



HOW TO UPDATE MANAGE AVAILABILITY SETTINGS

Step-By-Step Instructions

After adding employees to the system, you'll need to update the Manage Availability rules for each employee. These rules are referenced when auto-generating a schedule and to manage employee requests for shift drops, pick-ups and swaps. After you set these rules, if you add new employees you will need to update their settings, the system will not default the settings to what you've set for employees previously.

Update Manage Availability Settings:

1. Select **SETUP** in the left-side menu and select #6 - **MANAGE AVAILABILITY**.
2. Add the position(s) you'd like to update in the white toolbar and click **LOAD POSITIONS**.
3. Configure each of the following settings below.

Set Scheduling Rules:

Doubles

1. Can an employee work more than one shift in a day? Select **ALLOWED OR NOT ALLOWED**.

Hours/Day & Hours/Week (Position Level)

Entering the maximum number of hours does not guarantee an employee will be assigned the maximum number of hours indicated. The value indicates the max hours they can potentially be scheduled for.

1. Enter the maximum number of hours an employee can work in one day for the position(s) the employee is a member of. Must be whole numbers.
2. Enter the maximum number of hours an employee can work in one week for the position listed. Must be whole numbers.

Global Max (Hours Day/Week – Maximum Scheduled Between Multiple Positions)

1. Click on the green **GLOBAL SETTINGS** tab in the top right corner.
2. Enter the **DAILY MAX** hours an employee can work in one day across all of the positions they work. Must be whole numbers. Select **STATUS** to **ACTIVE** in the **EDIT ALL** row to apply to all employees or set for specific employees in their row.
3. Enter the **WEEKLY MAX** hours an employee can work in one week across all of the positions they work. Must be whole numbers. Select **STATUS** to **ACTIVE** in the **EDIT ALL** row to apply to all employees or set for specific employees in their row.
4. Click **SAVE**.
5. Click the green **MANAGE AVAILABILITY** button in the top right corner to return to the **MANAGE AVAILABILITY** section.



Priority:

Prioritize how SubItUp assigns shifts to available employees by assigning a number value for each employee. When generating based on priority, the lowest number is considered first for shift assignments. If set to 0 the employee will not be assigned a shift. You when you auto-generate a schedule, select **GENERATE SCHEDULE à STRICTLY BASED ON PRIORITY**.

1. Enter a number value of 1 or higher for each employee. Whole numbers must be used.

OT Pickup

The **OT PICKUP** setting only applies when you have moderation turned OFF in the **POSITION SETTINGS** and you prefer the system to manage the employee shift requests on your behalf instead of approving them.

1. Can an employee pick up or trade a shift if it will exceed the global max weekly hours you set? Select **ALLOWED OR NOT ALLOWED**.

Set

How to **OPEN** and **CLOSE** availability. When set to **OPEN** the system does not automatically send an alert to your staff. You must send a message to your staff to prompt them to enter their availability.

1. Select **OPEN** or **CLOSED** in the **EDIT ALL** row to open availability to all employees or select **OPEN/CLOSE** for specific employees in their row.
2. Click **SAVE**.

OPEN: Employees can update and modify their availability.

CLOSED: Employee's availability is locked and can only be modified by a manager.

Reset

Choose to default, reset or clear your employee's availability for a position.

SHIFT-BASED POSITIONS

1. Click on **CLEAR/RESET** in the **EDIT ALL** row or for a specific employee.
2. Click on the drop-down arrow next to **SHIFT-BASED**.
3. Choose preference: **NO CHANGE, NO PREFERENCE, AVAILABLE, UNAVAILABLE**.
4. Click **SAVE**.

If you have availability in the system already you will be prompted to decide the following:

1. Select **RESET ACTIVE SHIFT TEMPLATES** or **RESET INACTIVE SHIFT TEMPLATES**.
2. Click **CONFIRM** clearing employee availability.
3. Click **CONTINUE**.

HOURLY-BASED POSITIONS

1. Click on **CLEAR/RESET** in the **EDIT ALL** row of for a specific employee.
2. Click on the drop-down arrow next to **HOURLY-BASED**.
3. Choose preference: **NO CHANGE, CLEAR**.
4. Select **RESET ACTIVE SHIFT TEMPLATES** or **RESET INACTIVE SHIFT TEMPLATES**.
5. Click **CONFIRM** clearing employee availability.
6. Click **CONTINUE**.