

MyShiftPlanner First Time Setup

Welcome to **MyShiftPlanner**! We're so happy to have you with us and hope you enjoy the benefits of our app.

MyShiftPlanner is a free mobile app calendar specially designed for **shift working**. It not only keeps track of when you're working and calculates your shifts into the future automatically, but also keeps records of your worked hours, overtime, annual leave, pay (before taxes) and more. Add notes, link it to your personal phone calendar, search for days off and track your weekends...

But before you can enjoy all those benefits, you need to get your work rota and shifts into the app.

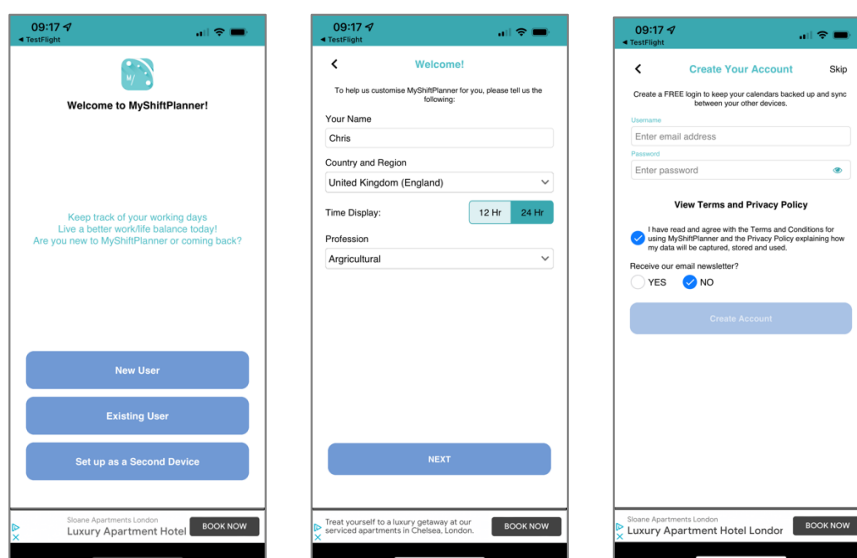
In this guide we'll help you do that, then take you through the main features of the app so you can get started quickly.

1. Setting up the app

When you first install the app, you'll be taken through a few introduction screens to get the app ready for you.

If you already have a MyShiftPlanner account, choose **Existing User** and log in with your details to recover your app and pull your data in.

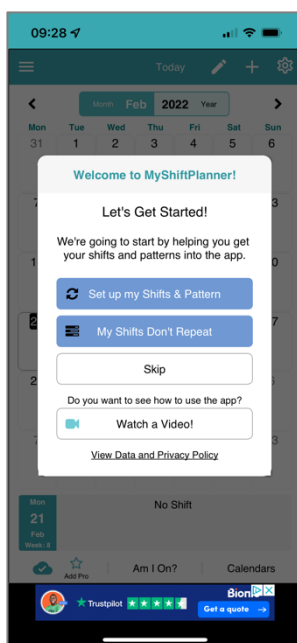
If you're a new user, choose **New User**. You'll be asked for your name (just so the app can refer to you by name – it's more polite for everyone), your country (so we can show you the correct public holidays) and your profession (to help us customise the app better for you).



After this you'll have the opportunity to create a **free MyShiftPlanner backup account**. We highly recommend this, as without it, if you delete the app, you'll lose all your data as it won't be saved anywhere but on your phone. If you really don't want and prefer to take the risk then you can tap **Skip** in the top corner.

A note on passwords: for your protection we insist that passwords are secure. That means they have to be at least 6 characters long and include a capital letter and a number of symbol such as !,.- or spaces. It makes it harder to guess your password so keeps your data more secure.

Once you've done this you'll be dropped into the main app and asked about your shift pattern/rota/schedule.



We support lots of different work rota situations, so at this point you need to pick which one suits you:

Repeating schedule (Set up my Shifts and Pattern)

Do your shifts repeat every so often? If so, we can help you by predicting your shifts into the future, so you don't need to keep adding them into the app. Just like magic!

If you aren't sure, pick this option anyway as you can always change your mind later.

My Shifts Don't Repeat

If your shifts keep changing every day, so there's no repeat to what you're working, choose this option.

The only downside is that we can't automatically predict when you're working to help you fill in your calendar, you'll need to do this by hand, but it's still easy to do.

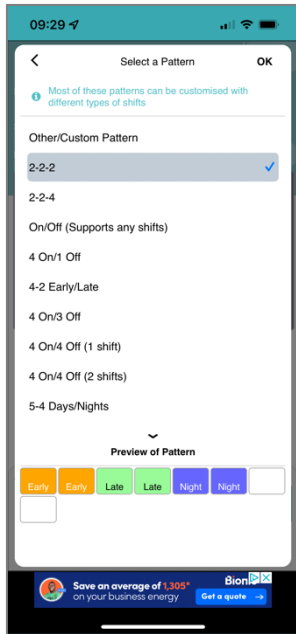
Skip - of course you can skip the pattern setup and dive straight into the calendar. That's no problem but you might want to read the rest of this guide to help you get set up as you'll be left to do it all yourself with a blank calendar.

Watch a Video – watch our setup video to get a quick way to see how the app works. It's like this setup guide but some people prefer a video.

2. Pattern Setup

For the app to be any use to you, you need to put your work rota/shifts into it. We do this through Pattern Setup. There are 2 types of pattern setup we offer:

- Build in patterns
- Custom pattern

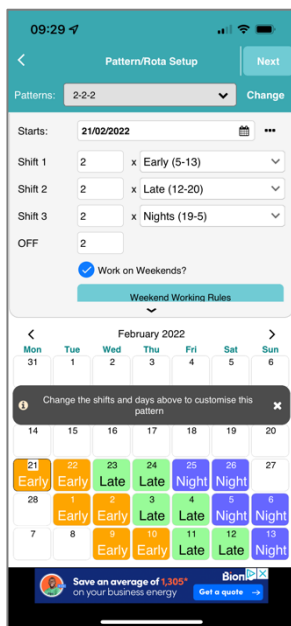


We include dozens of the most popular repeating patterns out of the box. Tap on each one in the list to see a quick preview and work out if your pattern is one of those.

Note: All the built-in patterns can be customised too. If you see one which looks similar to yours but may not be the correct type of shift (e.g. days instead of mornings) or maybe the wrong number (it shows 4 nights but you need 5) then select it anyway and try changing the shifts and number of days in the next screen. You can always return to the pattern list at any time to try a different one.

If none of those patterns are what you need, choose **Other/Custom Pattern** at the top of the list and you can create your own.

Built In Patterns – how to set them up



When you select a built-in pattern, you'll be shown some boxes you can use to customise it.

The most important is **Starts**. This is the date when the pattern you chose will start from in your calendar. Change this date to suit your work rota.

If you want to, you can then change the option options to change the number of each shift, the type of shift etc. If you aren't sure what an option does, change it and see how it affects the pattern shown at the bottom of the screen.

If you want to try a different pattern, tap the **Patterns** box at the top.

Tap **Next** when you're happy with the pattern.

The next screen asks you how you want us to predict how your pattern will repeat in future. You can also choose to repeat it into the past to fill out your calendar if you want to.

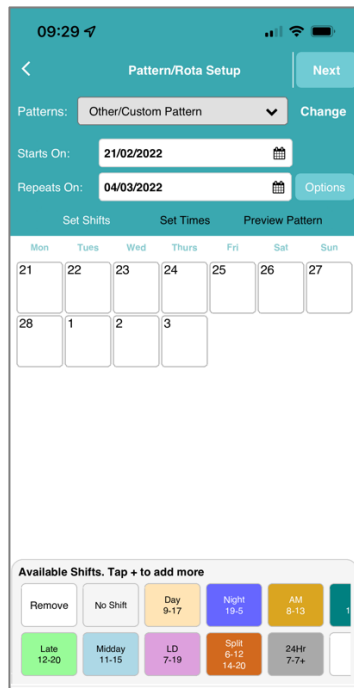
If you know that your current rota will be changing at some time in the future, you can also tell the app when that will be so it stops predicting and can switch to your new rota from that time.

We won't cover that here to avoid making things any more complicated, but keep in mind that we do support having more than one rota in the app!

Custom Patterns – for when your rota is more unique

There are literally millions of shapes and sizes of shift working rota used around the world, so we can't build every one of them into the app. For those cases, we offer Custom Pattern Setup.

To set up a custom pattern, choose **Other/Custom Pattern** from the list of patterns and tap **OK**.



Setting up a custom pattern is easy and starts with choosing the **Starts On** and **Repeats On** dates.

Starts On is the date your first shift is due to be worked.

Repeats On is the date the same shift will be worked again in future. This gives the app a way to figure out how many days your pattern is before it repeats.

After choosing these dates, you'll see a set of empty boxes appear in the middle of the screen. The number of boxes should be the number of days in your rota (including rest/off days).

You will also see a panel of coloured boxes at the bottom of the screen (we call this the **shifts panel**). Each coloured box is a shift with pre-defined times we've added for you already, which you can add into your pattern by tapping it, then tapping into one of the empty boxes above.

To remove a shift if you make a mistake, select the **Remove** box in the left of the shifts panel at the bottom of the screen, then tap on the day you want to clear.

Once you give it a try you'll quickly see how it works and is really simple.

What if I don't see the shift I need? That's simple, if you slide the shifts panel to the left, you'll see a **+** box at the end of the list of shifts. Tap this and you'll be able to add your own shifts with their own colour and times.

Once you have your pattern setup and it looks ok, you can tap **Next** in the top corner.

The next screen asks you how you want us to predict how your pattern will repeat in future. You can also choose to repeat it into the past to fill out your calendar if you want to. You can also give this pattern a name if you want to.

Once you're happy with your pattern, tap **Save** to save it and you'll see it's been added into your app calendar automatically repeating into the distant future automatically.

Manual Setup

If your work rota doesn't repeat, then you probably skipped the setup screen and are now seeing an empty calendar. What now?

At this point, you can add shifts into your calendar directly by tapping the **+** button in the top-right corner of the screen. This will show the **shift picker panel** containing the shifts you can add into your calendar. If you need more than the ones we've provided, tap the **+** button at the bottom of the panel to add other ones.

For more information on the other features of the app, see the next sections of this document.

Notes, Day Properties, Settings and More...

Once you have your shifts in the app, you can start to use lots of the other great features of MyShiftPlanner. We've included the main features you're likely to want to use below but please feel free to explore as the app can do a **lot more** than we can cover here.

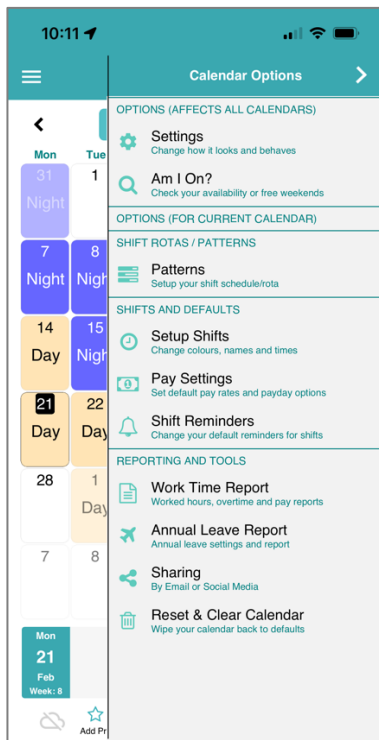
The Main Screen



This is the main screen of the app. It's a great calendar and works just like one:

- Switch between **Month** view and **Year** view by tapping the Month/Year boxes at the top.
- **Tap any day** to see details of the shift and any notes in the box at the bottom.
- Tap the grey box below the calendar to add a note to the selected day.
- Tap the **< and >** buttons at the top to go forward or back a month. You can also swipe left and right on the calendar to do the same.
- Tap the **+** button to add new things into the calendar such as shift swaps, annual leave and more.
- Tap the **cog icon** for **Settings** and setup of your shifts, patterns, pay and more.
- Tap the **pencil icon** for **Day Properties** to set the worked hours, overtime, and other properties for a particular day.
- Tap the **menu icon** in the top-left for system options such as your user account, Help, links to social media sites and more.
- Tap **Am I On?** at the bottom to search your calendar and find free days/weekends.

Settings (the COG icon)



A popular question for our support team is: How do I customise the app (e.g. change the first day of the week, change the time format from AM/PM to 24 hour, etc).

Tap the **cog icon**, then tap **Settings**.

In here you'll find all the options you need to customise your app to how you need it. If you need help with any of these, please contact our team or see the extensive FAQs page in the app menu.

Also in the Settings (COG) panel, you'll see options for changing your pattern, adding your shifts, configuring pay settings, reminders and lots more.

There's a lot in here but remember – if you need to set anything up within the app or calendar, it's likely to be under the cog icon.

+ Button



Once your pattern has been set up you can add extra things into your calendar by tapping the + button in the top-left of the screen.

The **shift picker panel** will appear on the right and by scrolling down it (use your finger to drag the list up and down) you'll see everything you can add.

Tap an item in the picker panel to select it, then tap a day in the calendar to add it to that day. If you make a mistake, just tap the day again to remove it.

The picker panel includes:

- **Activity icons** such as training, swaps, on-call.
- **Annual leave** (full day and part day)
- **Overtime** – you can set your overtime hours in the Day Properties screen (see below)
- **Shifts** – add one-off shift changes, or shift swaps through this panel.

Day Properties (Pencil Icon)

Tap the **pencil icon** to edit shifts, overtime, notes, and other details related to the day selected in the calendar.

Anything you do in this screen only affects the selected day and no others, so it's great if you have specific shift hours on a day or want to add notes.

The tabs at the top group the options:

- **Notes** – in here you add notes to the day and set some day-specific options.
- **Hours** – all your shift working is set up in here. Start/finish times, breaks, overtime, annual leave details and more.
- **Reminders** – the default reminders are set in the cog menu, but you can override it for this day in here
- **Pay** – the pay rates and options for this day, plus a useful pay report so you can track your earned pay for this shift.

If you have more than one shift set up on a day (or a part-day leave), you will see them below the green box the top. Just swipe left or right and tap each shift to switch to it.

The App (System) Menu

The app menu is where we keep non-calendar related options to keep it separate.

In here you'll find your **User Profile** containing details about your user account (e.g. your name, profession etc). You will also see the option to change the app styling to match your phone. We have options for **Light**, **Dark**, **Grey** and **Automatic**.

The most important options in here are:

- **Help and Social** – see our FAQs, Tips, Advice and get help.
- **Get in Touch** – if you get stuck and can't find an answer in Help and Social, you can get in touch with us directly and we'll do our best to help!
- **Add Pro Features** – find out about our Pro Pack and see how it can benefit your shift working needs.
- **Manage Purchases** – if you've already bought a Pro Pack subscription you can manage it from here.

Free Version and Pro Pack

Some apps claim to be free but are only time limited trials. MyShiftPlanner is not one of those! **Our free features are free forever** and always will be.

We offer more free features than any other shift working app on the market today. That's one of the many reasons our users love us and stay with us for so long.

How do we fund such great work? We do it by showing a small, unintrusive advertising banner at the bottom of the main screen which you may have seen. We don't show full-screen pop-up ads or make you sit through videos like other apps and games do.

For those who need more, we offer an inexpensive **Pro Pack** which adds lots of extra features for a small monthly or yearly fee which we use to fund the ongoing development and support of the app. This is a separate purchase because the Pro features are more expensive to develop and maintain.

We offer a **free 3-day trial of the Pro Pack** should you want to try it out with no obligation. Just cancel the trial before it ends, and you won't be charged.

What's in the Pro Pack?

Here are a few of the great features in the Pro Pack which you might want to trial:

- **Annual Leave tracking and reporting** - keep track of how many days leave you've taken and have remaining this year.
- **Work Time Reporting** – calculate and email reports of your worked hours, overtime and leave
- **Pay Calculations**
- **Customisable Shift Reminders**
- **Custom Icons** – add icons to any day for any purpose you need.
- **Live Sharing** – share your calendar and any changes you make with a friend, family, or work colleague directly into their MyShiftPlanner app.
- **Multiple Calendars** – create more than one calendar in your app for second jobs, other people, or other reasons.
- **Multiple Patterns** – the free version supports one work rota per calendar, but with Pro Pack you can add more if your rota changes.
- **Multiple Shifts per Day** – the free version is limited to one shift on a day but you can add a second with the Pro Pack.
- **Device Calendar Sync** – send your shifts to your phone calendar.
- **Personal Appointments** – see your personal appointments and events from your phone calendar inside MyShiftPlanner.
- **Payday Icons** – adds your payday into your calendar automatically so you never forget when you're going to be paid.

Next Steps

We hope you found this guide useful and are enjoying using MyShiftPlanner.

If you want more help, see our FAQs page on the website: <https://myshiftplanner.com/faqs> or check out the other help options in the Help and Social section of the app menu.

Thank you and please don't forget to leave us a review on our App Store page – especially if you're enjoying using our app!

Thanks from the MyShiftPlanner Support Team