

# Training Guide

## Microsoft Shifts



To book training or to speak to a trainer, please get in touch via:

e [training@imerseyside.nhs.uk](mailto:training@imerseyside.nhs.uk)

## Disclaimer

Periodically changes to business processes or updates to systems or applications result in the update of training guides and materials. It is the responsibility of the delegate to check that they have the most up-to-date guides. All guides contain a Change Control table at the front which will detail when the document was updated. If you want to check if you have the correct version please email [training@imerseyside.nhs.uk](mailto:training@imerseyside.nhs.uk)





## Change Control

Document Type		Document Title		
Training Guide		<a href="#">Microsoft Shifts</a>		
Version	Date	Owner	Change	Purpose
V0.1	6 November 2020	Darren Melling	Creation	Training Aid
V0.2	18 November 2020	Claire McGrady	Proof reading changes made	Quality assurance

## Document Approval

Version	Date	Approver Name	Approver Job Title
V1.0	17 December 2020	Claire McGrady	IT Training Manager

## Hints and Tips

	This symbol suggests a tip or a good method of working for speed and efficiency
	This symbol suggests a caution or an action to be aware of
	This symbol indicates an Information Governance warning
	This symbol indicates hints and tips that support digital optimisation

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# Microsoft Shifts


Microsoft Shifts is an App within Microsoft Teams. It is a [schedule](#) management tool which allows the creation, updating and management of working patterns, [shifts](#) and [time-off](#) for a [Team](#) or [workgroup](#).

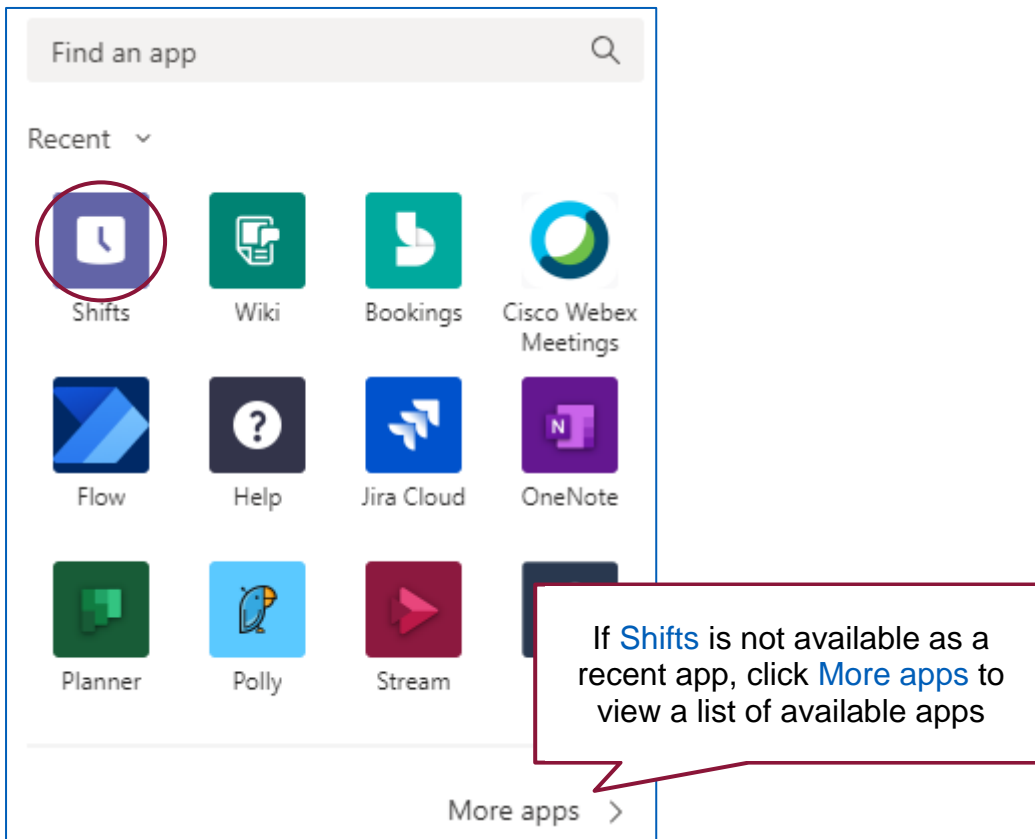
## Add the Shifts App to the Navigation Pane

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Open [Microsoft Teams](#).


To add the [Shifts](#) application to [Teams](#).

- From the [Navigation Pane](#) down the left hand side, select 
- In the window that appears, select [Shifts](#).



## Create a Schedule

---

 To create a [Schedule](#) in [Shifts](#), the user must be an [Owner](#) of the [Team](#) they wish to create a [schedule](#) for.

From the [Navigation Pane](#) in [Teams](#).

- Select the [Shifts](#) App 

- In the [All Schedules](#) section, select

[+ New schedule](#)

- Choose the [Team](#) to create a [schedule](#) for and select [Create](#)

A [Team](#) will be greyed out if the user is not an [Owner](#) of that [Team](#)

**Create a team schedule**  
You need to be an owner of the team to create a schedule.

Training Service	<a href="#">Create</a>
Office 365 Test Environment	<a href="#">Create</a>
Teams Demo Site	<a href="#">Create</a>

- Choose the correct [Time Zone](#) and [Closest City](#) then select [Confirm](#).

**Confirm the time zone for Teams Demo Site**  
The time zone is used for scheduling this team's shifts. You can change it at any time in Settings.

Local time  
16:31

Time zone  
[\(UTC+00:00\) Dublin, Edinburgh, Lisbon, London](#)

Closest city  
[London](#)

Step 2 of 2

[Back](#) [Confirm](#)

## Configure Shifts Settings

Once a [Schedule](#) has been created, the [Settings](#) for that [Schedule](#) can be amended to fit the working patterns and requirements of the [Team](#).

From the [Tabs](#) across the top, select [Settings](#).

[☰](#) **Shifts Training Team** [Schedule](#) [Requests](#) [Settings](#)



The [Time Zone](#) will automatically sync the time zone of Windows.

- Amend the [Start of week](#) day by selecting the required day from the dropdown menu.

- When turned **On**, **Copying Shifts** copies all **activities** that have been entered into the original **Shift** across to the new one as well as copying the time and hours.
- When turned **On**, **Open Shifts** allows **Team Members** to **view** and **Request** any **Open Shifts** offered within the **Schedule**.

<b>Time zone</b>	Team time zone (UTC+00:00) Dublin, Edinburgh, Lisbon, London ▾	Closest city London ▾
<b>Schedule</b>	Start of week Monday ▾	
<b>Copying shifts</b>	Include shift activities when copying shifts.	<input checked="" type="checkbox"/> On
<b>Open shifts</b>	Allow employees on this team to view and request open shifts on the schedule.	<input checked="" type="checkbox"/> On

## Time off Request list

**Team Members** can **Request** time off within **Shifts** for a variety of reasons. The reasons can be changed within **Settings** to suit the **Team**.

- Select an option from the list
- Delete the default option and type in a new option

Requests

Manage the list used for time-off requests.  
Add, remove or change the options people can choose from when requesting time off.

- Sick Day
- Parental Leave
- Off**
- Time In Lieu
- Holiday

Add custom option

Requests

Remove the option completely by selecting the bin icon.

- Parental Leave
- Emergency Leave**
- Time In Lieu
- Holiday

Add custom option

## Add custom options

If the **Team** requires more options for time off **Requests**.

- Select **Add custom option**

Requests

Manage the list used for time-off requests.  
Add, remove or change the options people can choose from when requesting time off.

- Sick Day
- Parental Leave
- Emergency Leave
- Time In Lieu
- Holiday

**Add custom option**

The **Custom Option** field appears.

Custom Option

The new item must be between 1 and 40 characters.

- Enter the new [Option](#):

Click on the icon to change it to something more relevant.

- Click anywhere else on the screen to save the option.

### Time Clock Setup

[Teams](#) can be used to [clock in](#) and [clock out](#) of a [Shift](#). This can also be performed on a mobile device using the mobile app. Clocking in and clocking out in Shifts is useful for more mobile Team Members. Breaks can also be logged.

- Select [Begin Setup](#)

- Select



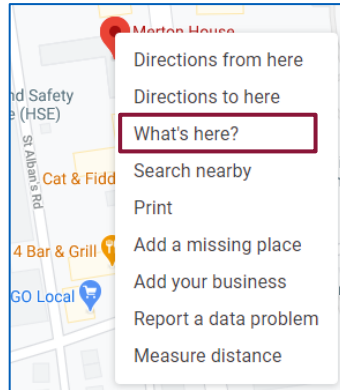
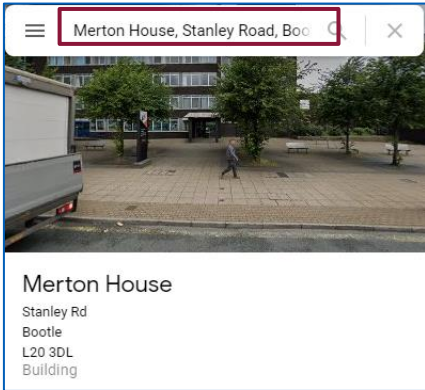
An optional location can be configured as a 'usual' clock on location for users.

- [Check the Include location detection for the mobile app option](#)
- Select [How to get coordinates](#) for guidance on getting the coordinates for the required location

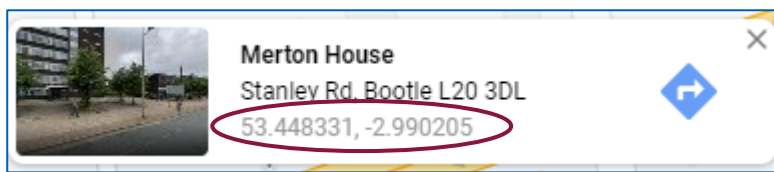
In [Google Maps](#).

- Enter the required address

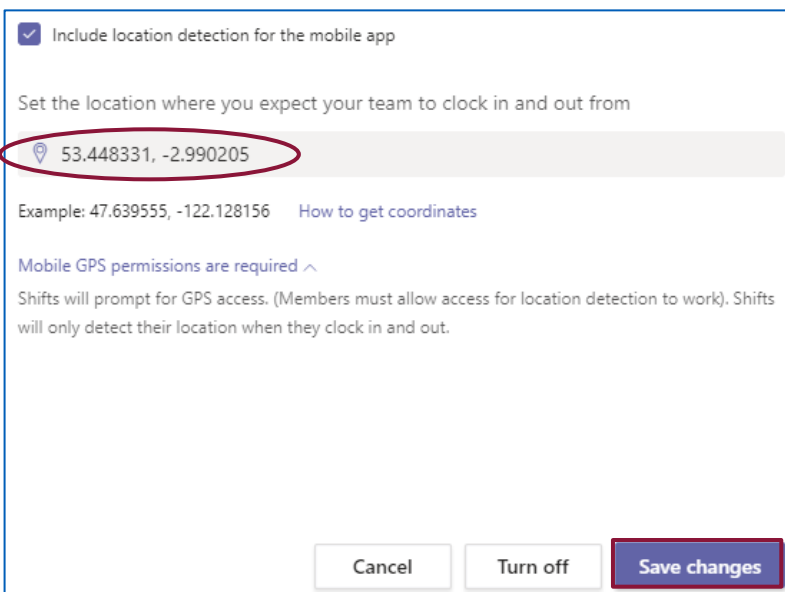
- When the result appears, right click on the red pin and scroll to What's Here?



- The coordinates will appear at the bottom of the screen.



- Enter the coordinates into the location field then Save Changes.





## Create a Group

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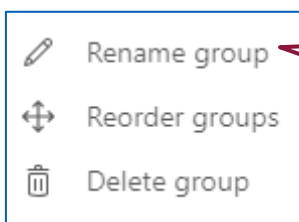
Within a [Team Schedule](#), [Groups](#) can be created to keep the [Schedule](#) more organised. For example, [Groups](#) can be added for work locations or job functions. [Members](#) can then be added to those [Groups](#).

### Add a Group

- Select  Add group

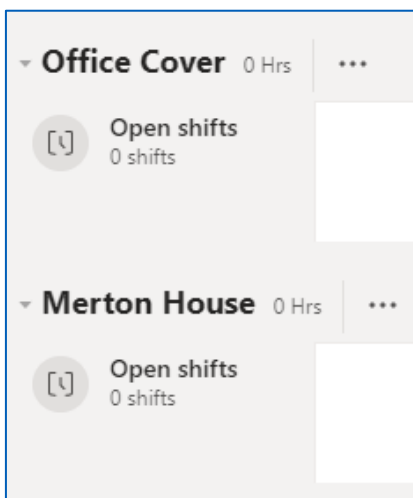
When the new “[Unnamed Group](#)” appears.

- Select  to access the [Group](#) options.



Click [Rename Group](#) to allocate a location, job function, specific duty etc.

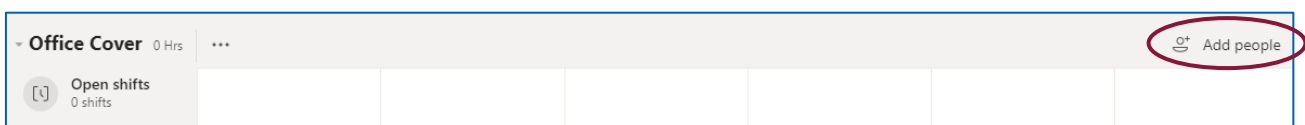
Created [Groups](#) will then be listed.



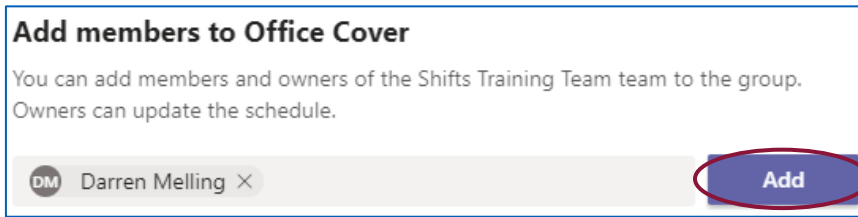
### Add People to a Group

Each [Group](#) has its own option to add [Members](#).

- Find the [Group](#) to add [Members](#) to then select its [Add people](#) option.



- Enter the name of the [Members](#) to be added to that [Group](#) then select [Add](#).



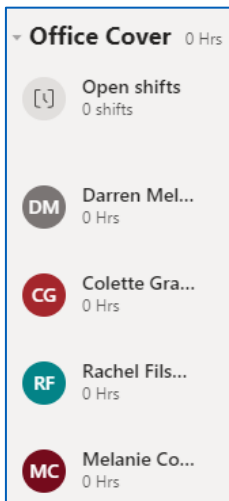
Only Members of the Team can be added to the Group. To add additional Members to the Team from this point, use the [Manage team](#) option towards the bottom of the box.



More than one Team Member can be added to the Group at the same time by [typing the name of the user](#) after the last Member has been chosen.

Once all of the Members have been added to the Group, select [Close](#)

The [Group](#) is now complete.



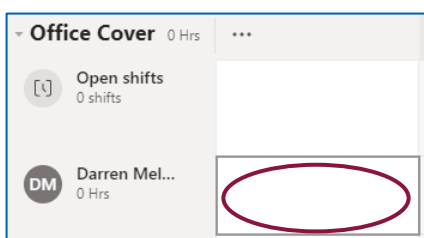
## Create a Shift

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[Shifts](#) can be created and allocated to [Members](#) of the [Group](#) or can be left open for [Members](#) to [Request](#).

### Create and Allocate a Shift

Double click an empty slot within the [Member's](#) [Schedule](#).



The **Shift** Properties open:

The screenshot shows the 'Shift Properties' dialog in the Microsoft Shifts app. It includes a color selector (Office Cover) set to Purple, a team member dropdown (Darren Melling), a date and time selector (09/11/2020, 8:30 to 16:30, 8h), a custom label field, an unpaid break field (0 min.), a shift note field, and a shift activities section. Red callout boxes with lines pointing to specific fields contain the following text:

- Pointing to the color selector: "The **Shift** colour can be changed to suit."
- Pointing to the team member dropdown: "The **Team Member** is prepopulated."
- Pointing to the date and time selector: "The date and time of the **Shift** can be adjusted."
- Pointing to the unpaid break field: "The length of any **unpaid break** can be entered."
- Pointing to the shift note field: "Any **Shift** notes for the **Member** can be added."

Change the **Shift** label from the time of the **Shift**.

- Select the **Custom label** field.

A close-up of the 'Custom label' field in the Shift Properties dialog. The text 'Custom label' is highlighted with a red box. To the right of the field is the text 'Show instead of time'.

- Enter the name/title of the **Shift**.

A close-up of the 'Office Cover' label in the Shift Properties dialog. The text 'Office Cover' is highlighted with a red box. To the right of the field is the text 'Show instead of time'.

- The display name of the **Shift** changes.

A screenshot of the Microsoft Shifts app showing the 'Office Cover' shift label. The label 'Office Cover' is highlighted with a red oval. The background is a purple bar representing the shift.

## Add timed/scheduled activities to a Shift

Activities can be added for action during a Shift. These are activities to take place at specific times throughout a Shift.

From the Shift Properties.

- Select
- Enter the name of the Activity to be completed
- Change the code for the Activity if required (limited to 2 letters)
- Give the Activity a colour
- Adjust the Start and End Times
- State whether the Activity is Paid or not
- Add the next Activity by selecting Add New

### Shift activities

Example: Lunch, Front counter etc.

Office Cover

AC SM FD

Name	Code	Colour	Start	End	Paid
Activity Calendar	AC	Blue	8:30	9:30	Yes
Skills Matrix	SM	Green	9:30	10:30	Yes
Further Development Needs	FD	Yellow	10:30	11:30	Yes

+ Add new

When all required activities are entered, select

Done

The Activities will be listed.

Shift activities ⓘ

Add daily activities or any additional breaks that you want to track with this shift.

8:30-9:30	Activity Calendar	AC	Paid
9:30-10:30	Skills Matrix	SM	Paid
10:30-11:30	Further Development Needs	FD	Paid
11:30-12:30	Monitor Training Inbox	TI	Paid
12:30-13:30	Lunch	LU	Unpaid
13:30-15:30	Monitor Training Inbox	TI	Paid
15:30-16:30	Complete Times		

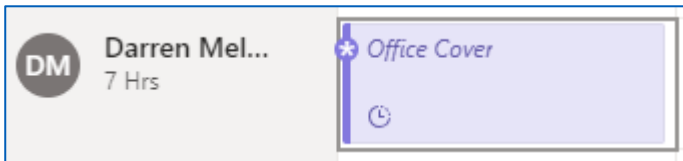
Edit activities

Select Edit activities to change or add activities

Save

When everything is entered and the **Shift** is ready for allocation, select

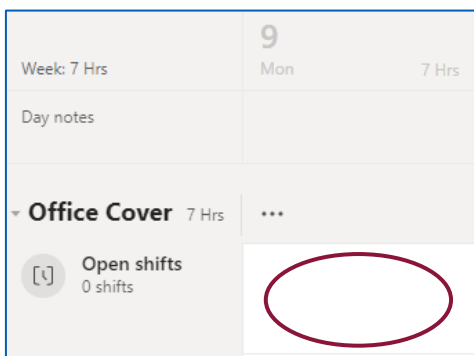
The **Shift** is now allocated.



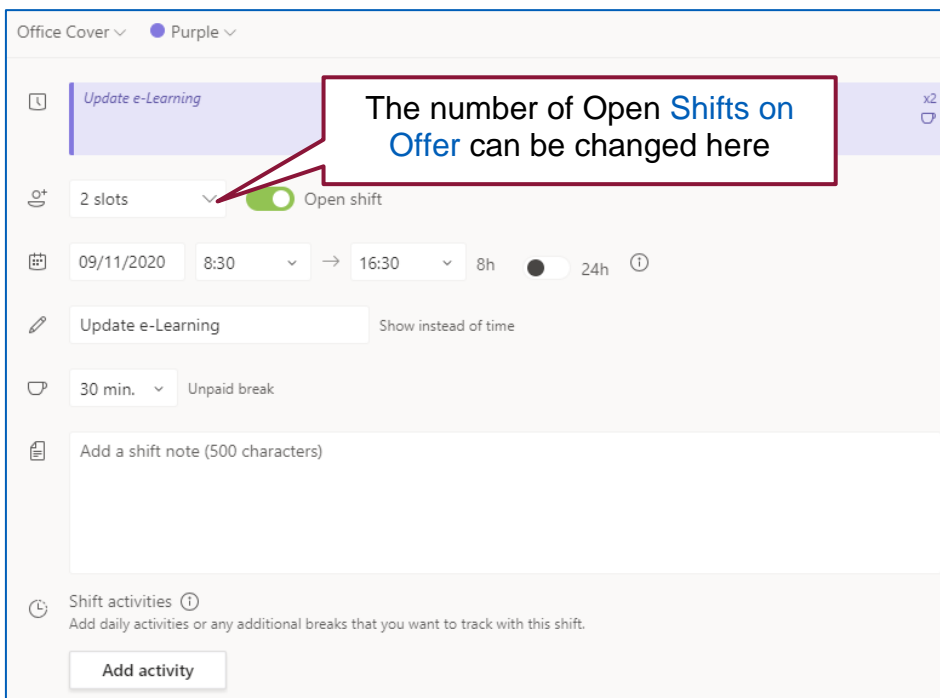
## Create an Open Shift

An Open **Shift** is a **Shift** that is on **Offer** to all **Members** of that **Group**.

- Double click the Open **Shift** field for the day on **Offer**.

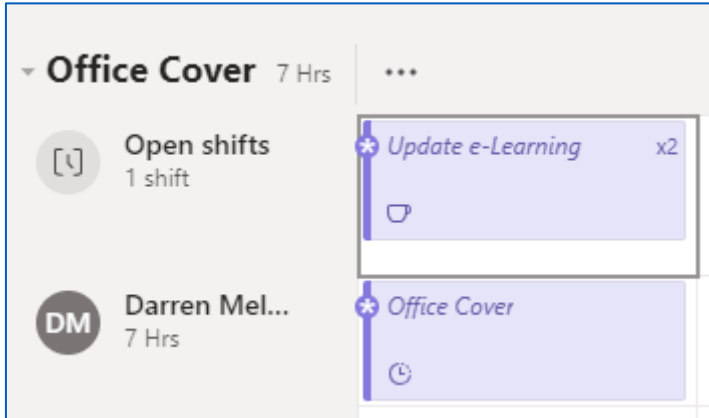


- The **Shift** Properties open with the Open **Shift** toggle on:



When everything is entered and the **Shift** is ready to be **Offered**, select

The [Shift](#) is now Open for [Members](#) to [Request](#).



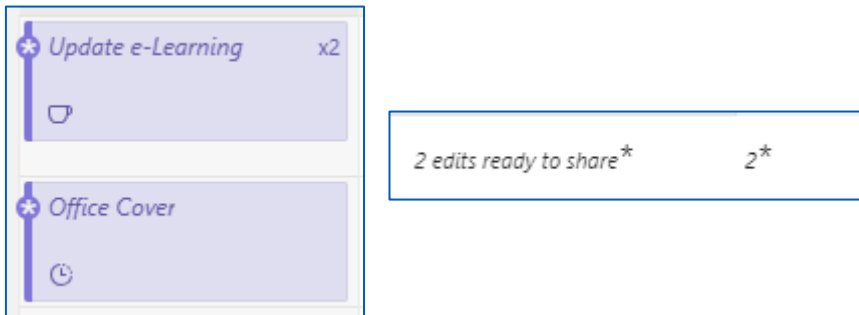
## Share a Schedule with the Team

Once all Shifts have been set up, the [Schedule](#) needs to be shared with the Team. Shifts will not be 'live' until sharing has been completed.



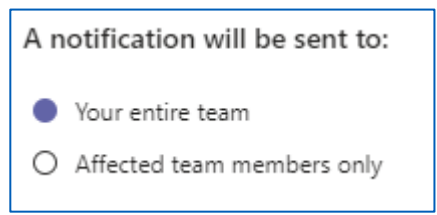
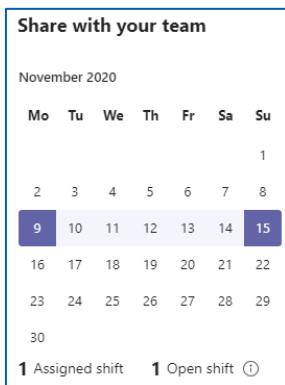
An [asterisk](#) indicates that there is new information or information has changed and is yet to be shared with the [Team](#).

Check the [Shifts](#) to be shared and the information bar at the bottom:



When everything is correct, select [Share with team \\*](#)

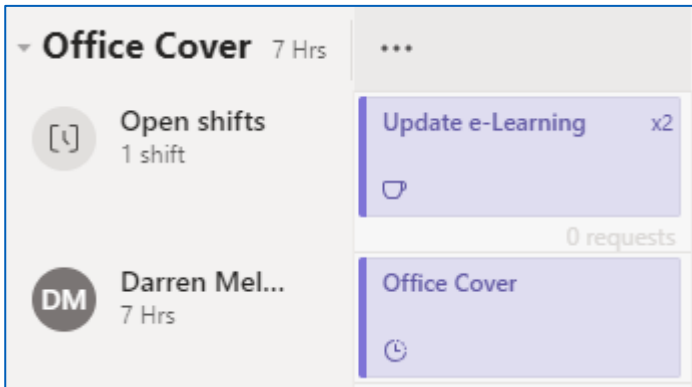
Select the Date Range to be shared, who will be notified then select [Share](#).





Once the [Schedule](#) has been shared, the [Share with Team](#) button will be inactive (greyed out).

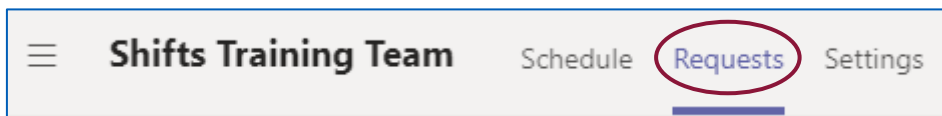
The [Schedule](#) is now shared and the appearance of the [Shifts](#) changes.



## Requests and Approvals

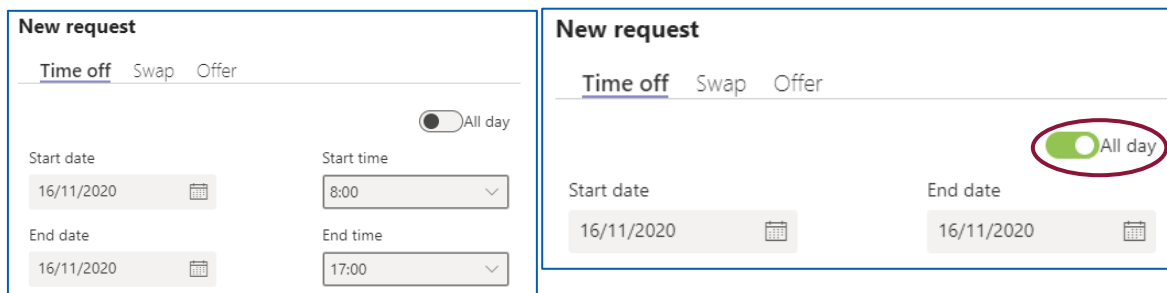
[Team Members](#) can [Request time off](#), [Shift Swaps](#) and [Offer their Shifts](#) to other [Team Members](#). These need to be [Approved](#) and then shared.

All [Requests](#) are made by selecting the [Requests](#) tab at the top of the [Schedule](#).

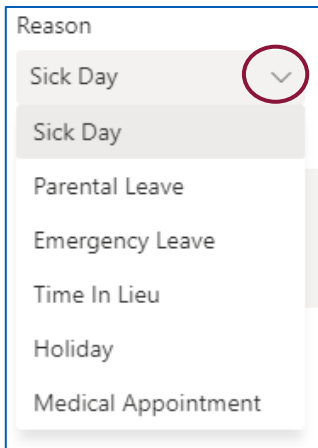


### Request Time Off

- Select
- Select the [Time Off](#) tab
- Complete the [Start](#) and [End](#) dates and the [Start](#) and [End Times](#), or
- Toggle the [All day](#) switch




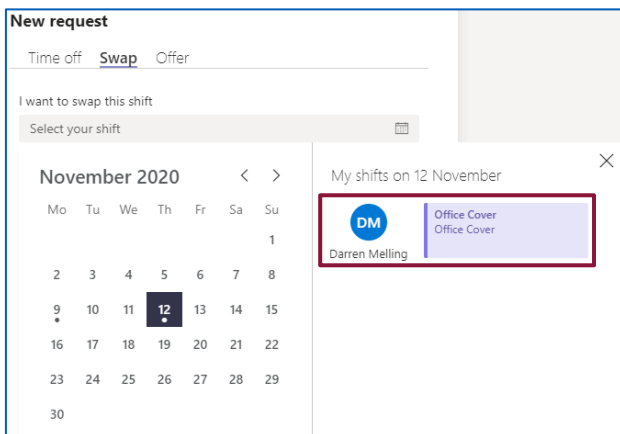
- Choose a reason from the drop down



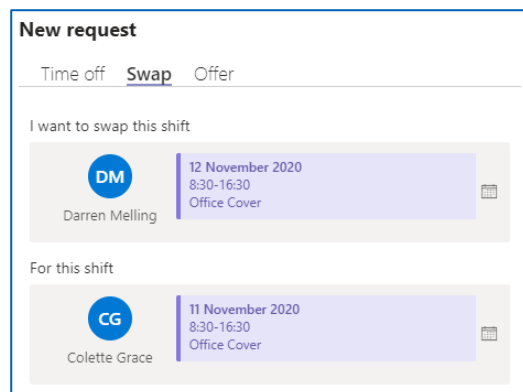
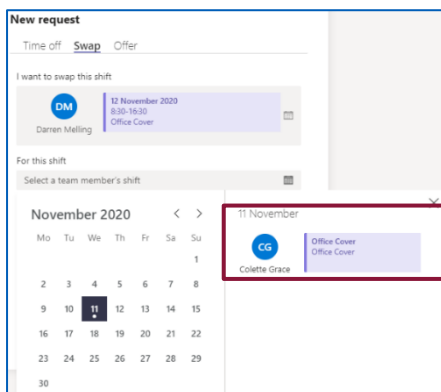
- Complete the Notes field if necessary, then select 

## Request a Swap

- Select 
- Select the **Swap** tab
- Select the date and the **Shift** to be Swapped



- Select the **Shift** to **Swap** to





- Add a note if necessary then select

**Send request**

### Offer a Shift to another Member

- Select
- Select the **Offer** tab
- Select the date and the **Shift** to be **Swapped** and the **Member** to **Offer** it to.

**Send request**

- Add a note if necessary then select

### Approve, Deny and Cancel Requests

**Requests** are divided into two sections, **In Progress** and **Completed**.

In the **In Progress** section.

- Select the relevant **Request**

- Choose **Deny** or **Approve**, adding a note if necessary.

- Once actioned, the **Request** moves to the **Completed** section.

Completed

**DM** Darren approved time off 11:20  
23 Nov, All day

Darren Melling 9:58

Holiday  
23 November 2020  
All day

**DM** Darren Melling 11:20  
✓ Approved



A **Shift Swap** or **Offer** will require approval from the other **Team Member**.

Darren Melling 10:47

You would like to swap this shift

12 November 2020  
8:30-16:30  
Office Cover

with Colette Grace's shift

11 November 2020  
8:30-16:30  
Office Cover

**CG** Colette Grace 10:50  
✓ Accepted

**DM** Darren Melling 10:50  
✓ Approved

## Use Views and Filters

A **Schedule** can be manipulated to show specific information by applying a view and/or a filter.

### Change View

- Select

- Select a **View** to show:

Quick access:

Your shifts

Team shifts ✓

View by:

People ✓

Shift

Show:

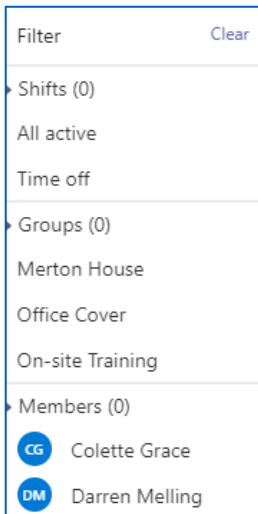
Groups ✓

Open shifts ✓

Availability ✓

**Add a Filter**

- Select
- Select [Filters](#) to apply.

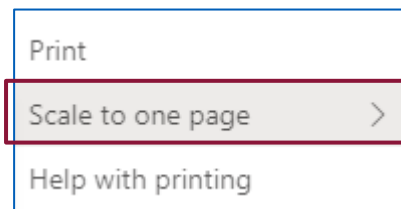


## Print a Schedule

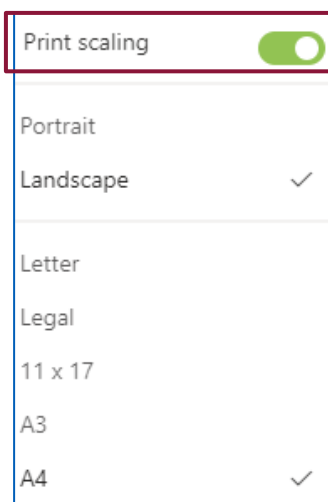
---

As well as being shared electronically and being accessible via the [Shifts App](#), a [schedule](#) can also be printed off.

- Select  Print
- Select [Scale to one page](#).

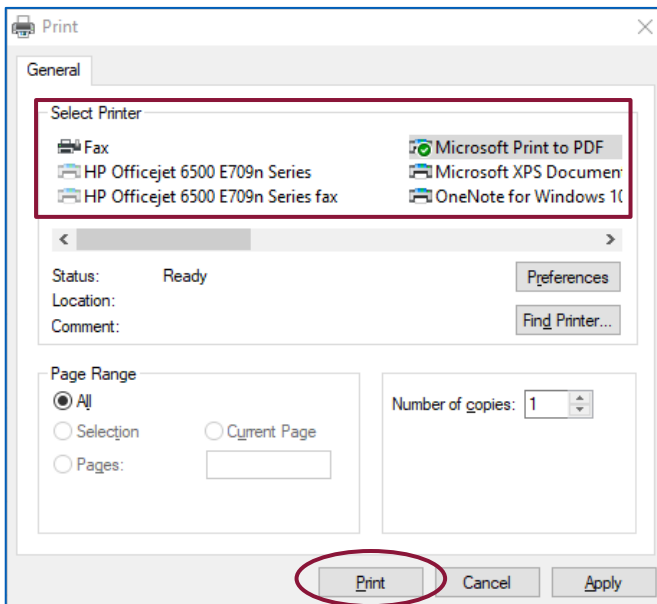


- For best results, turn on [Print Scaling](#), select [Landscape](#) and [A4](#).



- Select 

- [Choose the printer](#) to use and select [Print](#).



## Use the Time Clock

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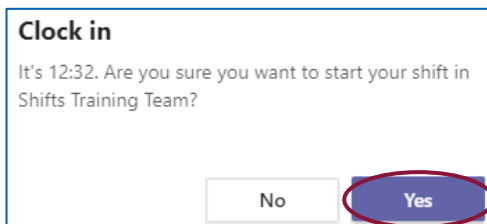
A feature of [Shifts](#) allows [Team Members](#) to [Clock in](#) and [Clock out](#) of their [Shift](#) as well as logging their break time.

### Clock in

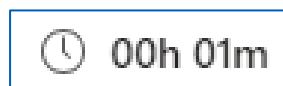
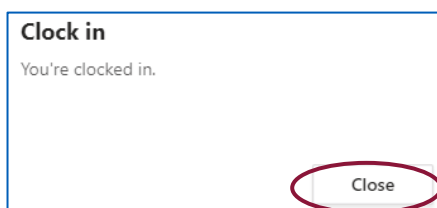
From the [Schedule](#)

- Select  ▾



- Confirm in the prompt:



- The timer begins:



### Log a Break


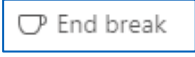
- Select the  next to the **Timer**
- Select 
- Confirm the **Start** of a break.

**Start break**

It's 12:39. Are you sure you want to start your break in Shifts Training Team?

**Start break**

Your break has started.

- Select the  next to the **Timer**
- Select 
- Confirm the **End** of break.

**End break**

It's 12:44. Are you sure you want to end your break in Shifts Training Team?

**End break**

Your break has ended.

## Clock out

- Select the **Timer**  00h 18m
- Confirm **Clock out**.


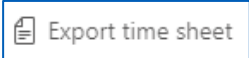
**Clock out**

It's 12:52. Are you sure you want to end your shift in Shifts Training Team?

**Clock out**

You're clocked out.

## Export Time Sheet

- Select the  next to the **Timer**
- Select 
- Choose the **Start** and **End** Date to export.

### Export Time Report


Export the time clock report for your team. Set the start and end date for your specified range.

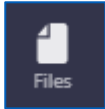
Start date


09/11/2020



End date

16/11/2020

- Select 
- The file [Downloads](#) to the [File](#) section which is accessible on the [Navigation Pane](#).



- Select 
- Select the Time [Report](#) file:

Type	Name	Downloaded ▾	Status
	TimeReport_TEAM_a0a5675f-2880-4638-9866-aef1f...	2 m ago	Downloaded
	meetingAttendanceList (3).csv	13/11/2020	Downloaded

The [Report](#) opens in Excel.

# Contact Details

IT Queries	Informatics Merseyside IT Service Desk	0151 296 7777
Training Queries	Informatics Merseyside Training Service	<a href="mailto:training@imerseyside.nhs.uk">training@imerseyside.nhs.uk</a>