

Core Package Tutorials # 9-11: Manage Your Availability

Click this link to view the employee tutorials:

<http://www.optimal-internet.com/ScheduleSource/employeetutorial/>

A. Availability Hierarchy

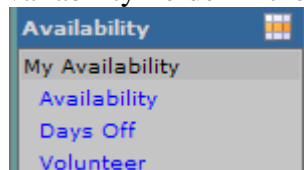
1. It is important to understand which availability is used when the automated scheduling engine is used to fill schedules. The system looks at the hierarchy listed below. Thus granted Days Off for a week will override any availability that has been entered.
2. Hierarchy:
 - 1) Days Off
 - 2) Rotations
 - 3) Alternate Availability
 - 4) Date-based Availability
 - 5) Local Availability
 - 6) Master Availability – if available to you
3. Override Capability:
 - A Scheduler can override availability entered conflicts and schedule an employee into any shift manually.
 - An Employee can override their own availability entered when claiming shifts from the swapboard.

B. How to View and Enter Your Availability (Tutorial # 9)

- Local Availability is used to enter what times you are normally available to work during a normal week. It is when you are available to work, not when you will work.

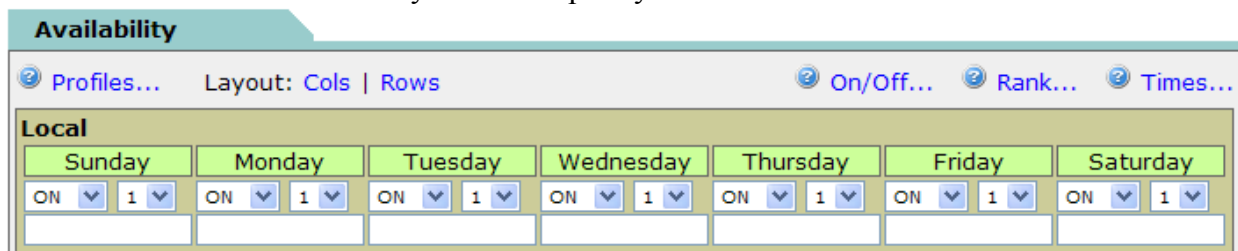
Step 1: Logon to the Employee Portal.

Step 2: Click on the Availability Folder in the left menu to open the list of options.



Step 3: To View your Availability - Click on the 'Availability' link.

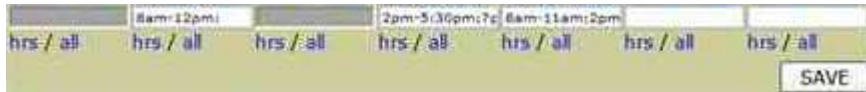
- The right page displays the Availability entry screen.
- Local Availability is in the top 'days' chart.



- This screen shows the current availability that is entered for you.
- Notice the defaults. If no availability is entered, you will have.
 - 1) A blank box indicates 24 hr availability every day.
 - 2) No priority given to any preferred days to work as all are ranked 1.

Step 4: Have you been given access to Enter or Edit your Availability?

1. If you have been given the privilege to enter or edit your availability, your local availability chart will have the hrs/all links and a 'Save' button. Proceed to Step 5.



2. If your local availability chart does not contain these, you must contact your scheduler to have your availability edited by the organization.

Step 5: Choose your priority for your most favorite days to work.

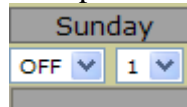
1. Set your most preferred days to the highest ranking (1-9).
2. Click on the drop-down list to choose day rankings.



- The automatic scheduling engine will try to choose your shifts for the most preferred days to work. (highest ranked number)

Step 6: Choose your Off days.

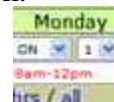
1. If you are not available for any work shifts, set that day to off.
2. Click on the On drop-down list and choose Off.




3. The box will turn to grey.
4. Any times entered will be ignored, as you are Off all day.

Step 7: Time ranges are entered to restrict the available range to less than 24 hours.

1. A blank box with no entry is the default and has no restricts on availability. Thus the availability is 24 hours.
2. Times can be entered in 2 different ways: Manually or Using the Availability Tool.
3. Manually Enter Times:
 - Click in the white box and type in the times you are available to work.
 - The basic format is **T1-T2**; Ex: 8am-12pm; or 8:30am-2:30pm;

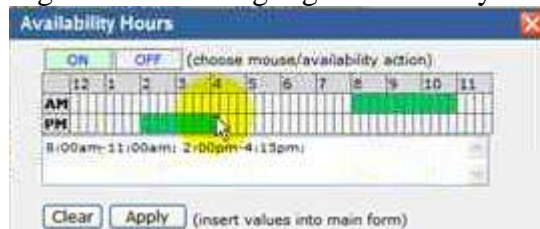


- Where T1 and T2 are times on 15 minute intervals, open-ended ranges are allowed. Ex: 1pm-; This would be availability from 1pm to midnight
- Intervals of work time need to be separated by a semi-colon.
Ex: 3pm-8pm; 9pm-;

- Use the Time Help link in the time menu bar. 

4. Use the Availability Tool to enter times:

- Click on the 'hrs' link below the times box: [hrs / all](#)
- Click and drag the cursor to highlight the hours you can work.



- Note the times are automatically written in the white box below the chart.
- Click Apply to insert the times into the Local chart for that day.
- Click Clear if you have an error, to clear the screen.

5. When times are entered, the color turns to red.

6. Click the  button.

Step 8: View availability by Calendar Month.

1. Scroll to the calendar below the Local availability box.
2. Availability Times you have entered are shown by day.
3. Days OFF are written in red.

< April, 2008 >						
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
30 OFF +	31 8am-12pm; +	01 OFF +	02 2pm- 5:30pm; 7pm- 9:30pm; +	03 8am-11am; 2pm-5pm; 6pm- 9:15pm; +	04 +	05 +

4. Local availability is carried on every month. Use the < or > to view the previous or the next month. < April, 2008 >
5. Times show in black indicate that local availability is being used.
6. Times shown in yellow highlight indicate that alternate availability is being used.
7. Times shown in tan highlight indicate that date-based availability is being used.


C. How to Enter an Alternate Availability (Tutorial # 10)

- Alternate Availability is used when you want to change your availability on a specific day for a specific month.

Step 1: Click on the Availability Folder in the left menu to open the list of options.

Step 2: Click on the 'Availability' link in the left menu.

Step 3: Have you been given access to Enter or Edit your Alternate Availability?

1. If you have been given this privilege you will see a blue plus (+) sign on every day in the future in the calendar view. Proceed to Step 4. 
2. If you do not have a blue plus (+) sign on the calendar, you must contact your scheduler to have your alternate availability entered by the organization.

Step 4: Edit your Alternate Availability.

1. Scroll down to the calendar. Use the scroll arrows to see the month you want, < or >.
2. Note the calendar shows your current availability for each day.

Ex: April 10th below



3. Click on the blue plus (+) sign on the day in the calendar that you want to enter a different availability for instead of your available times shown on the calendar.


4. Change to an Off day.

- On the Pop-up edit screen, choose OFF from the drop-down list.

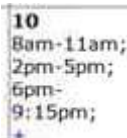


- Click SAVE.
- The calendar will refresh and you now appear as OFF on that day.



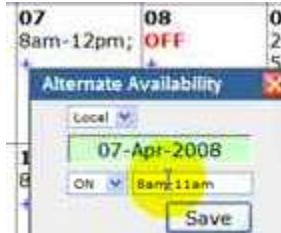
- If you want to remove this new availability and go back to your normal availability for that day, click on the red [x] . This will delete your alternate availability and you will be back to being available on your normal availability.

- The calendar will refresh and display your normal availability.



5. Change your Availability Times.

- On the Pop-up edit screen, choose On from the drop-down list.
- In the text box, Type in the new times that you are available on that day.
- Example. April 7th shows available from 8am-12pm; on the calendar. Typing in 8am-11am in the box changes the availability



- Click Save.
- The calendar will refresh and the new availability will appear.

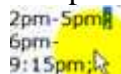


- The red [x] also appears so you can delete this alternate availability at any time, which will return you to the normal availability of 8am-12pm.
- Notice that this availability is highlighted in yellow because it is an alternate availability entered versus the normal availability which is black.

Step 5: Entering times.

1. If you are entering multiple times in intervals you must separate the times with a semi-colon ;

Example: 2pm-5pm; 6pm-9:15pm



2. The Times help icon in the top menu gives the correct entry format for time entries.



D. How to Enter a Date Based Availability (Tutorial # 11)

- This allows you to enter a different availability for multiple days.

Step 1: Click on the Available Folder in the left menu to open the list of options.

1. If you see the link 'Add Local Date-Based', under the Local availability chart, you have been granted the privilege of entering or editing this availability option. Proceed to step 2.
2. If you do not see this link, you must contact your scheduler to have your alternate availability entered by the organization.

Step 2: Click on the 'Add Local Date-Based' Availability link.



- A pop-up entry screen appears.

- 1) Enter a name for this time frame
- 2) Enter the dates that the new availability is to apply to in mm/dd/yy format
- 3) Click ADD. This will add a new availability chart right below the local availability chart.

Step 3: Enter New Availability.

- 1) The new availability chart added is identified as date-based.

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
OFF 1	OFF 1	OFF 1	OFF 1	OFF 1	OFF 1	OFF 1
hrs/all	hrs/all	hrs/all	hrs/all	hrs/all	hrs/all	hrs/all

- 2) Enter your new availability for the days within the range just as you do in the local availability chart. REFER to Step B above, or tutorial #9.
- 3) When the automated scheduling engine is used, it will use this availability over the local availability only during the effective dates listed.

Step 4: View current availability on the Calendar .

- 1) Scroll down to the Calendar.
- 2) Use the scroll arrows to see the month you want, < or >.
- 3) Date-based Available will replace the normal availability on the calendar during the effective dates listed.
- 4) Date-based Availability is highlighted in tan to show it is being used.