am - 3pm MICHAEL BROOME

On the Shift Details page, click Sign-Up List, then click Remove Me on the confirmation page:

N/A

PRODUCTION WORKERS

☐ OPEN

📍 **Main Plant**

Monday, August 31, 2020

6am - 3pm

Subject:
Morning Shift

Role:
Material Handler

Floor/Room:
Production Line 1C

Notes:
Door Code: 5667#
Emergency Contact:
Tim Riggs 555-555-5555

Sign-Up List

Close

You are currently on this sign-up list. Managers select list members for assignment.

Remove Me

Cancel

After clicking Remove Me, you will be returned to the calendar and a message will appear briefly at the top of the screen notifying you that you have been removed from the sign-up list.

Acknowledging a Shift

Overview

When Acknowledgements are enabled in the site settings, people can accept or decline a shift assignment. Most sites that enable acknowledgments also adjust their site settings to enable calendar icons, which indicate shifts that have not yet been acknowledged, and those that have been accepted or declined.

- Unacknowledged—A blue and white square indicates a shift that has been assigned and is waiting to be acknowledged by the assignee.

- Assigned—A green square indicates that the person who is scheduled to work this shift has acknowledged the assignment, either by accepting or declining the shift. In cases where the shift has been declined, the status icon remains green, and Assignment declined shows up in red below the person's name but does not change the green status icon.

Note: For a complete list of shift status icons, see Viewing the Calendar.

How to accept or decline a shift

Note: Acknowledgements must be enabled or you will not see the blue icon.

To acknowledge a shift, navigate to the calendar (Schedules > Shifts), then click on the shift that you would like to acknowledge as accepted or declined:
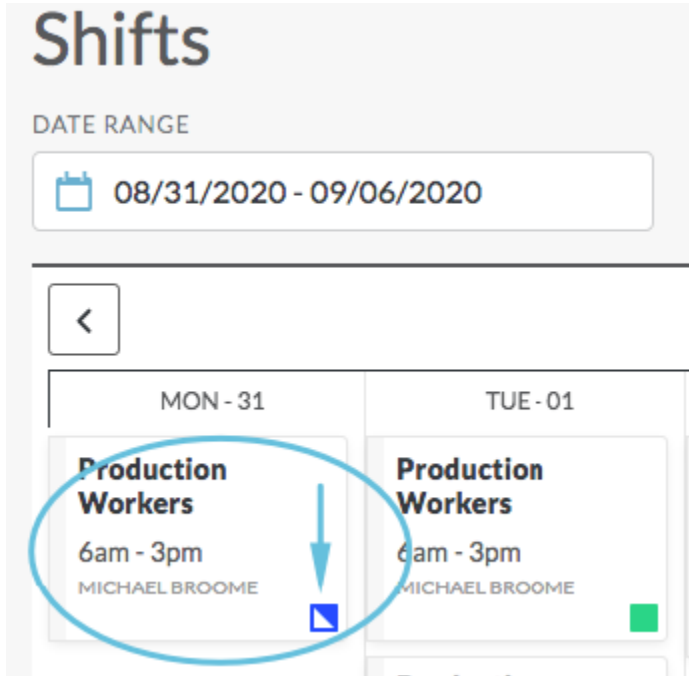
On the Shift Details page, click Acknowledge:
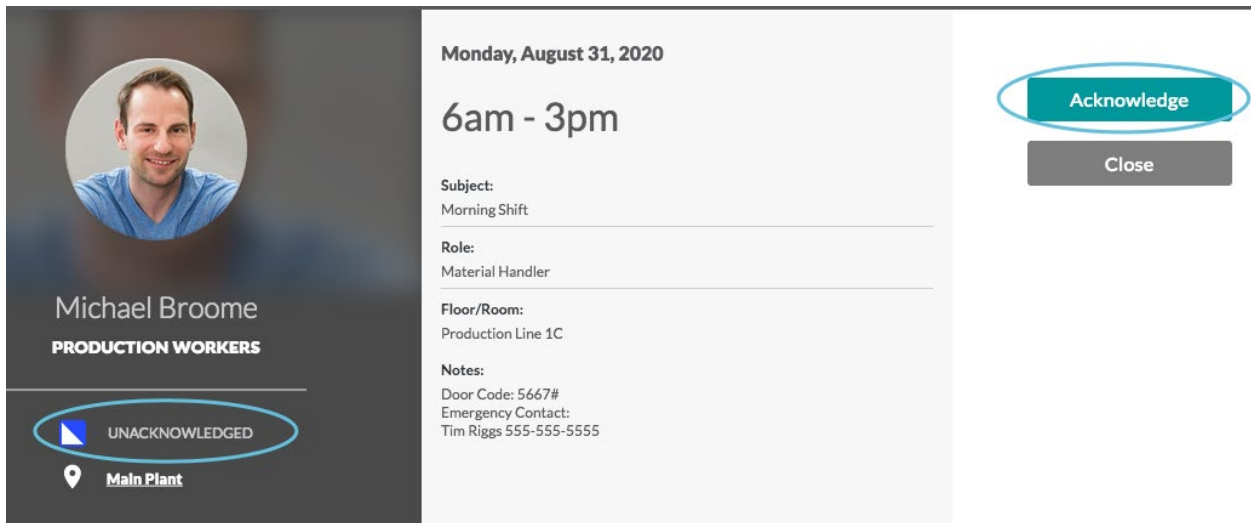
On the Acknowledge page, choose Accepted or Declined from the drop-down menu, and click Acknowledge:
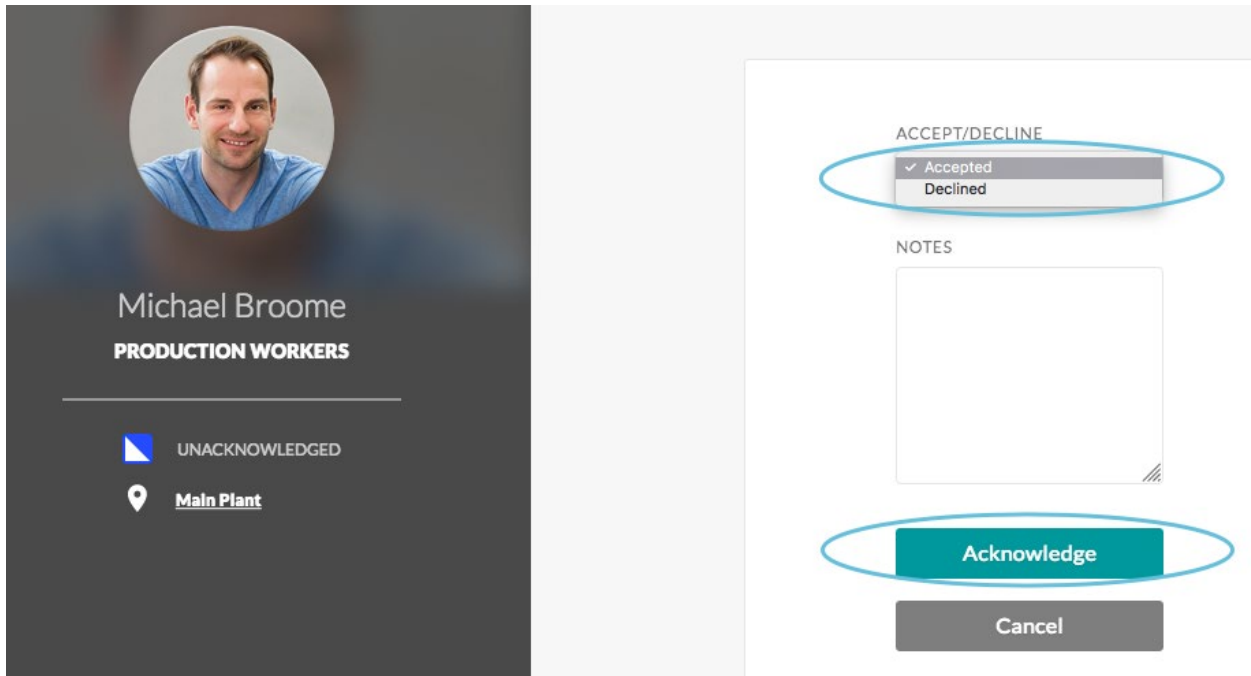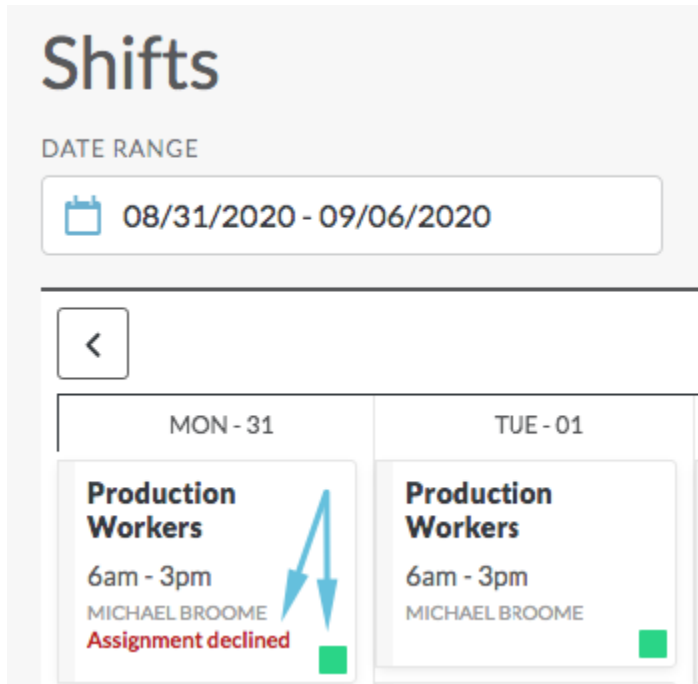
Once the Acknowledge button is clicked, the shift status changes on the calendar.

If the shift was acknowledged as accepted, then the shift shows up with the person's name, and the status icon will indicate the shift is assigned (green):
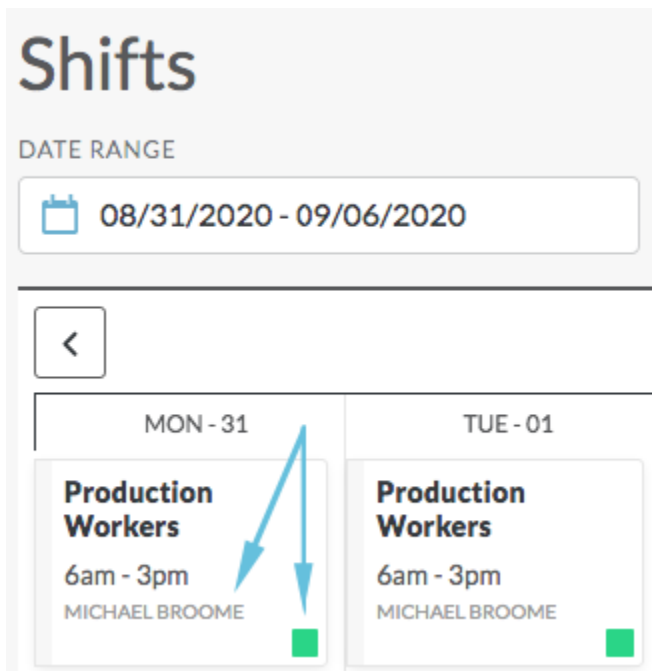
If the shift was declined, there are multiple possible actions that can occur based on the site settings:

● If the site setting Acknowledgement Notification > Unconfirm on Acknowledge: Decline is set to No, <u>then the person will remain assigned to the shift</u>, and the shift will show as open on the calendar with the words Assignment declined below the person's name. *Note: Until this person is unassigned from the shift or the shift is assigned to someone else, it will continue to show on the calendar as being assigned to this person (see Assigning Shifts).*

Shifts

DATE RANGE

📅 08/31/2020 - 09/06/2020

<

MON - 31	TUE - 01
Production Workers	**Production Workers**
6am - 3pm	6am - 3pm
MICHAEL BROOME	MICHAEL BROOME
Assignment declined	

● If the site setting Acknowledgement Notification > Unconfirm on Acknowledge: Decline is set to Yes (Use Standard Cancel Period), and the person is canceling before the cutoff deadline, <u>then the person will be unassigned from the shift,</u> and the shift will show as

open on the calendar:

- If the site setting Acknowledgement Notification > Unconfirm on Acknowledge: Decline is set to Yes (Use Standard Cancel Period), and the person declines after the cutoff deadline, <u>then they will remain assigned to the shift</u>, and will receive an error message.
- If the site setting Acknowledgement Notification > Unconfirm on Acknowledge: Decline is set to Yes, <u>then the person will be unassigned from the shift</u>, and the shift will show as open on the calendar:

How to decline a shift after having previously accepted it

If the site setting "Members can Modify Acknowledgements after Accept/Decline:" is set to Yes, then people can decline a shift after previously accepting it. *Note: the setting "Allow Acknowledge Decline" must also be set to Yes.*

To change acknowledgement from accepted to declined, navigate to the calendar (Schedules > Shifts), then click on the shift that was previously accepted:
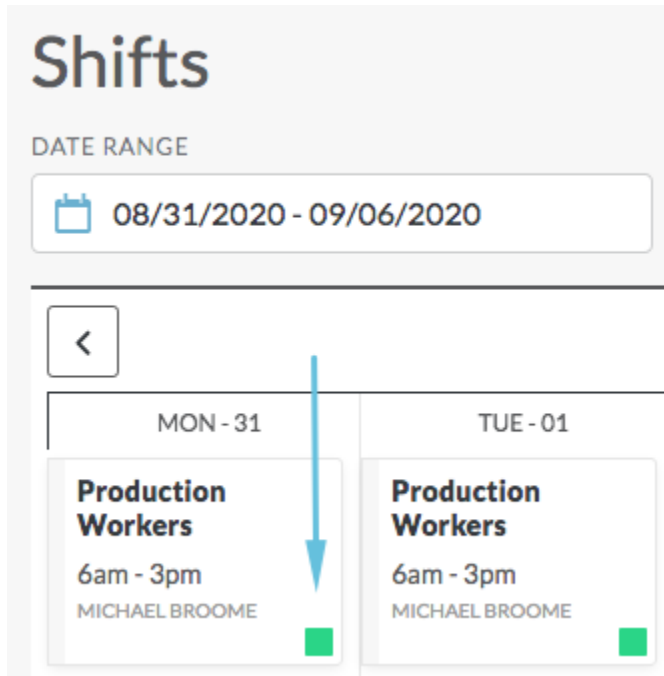

On the Shift Details page, click Update Accepted:
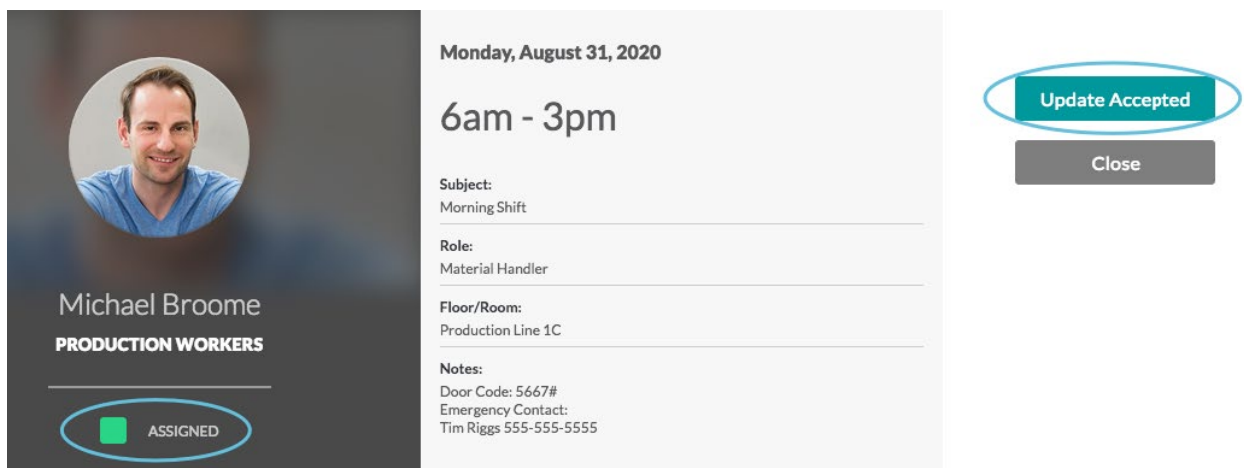
On the Acknowledge page, choose Declined from the drop-down menu, and click Acknowledge:
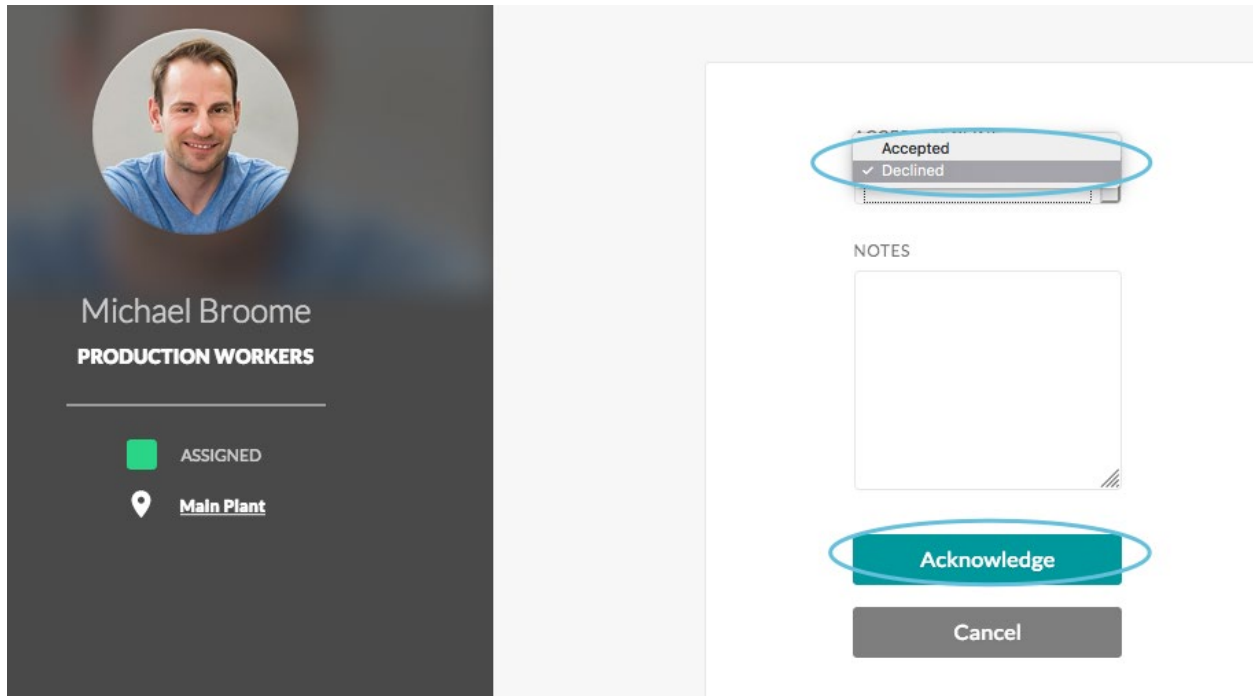
- If the site setting Acknowledgement Notification > Unconfirm on Acknowledge: Decline is set to No, then the person will remain assigned to the shift, and the shift will show as open on the calendar with the words Assignment declined below the person's name. *Note: Until this person is unassigned from the shift or the shift is assigned to someone else, it will continue to show on the calendar as being assigned to this person (see Assigning Shifts).*

- If the site setting Acknowledgement Notification > Unconfirm on Acknowledge: Decline is set to Yes (Use Standard Cancel Period), and the person is canceling before the cutoff

deadline, <u>then the person will be unassigned from the shift,</u> and the shift will show as open on the calendar:

- If the site setting Acknowledgement Notification > Unconfirm on Acknowledge: Decline is set to Yes (Use Standard Cancel Period), and the person declines after the cutoff deadline, <u>then they will remain assigned to the shift,</u> and will receive an error message.
- If the site setting Acknowledgement Notification > Unconfirm on Acknowledge: Decline is set to Yes, <u>then the person will be unassigned from the shift</u>, and the shift will show as open on the calendar:

How to accept a shift after having previously declined it

If the site setting "Members can Modify Acknowledgements after Accept/Decline:" is set to Yes, then people can accept a shift after previously declining it.

To change acknowledgement from declined to accepted, navigate to the calendar (Schedules > Shifts), then click on the shift that you (user) or someone on your team (manager) is assigned to that was previously declined:
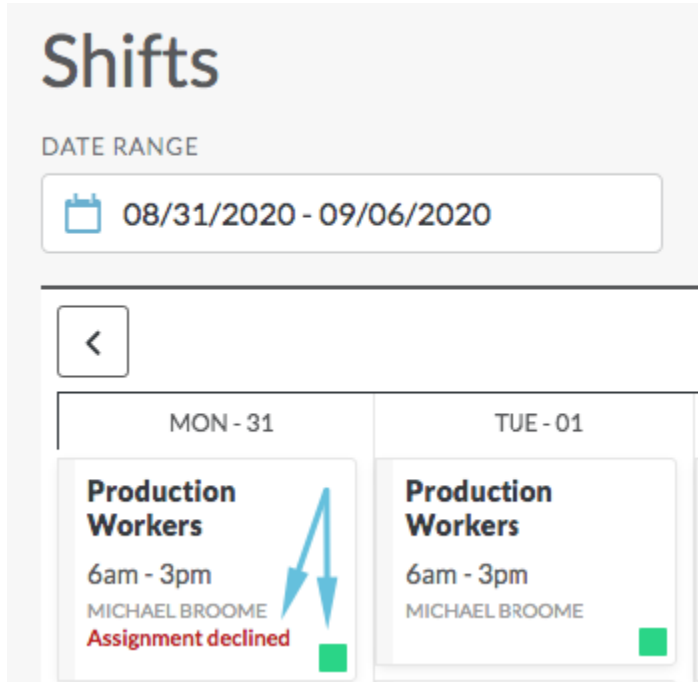
On the Shift Details page, click Update Declined:
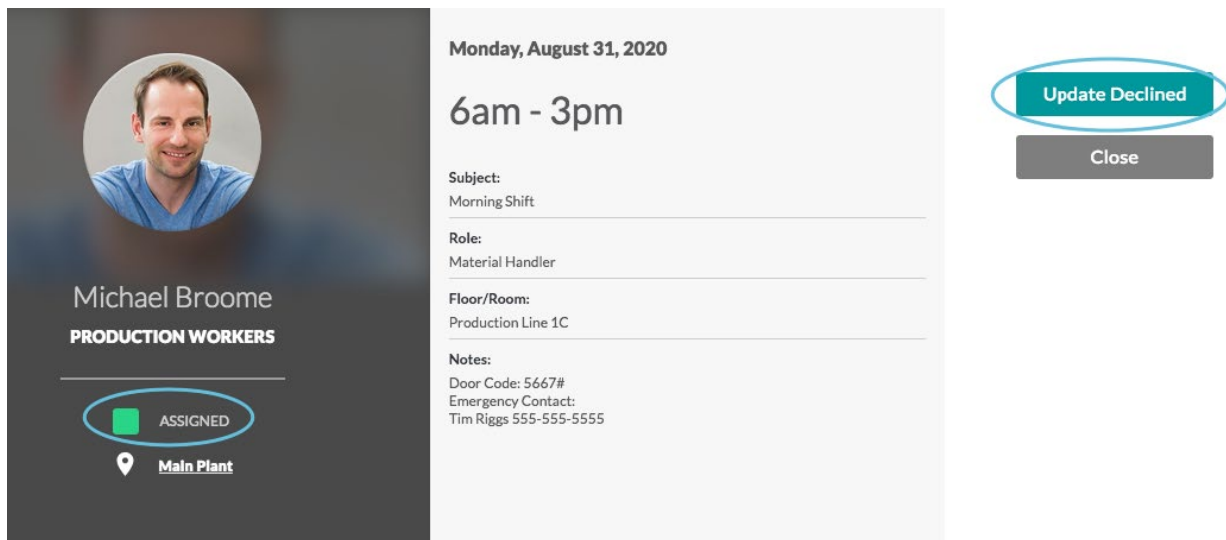
On the Acknowledge page, choose Accepted from the drop-down menu, and click Acknowledge:
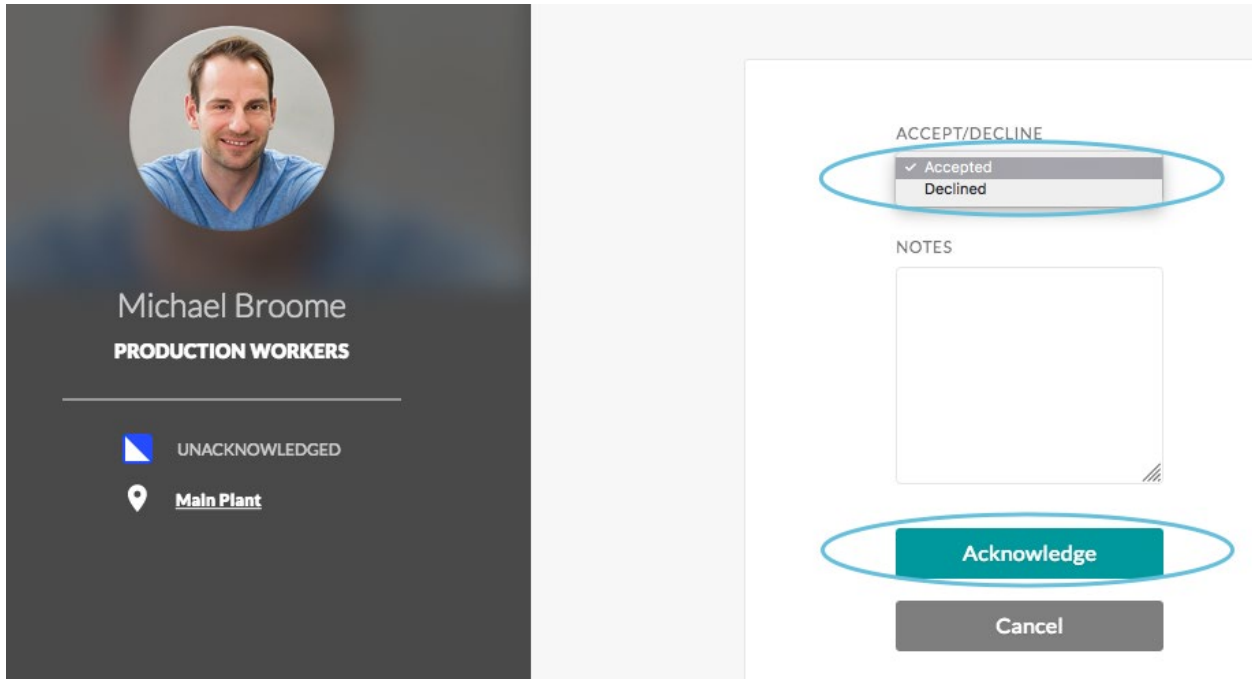
The shift shows up on the calendar as assigned:
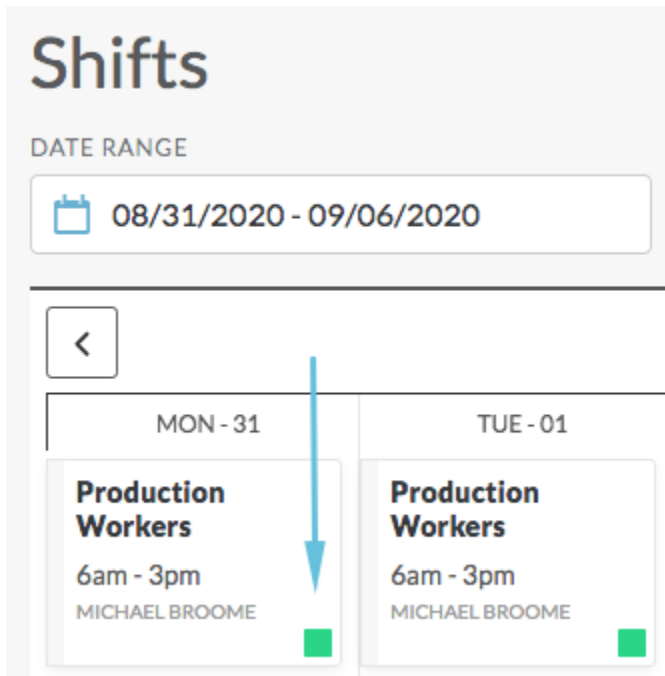
General and Specific Availability

Overview

The Availability tool lets people set either general or specific availability. General Availability is used when you have recurring times or days that you are always available or always busy. Specific Availability is used for adding one or more individual dates that you can or can't work. Availability is different than time off requests (see availability vs time off).

Note: The Availability tool allows you to indicate a busy time or an available time, depending on how the Shiftboard site is configured. If Shiftboard is configured to assume everyone is available, then you submit times that you are not available. If Shiftboard is configured to assume everyone is unavailable, then you submit times that you are available. Shiftboard automatically suggests the correct choice based on your site's configuration.

How to add general availability

To add general availability, navigate to Availability:
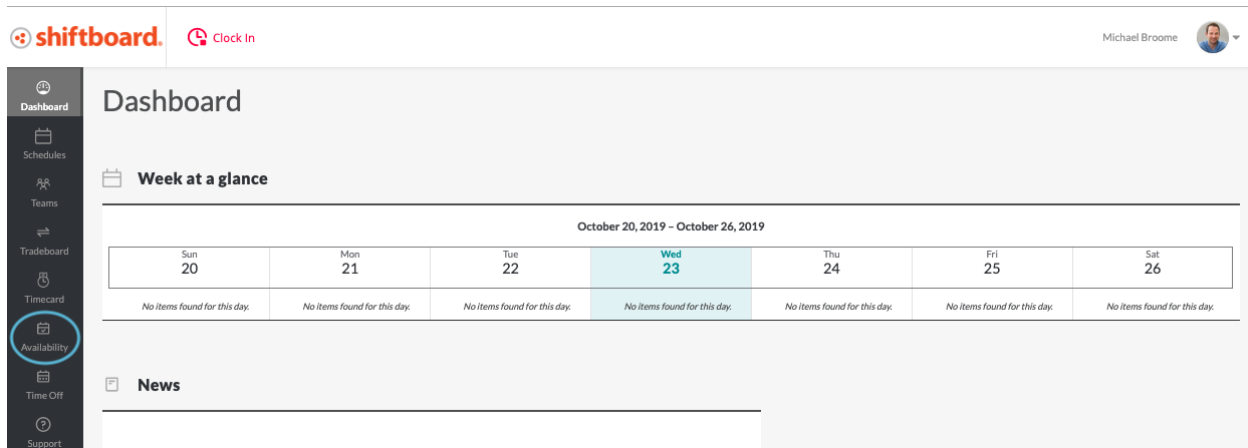
The Add Availability page then opens and allows you to set status, start and end dates, days of the week, time, and team. All availabilities are added as general availability, unless Choose Specific Dates is selected.

The screenshot below is numbered to correspond with explanations below the image:

Add Availability

Enter time you are not available to work.

TEAM

🔍 Production Workers   **1**   ✕

ACCOUNT

Michael Broome

DAYS   **3**

2 | Open | Ends | Specific | **4**

AVAILABILITY BEGINS

📅 10/01/2020

ON THESE DAYS

Select   **5**

TIME

| All day | Specific | **6**
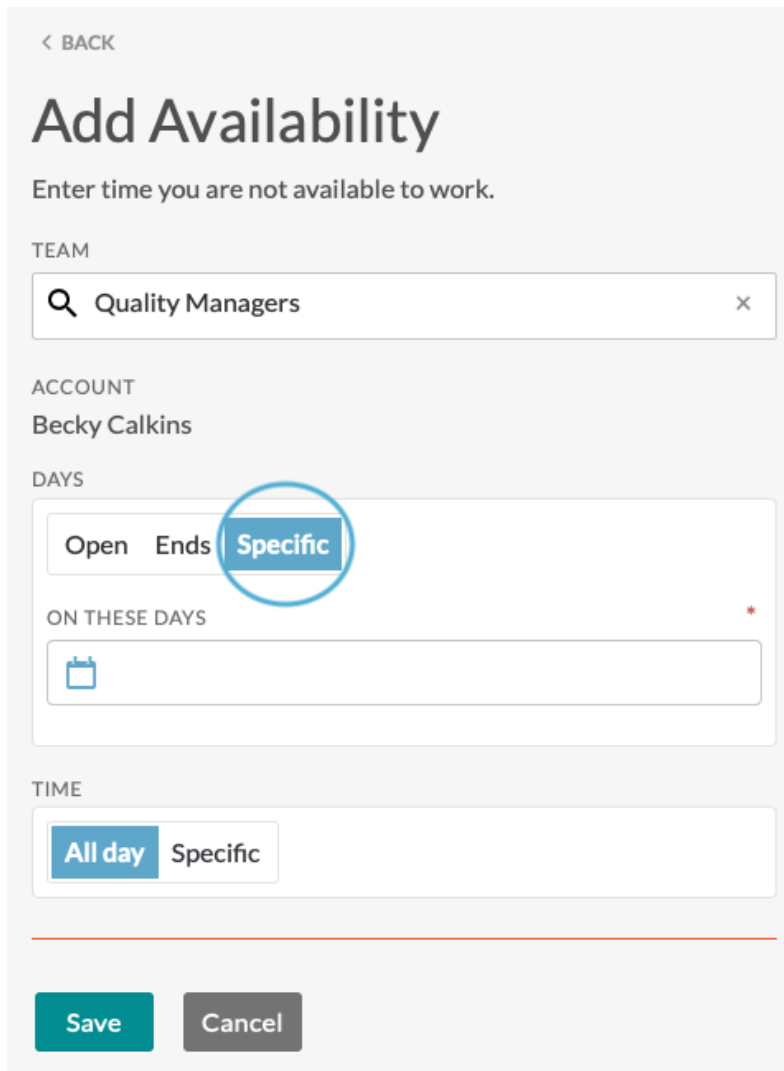
Save   Cancel   **7**

1. +
   Team—If you are assigned to multiple teams (workgroups), use this field to limit this availability to a specific team. Click in the box to select a workgroup from the drop-down list. If no team is selected, then this availability applies across all of your teams.Note: if your workgroup name is not Team, you will see your workgroup name.
2. Open—Select when you want your availability to start. Use this option for open ended availability entries with no end date.
   1. +
      Availability marked as open-ended will remain in the availabilities list until removed by the user (or a manager).
3. Ends—Use this option to enter a specific start and end time for your availability. Availability marked with a specific end date will be automatically removed from the availabilities list after that date has passed.

4. Specific —Allows you to choose specific dates that you are busy/available (see How to add specific availability section below).
5. On these days—Select the day or days of the week that you are available or busy.
6. Time—Allows you to indicate that you are free/busy either All Day or during Specific Hours.
7. Action buttons:
    1. +
        Save—Saves and adds this availability to the availabilities list.
    2. Cancel—Information entered into this form is removed and not saved.

How to add specific availability

To add specific availability, from the Add Availability page, choose Specific.

The fields automatically adjust., replacing the Start Date, End Date, and On These Dates fields with a group of fields that allow you to select specific dates:

Click inside the Date(s) field to display a mini calendar:
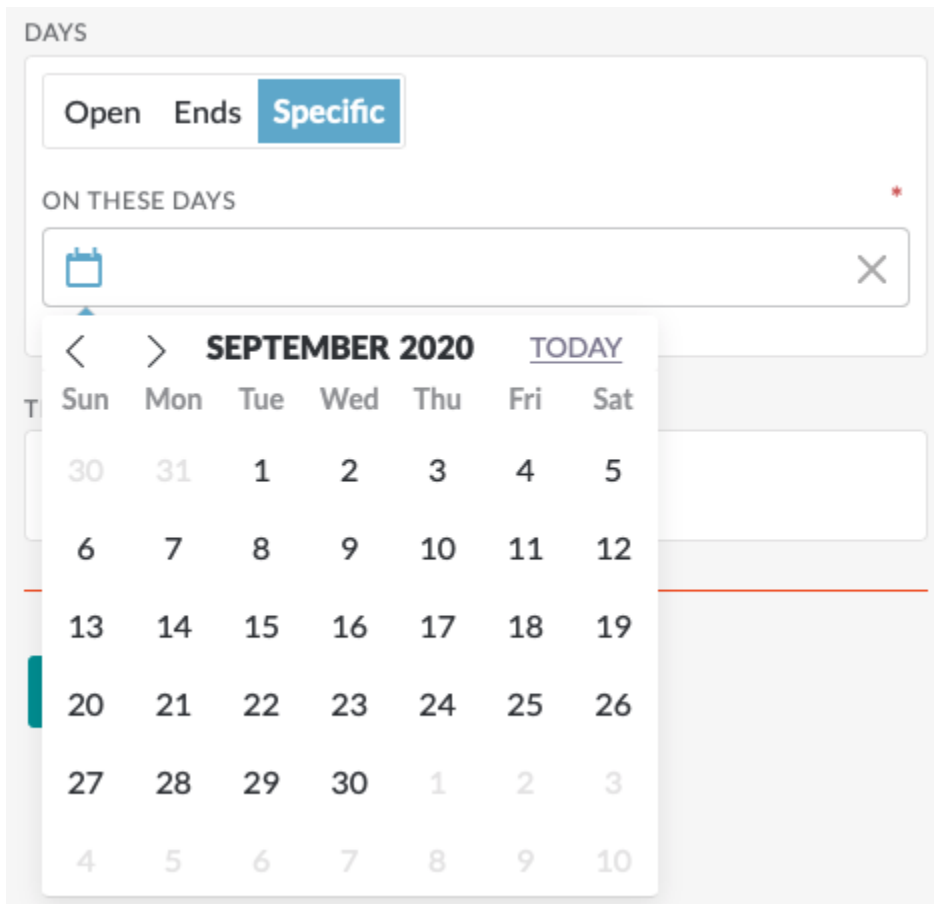
On the mini calendar, click on a date that you want to select. That date appears in the Date(s) box. To add additional dates to the list, continue to select additional dates. :
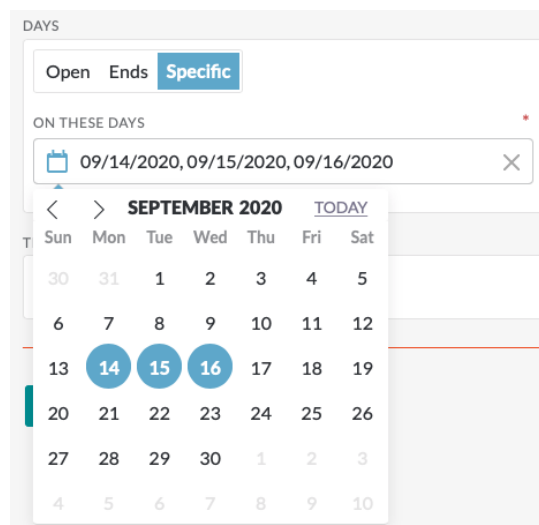
Note: All dates must have the same Time availability (e.g. All Day or the same specific hours).

For all dates in the list, choose the Time you are available or busy, either All Day or During Specific Hours:

If applicable, choose Team (see How to add general availability section above). Click Save to add these dates to your availability list.

Tradeboard

Overview

When Tradeboard is enabled in the site settings, people are allowed to post their assigned shifts for trade, so that someone else can take the shift. The tradeboard follows these guidelines:

- Shifts offered for trade are only viewable by people on the same workgroup (team).
- The tradeboard tool will not allow anyone to double-book themself, take a shift they don't qualify for (see role), or take a shift that will put them into overtime.
- Site settings determine whether shifts are defaulted to allow trades. When shifts are being created or edited, managers may override the tradeboard default setting.
- Site settings determine whether approval is needed to:
  - Post a trade
  - Take a shift that is up for trade

A trade must be posted for trade and someone must take the trade (and possibly be approved by a manager) before the shift is considered traded. Any shift that is up for trade will still appear on your schedule until someone else takes the shift from the tradeboard. If the shift is still on your schedule, you are still responsible to cover it, even if you have posted it for trade.

How to offer, edit, and take shifts using the tradeboard

Create a trade

If you are assigned to a shift, you can trade your shift. Navigate to Schedules > Shifts, and then click on a shift that you want to trade:

On the Shift Details page, click the Trade button:
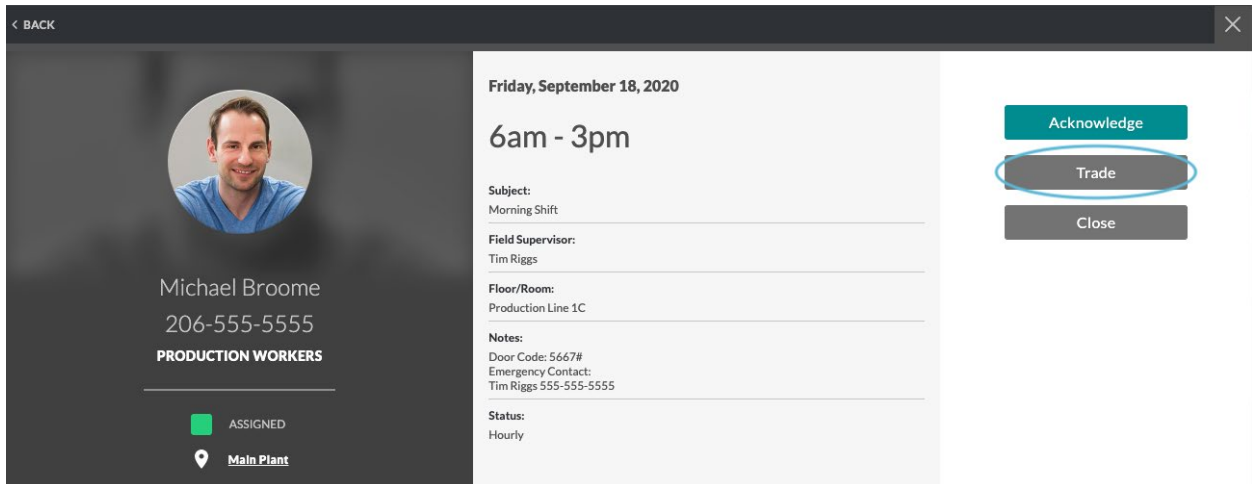
To set up a Trade, add notes regarding the shift (optional), then click Create Trade.
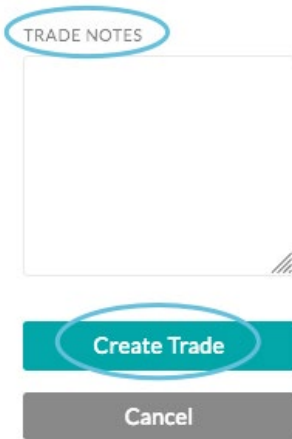
After you click Trade, you will be returned to the Shift Details page where you can click Close to return to the calendar. The calendar will now display the trade icon on the shift:
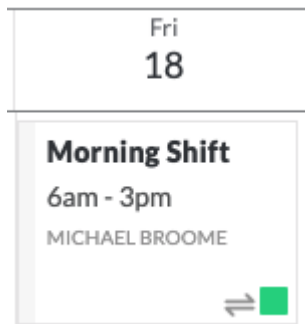
Edit or remove a trade that you posted

If you put a shift up for trade, you can edit the notes on the trade or delete the trade.

From the calendar, click on the shift that you posted for trade that you would like to edit or remove from the tradeboard:

On the Shift Details page, click the Edit Trade button:

To edit the trade, click in the Trade Notes box, edit the note, then click Edit Trade. You will be returned to the Shift Details page.
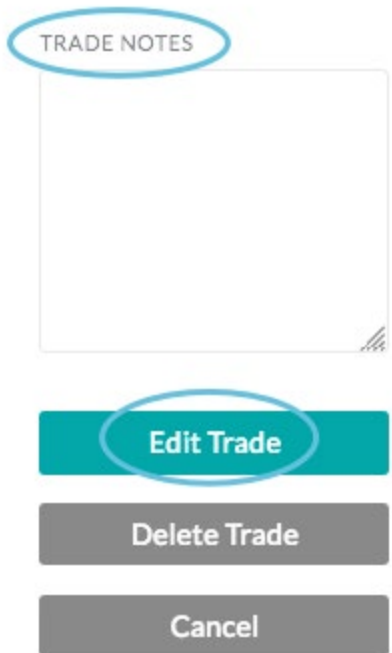
To delete the trade, click the Delete Trade button. A confirmation page will appear. Once you click Delete Trade on the confirmation page, you will be returned to the Shift Details page.
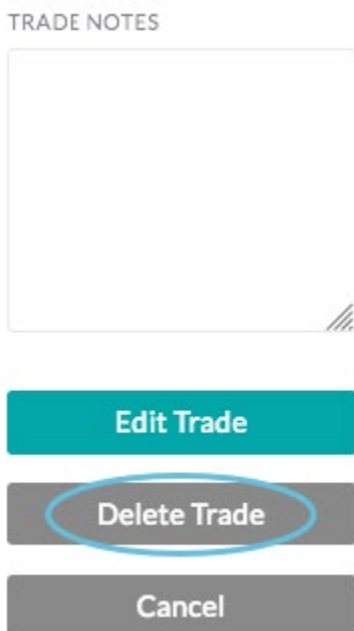
From the Shift Details page, click Close to return to the calendar. If you deleted the trade, then the trade icon will no longer appear on the calendar:
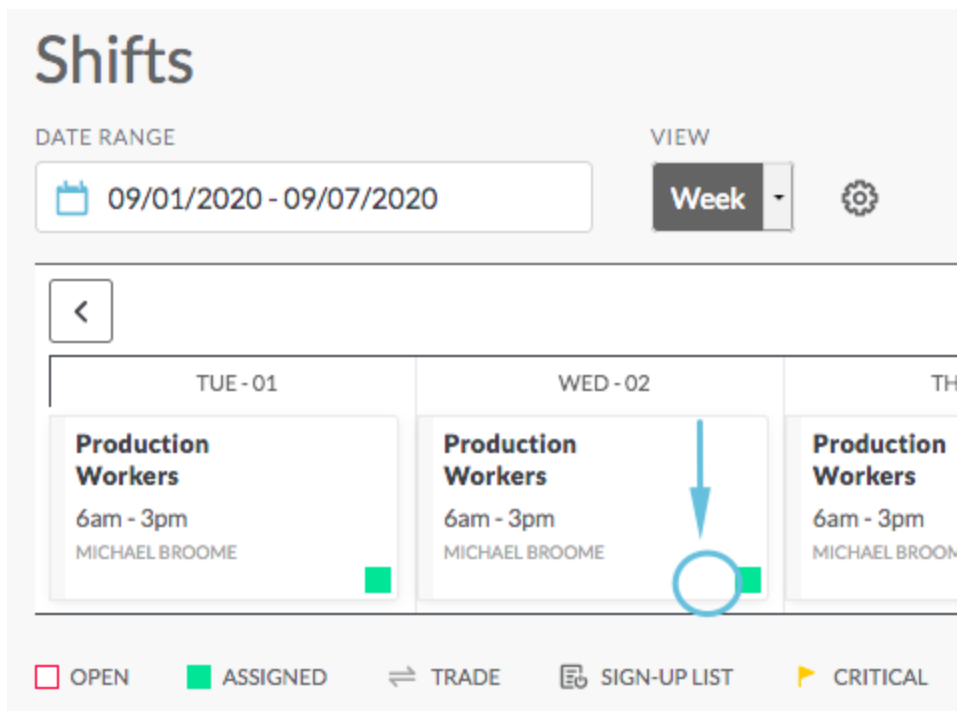
Take a shift that is up for trade

To take a shift that is offered up for trade, Navigate to Tradeboard:
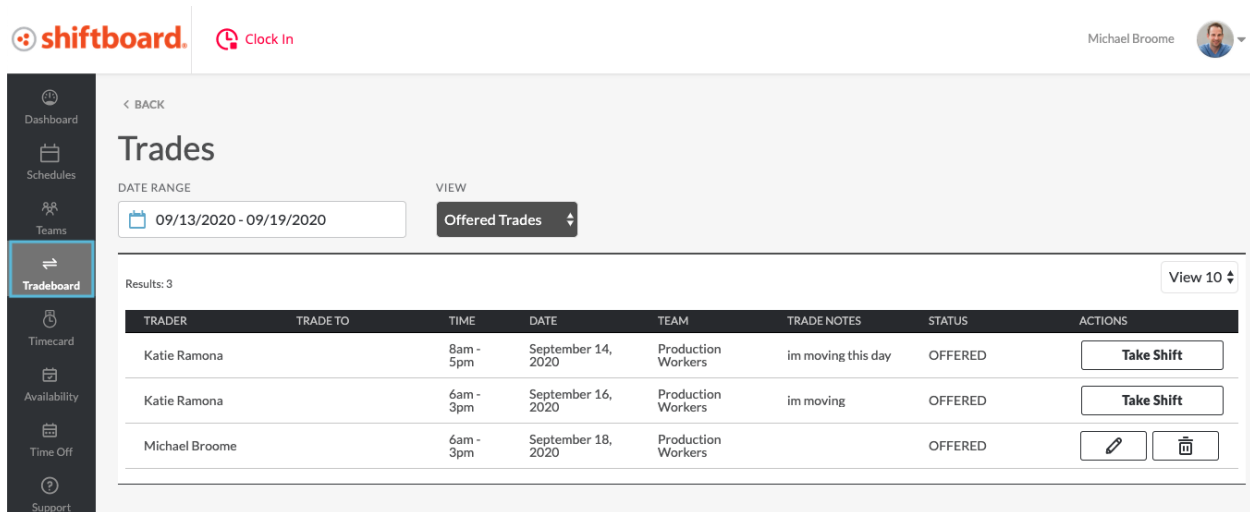
Use the Date Range field to narrow down the list of shifts that are up for trade within your workgroups (teams) on a given date or date range.

Note:

- *The Date Range field automatically selects the next two weeks, including today's date.*

- *To select different dates, click inside the Date Range field and choose dates from the datepicker.*

The tradeboard allows you to filter the list of shifts by Offered Trades and Completed Trades. Offered trades displays shifts that are available for trade. Completed trades displays shifts that have already been traded:

Note: If site settings require manager permission to post or accept a trade, then trades that are waiting for manager approval will be listed as pending on the tradeboard.

After choosing a shift that you want to take from the list of offered trades, click Take Shift.

Note:

- *Shifts listed as pending have been offered up for trade and are awaiting manager approval.*
- *If manager approval is required to take a shift, then after clicking Take Shift, you will see an Approval Required notification message, and the trade will show as unapproved on*

the tradeboard until it is approved.

Trades

DATE RANGE
📅 09/01/2020 - 09/30/2020

VIEW
Offered Trades ▾

3 Count

TRADER	TRADE TO	TIME	DATE	TEAM	DETAILS	STATUS	ACTIONS
Matt Snow		8am - 5pm	September 8, 2020	Production Workers		OFFERED	**Take Shift**
Katie Benson		6am - 3pm	September 10, 2020	Production Workers		OFFERED	**Take Shift**
Carolyn Bocera		8am - 5pm	September 11, 2020	Production Workers		PENDING	

Clocking In and Out

Overview

If your Shiftboard site has Clock In/Out enabled, then there are many ways that you can clock-in and clock-out of your shifts. This article explains how to use the web application for clocking in and out. You can also clock in using QR codes or with IVR using a PIN.

How to clock in for a shift

To clock in for a shift, click the clock-in icon, located at the top of all Shiftboard pages:

On the Timeclock page, click the clock-in icon for your shift.

If you are not assigned to a specific shift, then clock in for No Specific Shift.
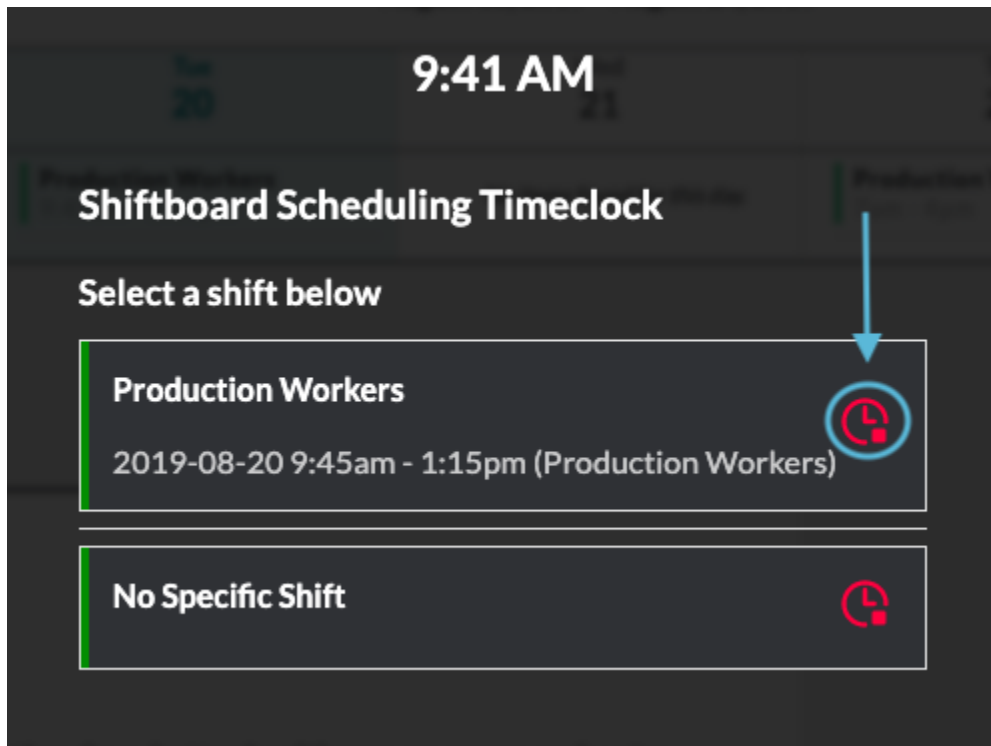
Once you click the clock-in icon, you are clocked in. The icon turns green with your clock in time, and a message appears confirming that you have clocked-in. Click the X or Esc to close the window.

The time that you clocked in for your shift will be shown in green:
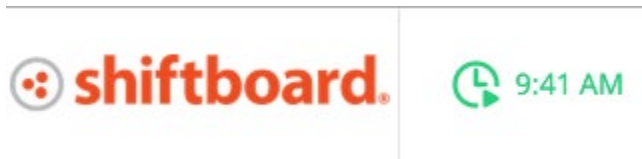
How to clock out of a shift

To clock out of a shift, click the time shown in green, located at the top of all Shiftboard pages:
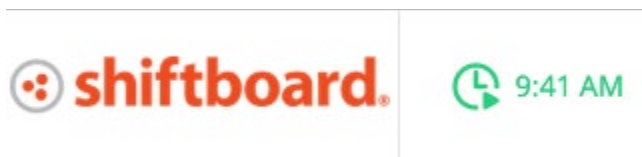
On the Timeclock page, click the clock-out icon:
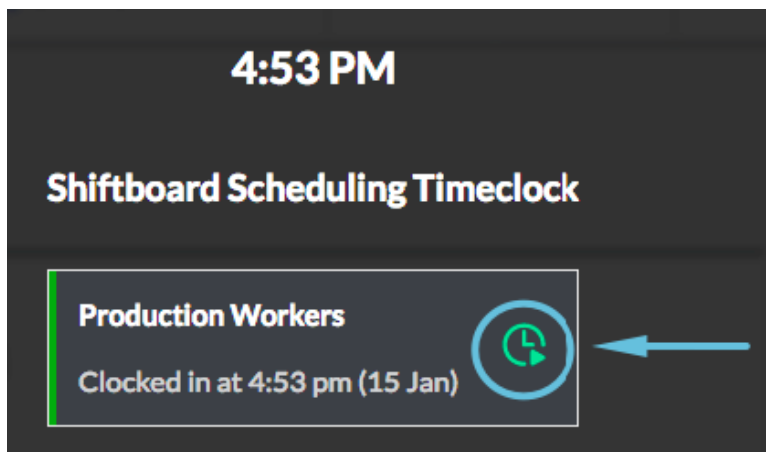
Once you click the clock-out icon, you are clocked out. The icon turns red, and a message appears confirming that you have clocked-out. Click the X or Esc to close the window.

The clock-in icon now appears, indicating that you are clocked out:
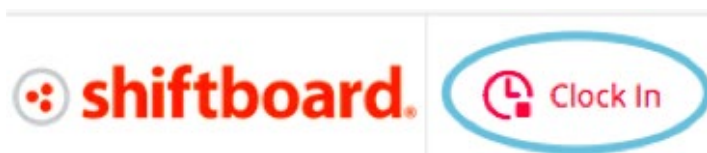
Timecards

A timecard is a record of the hours that you worked, and once you have clocked in/out of your shift, a timecard is automatically created.

To view timecards, navigate to the Timecards page which lists your recent timecards that have yet to be Approved or Processed. The total number of timecards in the list is shown in the top left corner. If you have no timecards, the results will tell you that no timecards were found:

Overview

A timecard is a record of the hours that you worked. If the timeclock feature is enabled for your site, timecards are automatically created once you have clocked in/out of your shift. If you don't use the timeclock, your manager may ask you to add a timecard based on your scheduled shift.

How to add a timecard

If you are asked by your manager to create timecards based on the actual time you worked your shift, you can manually create a timecard in Shiftboard.

To add a timecard, navigate to the Timecard page:
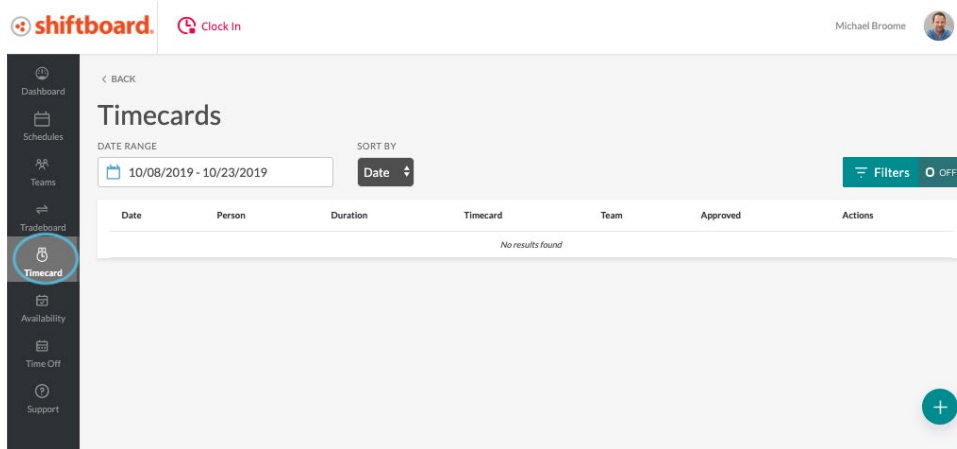
Click the plus button (+) on the main timecards screen:
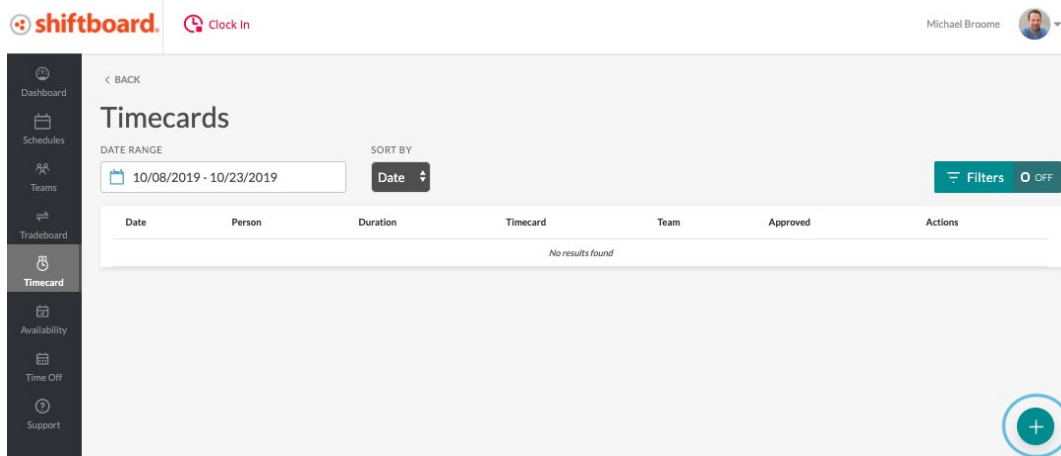
Choose Shift or No Shift at the top of the New Timecard form:
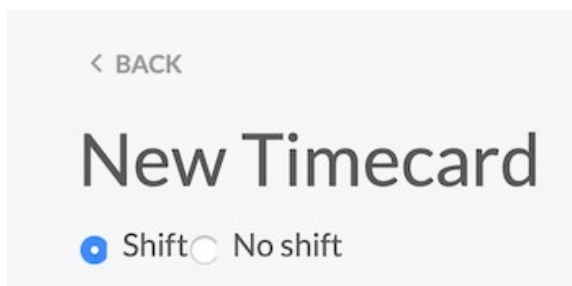
If you choose Shift, then the next field will be:

New Timecard

● Shift ○ No shift

APPROVE ☐   PROCESS ☐

ACCOUNT

🔍 Account

Katie Benson

Carolyn Bocera

Kara Breger

Michael Broome

Becky Calkins

Shift—Choose a shift from the drop-down list of your assigned shifts:

< BACK

New Timecard

● Shift ○ No shift

APPROVE ☐   PROCESS ☐

SHIFT

✓ Select One

2019-04-14T07:00:00 7am - 6pm (Forklift Drivers)

2019-04-13T07:00:00 7am - 6pm (Forklift Drivers)

End   Hr/Min

START DATE

📅 05/13/2019, 7:00 AM

END DATE

📅 05/13/2019, 6:00 PM

If you choose No shift, then the next field will be:

Team—Choose a workgroup (team) from the drop-down list:

Note: if your workgroup name is not Team, you will see your workgroup name.

Choose Duration

<u>If you selected one of your scheduled shifts</u>, then the dates/times for that shift will automatically show up in the duration section:

<u>If you are creating a timecard with no specific shift selected</u>, then enter either:

a. Start and end dates and times for the shift:

b. Start date and time, along with the number of hours and minutes worked:

Enter notes related to the shift in the Notes field:

NOTES

MILEAGE

Mileage

EXPENSE NOTES

[Add Timecard] [Cancel]

At the bottom, click Add Timecard to add this timecard to the list, or click Cancel to exit without saving changes.

You will be returned to your timecards' list. Timecards are show in the list in the order that they are submitted (i.e. the most recently submitted timecard gets added to the bottom of the list).