

Tradeboard (Optional) -----

Optional Tradeboard - How it Works

Use of the Employee Tradeboard is included in your membership 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>Employee Permissions](#) page. Employees (or managers for the employee) can set whether they are notified if a shift that they can work is added to the tradeboard.

Employee Tradeboard			
(use of the Tradeboard is optional)	Never	With Manager Approval	At Will
Employees Can Trade Shifts:	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Employees Can Drop Shifts:	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Can see & pickup UNASSIGNED SHIFTS:*	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
<p>*Unassigned "At Will" allows your employees to see & pickup unassigned shifts themselves, but any pickup request that would put them over their max hours per week will be sent you for approval</p> <p>Unassigned "With Manager Approval" allows manager to approve all requests by employees to pickup an unassigned shift (shifts remain posted until the shift is assigned)</p>			

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 to Jane making a trade proposal (and Jane will see a link to the new trade link on her home page when she signs in).	Jane signs in and clicks to agree to the trade. A message is sent to John that she agrees to trade. (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 trade in their "What's New" section and can either deny or approve the trade. -If approved the shifts are updated in the schedule and the 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	The shifts are immediately reassigned in the schedule.	Manager is notified 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

	to the proposed trade. John signs in and agrees to the trade. (Or if refused the trade must be reposted to the tradeboard)		employees receive notification that it was denied.
Dropping / Picking 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 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.
Picking Up Unassigned Shifts		At Will	With Manager Approval
If your Settings page 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 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.

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>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 with manager approval.

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

- You will receive a trade request after both employees have agreed to a 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 and 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 cannot drop a shift unless another worker first agrees to pick it up.

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](#)

Allowing Trades/Drops, Unassigned Shift Pickups "At Will"

On your **SETTINGS>Employee Permissions** page - if you allow employees to 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 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.

Dropping Shifts

Employees cannot drop a shift unless another worker agrees to pick it up.

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](#)

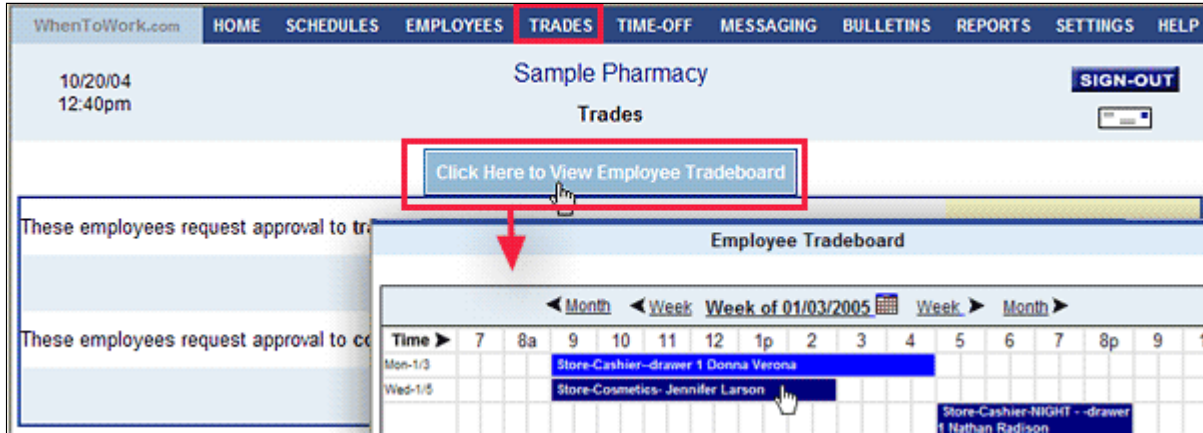
View The Employee Tradeboard

Many times Managers like to monitor the Tradeboard to see which employees have posted shifts they want to trade or drop. This could be of interest if an employee later does not show up for a shift.

To view the Employee Tradeboard

From any schedule view:

- In the top menu click **Trades** to go to the Trades page



- Click the **Click Here to View Employee Tradeboard** link
- The Employee Tradeboard will open in a new window

Related Topics:

- Optional Tradeboard - How it Works
- Requiring Manager Approval for Trades/Drops
- Allowing Trades/Drops "At Will"

Publish an "Open" Schedule - Allow Employees to Pick Up Unassigned Shifts

You can publish a schedule with some or all of your shifts open (unassigned) and have the employees sign in and choose their shifts off the Tradeboard. This method is used by many volunteer organizations.

To have open shifts appear on the Employee Tradeboard after Publishing:

From any Page

- In the top menu click **SETTINGS** to go to the Settings page (1.)
- Click the **Employee Permissions** tab (2.)
- Scroll down to the Employee Tradeboard permissions section and for "**Can see & pickup UNASSIGNED SHIFTS**" choose the setting you prefer (see options below) (3.)
- Optional - set to allow employees to not only see open shifts on the tradeboard but also see the open shifts on "Everyone's Schedule" (4.)
- Click **Save Changes** (5.)

WhenToWork.com HOME SCHEDULES EMPLOYEES TRADES TIME-OFF MESSAGING BULLETINS REPORTS ON NOW **SETTINGS** HELP

Mar 11, 2007 12:18pm Sample Pharmacy Live Chat Support CHAT WITH US LIVE! SIGN-OUT

SETTINGS

Info & Settings My Notifications **Employee Permissions** Add/Edit Managers Make a Payment

Save Changes

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

Time Off

Can REQUEST TIME OFF	<input checked="" type="radio"/> Yes <input type="radio"/> No
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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

Viewing Other Employees & Their Schedules

Can View EVERYONE'S SCHEDULE* (use your corresponding view "Change Layout" link to set employee displays)	<input checked="" type="radio"/> Yes <input type="radio"/> No
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* (If set to No - Employees CANNOT see everyone's schedule)	<input checked="" type="radio"/> Yes <input type="radio"/> No
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
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Tradeboard
(to turn off Tradeboard set all options to "Never")

	Never	With Manager Approval	At Will
Employees Can Trade Shifts:*	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Employees Can Drop Shifts:*	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Can see & pickup UNASSIGNED SHIFTS:** 3.	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

**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

"Never" - Employees cannot see or pickup unassigned shifts.

"With Manager Approval" - Employees can see Unassigned Shifts on the Tradeboard and request picking them up. When they click to request picking up a shift it is sent to the manager for approval. (More than one employee can request picking up the same shift but they will see the number of other requests that have already been submitted for that shift). Upon approval by the manager that employee is notified and scheduled to work the shift and it is then removed from the Tradeboard.

"At Will" - Employees can see Unassigned Shifts on the Tradeboard and immediately pick them up if they are under the maximum hours per week that you have set for them. Note: If picking up a shift would put the employee over his maximum hours per week it is sent to the manager for approval. In this case the shift remains on the Tradeboard (showing that there is a request) and another employee (not over their maximum hours per week) can take the shift and it is immediately assigned to them.

Employees can cancel their own shift pickup request at any time before manager has denied or approved it using the "Cancel This Request" link on their Trades page.

Related Topics:

- [Editing Employee Details](#)
- [Optional Tradeboard - How it Works](#)
- [Viewing Employee Tradeboard](#)
- [Tracking Schedule Changes - Import, AutoFill, Publish](#)