Self Serve

Once scheduling has been performed, the Self-Serve user (employee) who has a user login name defined by the Administrator can access the system.When a Self-Serve user logs in, only the Self Serve Menu appears. Personnel who have access to other User Groups, such as Administration or Schedulers, can access the Self Serve area by clicking on the [My Schedule] button, located in the upper left of the Main Menu screen, along the top bar of buttons.
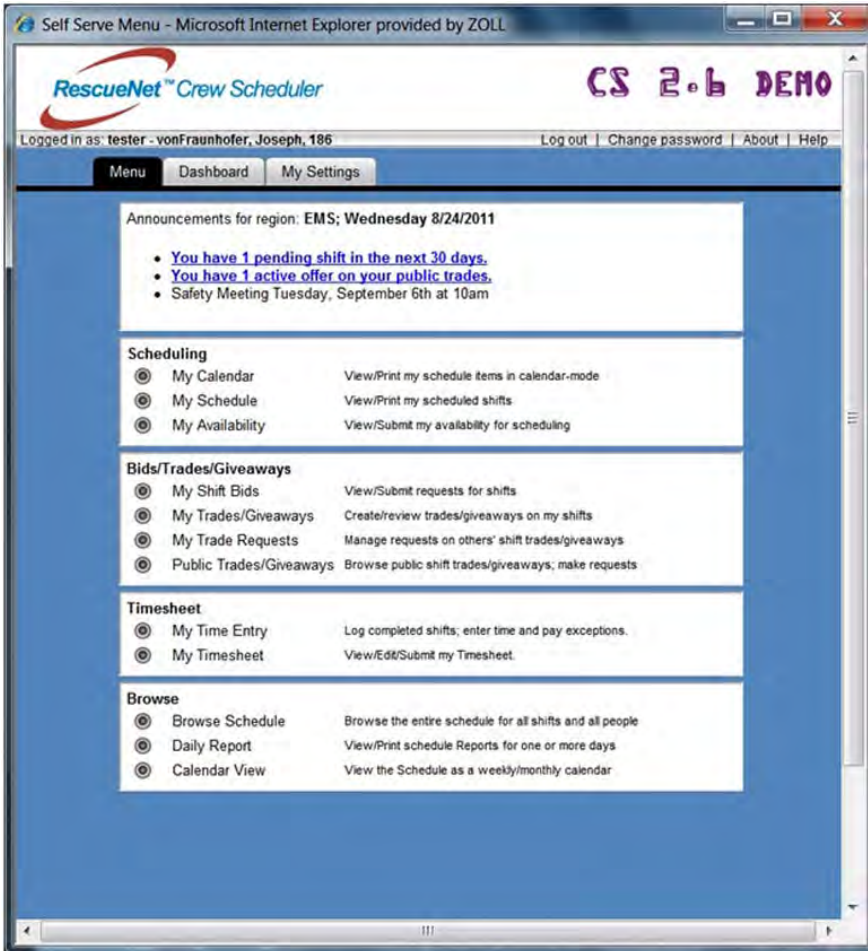

Logging In

After your system administrator has completed the initial setup of Crew Scheduler, you can log into the system.

Launch your Internet browser and enter the Crew Scheduler web site address. The Crew Scheduler Log-In page appears:
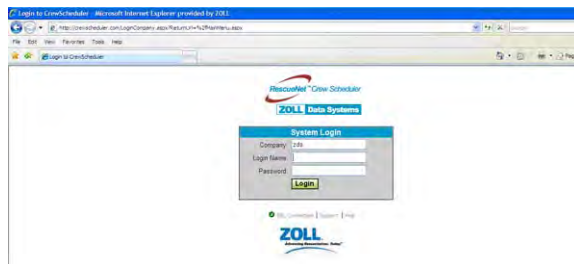
1. Enter the Company Name.

2. Enter your User Name and password.

3. Click Login and the Crew Scheduler Self Serve menu appears.

The Self-Serve Menu is broken up into six main areas: Announcements, Scheduling, Bids/Trades, Giveaways, Timesheet, Browse and Show/Hide My Status. Use the Self-Serve area to view your schedule, submit availability, place bids on shifts, view/edit timesheets, access your time entry, and view the entire schedule.

Note: If a particular user only has access to the Self-Serve screens, the user is transferred to the My Schedule view upon login. The Main Menu is not shown in this scenario.

Scheduling

My Calendar

My Calendar" presents a self-serve screen and a convenient calendar-based view of schedule data for a given employee.This screen shows scheduled shifts, availability, and shift bids, and provides click actions for navigating to items of interest. For high-level users (those with edit permission level "FULL"), the [Set Resource] button is available, allowing the screen context to change to that of any desired employee.

Note: The "My Calendar" screen uses the same permission settings as the existing "My Schedule" screen.

The screenshot shows a typical employee calendar with shifts, availability items, and shift bids. Note that when an item spans multiple days, the item is continued with a "(cont.)" label.

My Calendar Screen: Summary of Controls

The following controls appear at the top of the My Calendar screen.

- Show Shifts/Not Available/Shift Bids checkboxes: These turn on or off the display of the various item types.

- Verbose checkbox: If checked, additional information is added to the display of each item. Turning off verbose display can be helpful in getting the calendar to print on a single page.
- [Refresh] button: This refreshes the data displayed in the screen.
- [Print] button: This brings up a standard print dialog, allowing you to set printing options and print the calendar. If the calendar contains a large number of items, the printed version spans to a second page. If this occurs, try turning off verbose-mode.
- [Set Resource] button: This button is only available to users with edit permission of FULL. Clicking the button allows the screen context to be set to any employee.

The following actions occur when you click on an item in the calendar:

- Shift item: Goes to Shift Properties screen. Editable mode depends on user's permissions.
- Availability item: Goes to "My Availability" screen, if user has permission to do so. Editable mode depends on user's permissions.
- Shift Bid item: Goes to "My Shift Bids" screen. Editable mode depends on user's permissions.

Employee Confirmation

An employee who has pending shifts in the next 30 days sees a a message-link on the self-serve menu screen. Clicking on this link will open the My Calendar screen and the employee can click the link to confirm the pending shifts.
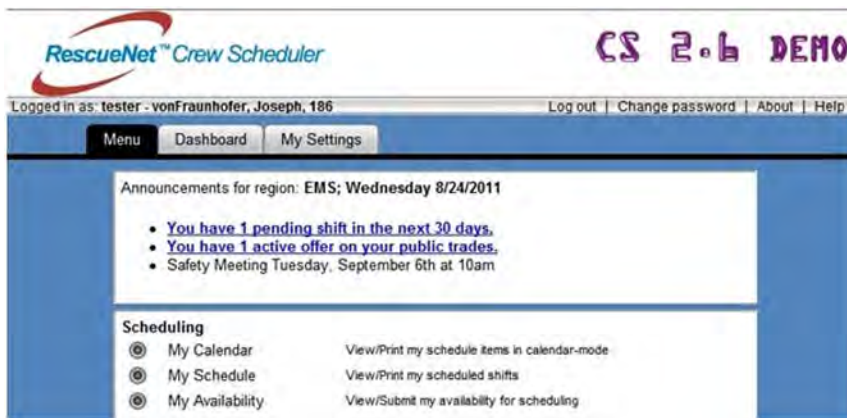
Click on the link to open the My Calendar screen and confirm the pending shifts and for the system to send a message to the Audit Log. For more information, see "Employee Confirmation" on page 4-34.

My Calendar: Display "Continued" Shift Items

You can display continued shift items on your calendar at: **Self Serve > My Calendar**

A system preference controls whether shifts crossing midnight display an additional "Continued" item on the second day.

You can set this preference at: **Main > Admin > Preferences > Screen Settings > My Calendar - Cont. Shift items**.

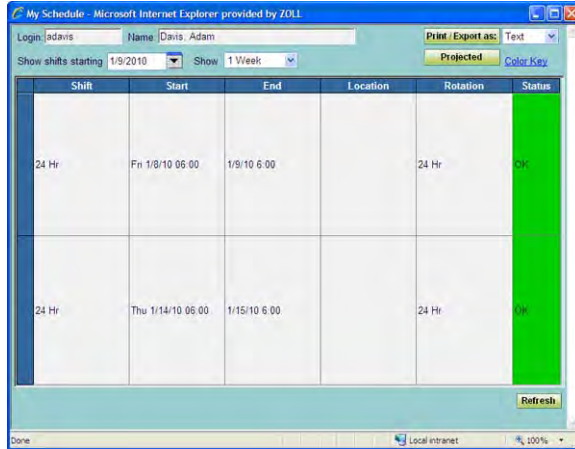# My Schedule

The My Schedule screen is used to display your currently scheduled shifts.

To open the My Schedule screen:

1. From the Self Serve Menu, select My Schedule.

2. Select the date from which you want to display your shifts, by selecting from the "Show Shifts Starting" box.

3. Select the amount of time you want to display in the Show box. For example, selecting "1 Week" will show your scheduled shifts for one week, starting on the date you selected.

4. Select to Print/Export as: text, Excel, Word or RTF.

5. Project Schedule – The Projected button allows crew members to project their schedule into the future. Projected shifts are based on the current shift template and crew member must be part of a shift template to use this option.

6. View Color Key – for a description of the slot status

The schedule displays with your scheduled shift's name (Shift), start and end dates, location, rotation name, and status.
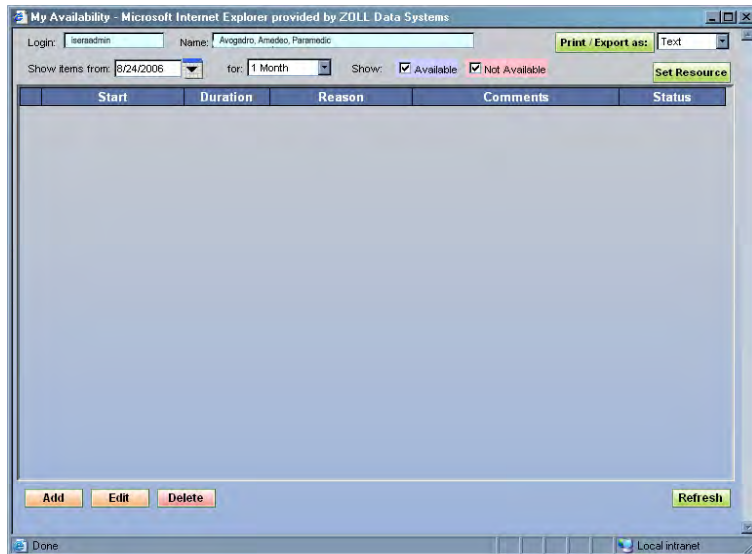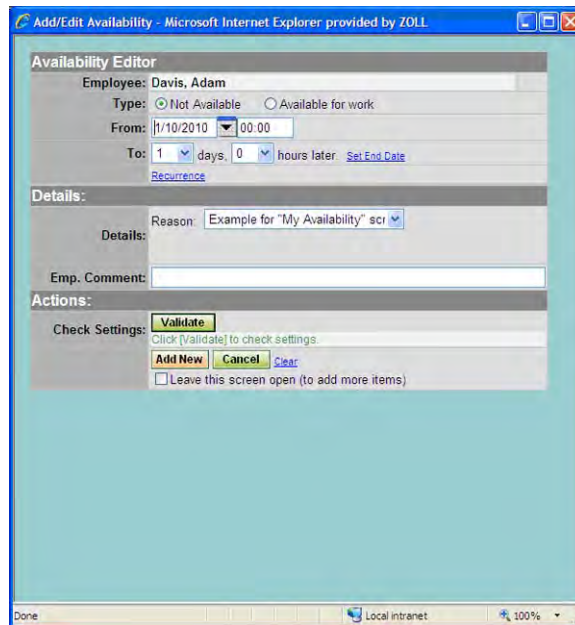

My Availability

From the My Availability screen you can view/submit your availability for scheduling.

To view or submit availability for scheduling:

1. From the Self-Serve Menu, select My Availability.

2. To add a new availability block, click the [Add] button. This brings up the Add/Edit Availability window.

3. Select Available or Not Available for work.

4. Select the start and end dates and times for which you will not be available.

5. Select a reason from the drop-down, and enter a comment, if desired.

6. Click the [Add New] button.

7. Once Available or Not Available time has been added, you can view it from the main My Availability screen.

Availability Recurrence

For more information on setting up and deleting availability recurrence, see "Setting Up Availability Recurrence" on page 4-40.

Bids/Trades/Giveaways

My Shift Bids

The My Shift Bids screen is displays slots for users who are qualified and available. Downtime and overtime rules are not checked until a bid is submitted.

1. From the Self Serve Menu, select "My Shift Bids".
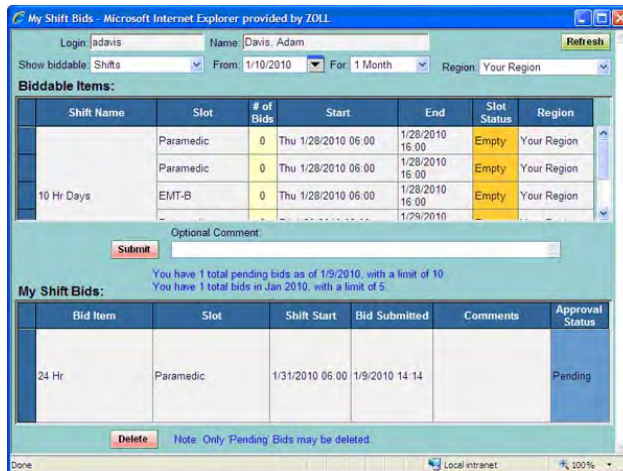
2. The top portion of the My Shift Bids screen allows the employee to select whether they want to view biddable shifts or template rotations, the starting date, amount of time (1day, 1 Week, 2 Weeks, 1 Month) and the region.

3. In the Biddable Items section, select the shift you wish to bid on.

4. Place any comments in the Optional Comments box.

5. Click the [Submit] button.

6. You can see the submitted shift bid(s) in the My Shift Bids table, with an Approval Status of "Pending". After an Approver reviews the shift bid, the Approval Status is either Approved or Denied.

Note: You can only delete pending bids.

My Trades/Giveaways

Shift trading allows employees to trade shifts with other employees. Shift trades can be automatic, or can be sent to supervisors for approval.
The following screenshot shows an example of a My Trades screen.

Work flow for Unsupervised Trades

1. Employee A goes to My Trades screen, selects a shift, and opens it for trading.

2. Employee A selects a shift of employee B, and invites employee B to swap shifts.

3. Employee B goes to "My Trade Requests" screen, and either accepts or denies the invitation.

4. If accepted, then the schedule is updated with the swap information: employee A is scheduled for employee B's shift, and vice-versa.

Work flow for Trades with Supervisor Approval

1. Employee A goes to My Trades screen, selects a shift, and opens it for trading.

2. Employee A selects a shift of employee B, and invites employee B to swap shifts.

3. Employee B goes to My Trade Requests screen, and either accepts or denies the invitation.

4. If accepted, the trade and request are marked Pending Approval.

5. Supervisor goes to Review Shift Trades screen and approves or denies the trade. Before approving or denying, the supervisor can validate the impact the trade would have on employee overtime pay.

6. If approved, then the schedule is updated with the swap information: Employee A is scheduled for employee B's shift, and vice-versa.

For a shift trade to be allowed, the following criteria must be met:

- Qualified - Each employee is qualified for the new shift.
- Available - Each employee is available for the new shift.
- OT limits - The new shift does not cause either employee's Net OT to increase beyond a threshold.
- Rest period - The new shift does not violate the minimum rest period value.
- Future only – Both shifts must be in the future.

Related Topics

- For more information on rules for valid shift trades, Net OT, see ""Net OT" defined" on page 5-8.
- For Net OT and pending timesheet items, see "Net OT and pending timesheet items" on page 5-8.
- For more information on Private and Public Trades, see "Private and Public Trades" on page 5-13.
- For more information on Notification, see "Notification" on page 5-13.

- For more information on Active Links on the self serve menu, see "Active Links on the Self-Serve Menu" on page 5-14.
- For more information on status of swapped shifts, see "Status of Swapped Shifts" on page 5-14.
- For more information on status of trades and trade requests, see "Status of Trades and Trade Requests" on page 5-14.

Employee FAQ for Shift Trading

How do I trade a shift with my buddy?

1. Go to screen My Trades.

2. Select your shift; click [Open as] [Private Trade].

3. The "Add Trade Request" screen will pop up. Select your buddy's shift and click [Add Request].
.If you don't see your buddy's shift in this screen, then one of you is not available and qualified for the other shift.

4. Once your buddy accepts the request, your shifts will be swapped. The final swap might require supervisor approval.

How do I open my shift so anybody can offer a trade?

1. Go to screen My Trades.

2. Select your shift; click [Open as] [Public Trade].

3. Your shift is now visible to employees who are qualified and available for it.

4. When another employee offers a shift on this trade, you will see the request on the My Trades screen. If email notification is enabled, you will get an email telling you about the offered shift.

5. To do the swap, go to screen My Trades, select the trade and the desired request, and click [Swap]. The final swap might require supervisor approval.

How do I make an offer on a public trade?

1. Go to screen Public Trades. This will show shifts for which you are qualified and available.

2. Select a shift and click [Add Requests].

3. The "Add Trade Request" screen opens.
   If this screen is empty, then the trade owner is not qualified and available for any of your shifts.

4. Select one of your shifts and click [Add Request].
   This will add your request and notify the trade owner that you have offered a shift for trading. If desired, you may offer additional shifts at this point.

5. If the trade owner selects one of your offered shifts, the shifts will be swapped or set to "Pending" if supervisor approval is required.

Why don't I see all of my/their shifts when making trade requests?

The "Add Trade Request" screen only shows shifts for which you (or the other person) are qualified and available.

Shift Giveaways

This feature allows employees to give away selected shifts to other employees who meet all requirements for the shift. Giveaways work exactly like shift trades, except instead of two employees exchanging shifts, one employee gives up a shift while the other takes it.
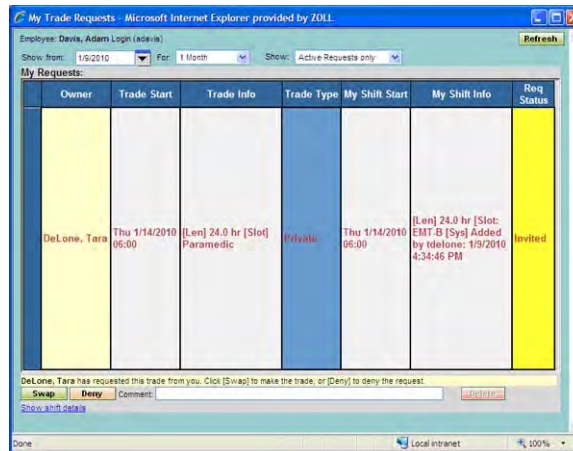
Employee FAQ

How do I give away a shift?

1. Go to screen My Trades/Giveaways

2. Select your shift; click [Open as] [Giveaway].

3. Your shift is now visible to qualified/available employees looking to take shifts.

How do I see shifts available to be taken?

1. Go to screen Public Trades/Giveaways. This will show trades and giveaways where you are qualified and available.

2. Select a shift of type "Giveaway" and click [Take Shift].

3. If you meet the overtime requirements, you will be given the shift right away. If your OT is above the approval threshold, the giveaway will require supervisor approval.

My Trade Requests

The My Trade Requests screen allows employees to view all the trade requests that have received from other employees. The following screenshot shows an example:

The field descriptions are as follows:

- **Show from**:Select start date to view request
- **For:**1 Day, 1 Week, 2 Weeks, 1 Month, 6 Months or 1 Year
- **Show**:Active Requests Only or All Request
- **My Requests**:Show a list of request from other employees
    - **Owner**:Person requesting the trade
    - **Trade Start**:The date and time of the owner's shift they wish to trade
    - **Trade Info**:Length of shift and Slot information
    - **Trade Type**:Private or Public
    - **My Shift Start**:The date and time of your shift the other employee would like to trade
    - **My Shift Info**:Length of shift, slot information and information on who entered trade with date and time
    - **Request Status**: For more information on each status item and description, Table 5-2 on page 5-15.
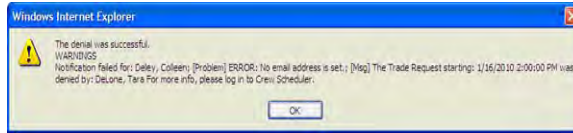
If you elect to accept the trade, click on the Swap button and add any comments.
The following screen appears:

Click OK to continue the swap, or Cancel to stop the swap.

If you elect to deny the trade, click on the Deny button and add any comments. Click OK.

The screenshot shows an example of the screen that appears after you deny a trade.

Public Trades/Giveaways

The Public Trades/Giveaways area allows employees to view all the public trades and giveaways entered by other employees.

The following screenshot shows an example. The top section of the screen is used to filter the trades and giveaways that are being viewed.

Available public trades and giveaways are:

- **# Req** – Number of employees who have requested to trade the trade or giveaway
- **Type** – Identifies whether the line item is a trade or giveaway
- **Start** – Date and time of shift being made available for trade or giveaway
- **Length** – Length of shift being made available for trade or giveaway
- **Employee** – The employee wanting to trade or giveaway the shift
- **Slot** – The slot within the shift being made available for trade
- **Comments** – A list of comments entered for the trade or giveaway
- **Trade Status –** For more information, see "Status of Trades and Trade Requests" on page 5-14.

Setting up a Trade

If you are an employee and have found a shift you would like to trade:

1. Select the shift from the list.

2. Click on the Add Request.

3. A screen appears showing all the shifts available for trade.

4. Select the shift to trade, click on the Add Request button and add any comments.
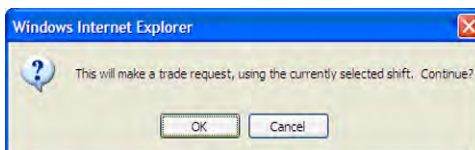
5. Click OK. A screen appears to confirm the added request.

6. Click OK.

Now the employee who initiated the trade is notified of the trade offer and has the option to either swap or deny the offer. Employees can view the trade offers by going to My Schedule>My Trades/ Giveaways and selecting the shift.

If an employee finds a shift they would like to take:

1. Select the shift from the list.

2. Click on the Take Shift button.
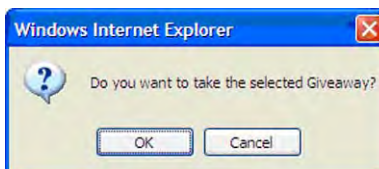
3. Click OK. The following screen appears.

4. Click OK.

The shift no longer appears on the schedule of the employee who wanted to give the shift away. The schedule appears for the employee who accepted the shift.

Timesheets

My Time Entry

The "My Time Entry" screen allows creating, editing, and deleting timesheet items.

This screen is accessible from several places:

1. From the [Edit Timesheet] button on screen "Review Timesheets".

2. From the "My Time Entry" button on the self-serve menu. This button will not be visible unless employees have permission to open the screen "My Time Entry - Main":

3. From the [Edit] button on screen "My Timesheet".

Once open, the My Time Entry contains a tab for each type of timesheet for which permission exists. If view permission does not exist for a particular tab, then that tab is not visible. Some tabs, such as the Adjust Hours tab might be enabled for some users (for example, Timesheet Approvers), but not for employees. If a particular tab such as Mileage does not apply to your company, the permission can be revoked for all users and the tab not appear again.

Entering Time Exceptions

- **Punch Module Note – Employee access to "Shift" tab:** If your employees are punching in and out for shifts, you probably do NOT want to grant them access to screen "My Time Entry – Shift tab". Employee access to the Shift tab is intended for companies that allow employees to enter their own shift hours.

- **Permissions Note – [Set Resource] button**: For users with view permission higher than level "Current User Only", the My Time Entry screen contains a button called [Set
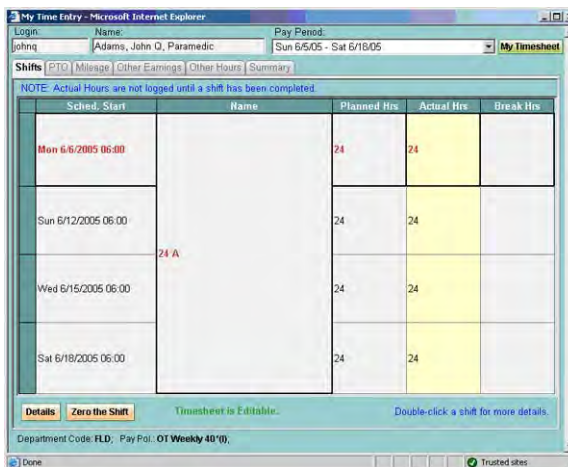
Resource]. This button allows the context of the screen to be changed to that of another user. Only supervisors and approvers should have access to this button. Employee permissions for "My Time Entry – Main", should never be set higher than "Current User Only". This rule applies to all of the self-serve screens: My Schedule, My Availability, My Shift Bids, and My Timesheet.

Example: employee enters shift times and PTO items:

The following example demonstrates an employee using the Time Entry screens to enter some timesheet data. In this example, employees have been granted permission to all of the time entry screens except for "Adjusted Hours". This example is for a NON-PUNCHING employee. A punching employee should not be given access to the Shifts tab.

Employee John Q. Adams opens the My Time Entry screen, which defaults to the "Shifts" tab, showing planned (scheduled) and actual (worked) hours for all shifts in the pay period. Double-clicking on the Monday shift here:

This brings up the Shift Details screen shown below.

In the example, John has added a 90-minute block of time to the end of the shift (from 0600 to 0730), and he has selected the payroll code "LC – Late Call". Further, he has provided a response number for the CAD call that made him late. For a shift exception like this, either a comment or a response number must be provided. The Department Code (FLD) is John's default, and has not been altered. The earnings code (ST) is the default choice for shifts.

The entire procedure John used to enter his late call was:

1. From My Time Entry, double-click on the desired shift.

2. From Time Entry Details, click the [New] button, and enter exception information (times, codes, comments).

3. Click the [Save Changes] button.

For his Sunday shift, John went home six hours early due to illness. After editing the end time for the Sunday shift (not shown in this example), he goes to the "PTO" tab and claims six hours of sick time:

The procedure here was:

1. From My Time Entry, click the "PTO" tab.

2. Click [New] and enter information. Once [New] is clicked, that button disappears and the [Save Changes] button appears.

3. Click [Save Changes].

John also claims a reimbursement for the Stapler he purchased for use on Project 23:

To claim the reimbursement:

1. From My Time Entry, click the "Other Earnings" tab.

2. Click [New] and enter information.

3. Click [Save Changes].

My Timesheets

To access My Timesheets, go to: **Self Serve Menu>Timesheet>My Timesheet**.

This section illustrates how My Timesheets work with an example.

John has completed his timesheet entry. He opens the My Timesheet screen and verifies his information:

- Stapler reimbursement
- 90-minute Late Call on shift starting Tues the 7th.
- Went home 6 hrs early on shift starting Sun the 12th. (Shift has only 18 hrs.)
- 6 hrs PTO (sick time) to make up for the item above
- Overtime kicks in the second work week, once his worked hours exceed 40. He works 18 hrs on the 12th, and 24 hrs on the 15th, so 2 hours of the 15th are overtime.

Items where scheduled hours differ from actual hours are colored red. These items are highlighted because they require scrutiny by the timesheet approver.

When John is ready to submit the timesheet, he can enter an optional comments and click the Submit button. In this example, he uses the comment box to note his equipment purchase.

Note: If you want to disable the timesheet-submit feature, but still allow employees to view the My Timesheet screen, simply set the edit permission to NONE for the Self-Serve permission group.

Browse

Browse Schedule
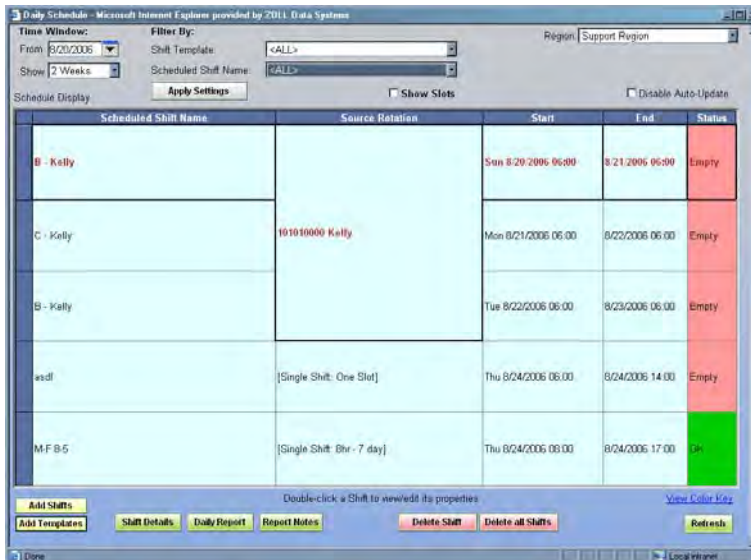
The Browse Schedule screen is used to browse through the entire schedule for all shifts and all personnel.

To browse the schedule:

1. From the Self Serve Menu, select Browse Schedule. This will bring up the Daily Schedule screen.

2. You can change the day that is displayed by selecting from the "From" drop-down menu.

3. You can change the period of time that is displayed by selecting from the Show drop-down menu.

4. You can change the filtering criteria by selecting from either the Shift Template or Scheduled Shift Name drop down under Filter By.

5. If you have permissions to view other regions, you can select to view other regions by selecting from the Regions drop down list.

6. To view all slots on a shift, select Show Slots

7. You must click on the Apply Settings button to apply all settings changed above (the Apply Settings button will turn yellow after a setting has been changed)

You can view shift details by selecting a shift in the Schedule Display and either double clicking on it or clicking on the Shift Details button at the bottom of the page.

You can view a report of the schedule by clicking on the Daily Report button at the bottom of the page (see chapter 4, the Scheduling chapter for more information on the Daily Report)

A link in the lower right hand corner of the screen, View Color Key, allows you to view the different shift and slot statuses.

Note: The Self Serve user is not able to perform any editing functions from the Daily Schedule screen.

Daily Report

The Daily Report screen is used to view scheduled shifts for a particular day in the desired region. You can use the Schedule Notes section in the Daily Report to enter any additional information to be included on printed reports.


To view or print the Daily Report:

1. From the Self Serve Menu, select Daily Report.

2. Enter the shift date you wish to view in the Display From box.

3. Select the region you wish to view in the Region box.

4. Select the period of time you wish to view from the "For" drop down list (1day, 1 Week, 2 Weeks and 1 Month).

5. Select they layout style of the report from the Style box.

6. Select the Sort by option you wish to see from the drop down list (Start Time, Shift Name and Vehicle)

7. To print the Daily Report, you can export the schedule in Word or PDF by selecting from the drop-down menu next to the [Print / Export to:] button, then click the [Print / Export to:] button.

Calendar View

Calendar View shows a monthly or weekly calendar for a single region. The view can be configured to show shifts, shift bids, available items, and not-available items.
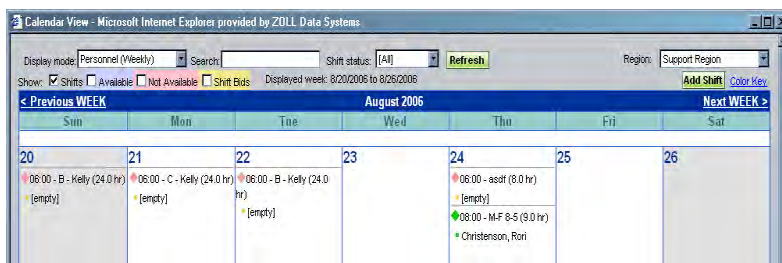
Screen Controls and Filters

- Checkboxes for shifts, availability, and bids: Allow the display of Available, Not-Available, and Shift-bid items. In addition, shifts items can be turned off in order to de-clutter the screen when viewing availability.
- Search filters: To set a search filter, type a phrase into the search box and press the [Enter] key (or use the [Refresh] button).
  - Use Search Crew mode to filter the calendar based on employee name.
  - Use Search Shift mode to filter by shift name.
- Tooltips and Click Action: for more information,see "Tooltips and Click Action" on page 4-10.
- Status filter: The status filter allows the calendar to show only shifts/slots of a that contain a particular status. These status filters: (pending, conflict, downtime, unqualified, pending, empty, unknown) use SLOT status. Only slots of that status will be shown on the screen and in the pop-up tooltip. Note that the shift may have a different status.

Status filters "OK" and "Not OK" use SHIFT status. All shift slots are included on the screen and in the pop-up tooltip.

Show/Hide My Status

Show My Status: Clicking on the Show My Status link at the bottom of the Self Serve Menu shows your next shift name, date and time; your home region and the date and time your password expires.By clicking on the Hide My Status link, the status information becomes hidden.