Getting started with Findmyshift

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Managers

Creating your first rota

Creating a staff rota from start to finish takes less than 30 seconds. If you have a staff list (CSV or Excel) then you might want to keep that handy, or you can enter your staff manually.

1. Click on Get started in the top menu.

2. Enter your staff names, or if you have a staff list handy you can drag it on to the page.
3. Start scheduling!

TIPS:

- You won't be asked to register an account at first, but you'll need to register an account later if you want to save your rota.
- You don't need to upload all of your staff data at once. You can always upload or enter more data later.

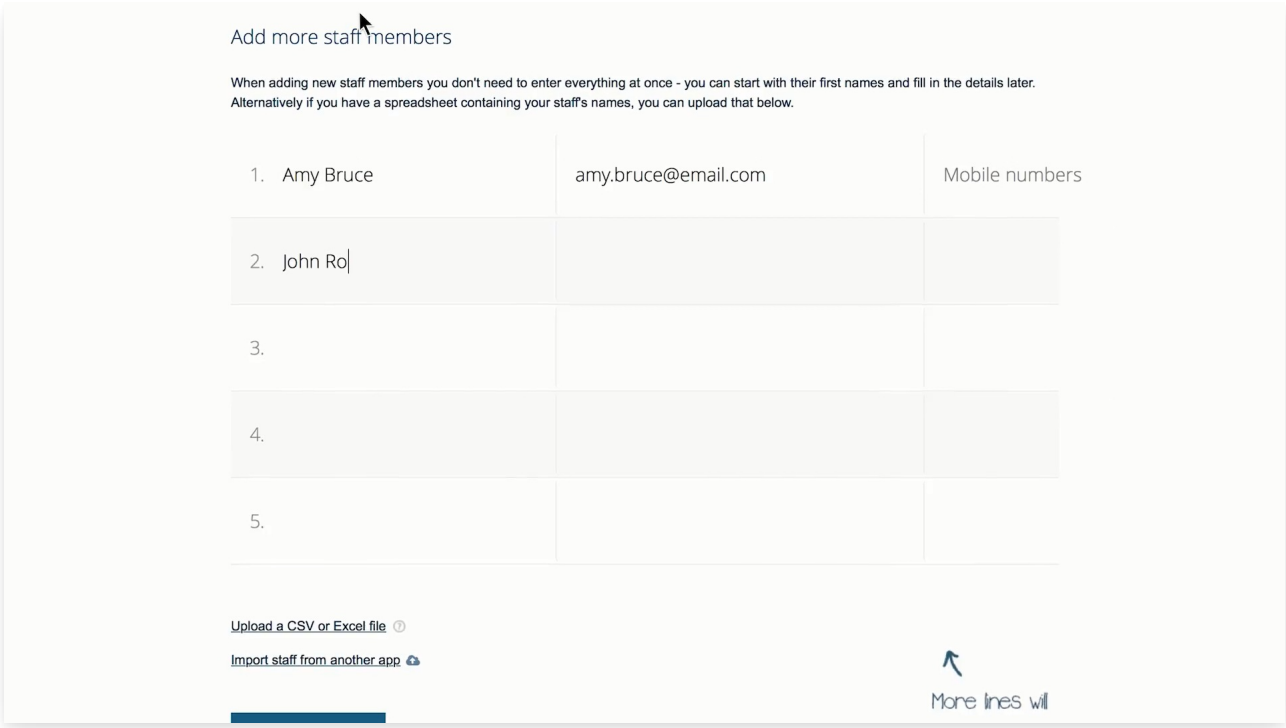
Adding staff to your team

Whether you're just getting started or you're adding staff to an existing team, adding your staff is easiest if you have your staff listed in a CSV file, or Excel spreadsheet. If you don't have a staff list handy, you can always enter your staff data manually, or you could start putting a list together using a template.

1. If you're adding new staff to an existing team, click "Staff" > Add new staff in the top menu.
2. If you have a staff list handy you can drag and drop it on to the page, or click "Upload a CSV or Excel file" at the bottom.

TIPS:

- We'll take any data you upload and merge it with any existing staff to avoid adding any duplicates.
- Suggested columns include: First name, Last name, Email, Mobile, Department, Job title, Date of birth, Hourly rate
- There are no strict requirements for the column headings but anything we don't recognise will be ignored.



Inviting your staff to log in

After adding staff to your team and adding some shifts, you might want to invite them to log in so they can check their shifts, submit requests or request time off. Like most systems, your staff will need a login and password to identify themselves - typically their email address and an auto-generated password.

After you add a new staff member, Findmyshift will automatically generate a welcome message and queue it in the "Outbox", containing their login and password to access the site.

IMPORTANT! The welcome messages generated for new staff need to be authorised by a manager before they're sent. To authorise them, a manager must visit the "Outbox", select the appropriate delivery methods and click "Send".

Choosing your settings

Findmyshift's default settings won't always be perfect for everyone, but as an administrator you can change the settings of your team at any time via the "Settings" menu.

Aside from the option under "Settings" menu, on every page you'll find an "Options" menu. These options only affect you, and in some cases can be used to override the selected options under the "Settings" menu.

TIPS:

- The options chosen under the "Settings" menu apply to everyone on your team.
- The options chosen under the "Options" menu on each page will only apply to the logged in user.

Entering shifts

Once you've entered your staff you'll be taken to the rota, typically called the "Overview", but if you're scheduling facilities as well then you'll find it's called the "Staff view" to avoid confusion.

This view is your main entry screen, and works very much like an Excel spreadsheet. You can drag & drop, copy & paste, make changes to multiple cells at once and access most options with the right click menu.

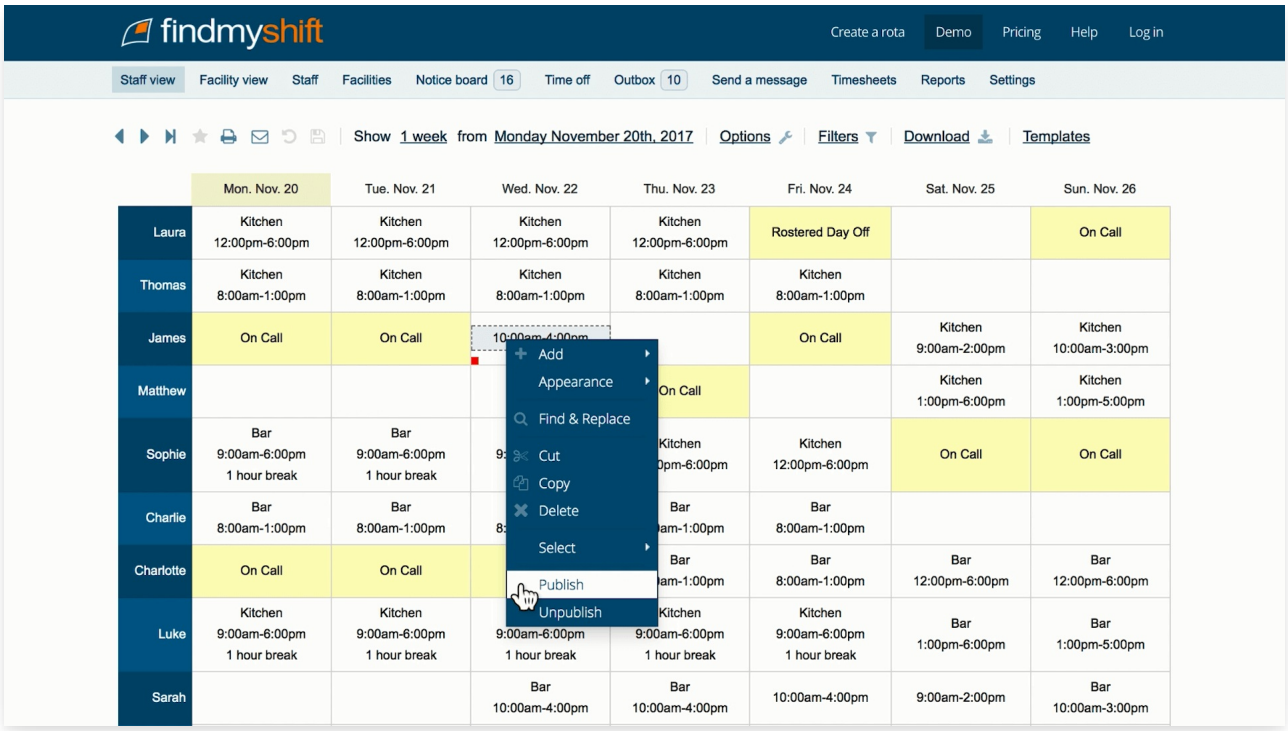
- To select a cell, click it with your mouse, or you can use the arrows on your keyboard.
- To add a new shift to the selected cell and start typing, or double click it, or right click and select "Add" > "Shift".
- To delete a shift, press the `delete` key on your keyboard, or right click and select "Delete".

Publishing shifts

Depending on your settings, you may need to publish shifts before your staff can log in and see them. To know whether you need to publish a shift, you'll see a small red dot in the bottom left hand corner of its cell. To publish:

1. Select the cell (or cells) you'd like to publish.
2. Right click the selected cell(s) and select "Publish". Once published, the red dots will disappear.

TIP: If you're not seeing any red dots on your rota, you may have "Automatic publishing" switched on under "Settings" > "General".

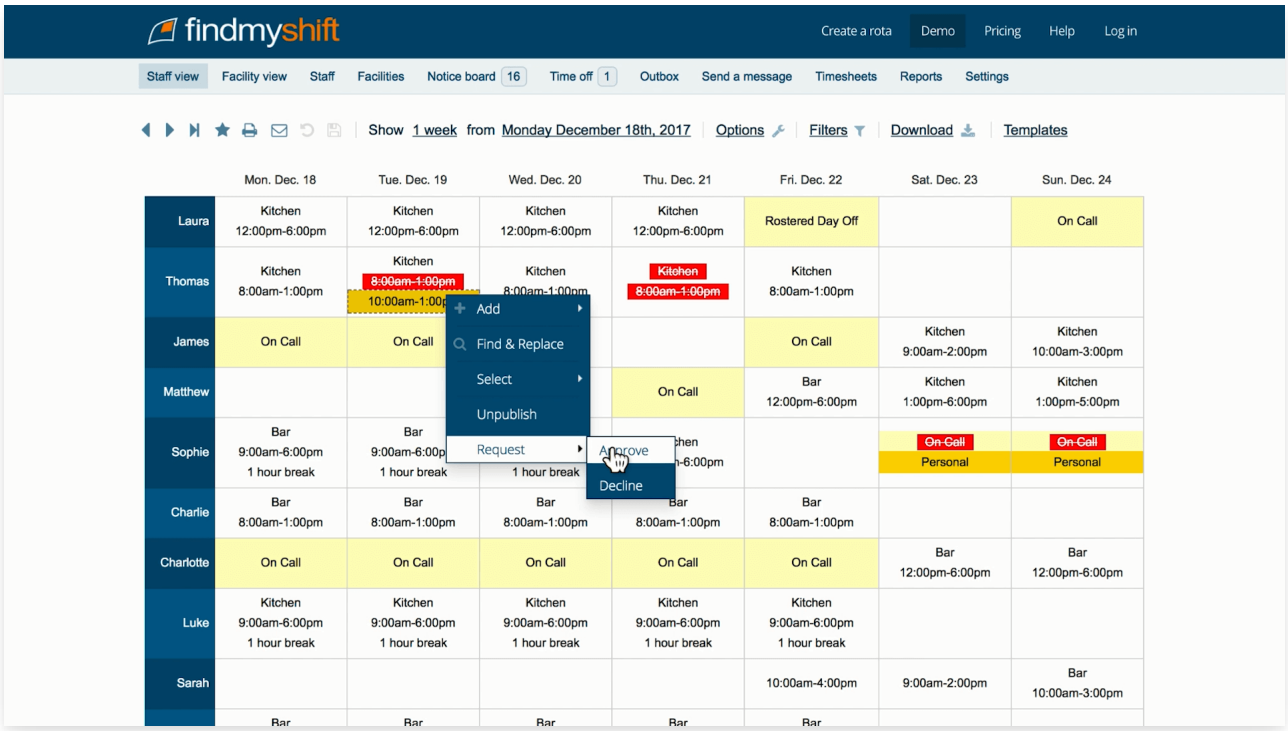


Handling requests and cancellations

Once a staff member has made a shift request or a cancellation, as a manager you can approve or decline the requests.

- To approve requests, select the request, or the cell(s) containing the requests, right click and select "Requests" > "Approve".
- To decline requests, select the request, or the cell(s) containing the requests, right click and select "Requests" > "Decline".

Once you approve (or decline) requests, notifications for staff need to be authorised by a manager before they're sent. To authorise them, a manager must visit the "Outbox", select the appropriate delivery methods and click "Send".



Handling time off requests

If you are an administrator or time off manager, you may be notified when staff request time off.

When staff request time off, you will see this time off on your rota highlighted yellow, as well as at the top of the "Time off" page.

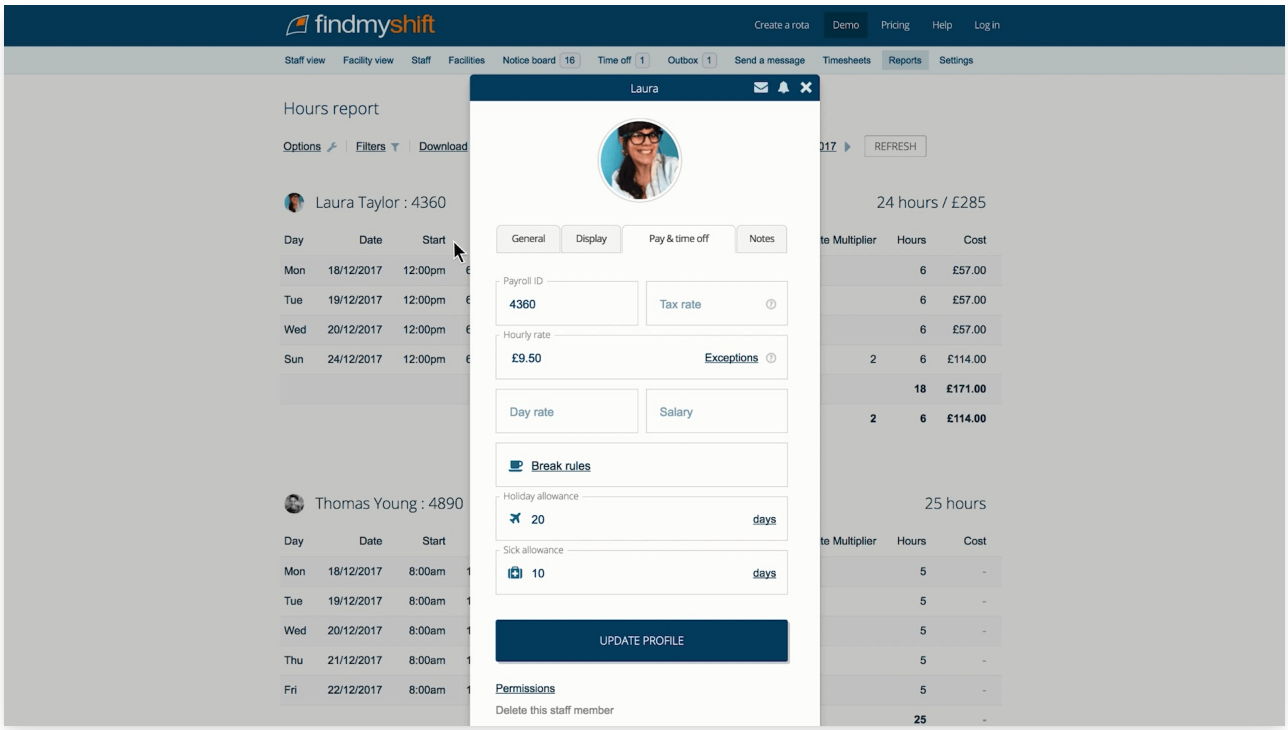
- To approve requests directly from the rota, select the request or the cell(s) containing the requests, right click and select "Requests" > "Approve".
- To approve the requests from the "Time off" page, click the "thumbs-up" icon to the right of the request.
- To decline requests directly from the rota, select the request or the cell(s) containing the requests, right click and select "Requests" > "Decline".

Adding pay rates to track staff costs

To track staff costs you'll either want to enter an hourly rate, day rate or salary for each of your staff members.

To enter these rates, open a staff member's profile and select the "Pay & time off" tab, where you'll see an entry box for "Hourly rate", "Daily rate" and "Salary". The first time you enter these rates you'll just be entering an amount, however any subsequent attempts to edit

these rates after you save your changes will open an advanced edit window, allowing you to enter additional rates and specify each rate's start and finish date.



Staff

Requesting or cancelling a shift

Depending on your manager's settings, you (as a staff member) may be able to request and cancel shifts on your rota.

- To request a shift from the "Staff view", select one or more cells next to your name (corresponding with the required dates), right click and select "Request". In the box that appears, type the start and finish times, facility name, or comments you would like to request and press `enter` .
- To request a shift from the "Facility view", right click any cell next to the facility you would like to request, right click and select "Request". In the box that appears, type the start and finish times you would like to request and press `enter` . If you do not want to specify a start and finish time for the request, you can leave the box blank.
- To cancel a shift from either view, select a shift (or select one or more cells), right click and select the appropriate "Cancel" option. You will be prompted to provide a comment for the cancellation, however this is optional.

Requesting time off

To request time off, click on "Time off" > "Request time off" and select the required options.

If you are requesting regular time off, click the "Never" link next to "Repeat" and select the cycle of the regular time off.

Updating your profile picture

To change your profile picture, click on your default profile picture in the top-right area of the page. Once your account appears, hover over the default profile image and click on the camera icon (to take a new photo) or the image icon (to upload a photo).