

# Employee Scheduling System - User Guide

This guide will help you manage your work schedules, set your availability, apply for leave, and claim open shifts. Whether you're an employee or a manager, this guide has everything you need to get started.

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## Table of Contents

1. [Getting Started](#)
  2. [Understanding Your Role](#)
  3. [Visual Process Flows](#)
  4. [For Employees](#)
  5. [For Managers](#)
  6. [Understanding Schedule Status](#)
  7. [Notifications & Alerts](#)
  8. [Frequently Asked Questions](#)
- 

## Getting Started

### What is the Employee Scheduling System?

The Employee Scheduling System helps you and your team manage work schedules efficiently. You can:

- View your upcoming shifts
- Set your availability preferences
- Apply for time off
- Claim available shifts
- Get notified about schedule changes
- Track your work hours and wages

# Accessing the System

1. Log in to your account using your company credentials
2. Navigate to the **Scheduling** section from the main menu
3. You'll see different options based on your role

## Visual Process Flows

These flowcharts show you exactly how different processes work in the system.

### ? Employee Availability Process

**How it works when you set your availability:**

```
flowchart LR
    A([Employee Sets Availability]) --> B[Save as Draft]
    B --> C[Submit for Approval]
    C --> D[Manager Notified]
    D --> E[Manager Reviews]
    E -->|Approve| F[Approved]
    E -->|Reject| G[Employee Notified]
    F --> H[Shows in Scheduling]
    G --> I[Employee Can Resubmit]

    style A fill:#e3f2fd
    style F fill:#c8e6c9
    style G fill:#ffcdd2
    style H fill:#c8e6c9
```

**Steps:**

1.  You set your available/unavailable times

2.  Save it as a draft (you can edit)
3.  Submit for manager approval
4.  Manager gets email notification
5.  Manager approves or rejects
6.  You get notified of the decision
7.  If approved, it's used for scheduling

## ? Leave Application Process

### How your leave request is processed:

```

flowchart TD
    A([Employee Applies for Leave]) --> B[Check Leave Balance]
    B --> C[Request Denied]
    B --> D[Check for Shift Conflict]
    D --> E[Cannot Apply Cancel Shift First]
    D --> F[Check Blackout Days]
    F --> G[Leave Not Allowed]
    F --> H[Request Submitted]
    H --> I[Status: Pending]
    I --> J[Manager Reviews]
    J --> K[Leave Approved]
    J --> L[Leave Rejected]
    K --> M[Confirmation Email Sent]
    L --> N[Rejection Email Sent]
  
```

```
style A fill:#e3f2fd
style K fill:#c8e6c9
style L fill:#ffcdd2
style C fill:#ffcdd2
style E fill:#ffcdd2
style G fill:#ffcdd2
```

## Steps:

1.  Select dates and leave type
2.  System checks your balance
3.  System checks for shift conflicts
4.  System checks blackout days
5.  Request is submitted to manager
6.  Manager approves or rejects
7.  You receive email notification

# ? Claiming an Open Shift

## How to claim and get approved for an open shift:

```
flowchart LR
    A([Employee Sees  
Open Shift]) --> B{Check Your  
Schedule}
    B -->|Conflict| C[Cannot Claim  
Overlapping Shift]
    B -->|Available| D([Click  
Claim Shift])
    D --> E([Claim Request  
Submitted])
    E --> F([Manager  
Notified])
    F --> G{Manager  
Reviews}
    G -->|Approve| H([Shift  
Assigned to You])
    G -->|Reject| I[Claim  
Rejected]
    H --> J([Shows on
```

Your Schedule]

I --> K([Shift Remains  
Open])

style A fill:#e3f2fd

style H fill:#c8e6c9

style J fill:#c8e6c9

style I fill:#ffcdd2

## Steps:

1.  Browse available open shifts
2.  Check if it conflicts with your schedule
3.  Click "Claim This Shift"
4.  Manager gets notification
5.  Manager approves or rejects
6.  If approved, shift appears on your schedule

# ? Manager: Creating & Publishing Schedules

## Complete workflow from creating shifts to final approval:

flowchart TD

```
A([Manager Creates  
Shifts]) --> B{Check for  
Conflicts}  
B -->|Employee on Leave| C[Warning Shown  
Cannot Assign]  
B -->|Shift Overlap| C  
B -->|No Issues| D[Save as  
Draft]  
D --> E[Draft Status  
Not Visible to Employees]  
E --> F{Ready to  
Publish?}  
F -->|No| G[Keep Editing]  
F -->|Yes| H[Publish  
Schedule]  
H --> I[Employees  
Notified]
```

```

I --> J[[]Employees Can
View Schedule]
J --> K{Final
Review OK?}
K -->|Need Changes| L[Make Edits]
K -->|All Good| M[[] Approve
Schedule]
M --> N[[]Schedule
Locked]
N --> O[[]Approval
Confirmation Sent]
L --> H

style A fill:#e3f2fd
style D fill:#fff9c4
style H fill:#bbdefb
style M fill:#c8e6c9
style N fill:#c8e6c9

```

## Steps:

1.  Create shifts and assign employees
2.  System checks for conflicts automatically
3.  Save as draft (only you can see)
4.  Publish when ready (employees notified)
5.  Employees can view published schedules
6.  Make final edits if needed
7.  Approve to lock the schedule
8.  Everyone gets confirmation

# ? Complete Team Scheduling Flow

## The big picture - how everything works together:

```

flowchart TD
    subgraph "[]Week 1: Planning"
        A[[]Manager Reviews
Team Availability]
        B[[]Checks Leave
Requests]
    end

```

```

    C[[]Creates Draft
Schedule]
    end

    subgraph "[]Week 2: Publishing"
        D[[]Manager Publishes
Schedule]
        E[[]Team Gets
Notifications]
        F[[]Team Views
Schedule]
    end

    subgraph "[]Week 3: Adjustments"
        G[[]Employees May
Claim Open Shifts]
        H[[]Manager Reviews
Claims]
        I[[] Manager Approves
Schedule]
    end

    subgraph "[]Week 4: Execution"
        J[[]Team Works
Approved Shifts]
        K[[]System Tracks
Hours & Wages]
    end

    A --> B --> C --> D --> E --> F --> G --> H --> I --> J --> K

    style D fill:#bbdefb
    style I fill:#c8e6c9
    style K fill:#c8e6c9

```

# Understanding Your Role

The system has different features depending on your role:

# ? Employee

As an employee, you can:

- View your assigned shifts
- Set your weekly availability
- Apply for leave
- Claim open shifts
- View your work hours and forecasted wages

# ? Manager

As a manager, you can do everything an employee can, plus:

- Create and assign shifts to your team
- Publish and approve schedules
- Review availability requests
- Approve or reject leave applications
- Create open shifts for team members to claim
- View team forecasts (hours, wages, staffing)

# ? Administrator

Administrators have full access to:

- All employees across all branches
  - System-wide settings
  - Shift templates
  - Employee groups and leave policies
- 

## For Employees

### ? Viewing Your Schedule

#### Step 1: Access Your Schedule

1. Click on **My Schedule** from the main menu
2. You'll see your shifts displayed in a calendar or list view

#### Step 2: Understanding Your Shift Details

Each shift shows:

- **Date and Day**
- **Start Time** (when your shift begins)
- **End Time** (when your shift ends)
- **Shift Name** (e.g., Morning Shift, Evening Shift)
- **Role** (your position for this shift)
- **Status** (Draft, Published, or Approved)

## Different Views

- **Weekly View:** See all your shifts for the week with total hours
- **Monthly View:** See shifts across the entire month
- **Hourly View:** See detailed breakdown by hour

# ? Setting Your Availability

Your availability tells managers when you prefer to work or when you're unavailable.

“  See the [Availability Process Flowchart](#) above for a visual guide!

## Step 1: Go to Availability Settings

1. Navigate to **My Availability**
2. Click **Set Availability**

## Step 2: Choose Your Days

1. Select the day(s) of the week (Monday through Sunday)
2. You can set different availability for each day

## Step 3: Set Your Time Preferences

1. **If you're available:**
  - Choose "Available"
  - Select your start and end times
  - Example: Available Monday 9:00 AM - 5:00 PM
2. **If you're unavailable:**
  - Choose "Unavailable"
  - Select the time range you cannot work
  - Example: Unavailable Wednesday 2:00 PM - 6:00 PM

## Step 4: Save and Submit

1. Click **Save** to save your availability as a draft
2. Click **Submit for Approval** to send it to your manager

“  **Tip:** You can set your availability for the whole day by selecting "Whole Day Available" or "Whole Day Unavailable"

## Step 5: Wait for Approval

- Your manager will receive your availability request
- You'll get a notification when it's approved or rejected
- Approved availability is shown in green
- Rejected availability is shown in red

## ? Applying for Leave

“  See the [Leave Application Flowchart](#) above for a visual guide!

## Step 1: Go to Leave Application

1. Navigate to **Apply Leave**
2. Click **New Leave Request**

## Step 2: Check Your Leave Balance

Before applying, check your available balance:

- **Paid Leave:** Time off with pay
- **Sick Leave:** For illness or medical appointments
- **Unpaid Leave:** Time off without pay

The system shows how many days you have remaining for each type.

## Step 3: Fill Out Leave Details

1. **Select Leave Type** (Paid, Sick, or Unpaid)
2. **Choose Date(s):** Click on the calendar to select one or multiple days
3. **Enter Reason:** Briefly explain why you need leave
4. **Review Balance:** Make sure you have enough leave balance

## Step 4: Submit Application

1. Click **Submit Leave Application**

2. The system will check for any conflicts:

- ☐ If you have a shift assigned on that day, you cannot apply for leave
- ☐ If it's a blackout day (busy period), leave may not be allowed
- ☐ If you've exceeded monthly limits

## Step 5: Track Your Request

- **Pending:** Waiting for manager approval (Yellow)
- **Approved:** Your leave is approved (Green)
- **Rejected:** Your leave was not approved (Red)

You'll receive email and in-app notifications about your leave status.

“ ⚠ **Important:** You cannot apply for leave if you already have an approved shift on that day. Cancel your shift first.

## ? Claiming Open Shifts

Open shifts are available shifts that haven't been assigned to anyone yet. You can claim them if you're available!

“ ☐ See the [Open Shift Claiming Flowchart](#) above for a visual guide!

## Step 1: View Open Shifts

1. Go to **Team Schedule** or **Available Shifts**
2. Look for shifts labeled "Open Shift"

## Step 2: Review Shift Details

Check the:

- Date and time
- Role required
- Shift length
- Your current schedule (make sure it doesn't conflict)

## Step 3: Claim the Shift

1. Click on the open shift
2. Click **Claim This Shift**
3. Confirm your claim request

## Step 4: Wait for Approval

- Your manager receives your claim request
- They'll review and either approve or reject it
- You'll get notified of the decision

“  **Tip:** Only claim shifts you can definitely work. Claiming and then canceling creates scheduling issues.

## ? Viewing Your Work Hours

1. Navigate to **My Schedule**
2. Select the date range (week or month)
3. You'll see:
  - **Total Hours Worked**
  - **Forecasted Wages** (based on your hourly rate)
  - **Number of Shifts**

This helps you track your expected earnings for the pay period.

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## For Managers

### ? Creating and Assigning Shifts

“  See the [Schedule Creation Flowchart](#) above for a visual guide!

#### Step 1: Access Schedule Management

1. Go to **Team Schedule** or **Manage Schedules**
2. Select the date range you want to schedule

#### Step 2: Create a New Shift

1. Click **Add Shift** or click on a date in the calendar
2. Fill in shift details:
  - **Employee:** Select who to assign (or leave as "Open Shift")
  - **Date:** When the shift occurs
  - **Start Time:** When the shift begins

- **End Time:** When the shift ends
- **Shift Template:** Choose from predefined shifts (Morning, Evening, Night)
- **Role:** What position they'll work
- **Notes:** Any special instructions

## Step 3: Check for Conflicts

The system automatically checks:

- **No overlapping shifts:** Employee doesn't have another shift at the same time
- **No leave conflicts:** Employee hasn't applied for leave on this day
- **Availability warning:** You'll see if the employee marked themselves unavailable

“ **⚠ Force Add Option:** If an employee is marked unavailable but you still need to assign them, you can force add the shift. They'll be notified.

## Step 4: Save as Draft

- Click **Save**
- The shift is saved but NOT visible to employees yet
- You can make changes before publishing

# ? Publishing Schedules

Employees can only see shifts after you publish them.

## Step 1: Review Draft Shifts

1. Go to **Manage Schedules**
2. View all draft shifts for the selected period
3. Make any final changes

## Step 2: Publish Shifts

1. Select the date range
2. Click **Publish Schedule**
3. Confirm publication

### What happens:

- All draft shifts change to "Published" status
- Employees receive email notifications
- Shifts appear on employee schedules
- Shifts are still editable

# ? Approving Schedules

Published shifts need final approval before they're locked in.

## Step 1: Review Published Shifts

1. Go to **Manage Schedules**
2. Filter by "Published" status
3. Review all shifts in the date range

## Step 2: Approve Schedules

1. Select the date range
2. Click **Approve Schedule**
3. Confirm approval

### What happens:

- Shifts change to "Approved" status
- Employees receive approval confirmation
- Shifts are now finalized (harder to change)
- System marks them as confirmed

“ **Tip:** Only approve schedules when you're certain. Approved shifts should rarely change.

# ? Unpublishing Schedules

If you need to make significant changes to a published schedule:

1. Select the published date range
2. Click **Unpublish Schedule**
3. Confirm unpublishing

### What happens:

- Shifts return to "Draft" status
- Employees lose visibility
- You can make changes freely

# ? Reviewing Employee Availability

## Step 1: Access Availability Requests

1. Go to **Team Availability**
2. You'll see all submitted availability requests

## Step 2: Review Each Request

For each employee's availability:

- See which days/times they prefer to work
- See which days/times they're unavailable
- Check if it fits your scheduling needs

## Step 3: Approve or Reject

1. Click on the availability request
2. Choose:
  - **Approve:** Accept their availability preferences
  - **Reject:** Decline (they'll need to discuss with you)
3. Add notes if needed

### Notification:

- Employee receives email notification
- They see the status update in the app

“ **Best Practice:** Communicate with employees about rejected availability to find a solution.

# ? Managing Leave Requests

## Step 1: View Leave Requests

1. Navigate to **Leave Management**
2. Filter by:
  - **Pending:** Awaiting your decision
  - **Approved:** Already approved
  - **Rejected:** Previously declined

## Step 2: Review Each Request

For each leave application, check:

- Employee name and leave dates
- Leave type and reason
- Their remaining leave balance

- Current schedule conflicts

The system shows warnings if:

- Employee has a shift on that day
- Too many people already on leave
- Insufficient leave balance

## Step 3: Make Your Decision

### To Approve:

1. Click **Approve**
2. Confirm approval
3. Employee receives confirmation email

### To Reject:

1. Click **Reject**
2. Add a reason (helps employee understand)
3. Employee receives rejection email

“ **⚠ Important:** Once approved, leave should rarely be revoked. Employees plan around approved leave.

## ? Viewing Team Forecasts

Track your team's hours and costs.

### Step 1: Access Forecasts

1. Go to **Team Schedule**
2. Select the date range
3. Enable forecast view

### Step 2: View Overall Forecast

You'll see totals for the selected period:

- **Total Employee Hours:** Sum of all shift hours
- **Total Wage Cost:** Based on hourly wages
- **Number of Employees Scheduled**

### Step 3: View Daily/Hourly Breakdown

- **Daily Forecast:** Hours and costs per day
- **Hourly Forecast:** Hour-by-hour staffing levels (helps identify understaffed periods)

“📄 **Use This For:** Budget planning, identifying gaps in coverage, optimizing labor costs

## ? Managing Open Shift Claims

When employees claim open shifts, you need to approve them.

### Step 1: View Claim Requests

1. Go to **Open Shifts** or **Claim Requests**
2. See all pending claims

### Step 2: Review Each Claim

For each request:

- Employee name
- Their current schedule
- Shift details
- Request date

### Step 3: Approve or Reject

1. **Approve:** Employee is assigned the shift, receives confirmation
2. **Reject:** Shift remains open for others to claim

## ? Using Shift Templates

Save time by creating reusable shift templates.

### Step 1: Create Templates

1. Go to **Shift Master** or **Shift Templates**
2. Click **Add New Shift Template**
3. Define:
  - Shift name (e.g., "Morning Shift")
  - Standard start time (e.g., 9:00 AM)
  - Standard end time (e.g., 5:00 PM)

### Step 2: Use Templates

When creating shifts:

1. Instead of entering times manually
2. Select from your templates
3. Times auto-fill (you can still adjust)

“  **Common Templates:** Morning Shift, Afternoon Shift, Night Shift, Weekend Shift

# Understanding Schedule Status

## ? Shift Status Indicators

Status	What It Means	For Employees	For Managers
<b>Draft</b> <input type="checkbox"/>	Shift is being planned	Not visible to you	Can edit freely
<b>Published</b> <input type="checkbox"/>	Schedule is released	You can see it	Can still edit
<b>Approved</b> <input type="checkbox"/>	Schedule is final	Confirmed shift	Locked in
<b>Unpublished</b> <input type="checkbox"/>	Schedule was retracted	No longer visible	Back to draft

## ? Color Coding

Different shift types may have different colors:

- **Morning shifts:** Often shown in light blue
- **Evening shifts:** Often shown in orange
- **Night shifts:** Often shown in dark blue
- **Open shifts:** Often shown in gray or outlined

(Colors are customizable by your administrator)

# Notifications & Alerts

## ? Email Notifications

You'll receive emails for:

- New shifts assigned to you
- Schedule published/approved
- Availability request status
- Leave approval/rejection
- Open shift claim status

## ? In-App Notifications

Real-time alerts appear in the app for:

- Schedule changes
- New open shifts available
- Urgent manager messages
- Reminder about upcoming shifts

## ?? Notification Settings

Customize your preferences:

1. Go to **Settings** or **Preferences**
  2. Select **Notifications**
  3. Choose what you want to be notified about
  4. Select delivery method (Email, App, SMS if available)
- 

# Frequently Asked Questions

## General Questions

**Q: How far in advance will I see my schedule?** A: This depends on your manager's scheduling practices. Typically, schedules are published 1-2 weeks in advance.

**Q: Can I trade shifts with coworkers?** A: This depends on your company's policy. Check with your manager about the shift swap process.

**Q: What if I can't work a scheduled shift?** A: Contact your manager as soon as possible. You may need to find coverage or request leave.

## For Employees

**Q: Why can't I apply for leave on a specific date?** A: Common reasons:

- You have an approved shift on that day (cancel shift first)
- It's a blackout day (busy period)
- You don't have enough leave balance
- Monthly leave limit reached

**Q: My availability request was rejected. What now?** A: Talk to your manager to understand why and work out a solution that works for both.

**Q: Can I claim multiple open shifts?** A: Yes, as long as they don't overlap with your existing schedule.

**Q: How do I know if my claim was approved?** A: You'll receive a notification and email. The shift will appear on your schedule if approved.

**Q: What's the difference between "unavailable" and "requesting leave"?** A:

- **Unavailable:** Standing preference (e.g., "I prefer not to work Sundays")
- **Leave:** Specific time off request for a particular date

**Q: Can I see how much I'll earn this pay period?** A: Yes! View your schedule and it will show forecasted wages based on your hourly rate.

## For Managers

**Q: What happens if I delete an approved shift?** A: The employee will be notified. Use this carefully as it affects their expected income.

**Q: Can I assign an employee who has leave approved?** A: No, the system prevents this to avoid conflicts.

**Q: What's the difference between publishing and approving?** A:

- **Publishing:** Makes schedule visible to employees (still editable)
- **Approving:** Finalizes and confirms the schedule (locked)

**Q: How do I handle overstaffing/understaffing?** A: Use the hourly forecast view to see staffing levels throughout the day. Adjust shifts accordingly.

**Q: Can I copy last week's schedule?** A: Yes! Use the "Copy From Past Week" feature to duplicate a previous schedule.

**Q: What if an employee isn't showing up in my list?** A: They may be:

- In a different branch

- Not in your management hierarchy
- Marked as inactive
- Not assigned a schedulable role

**Q: How do I create an open shift?** A: When creating a shift, select "Open Shift" as the employee instead of a specific person.

## Leave Management

**Q: What's a blackout day?** A: Dates when leave requests aren't allowed due to business needs (e.g., holiday rush, major events).

**Q: How is leave balance calculated?** A: Based on your employee group's annual allocation minus leaves already taken this year.

**Q: What's the monthly leave limit?** A: Prevents all leave being used at once. Limits how many days per month you can take per leave type.

**Q: Can I cancel approved leave?** A: Contact your manager. They can update the status in the system.

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## Tips for Success

### For Employees ?

1. **Set your availability early:** Helps managers plan better and gives you shifts you prefer
2. **Check your schedule regularly:** Respond quickly to any changes
3. **Plan leave in advance:** Better chance of approval
4. **Keep the app notifications on:** Stay informed about schedule updates
5. **Communicate with your manager:** If you have scheduling conflicts or concerns

### For Managers ?

1. **Publish schedules consistently:** Employees appreciate predictability
  2. **Respect approved availability:** It builds trust with your team
  3. **Use forecasts:** Avoid overstaffing (high costs) or understaffing (poor service)
  4. **Respond to requests promptly:** Don't leave employees waiting
  5. **Communicate changes:** If you must change an approved schedule, explain why
  6. **Use shift templates:** Saves time on repetitive scheduling
  7. **Plan for busy periods:** Schedule extra staff during known rush times
-

# Getting Help

## Need Assistance?

1. **Contact Your Manager:** For scheduling questions or conflicts
2. **HR Department:** For leave policies or system access issues
3. **IT Support:** For technical problems or login issues
4. **User Guide:** Refer back to this guide for step-by-step instructions

## Reporting Issues

If you encounter a problem:

1. Note the date, time, and what you were trying to do
2. Take a screenshot if possible
3. Report to your manager or IT support
4. Include any error messages you saw

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# Quick Reference Guide

## Common Actions

I Want To...	Employee	Manager
See my schedule	My Schedule	Team Schedule
Set when I can work	My Availability	Team Availability
Request time off	Apply Leave	Leave Management
Claim an open shift	Available Shifts	Open Shifts
See my hours/pay	My Schedule (View Hours)	Team Forecast
Get notifications	Settings → Notifications	Settings → Notifications

## Status Meanings

Icon/Status	Meaning
 Draft	Not visible to employees yet
 Published	Visible but not final

Icon/Status	Meaning
☑ Approved	Confirmed and locked
☐ Pending	Waiting for approval
☑ Approved	Request was accepted
☐ Rejected	Request was declined

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# Conclusion

The Employee Scheduling System makes managing work schedules simple and transparent. By following this guide, you can:

- ☑ Stay on top of your work schedule
- ☑ Communicate your availability
- ☑ Plan your time off effectively
- ☑ Find additional work opportunities
- ☑ Track your hours and earnings

**Remember:** Communication is key! If you have questions or concerns, don't hesitate to reach out to your manager.

Happy scheduling! ☑☑

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Revision #6

Created 8 December 2025 11:33:05 by Shrikant Patel

Updated 5 March 2026 05:59:44 by Shrikant Patel