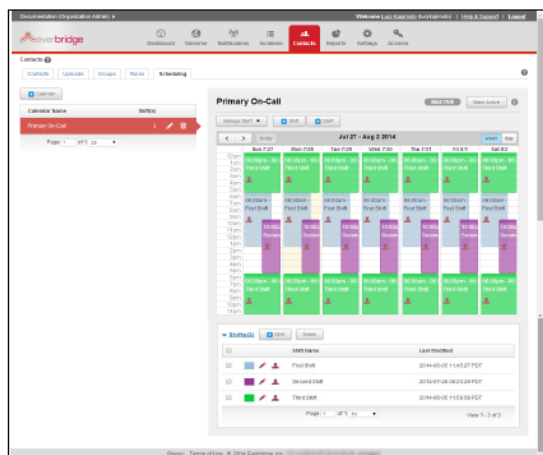


## Quick Sheet MN: Scheduling



### Getting Started

Scheduling offers a calendar interface where you can maintain multiple calendars in an organization, multiple shifts on a calendar, and manage shift assignments and staff availability.

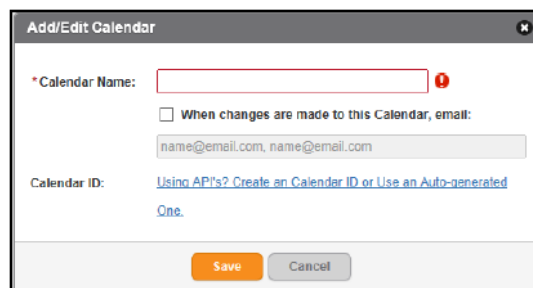
To create schedules, you will need to:

- Create a calendar
- Add shifts to the calendar
- Add staff to the shifts

### Create a Calendar

Create a calendar by selecting the Scheduling sub-tab. Click the + Calendar button and complete the fields shown at right.

Optionally, you can choose to e-mail certain people when the calendar is changed. This will only occur when the calendar is activated. When you are ready for calendar administrators to receive email change notification and for the calendar to be available for notification purposes, make the calendar active.

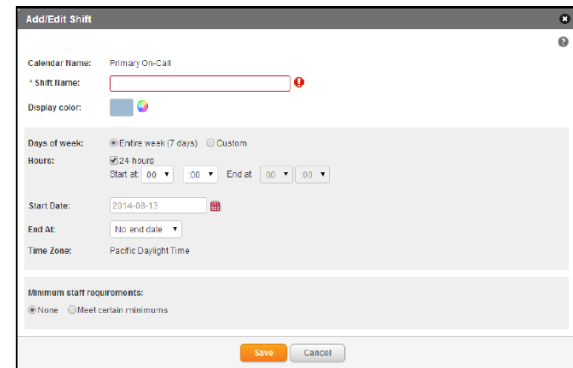


**Add/Edit Calendar**

\*Calendar Name:

☐ When changes are made to this Calendar, email:

Calendar ID: [Using API's? Create an Calendar ID or Use an Auto-generated One.](#)



**Add/Edit Shift**

Calendar Name: Primary On-Call

\*Shift Name:

Display color:

Days of week: ☒ Entire week (7 days) ☐ Custom

Hours:  Start at:  :  End at:  :

Start Date:

End At:

Time Zone:

Minimum staff requirements: ☒ None ☐ Meet certain minimums

### Create Shifts

To create new shifts, from the scheduling sub-tab, select the desired Calendar in the left hand pane and choose + Shift.

Choose a shift name, days of the week, hours, start date, end date (if applicable), time zone, and any minimum staffing requirements for the shift.

When using minimum staffing requirements, choose the add another field option, selecting the field for a specific type of staff and the number of staff of that type required.

### Staff Shifts

Staff can be added to a shift for a single day, a date range or on a weekly rotation by choosing +Staff on the calendar page or by clicking on the shift on the calendar.

Staff members can be designated as unavailable for certain periods of time, preventing them from being scheduled.

Views are available for staff or the shift. Staff view shows details for the assigned staff, while the Shifts view shows the details for the shift.

Calendars must be made active to trigger change notifications.

