

Tradeboard (Optional) -----

Optional Tradeboard - How it Works

Use of the Employee Tradeboard is included in your subscription but is optional. You can set whether or not your Employees can use the tradeboard on your [SETTINGS>Employee Permissions](#) page.

The Tradeboard allows employees to work with each other to deal with problems in their work assignments. You can allow Employees to either trade "at will" or "with Manager approval."

The tradeboard can also show any Unassigned (open) shifts if you choose that option on your [SETTINGS>Global Employee Permissions](#) page. Employees (or Managers for the Employee) can set whether they are automatically notified when a shift that they can work is added to the tradeboard.

HOME	SCHEDULES	EMPLOYEES	TRADES	TIME-OFF	MESSAGING	REPORTS	ON NOW	SETTINGS	HELP	SIGN OUT
Sample Pharmacy								Company / My Information		
SETTINGS								My Notifications Email/Text		
Employee Permissions								Global Employee Permissions		
Add/Edit MANAGERS								Payments - Pricing - Billing		
Upload My Company Logo										
Info & Settings		My Notifications		Employee Permissions		Add/Edit Managers				
<input type="button" value="Save Changes"/>										
Display										
Can see SHIFT COLORS on schedules								<input checked="" type="radio"/> Yes <input type="radio"/> No		
Can see CATEGORIES on schedules								<input checked="" type="radio"/> Yes <input type="radio"/> No		
Can see the EMPLOYEE COMMENTS field								<input type="radio"/> Yes <input checked="" type="radio"/> No		
Preferences										
Can Set their own Prefer & Dislike work time PREFERENCES								<input checked="" type="radio"/> Yes <input type="radio"/> No		
Can Set their own CANNOT WORK times								<input type="radio"/> Yes <input checked="" type="radio"/> No		
Can Set their Preferences for POSITIONS								<input checked="" type="radio"/> Yes <input type="radio"/> No		
Viewing Other Employees & Their Schedules										
Can View EVERYONE'S SCHEDULE*								<input checked="" type="radio"/> Yes <input type="radio"/> No		
<small>(use your corresponding view "Change Layout" link to set employee displays)</small>										
Can see UNASSIGNED SHIFTS on Everyone's schedule view*								<input type="radio"/> Yes <input checked="" type="radio"/> No		
Can View STAFF LIST and MESSAGE OTHER EMPLOYEES*								<input checked="" type="radio"/> Yes <input type="radio"/> No		
<small>(If set to No - Employees CANNOT see everyone's schedule)</small>										
Can View Other Employees' AVAILABILITY*								<input checked="" type="radio"/> Yes <input type="radio"/> No		
Bulletin Board										
Can Add Entries to the BULLETIN BOARD*								<input checked="" type="radio"/> Yes <input type="radio"/> No		
Time Off										
		Never	With Manager Approval	At Will						
Can ENTER TIME OFF								<input type="radio"/> Never <input checked="" type="radio"/> With Manager Approval <input type="radio"/> At Will		
Tradeboard										
<small>(to turn off Tradeboard set all options to "Never")</small>										
		Never	With Manager Approval	At Will						
Employees can Trade each others Shifts:*								<input type="radio"/> Never <input checked="" type="radio"/> With Manager Approval <input type="radio"/> At Will		
Employees can Drop/Cover each others Shifts:*								<input type="radio"/> Never <input checked="" type="radio"/> With Manager Approval <input type="radio"/> At Will		
Employees can Unassign themselves from Shifts:								<input checked="" type="radio"/> Never <input type="radio"/> With Manager Approval <input type="radio"/> At Will		
Can see & pickup UNASSIGNED SHIFTS:**								<input type="radio"/> Never <input checked="" type="radio"/> With Manager Approval <input type="radio"/> At Will		
**Unassigned "At Will" allows employees to see & pickup unassigned shifts themselves, but any pickup request that puts them over maximum hours per week will be sent to manager for approval										
Unassigned "With Manager Approval" allows manager to approve all requests by employees to pickup an unassigned shift (shifts remain posted until manager approves shift pickup - allowing multiple employees to request same shift)										
*To prevent employees from ever seeing other employee names, set these options to No/Never										
<input type="button" value="Save Changes"/>										

When Employees sign in and view the Tradeboard they only are shown the shifts for the Positions they are allowed to work.

"Private" Shift Trade		At Will	With Manager Approval
John signs in and clicks one of Jane's shifts and suggests a trade for one of his specific shifts. An e-mail is sent private to Jane making a trade proposal (and Jane will see a link to the	Jane signs in and clicks to agree to the trade. A message is sent to John that she agrees. (If Jane refuses the trade a message is sent to John informing him)	Shifts are automatically changed in the schedule.	Manager is notified of the pending trade by email and in their "What's New" section and can either deny or approve. -If approved the shifts are updated in the schedule and the

new trade offer on her home page when she signs in)			employees are notified. -If denied the employees receive notification that it was denied.
Trading Shifts		At Will	With Manager Approval
John signs in and wants to get rid of one of his shifts and trade for someone else's. He posts his shift to the tradeboard and indicates he wants to trade.	Jane signs in and sees John's shift on the tradeboard and wants to offer one of her shifts in trade for his. The shift is removed from the tradeboard and an e-mail is sent to John asking him if he agrees to the proposed trade. John signs in and agrees to the trade. (Or if refuses he must repost the trade to the tradeboard)	The shifts are immediately reassigned in the schedule.	Manager is notified of the pending trade in their "What's New" section of the drop/pickup of the shift. -If approved the shift is updated in the schedule. -If denied the employees receive notification that it was denied.
Drop / Cover up a Shift* <small>*Note: Dropping a shift always requires that another employee agree to picking it up.</small>		At Will	With Manager Approval
John wants to get rid of a shift and posts it on the Tradeboard indicating he wants someone else to pick it up.	Jane signs in and wants to pick up the shift and add it to her schedule. An e-mail is sent to John that she wants to pick up the shift.	The shift is immediately reassigned to Jane in the schedule	Manager is notified of the pending pickup in their "What's New" section of the drop/pickup of the shift. -If approved the shift is updated in the schedule. -If denied the employees receive notification that it was denied.
Unassign Themselves from Shifts		At Will	
If your Settings page is set to allow employees to unassign themselves from shifts they can click their shift and then click to unassign it.	Jane signs in and does not want to work a shift she is assigned to, she clicks the shift and then clicks the "Remove Me From this Shift" link.	The shift is immediately set to unassigned and Jane is no longer assigned to it. The open shift is posted to the tradeboard if you have chosen the "Can See and Pick Up Unassigned Shifts" option.	
Picking Up Unassigned Shifts		At Will	With Manager Approval
If your Settings page "Can See and Pick Up Unassigned Shifts" option is set to put Unassigned shifts on the Tradeboard they will show up on the Tradeboard when the schedule is published.	Jane signs in and sees an open shift that she wants to add to her schedule and clicks to pick it up.	The shift is immediately reassigned to Jane in the schedule. (If this shift puts her over max hrs/wk it is sent for manager approval.)	Manager is notified of the pickup request in their "What's New" section of the shift to be picked up. -If approved the shift is updated in the

			schedule. -If denied the employees receive notification that it was denied.
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Related Topics:

- ⌵ [Requiring Manager Approval](#)
- ⌵ [Allowing Trades/Drops "At Will"](#)
- ⌵ [Viewing Employee Tradeboard](#)

Requiring Manager Approval for Trades/Drops & Picking up Unassigned Shifts

On the [SETTINGS>Global Employee Permissions](#) page the option to Allow Trades "With Manager Approval" gives you control as to whether or not changes go into effect automatically or only after manager approval.

If you have set Trades or Drop/Pickups to be "With Manager Approval"

- You will receive a trade request only **after both employees have agreed to trade their shifts**
 - If you approve the request the shifts are updated in the schedule and the employees are notified.
 - If you reject the request the affected employees receive notification that it was denied.
- You will receive a drop/pickup request when an employee wants to drop a shift after another employee agrees to pick it up
 - If you approve the request the shift is updated in the schedule and the employees are notified.
 - If you reject the trade/drop the employees receive notification that it was denied.

Dropping Shifts

Employees normally cannot drop a shift unless another employee first agrees to pick it up. (But you can let Employees unassign themselves from shifts on the [SETTINGS>Global Employee Permissions](#) page.)

Example: John wants to drop a shift. He clicks on his shift and chooses to place it on the tradeboard as a "drop." Jane sees his shift on the tradeboard and clicks on the shift and agrees to pick up his shift. If you allow drops "At Will" the schedule would then reflect Jane as the worker for that shift. If you allow drops only with "Manager Approval" then a pending trade request is sent to the manager and is seen in the "What's New" section of the Manager Home Page.

Some managers periodically review [the tradeboard](#) and unassign or reassign shifts listed as drops.

Related Topics:

- [Optional Tradeboard - How it Works](#)
- [Allowing Trades/Drops "At Will"](#)
- [Viewing Employee Tradeboard](#)

Allow Trades, Drop/Cover, & Unassigned Shift Pickups "At Will"

On your [SETTINGS>Global Employee Permissions](#) page - if you let Employees trade shifts or drop/pickup shifts "At Will" they can simply trade shifts and post shifts to the Tradeboard **and if someone agrees to trade or pick them up then the schedule is automatically updated** without the Manager's involvement.

If you allow pickup of Unassigned shifts "At Will" employees can pick up shifts up to their set maximum hours per week - any shift putting them over their maximum hours per week will be sent to the manager for approval.

Drop/Cover Shifts

Employees normally cannot drop a shift unless another employee first agrees to take it. (You can let employees unassign themselves from shifts on your [SETTINGS>Global Employee Permissions](#) page.)

Example: John wants to drop a shift. He clicks on his shift and chooses to place it on the tradeboard as a "drop." Jane sees his shift on the tradeboard and clicks on the shift and agrees to pick up his shift. If you allow drops "At Will" the schedule would then reflect Jane as the worker for that shift. If you allow drops only with "Manager Approval" then a pending trade request is sent to the manager and is seen in the "What's New" section of the Manager Home Page.

To track who picked up or dropped each shift click the shift in any weekly view and then click the [Shift History](#) link in the shift change window.

Related Topics:

- [Optional Tradeboard - How it Works](#)
- [Requiring Manager Approval for Trades/Drops](#)
- [Viewing Employee Tradeboard](#)

View The Employee Tradeboard

Many times Managers like to monitor the Tradeboard to see which Employees have posted shifts that they want to trade or drop. Managers with permission to edit shifts can click any shift and reassign or unassign it. How Employees can use the tradeboard is controlled from the [TRADES>Set Tradeboard Permissions](#) page.

To view the Employee Tradeboard

From any schedule view:

- In the top menu hover over **TRADES** and choose "View Employee Tradeboard"

The screenshot shows the 'Employee Tradeboard' interface. At the top, there is a navigation menu with options: HOME, SCHEDULES, EMPLOYEES, TRADES (selected), TIME-OFF, MESSAGING, REPORTS, ON NOW, SETTINGS, HELP, and SIGN OUT. Below the menu, there are tabs for 'Trades Awaiting Approval' and 'Employee Tradeboard'. The main area displays a grid for the week of Jul 6, 2009. The grid has columns for time slots (12, 1a, 2, 3, 4, 5, 6, 7, 8a, 9, 10, 11, 12, 1p, 2, 3, 4, 5, 6, 7, 8p, 9, 10, 11) and rows for days of the week (Monday - Jul-6 to Sunday - Jul-12). A shift for 'Store-Receiving- Dean Almanson' is highlighted in green and circled in red. Below the grid, there is a legend for shift colors: green for 'Wants to Trade Only', light blue for 'Wants to Drop Only', and purple for 'Trade or Drop Okay'. At the bottom, there is a section titled 'The following shifts are unassigned and available for employees to pick up:' with a grid showing a shift for 'Store-Pharmacist-9am - 3pm' on Monday - Jul-6.

- Click any shift to open the [Shift Change](#) window

Related Topics:

- [Optional Tradeboard - How it Works](#)
- [Requiring Manager Approval for Trades/Drops](#)
- [Allowing Trades/Drops "At Will"](#)