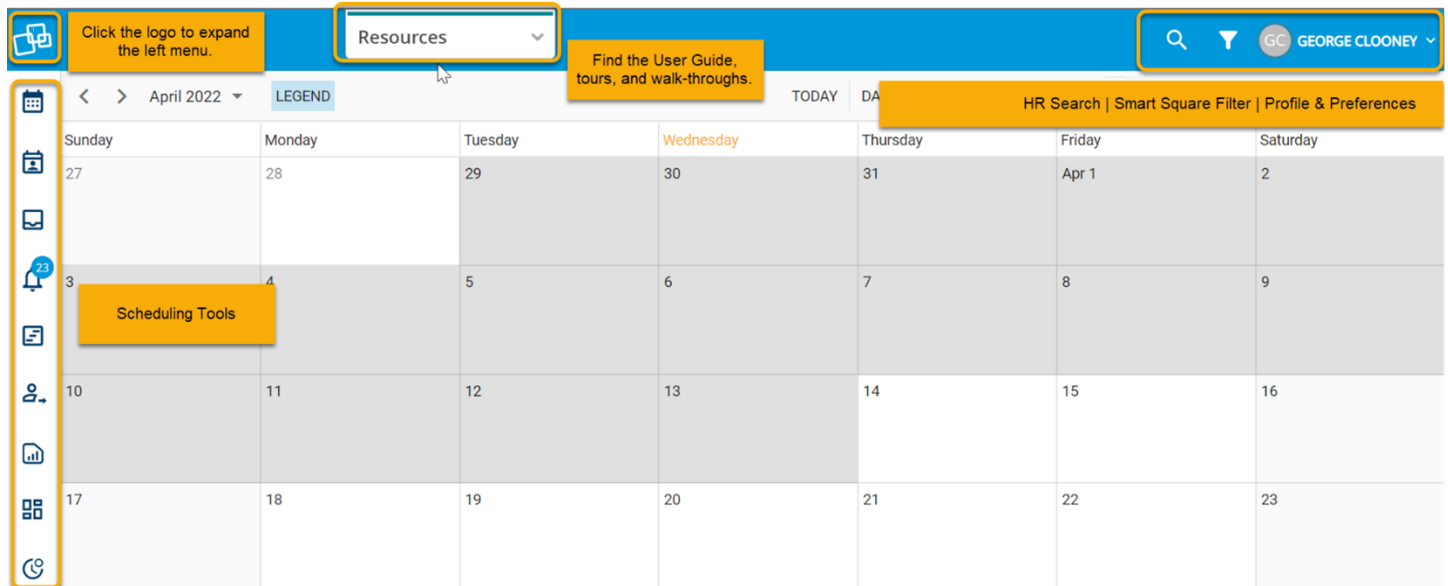# Smart Square®

Exciting News! **A modern Menu Navigation Experience, Staff Requests, and Communication Center** are coming June 29th! No more flipping to the Classic Smart Square menus! Everything is in one place. We think you'll find the new views much more modern and convenient to access!

NEW MENUS

MENU CHANGES

Menu items on the left-hand side get new icons and are in a slightly different order.
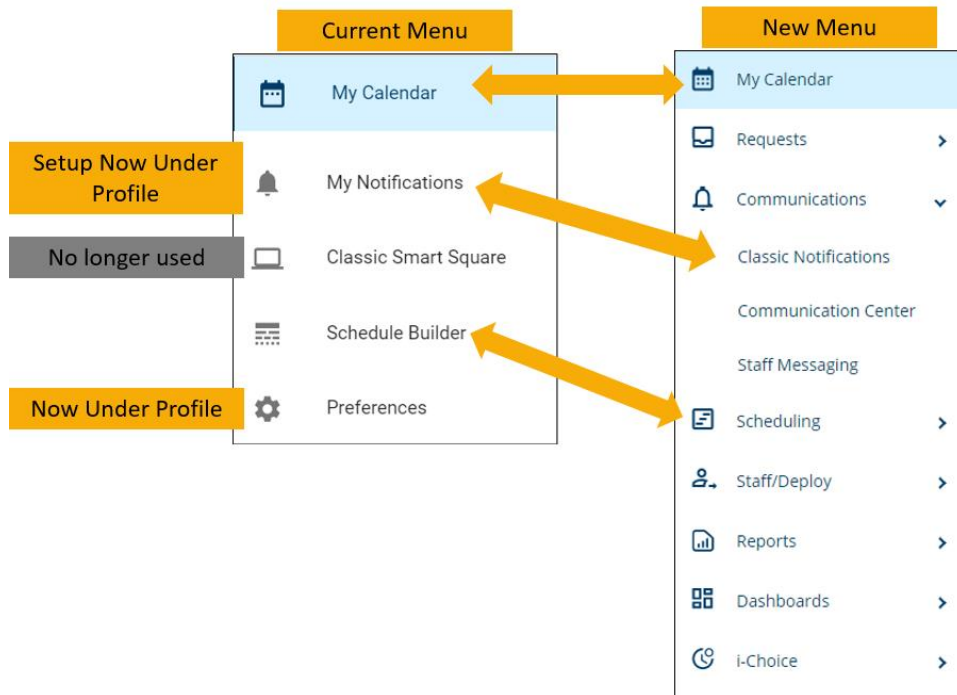
What happened to the tools at the top of the screen?

Tools at the top of the page are now merged into the left-hand side of screen. Now anything dealing with scheduling is in one convenient space.
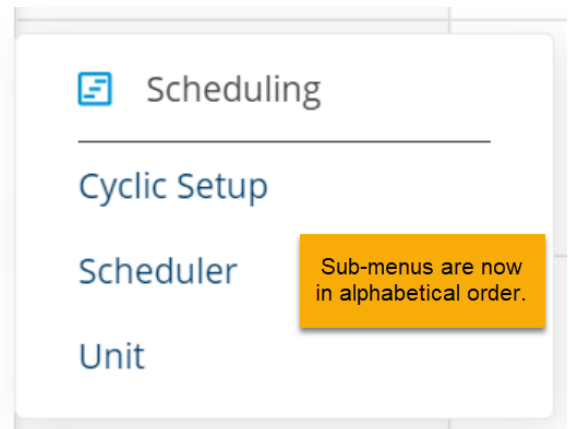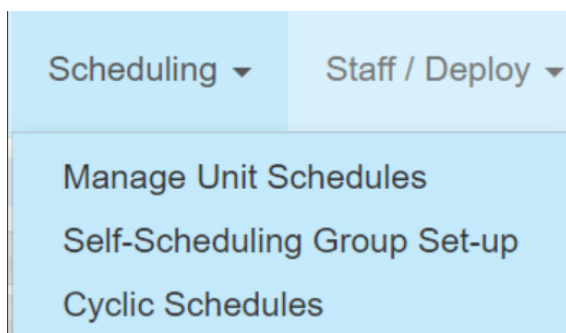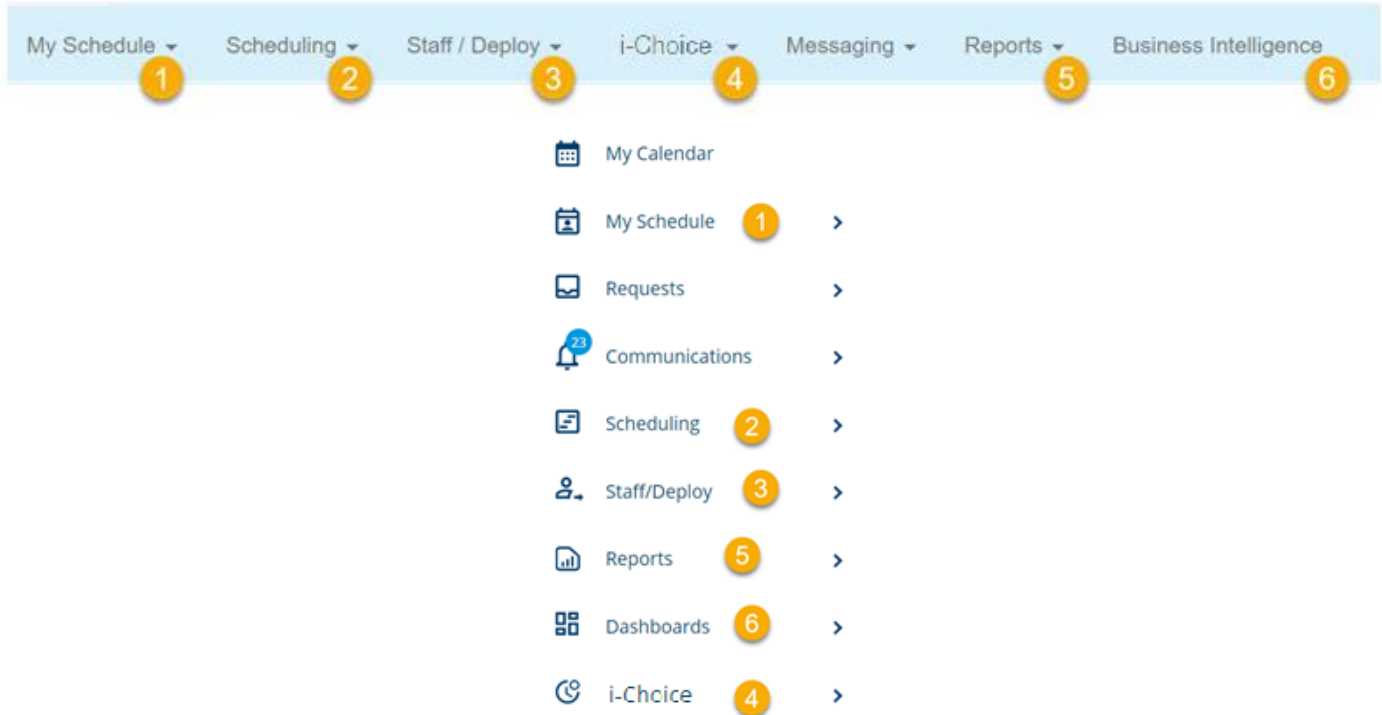
My Schedule ▾	Scheduling ▾	Staff / Deploy ▾	i-Choice ▾	Messaging ▾	Reports ▾	Business Intelligence
1	2	3	4		5	6

▦ My Calendar

🗓 My Schedule **1** >

☐ Requests >

🔔²³ Communications >

☰ Scheduling **2** >

👤 Staff/Deploy **3** >

📊 Reports **5** >

🔲 Dashboards **6** >

🕒 i-Choice **4** >

Scheduling ▾	Staff / Deploy ▾
Manage Unit Schedules	
Self-Scheduling Group Set-up	
Cyclic Schedules	

→

☰ Scheduling
_____

Cyclic Setup

Scheduler

Unit

Sub-menus are now in alphabetical order.

What menu items are being renamed?
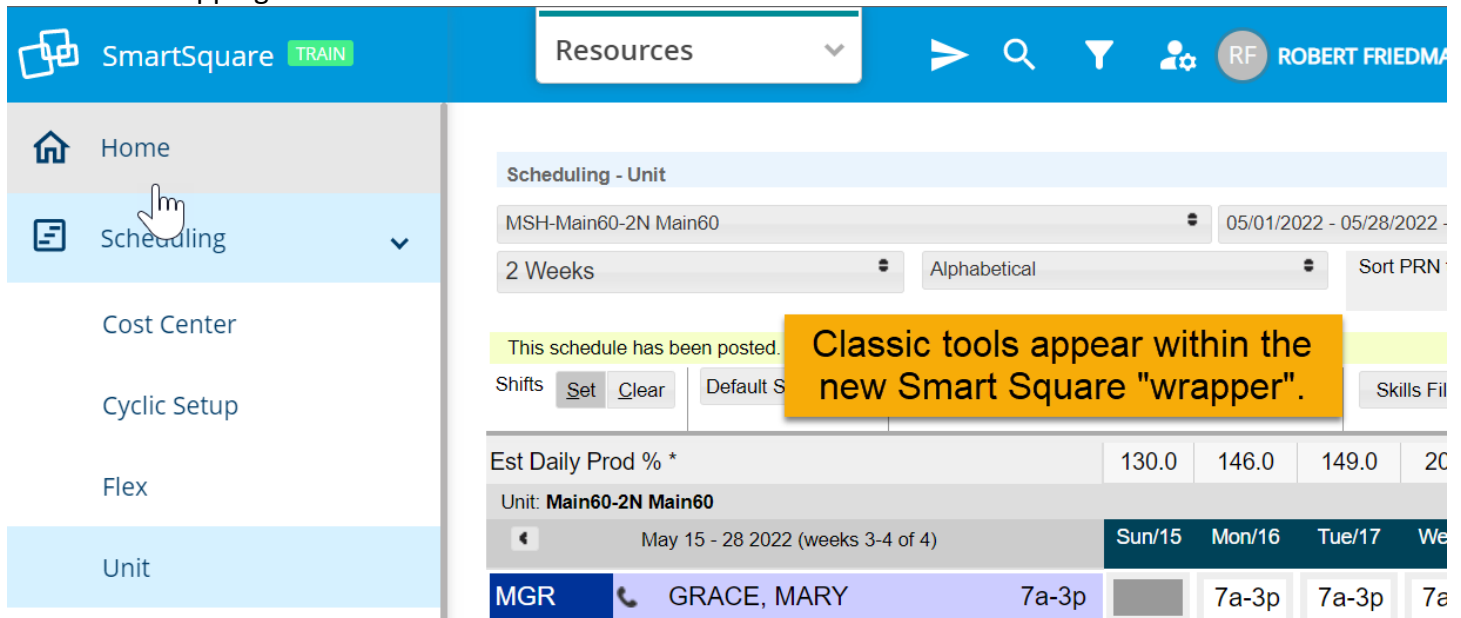
MENU NAME UPDATES

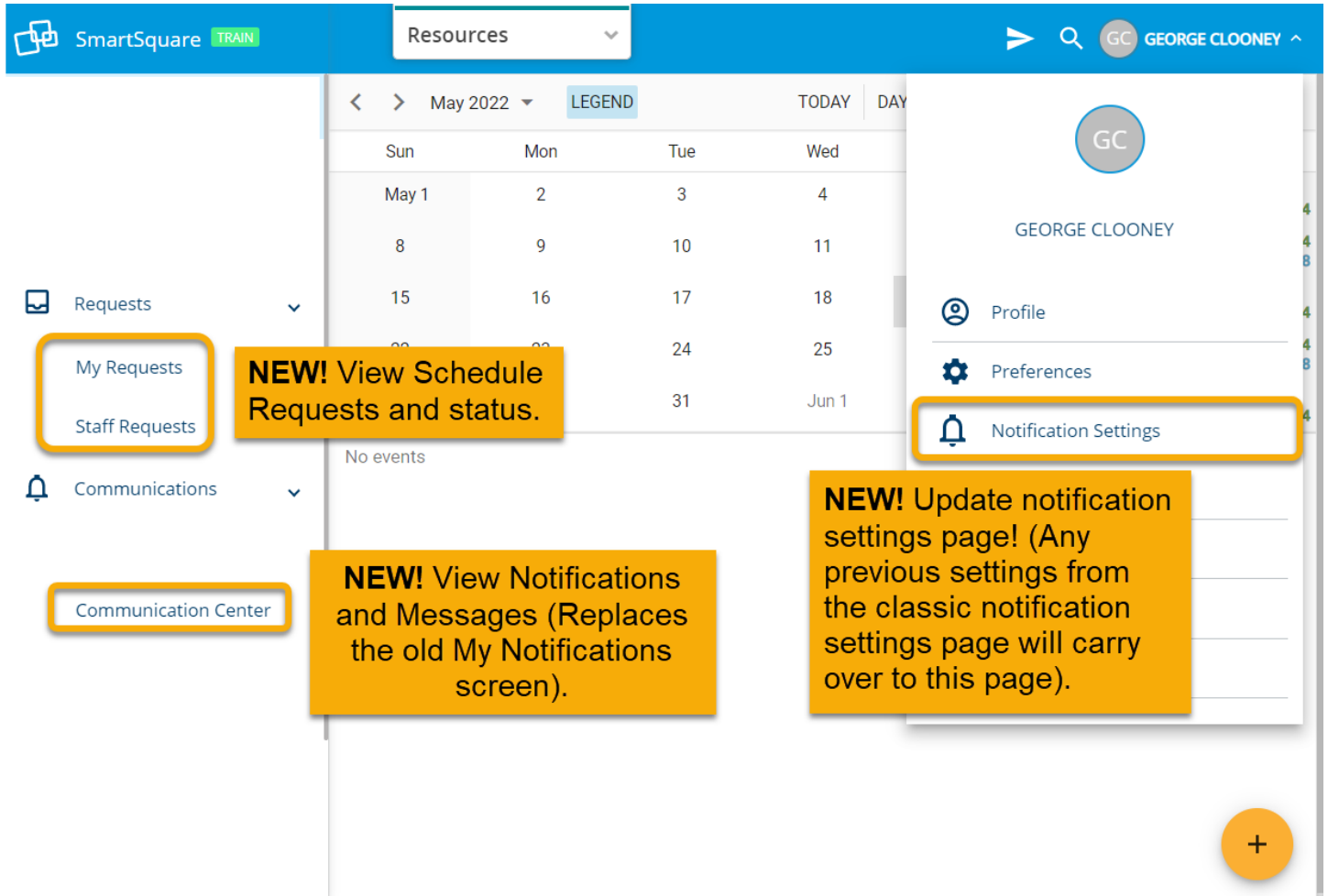Most menus are the same. A few tools have been renamed to save on space.
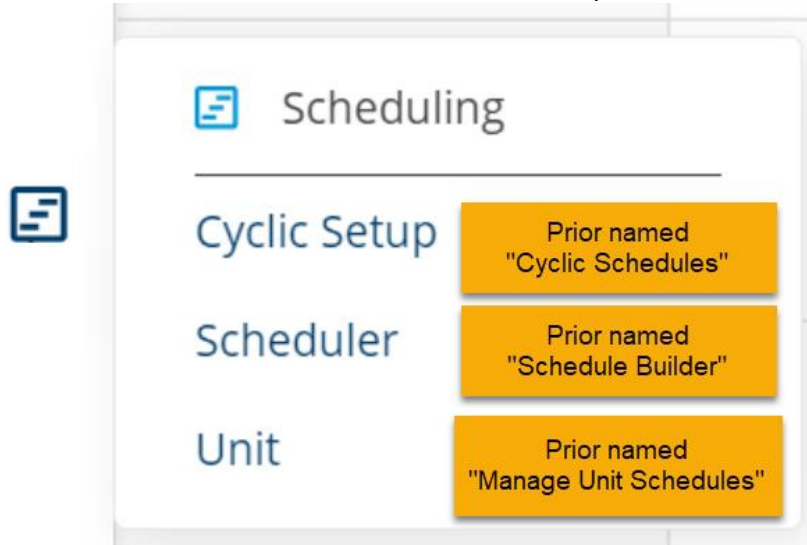
What will happen if I select a classic tool?

CLASSIC SCREENS

The classic tools will appear within the new menu like the modern tools. You may notice a bit more space within the wrappings.

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New Options! REQUESTS & COMMUNICATION CENTER

SmartSquare `TRAIN`

Resources

GEORGE CLOONEY

	May 2022 ▾	LEGEND		TODAY	DAY
Sun	Mon	Tue	Wed		
May 1	2	3	4		
8	9	10	11		
15	16	17	18		
		24	25		
		31	Jun 1		

Requests ▾

My Requests

Staff Requests

NEW! View Schedule Requests and status.

Communications ▾

Communication Center

NEW! View Notifications and Messages (Replaces the old My Notifications screen).

No events

GC

GEORGE CLOONEY

⊙ Profile

⚙ Preferences

🔔 Notification Settings

NEW! Update notification settings page! (Any previous settings from the classic notification settings page will carry over to this page).

New – Notification Settings:

The classic notification settings are still available under Classic Notifications, but the new Notification Settings option under your profile makes it easier to update your desired notification preferences! The notifications settings you have already elected will display here too.
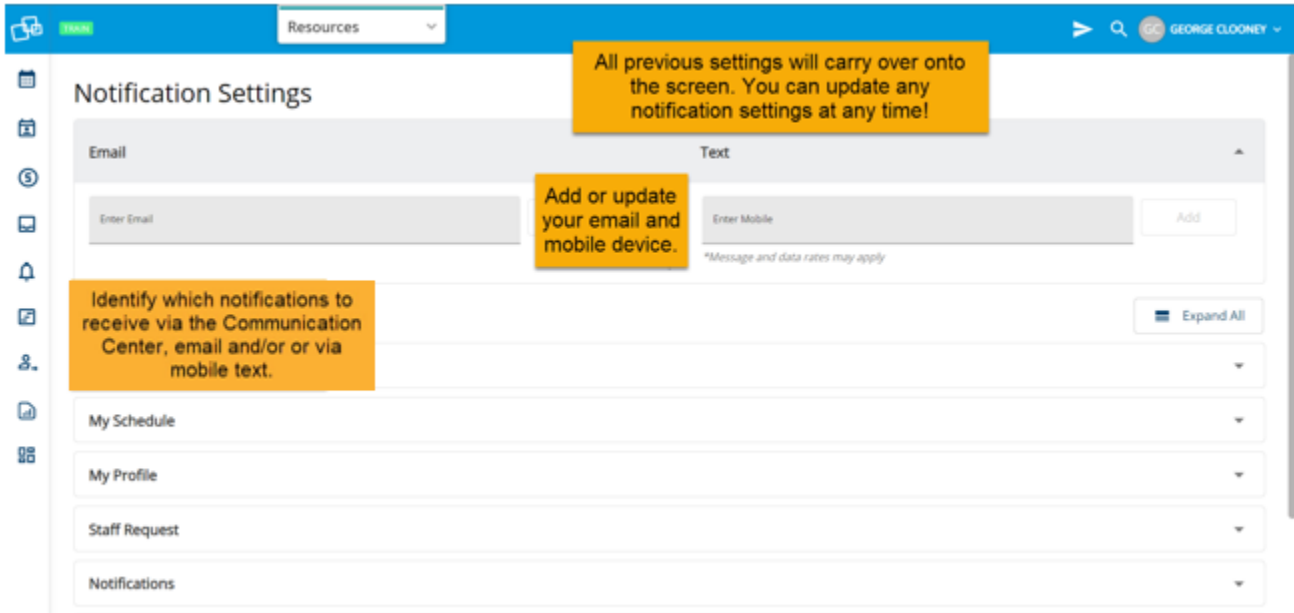
New – Staff Requests:

Staff Requests for shift trades (if available for your unit) and time off are still available under Classic Notifications, but they can now be viewed and accepted/denied on the new Staff requests page instead of using the classic view.
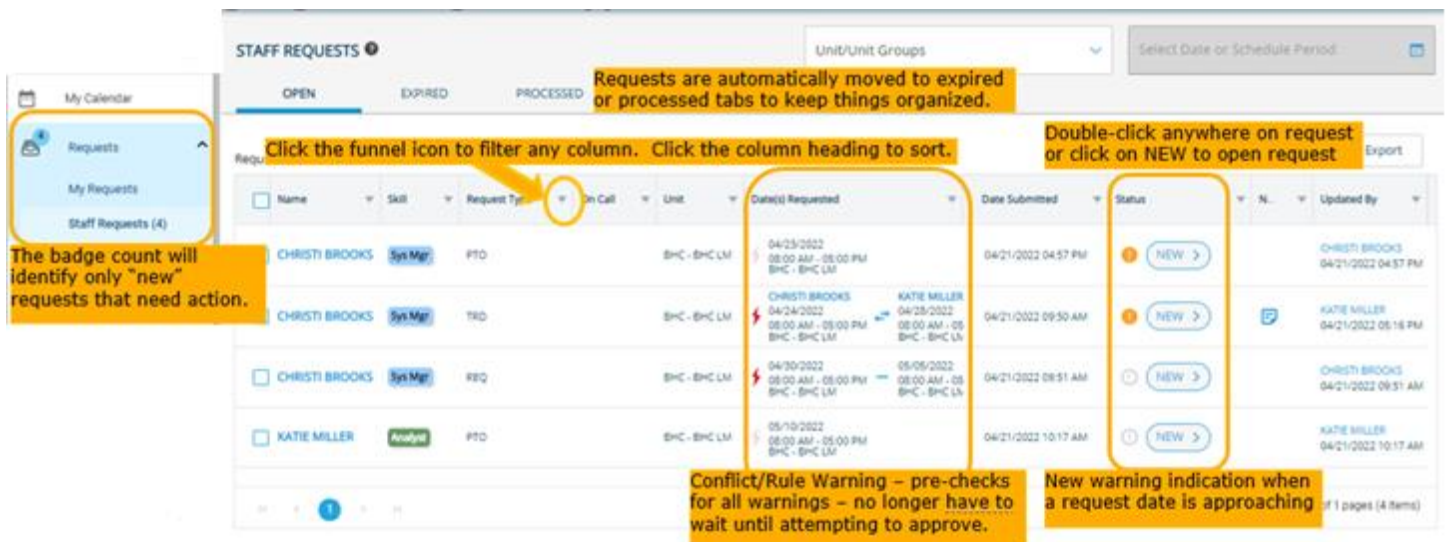
Request panel opens on right side of screen and includes two tabs:
Request Details – provides everything you need to know about the request, including the warning displays.
Date Details – provides the staff list and balancer information.

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You have the option under preferences to make the Staff Request page your default landing page if you would like to see your staff requests as soon as you log into Smart Square.

Preferences

Shift Display
- ● Start To End (7a-7p)
- ○ Military Start To End (700-1900)
- ○ Shift Abbreviation (Shift D)

Default Landing Page
- ○ Calendar
- ○ Staff Requests
- ● Classic Communication Center
- ○ Schedule Builder

Select **'Staff Requests'** if you want your default load page to be the new Staff Requests processing page.

- ○ Day
- ○ Month Agenda
- ○ Week
- ● Agenda

CHRISTI BROOKS

- 👤 Profile
- ⚙ Preferences
- 🔔 Notification Settings
- 🔊 Support
- 📘 Tutorials
- ℹ Terms of Service
- ➡ Log out

New - Communication Center:

Classic Notifications are still available, but the notifications you have already elected to receive can now be viewed in the new Communication Center instead of going to Classic Notifications. Double-click to open and view the details of any item.

COMMUNICATION CENTER

UNREAD   READ   DOCUMENTS

Select Date or Schedule Period

Results (1)

Click any Column Header to sort.   Click the funnel icon to filter any column.

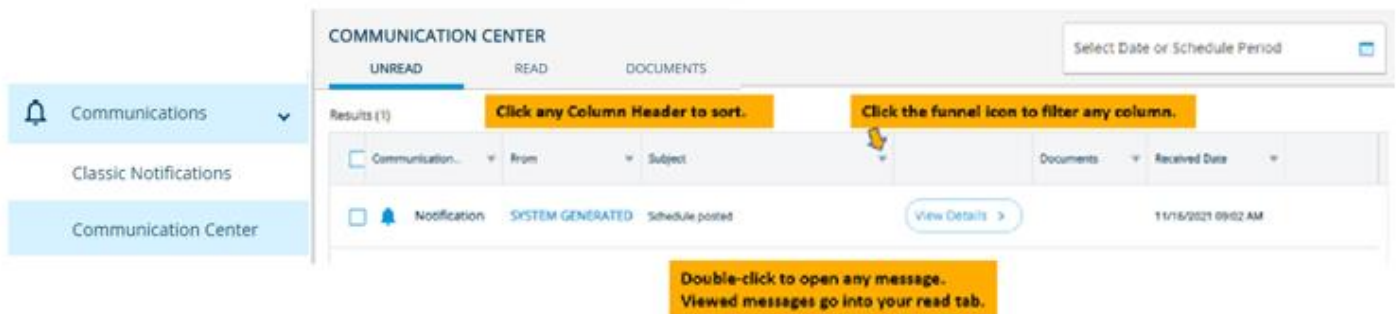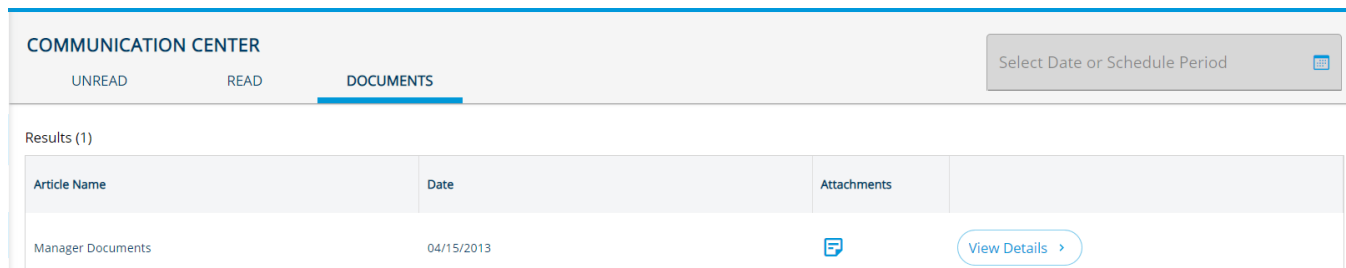|	Communication...	From	Subject		Documents	Received Date
🔔	Notification	SYSTEM GENERATED	Schedule posted	View Details >		11/16/2021 09:02 AM

Double-click to open any message.
Viewed messages go into your read tab.

Communications
  Classic Notifications
  Communication Center

Click the Documents tab to view manager documents.

COMMUNICATION CENTER

UNREAD   READ   **DOCUMENTS**

Select Date or Schedule Period

Results (1)

Article Name	Date	Attachments	
Manager Documents	04/15/2013	📄	View Details >

NEW MENU QUICK REFERENCE

Old Menu Item	New Menu Item
Business Intelligence	Dashboards
Filter icon	Top of screen filter icon (beside name) New Search line - limits options shown for filtering Icon has count to show number of filters currently applied
Help and Support	Profile (click Name/Initials) --> Support
i-Choice --> i-Choice Detail Report	i-Choice --> Detail Report
i-Choice --> i-Choice Weekly Summary Report	i-Choice --> Weekly Summary
Legend	Top of screen LEGEND button on My Calendar view
LOGOUT	Profile (click Name/Initials) --> Log out
Menu automatically expanded with button to minimize	Must click Smart Square icon to expand menu
My Calendar	My Calendar
My Notifications	Two options: 1) Communications --> Classic Notifications 2) Requests --> My Requests/Staff Requests and Communications --> Communication Center
My Notifications --> Change Settings Gear icon	Two Options: 1) Communications --> Classic Notifications --> Change Settings gear icon 2) Profile (click Name/Initials) --> Notification Settings
My Schedule menu (from Classic Smart Square top of screen menu)	My Schedule
Preferences --> Preferences tab	Profile (click Name/Initials) --> Preferences
Preferences --> Profile tab	Profile (click Name/Initials) --> Profile
Preferences --> Security tab --> Change Password	Profile (click Name/Initials) --> Profile --> Change Password
Question mark icon for Tutorials and Contact Support	Profile (click Name/Initials) --> Tutorials Profile (click Name/Initials) --> Support
Reports Menu	Reports
Schedule Builder	Scheduling --> Scheduler
Scheduling --> Cyclic Schedules	Scheduling --> Cyclic Setup
Scheduling --> Hourly Schedules	Scheduling --> Hourly View
Scheduling --> Manage Cost Center Schedules	Scheduling --> Cost Center
Scheduling --> Manage Unit Schedules	Scheduling --> Unit
Scheduling --> Self-Scheduling Group Set-up	Scheduling --> Self-Scheduling Setup
Scheduling Preferences (from top of Classic Smart Square view)	Profile (click Name/Initials) --> Preferences
Self-Scheduling	Self-Scheduling
Silhouette for Preferences, Change Password, and Logout	Profile (click Name/Initials) --> Preferences Profile (click Name/Initials) --> Profile --> Change Password Profile (click Name/Initials) --> Log out
Staff/Deploy Menu (Staffing Analysis, Deployment, Deployment Balancer, Daily Assignments, Recruitment Call List)	Staff/Deploy Menu
Top of screen magnifying glass to search	Top of screen magnifying glass to search (beside name/initials) Has Last Account link which is new for elevated users
Tutorials	Profile (click Name/Initials) --> Tutorials