

## Open Shift Manager Guide

### Accessing Open Shift Manager

- Desktop:  
Navigate to Schedule Admin → Scheduling → Shift Billboard → Open Shift Manager.
- Mobile:  
From Self Service Portal, go to Quick Links → Scheduling → Open Shift Manager.

Both options provide the same features and functionality.

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### Tabs Overview

Open Shift Manager includes four tabs:

1. Pending Actions
  2. Active Posts
  3. Open Shifts
  4. Completed
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#### 1. Pending Actions

- This tab will display no actions because posted shifts are set as Immediate Claim (no leader approval required).
- All tabs show data for six weeks into the future for teams you have access to. If you manage multiple teams, this could include thousands of shifts.
- Use filters to narrow results by:
  - Date range
  - Team
  - Job role

Filtering is especially helpful for large groups.

How to Filter by Date:

- Click the calendar icon.
  - Select the start and end dates.
  - The page updates immediately.  
(Note: This tab will still display "No Pending Actions.")
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#### 2. Active Posts

Displays shifts posted to the billboard.

Column 1:

- Shows total count of posted shifts for your teams.
- Default date range: current date through six weeks (unless modified in Pending Actions).
- Displays: shift date, label, team, activity, job, billboard group(s).
- Hover over ellipsis (...) to view full details.
- Select a shift to view details in Column 2.

Column 2 (Selected Shift):

- Shows Date/Shift Label and three action buttons:
    - Withdraw Post – Removes posting and updates the unassigned shift as “Not Posted.”
    - Relief Not Needed – Removes posting and deletes the unassigned shift.
    - Assign – Assign the shift to an employee and removes it from postings.
  - Shift Details: Start/end time, skills (if applicable).
  - Post Details: Posted by leader, claim type (Immediate), billboard group(s), eligible employees (with search option).
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### 3. Open Shifts

Displays all unfilled shifts, including those canceled or withdrawn.

Column 1:

- Shows total count of open shifts for your teams.
- Displays: shift date, label, team, activity, job.
- Withdrawn postings show a warning icon with date/time stamp.
- Select a shift to view details in Column 2.

Column 2 (Selected Shift):

- Shows Date/Shift Label and two action buttons:
    - Relief Not Needed – Deletes the unassigned shift.
    - Assign – Assign the shift to an employee.
  - Shift Details: Start/end time, skills (if applicable).
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### 4. Completed

Displays shifts that have been claimed or expired.

Column 1:

- Shows total count of completed shifts for your teams.
- Displays: shift date, label, team, activity, job, and:
  - Claimed shifts (shaded green with employee name).

- Expired shifts (shaded orange).
- Hover over ellipsis (...) for full details.
- Select a shift to view details in Column 2.

#### Column 2 (Selected Shift):

- Claimed Shift: Two tabs:
    - Assignee: Employee name, contact info, employment details.
    - Shift Details: Start/end time and shift specifics.
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#### Filtering Options

- Located on the right side of the blue toolbar.
  - Features:
    - Pre-selected items (uncheck to remove).
    - Various categories for filtering are listed, use the look-up icon or type in the box and press Tab.
    - Click Apply for each filter selected.
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#### Need Help?

- Email: [wfm@vumc.org](mailto:wfm@vumc.org)
- Help/User Site: [www.vumc.org/WFM](http://www.vumc.org/WFM)