USER GUIDE

Employee Scheduler

Basic User Guide

SYSTEMS24-7

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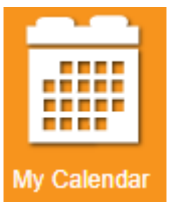
Accessing the Employee Scheduler

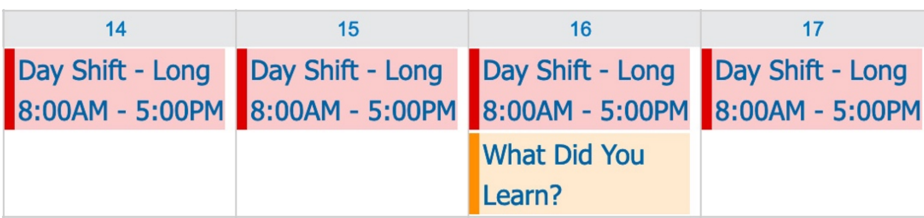
The **Employee Scheduler** feature allows you to view your working schedule for the organization you work or volunteer at.

To get started, log on to Systems 24-7 using your unique username and password. If this is your first time logging on, you will be asked to select your time zone. Make your selection using the dropdown menu and click **Save** to continue.

To access the **Employee Scheduler**, select the calendar icon from the navigation menu on the left-hand side of the page.



Your calendar will open in calendar view to the current month. By default, the calendar will display any scheduled shifts and registered events for the month. They will be displayed like this:



If your calendar is blank, then you do not have any shifts or events scheduled yet.

Calendar Functionality

To navigate through the calendar, you can use different functions found at the top of the calendar. You can switch your view to **Day**, **Week**, or **Month** by selecting the appropriate button found in the top left corner of the calendar.

You can also toggle through each day, week, or month by using the arrow keys located in the top right corner of the calendar. If at any point, you would like to return to today's date, select the **Today** button.

If you prefer, you can also view your calendar in list mode rather than calendar mode to view a list of any scheduled shifts or events you have been registered for. To do this, select **List** at the top of the page and make your date range selection.

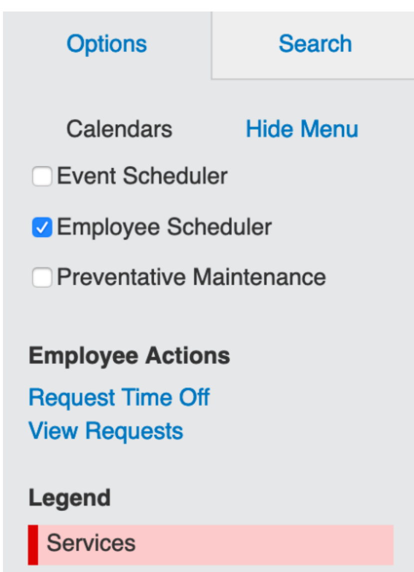
All calendar modes function the same, so for the sake of this user guide, we will demonstrate in **Calendar** mode using the **Month** view.

The details of your shift will display within the calendar day as shown below. It includes the **Shift Name** and the **Time** you are scheduled for.

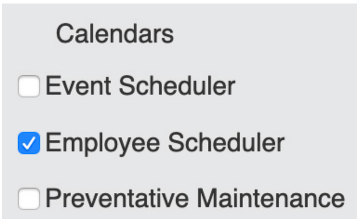
Along the left-hand side of your screen is the **Calendar Toolbar**. There are two tabs to the toolbar: **Options** and **Search**. The option tab allows you to view different calendars (if applicable), request time off/view pending requests, and displays the calendar legend. The search tab allows you to search for calendar entries within *your* calendar using filters.

Calendar Toolbar: Options

By default, the calendar toolbar is on the **Options** tab which allows you to turn on and off calendars, access employee actions, and displays the calendar legend.



The first item you will see is **Calendars** which lists the different calendars you have access to within your company. All calendars are in view by default but to turn off a calendar, simply uncheck the box by clicking on it. This will hide all entries relating to that specific calendar. This can come in handy if you have access to multiple calendars with a lot of entries.

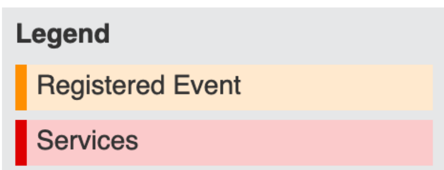


Below the list of calendars are **Employee Actions**. Think of these as quick links to common tasks relating to the Employee Scheduler. We will explore these in greater details later but for now here is a brief description of each action:

Request Time Off: This allows you to make a time off request.

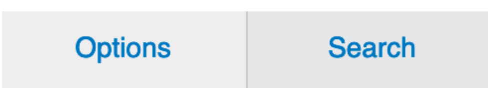
View Requests: This allows you to view your pending and completed requests.

Below employee actions is the calendar **Legend**. Each calendar entry for each type of calendar will have a colour assigned to it chosen by your administrator. Only entries that are active in your calendar will appear in the legend.

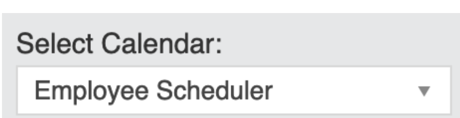


Calendar Toolbar: Search

To access the calendar search function, select the **Search** tab from the **Calendar Toolbar**.



The search tab allows you to search *your* calendar(s) for scheduled shifts or registered events using a set of filters. To get started, select **Employee Scheduler** from the dropdown menu.



Use the **Keyword Search** to find the shift you are looking for. There are more search filters in development and will be added to the system soon!

Request Time Off

Start by accessing your calendar from the feature's menu. Using the **Calendar Toolbar** select **Request Time Off** which can be found under **Employee Actions**.

Employee Actions
Request Time Off
View Requests

This is your time off request form. Begin by selecting the **Time Off Type** using the dropping down menu.

Time Off Type: * Personal Day

Select whether or not your request will be paid or unpaid.

Pay Type: * Paid

Select the **Start Date** and **End Date** for your request and the number of total days off your request will use. It's important to only account for working days and not your days off.

Start Date: * January 18, 2021
End Date: * January 20, 2021
Total Days Requested: 3 Only include working days, not your scheduled days off

If necessary, you can leave a comment for the administrator detailing why you are placing the request. This will show up when they are reviewing your submission.

Select **Submit Request** to complete your submission. The system will notify you if your request was submitted successfully or if you missed a required field.

Time Off Request submitted successfully.

View Requests

Start by accessing your calendar from the feature's menu. Using the **Calendar Toolbar** select **View Requests** which can be found under **Employee Actions**.

Employee Actions
Request Time Off
View Requests

This is your **My Calendar Requests** page which allows you to view and manage your calendar requests. Requests are broken up into three charts: **Pending Requests, Reviewed Requests** and **Completed Requests**.

Pending Requests

Request Type	Start Date	End Date	Status	Authoring Options
Sick Day	July 21, 2021	July 21, 2021	Pending	Comments Edit Delete

Reviewed Requests

Request Type	Start Date	End Date	Status	Authoring Options
Sick Day	July 21, 2021	July 21, 2021	Approved	Comments Edit Delete

Completed Requests

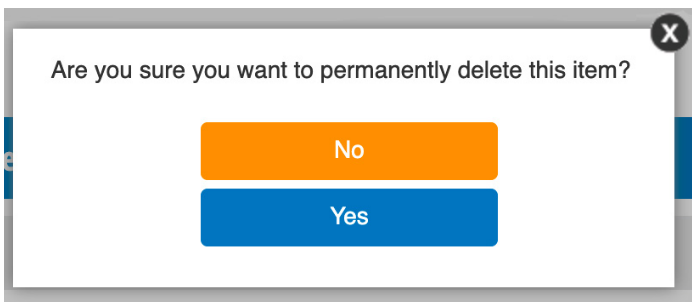
Request Type	Start Date	End Date	Status	Authoring Options
Sick Day	July 21, 2021	July 21, 2021	Declined	Comments Edit Delete

Pending Requests

If you ever need to edit or cancel a request, you will be able to use the **Authoring Options** in your **Pending Requests** chart.

To **Edit** a request, simply click on the edit icon. Make any changes to your request and select **Save Changes** to complete the update.

To **Delete** a request, simply click on the delete icon. A dialogue box will appear asking if you would like to permanently delete the request. Select **Yes** to confirm your selection.



The request will be cancelled and removed from the Pending Request chart and from your administrators.