Swap Manual

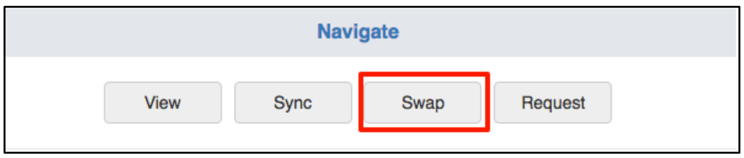
QGenda Support: **855-399-9945** (ext 2)
www.QGenda.com

Swap Tab

The Swap tab allows scheduled users to submit their traded shifts which eliminates the need to contact their administrator about every change. Once a swap has been submitted and approved by all parties involved, QGenda will notify the group's administrator (if administrative approval is required) to review the swap and give the final approval.

Getting Started

To enter the Swap Tab, click the "Swap" link on the home page (after logging into QGenda), or click the Swap tab at the top of the screen.



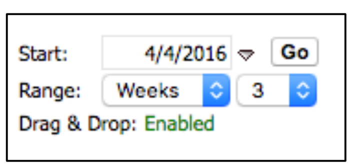
If you do not have the Swap Tab as one of your options, your profile does not have swapping privileges. Contact your administrator if you think this is an error.

Navigation in the Swap Tab is similar to the navigation in the View Tab. The task box and staff box can be used to show or hide staff members or tasks on the swap scheduling grid.

Submitting a Swap

To submit a swap, follow the steps below:

- Select the date you wish to start viewing the schedule by clicking on a day within the calendar that appears when clicking on the date. Use the range drop down menu to manipulate how far into the future you wish to view from the specified start date.
    - **Note:** When selecting a start date, you *must* select a date in the calendar to tell QGenda what date you would like to start viewing schedule. **Navigating to the month in the calendar is not specific enough**.



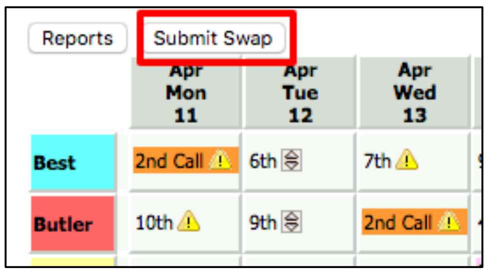
- On the schedule grid, you will notice that some assignments have the icon that are referred to as "elevator buttons." Any task that has the icon next to it means that it may be swapped.
- There are two ways to move the tasks around on the schedule grid:
    1. By using drag and drop, simply left-click and drag it to another user on the same day.

2. Left-click on the elevator button of the task you wish to move which will display a list of every member of your group to whom you can move the task. Then click on the intended recipient to move the task to their name.

- Once you have moved a task, a pending symbol, , will appear next to that assignment. The pending symbol means the swap is still awaiting submission or approval from another staff member or the administrator.

***Note**: You may only move shifts within the same day as to not lose coverage when making swaps. If you wish to swap across multiple days, you will have to swap your task on the first day and then do the same on the second day.*

- Once you have made all of your desired swaps and are ready to submit, click on the submit swap button at the top of your page.

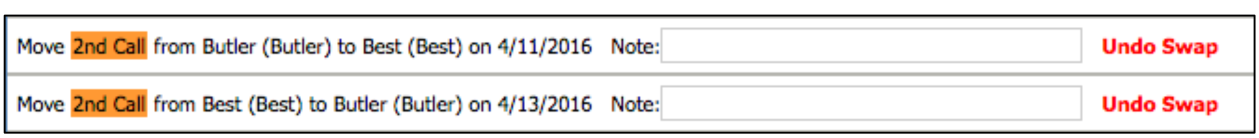


- The staff members who are involved in the swap will receive an email notification from QGenda asking them to log in and approve or deny the swap.
    - If the swap does **not** require admin approval, the swap will be immediately published once all parties involved have approved the swap.
    - If the swap does require admin approval, the swap will be published once all parties involved as well as your administrator have approved the swap.

Reviewing, Approving/Rejecting, and Viewing Past Swaps

At the bottom of your screen, you will see three tabs associated with swapping:

- **Swap Summary** will display the swaps that you have made during this session. Once you submit your swap, logout, or refresh your screen, this tab will empty. You will also notice that you have the ability to undo your swap as long as it has not yet been submitted. You may enter a note which will be seen by all parties involved.



- **Swaps Pending My Approval** will show you all swaps requiring your approval. Upon approving, your group's administrator will be notified to give the final approval. If admin approval is not required, the swap will become published once approved. You may enter a note which will be seen by all parties involved.

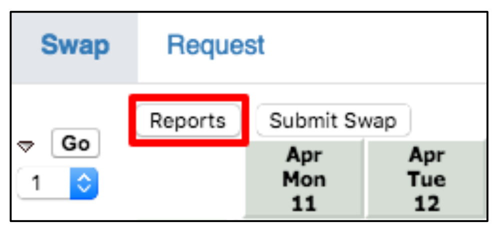
Move 2nd Call from Butler (Butler) to Best (Best) on 4/11/2016	Note:	Yes	No
Move 2nd Call from Best (Best) to Butler (Butler) on 4/13/2016	Note:	Yes	No

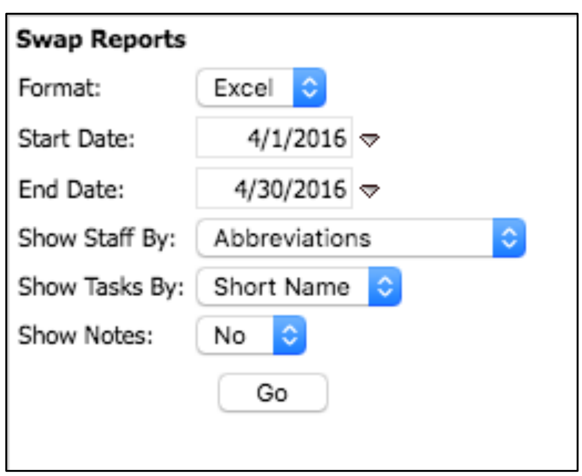
- **My Swap History** will show you all of your past swaps including those that are still pending, already approved, or have been denied.

Move OB Call from Best (Best) to Butler (Butler) on 4/7/2016	Approved
Move 9th from Best (Best) to Butler (Butler) on 4/14/2016	Pending (Best) Approval
Move 2nd Call from Butler (Butler) to Best (Best) on 4/11/2016	Denied by Staff Member
Move 2nd Call from Best (Best) to Butler (Butler) on 4/13/2016	Pending Admin Approval

Viewing Swap Reports

Swap Reports will give you a detailed file of all swaps that have been made in a specified period of time. The information will include who entered the swap, which tasks were swapped, the date and time the swap was submitted, and the status of the swap. To generate the file, click on the Reports button next to Submit Swap at the top of your Swap Tab:





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