# Getting Started with Lightning Bolt

For Providers

A simple guide for providers to start using Lightning Bolt's scheduling system.

How do I log in?

If it is your first time logging in, you may have received an email prompting you to set your password. Follow the instructions in that email to set your password.

To login, navigate to lightning-bolt.com and click **Access Schedule** in the top right corner.

1.866.678.3279   info@lightning-bolt.com   **Access** Schedule ▶
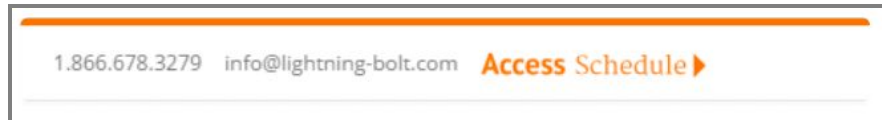
Enter your username and password. The username will be set by your administrator. Your password will either be set by your administrator or by you through a link provided by email.

Viewing the Schedule

Once you've logged into Lightning Bolt, you will be taken to the **Dashboard**. Here, you'll see one of the following two icons:

Click on one of these to access **Viewer**, where you will be able to see your schedule.

Tip: Viewer is fully compatible with mobile devices, so you can quickly access your schedule on the go! In your mobile browser, just type in the same address (lblite.lightning-bolt.com/viewer).

Tip: if you don't know your username or password, please contact your scheduling administrator. They will be able to set your account up for you.

What are the different ways I can view my schedule?

If it's your first time using Viewer, your default view will be "Me". To change your view, simply click on the view name at the top of the screen.
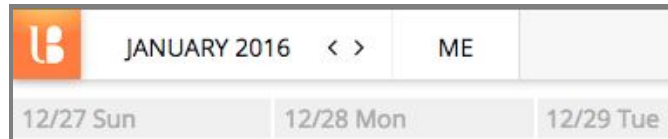
On the right side of your screen, the **Views panel** should open up:
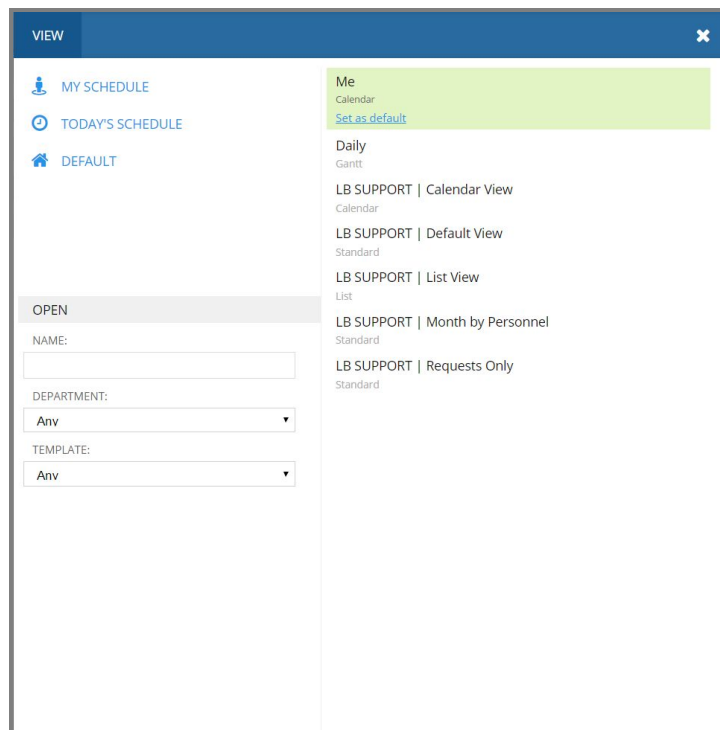
On the right side of the panel, a list of all your available views will show up. **Click** the view you'd like to see to open it up.

All versions of Lightning Bolt also come with two standard views that everyone will have access to: the **Me** view and the **Daily** view (you can find these on the left side of the **Views panel** as well). You can also click on these views to open them up.

Once you've found a view that you like, you can open the Views panel back up and **click** the **Set as Default** link to make the view your default. Whenever you open up Viewer in the future, it will load the schedule with your default view.

How do I navigate between days/weeks/months on the schedule?

By default, Viewer will load with schedule data from either the current month, week or day, depending on your default view settings. You can easily navigate between specific days, weeks, or months by using the **date selector** in the top-left corner of the page. Use the arrows to scroll through the months, or click on the month's name to open a window that allows you to jump wherever you'd like.
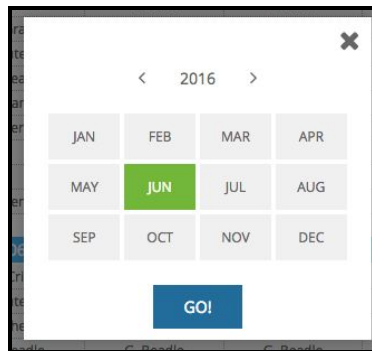
How do I see the details of an assignment?

Left-click any cell on the schedule to see the information about the provider who is scheduled, the slot details (such as pending swaps), and the slot history (such as changes that have been made).
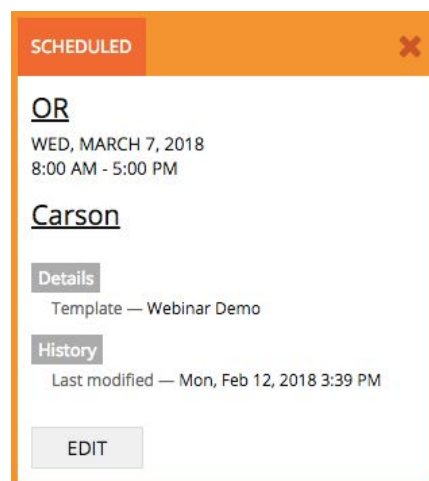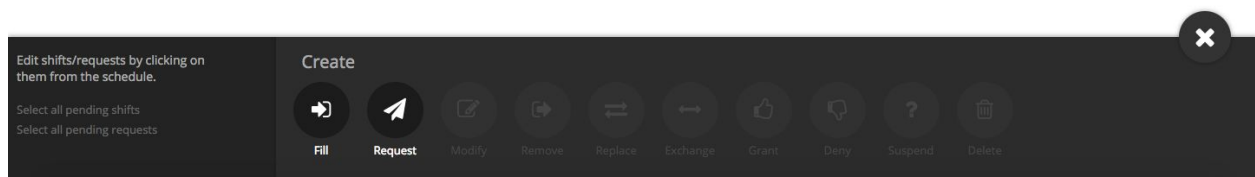
How do I make a request?

If your administrator has set up the appropriate permissions, you can use Lightning Bolt to make requests for time off (or other shifts) on future schedules.

On Viewer, navigate to a future date you would like to make a request for.

Select the ✏️ pencil icon in the bottom right corner. This will expand a toolbar.
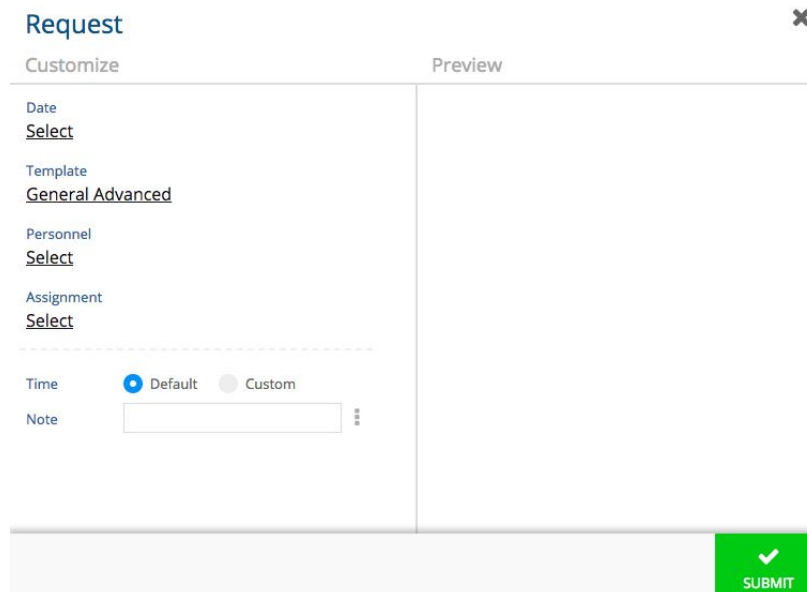
Select **+ Request** button.

Select **date(s)** you would like to request by **clicking on them.**
Your name should be selected under Personnel by default.
Select **Assignment(s)** you would like to request.
Optionally, you can add a **Note** attached to the request(s).
Click on **Submit**.

Tip: The request window by default will open up the first month that is requestable (the month right after the last schedule that has been released). It will also stop you from making a request too far in the future. The administrator can configure how far in the future you are able to request.

Request Status:

■ A request with a green box means that request has been approved. Approved requests will get added to the schedule.

■ A request with a blue box means that request is pending, waiting approval from the administrator. Pending requests do not get added to the schedule.

■ A request with a red box means that request has been denied. Denied requests do not get added to the schedule.

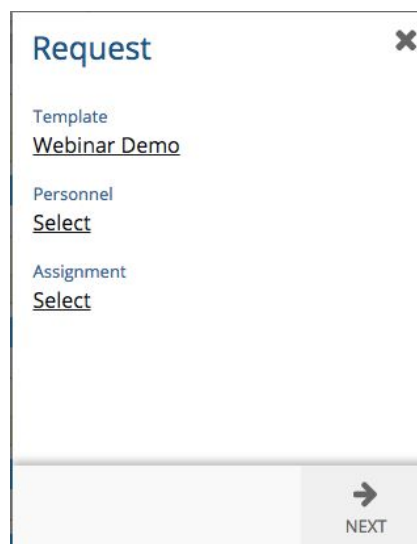■ A request with a yellow box means there is a note attached to that request.

Tip: You can hover over any request and it will show you the status of that request and the request note if applicable.

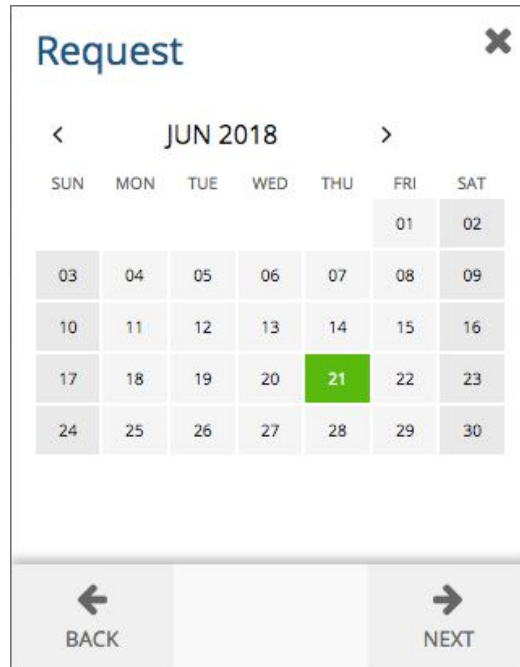**Alternative way to make a request:**

You can also make a request by left clicking on the date in Viewer and then selecting **Create Request**.
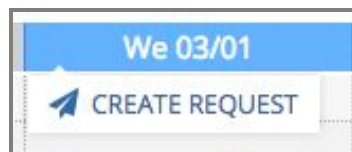
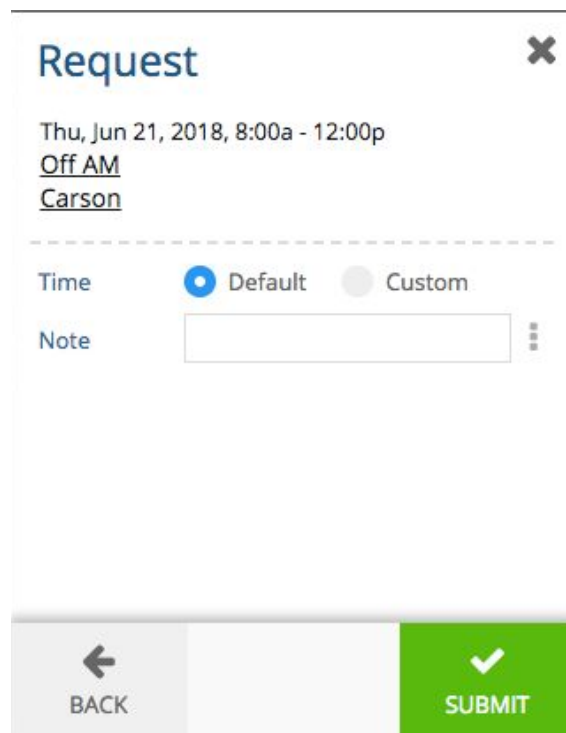Select the proper information for the request. Then click **Next**.

Select the date(s) you would like to request by **clicking on them**. Then click **Next**.

Review your request and click **Submit**.

How do I make swaps?

If your administrator has set up the appropriate permissions, you can use Lightning Bolt to request shift swaps on the current schedule.

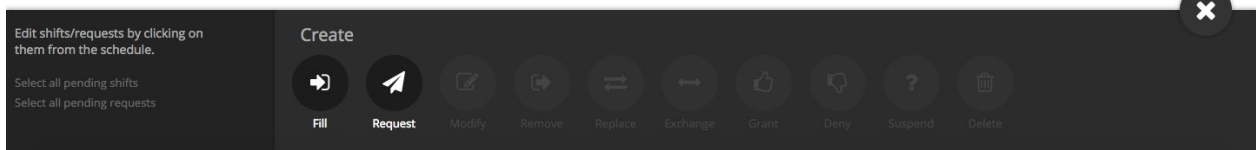On Viewer navigate to the date you would like to make a swap for.

Select the pencil icon in the bottom right corner. This will expand a toolbar.

Swap tool bar options:

<u>**Fill**</u> allows you to add yourself to the schedule.

Select **Fill**

Select **date(s)** you would like to request by **clicking on them.**
Your name should be selected under Personnel by default.
Select **Assignment(s)** you would like to add.
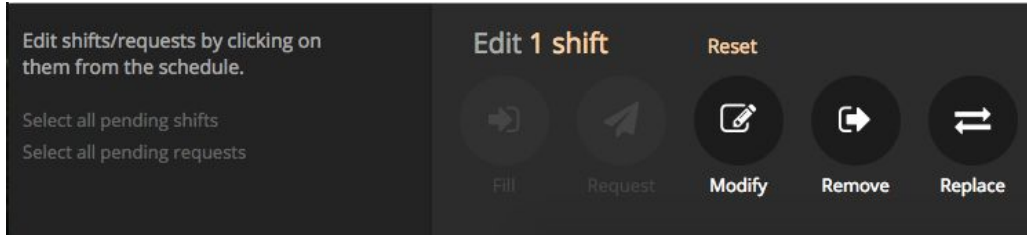Optionally, you can add a **Note** attached to the fill(s).
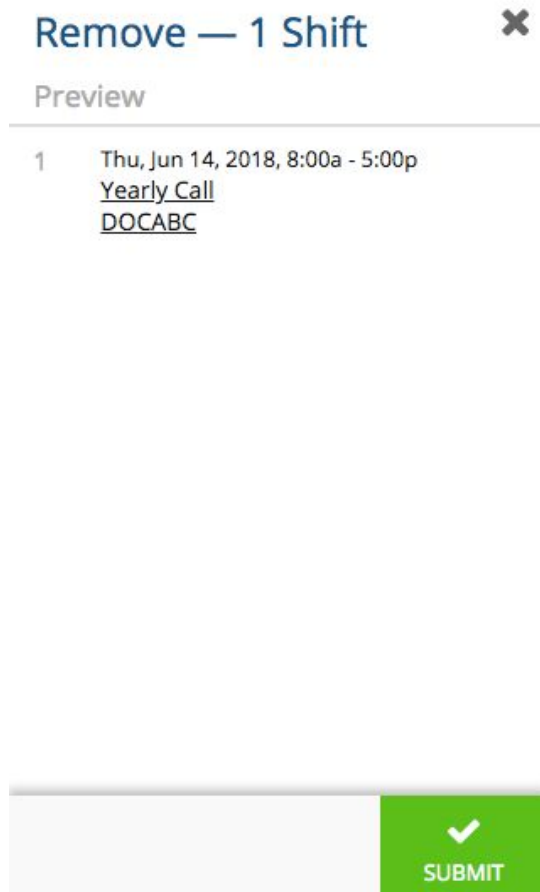Click **Submit**.

Remove allows you to take yourself off the schedule.

First **select cell(s)** that you are working on the schedule that you would like to remove.

Select **Remove**

Review the remove. Then click **Submit**.
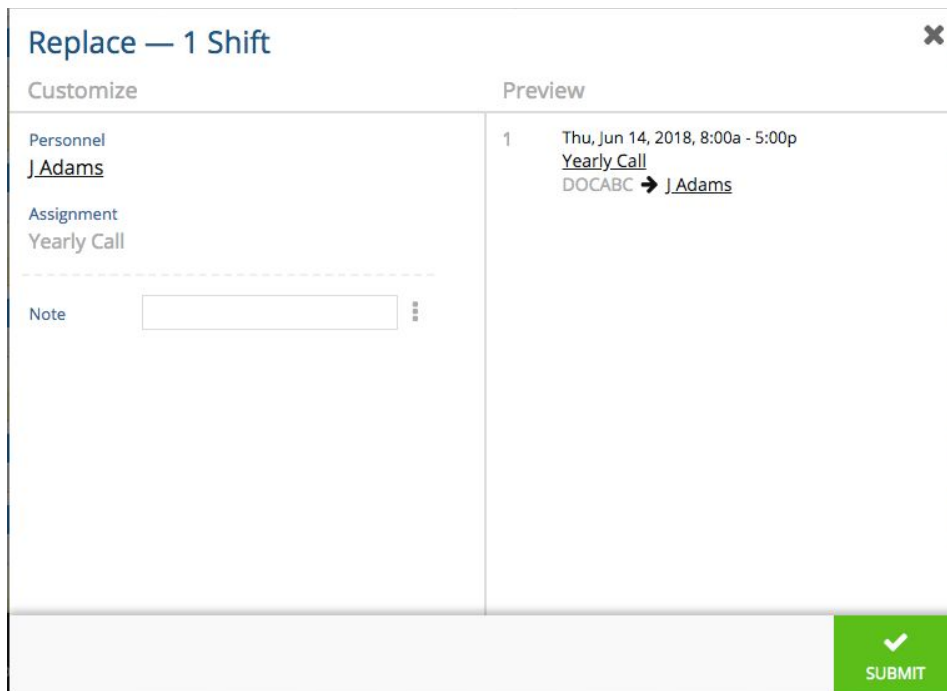
Replace allows you to take someone else's shift(s) or have someone take over your shift(s).

First **select cell(s)** that you are working on the schedule that you would like to be replaced.

Select **Replace**
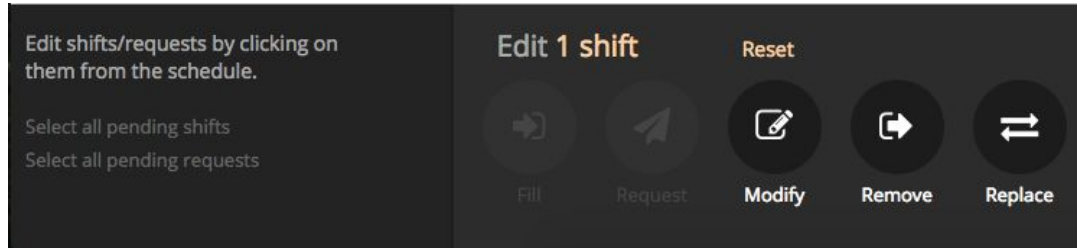
Select a New Personnel to replace you. Click **Submit**.

Or you can select someone else on the schedule.

Select Replace and by default your name appears in New Personnel field
Click **Submit**.
You now will take that person's shift.

The **Exchange** tool allows you to switch two unique provider's schedules.

First select cells of your schedule and another person. And only select one other person.

Th 06/14	Fr 06/15
J Adams	DOCABC
R Mathews	
Th 06/21	Fr 06/22
J Adams	DOCABC

Tip: The Exchange tool can be used If only two personnel are selected in the schedule.

Select **Exchange**.

Edit shifts/requests by clicking on them from the schedule.

Select all pending shifts
Select all pending requests

Edit **4 shifts**   Reset

Fill   Request   **Modify**   **Remove**   **Replace**   **Exchange**

Review the exchange. Then click **Submit**.

Exchange — 4 Shifts   ✖

Preview

1   Thu, Jun 21, 2018, 8:00a - 5:00p
     Yearly Call
     J Adams ➜ DOCABC

2   Thu, Jun 14, 2018, 8:00a - 5:00p
     Yearly Call
     J Adams ➜ DOCABC

3   Fri, Jun 15, 2018, 8:00a - 5:00p
     Yearly Call
     DOCABC ➜ J Adams

4   Fri, Jun 22, 2018, 8:00a - 5:00p
     Yearly Call
     DOCABC ➜ J Adams

✔
SUBMIT

Alternative way to make a swap:

You can **right click** on the cell and select **Replace**.

Select a new Personnel to Replace you.

Review the swap. Then click **Submit**.

*Tip: When you try to **right click** a cell, make sure to close the pencil tool bar on the bottom because if it is open it will not allow you to **right click** a cell.*

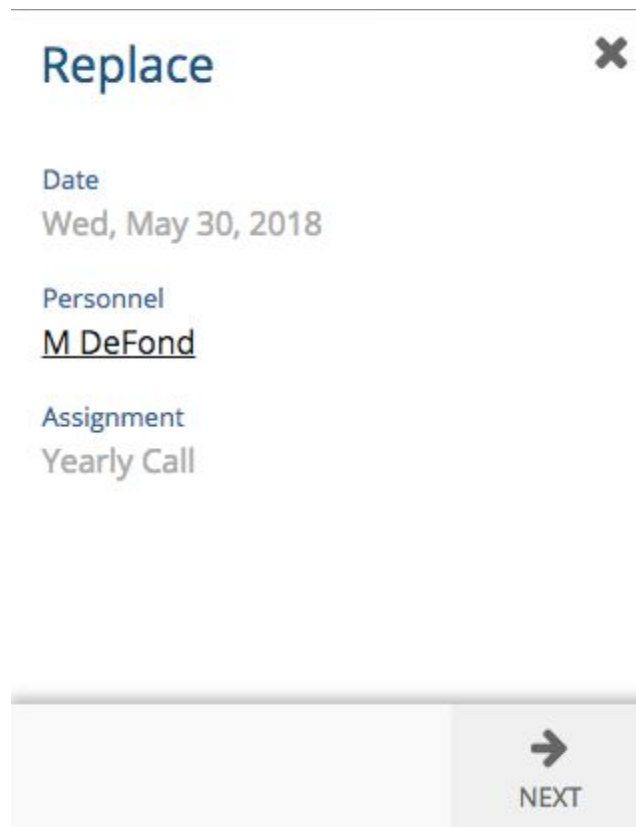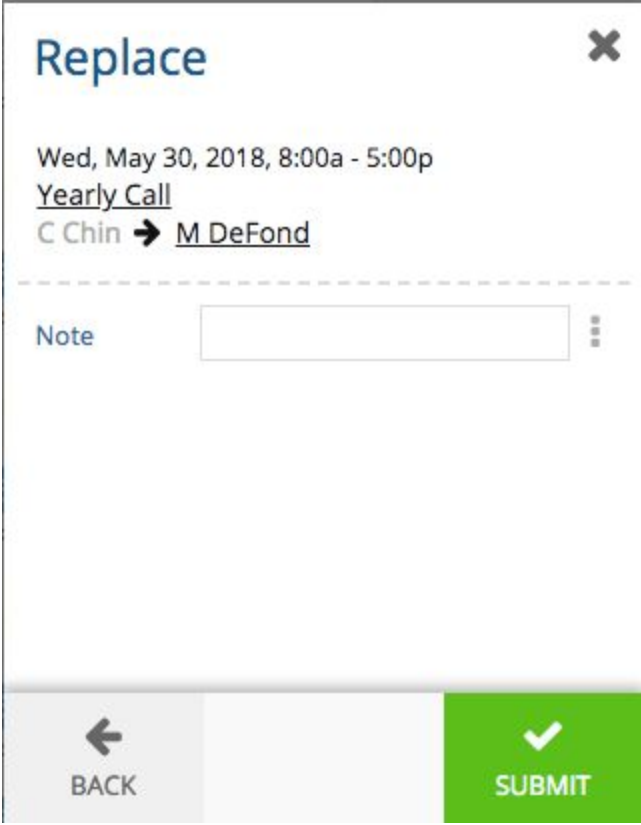**Note: If the **Swaportunity** feature has been enabled for your group, you can select multiple providers to replace you. Lightning Bolt will then email each provider letting them know you've requested they cover the assignment. They can accept or decline the request from the email or the **LBLite User Menu**.*

How do I grant or deny a swap?

If your administrator has set up the appropriate permissions, you can use Lightning Bolt to **grant** or **deny** swaps that other providers have requested on the current schedule.

Typically, you will only be allowed to approve swaps that other providers have requested involving you (e.g. a swap that involves you covering another provider's shift, or a swap where another provider takes one of your currently scheduled shifts).

Select the pencil icon in the bottom right corner. This will expand a toolbar.

Select the **pending swap(s)** on the schedule by clicking on them individually or using the 'select all' buttons along the left-hand side of the bulk action toolbox.

Then click on either **Grant** or **Deny**.
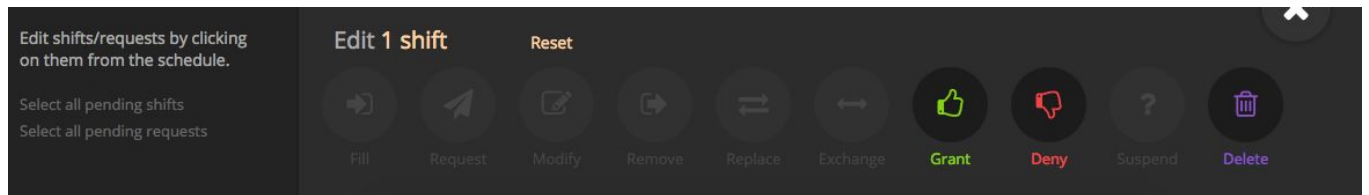
Alternative way to grant or deny a swap:

Right-click on a pending swap. Select on either **Grant Swap** or **Deny Swap**.
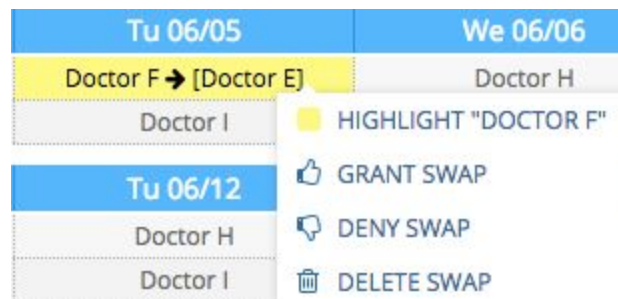
You'll then see another pop-up asking you to confirm your choice – when you're done, just click **Submit**, and the schedule will update to reflect your change.

How do I set up a calendar subscription?
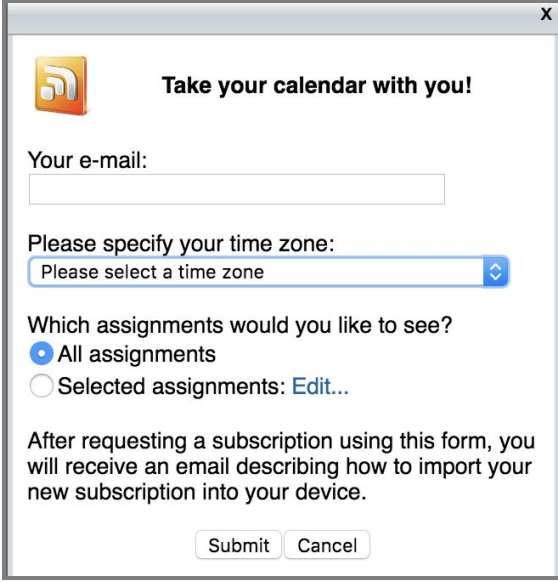
Calendar subscription allows you to sync your personal schedule to another calendar.

On the Dashboard, **click** on Mobile Calendar.

Enter your email address and select your timezone.
You can optionally subscribe to a subset of your assignments.
Click **Submit**.

You then will receive an email with a variety of links and directions for adding your schedule to different forms of calendars that include Google Calendar, iPhone, Android, IBM Lotus Notes, iCal, and Microsoft Outlook.

Can I access my schedule from my mobile device?

Yes! Lightning Bolt's mobile app makes it easy to submit requests for time off and swap shifts with your colleagues from the convenience of your mobile device. You can find more information about the app here.

We provide both **iPhone and Android** apps that are available for download, free of charge.

iPhone: You can find us in the App Store **here**. You can also load the App Store on your mobile device, and search "Lightning Bolt Solutions" -- we should be the first result that pops up.

Android: You can find us in the Google Play store **here**. Or you can search for "Lightning Bolt Solutions" and we should be the first result that pops up.

Our team is already working to bring more feature improvements to the app. If you have suggestions, let us know by contacting featurerequests@lightning-bolt.com

How do I change my password / email address?

On the Dashboard, select your first name in the top right corner and Select **Account Settings**.
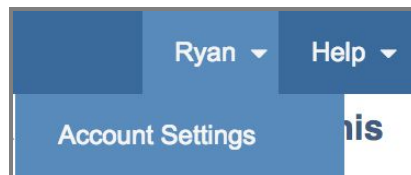
From there you will be able to change your **password**, **recovery email**, **notification email**, and **default web page**.

The **recovery email** will be used if you ever forget your username or password and need to reset it.

The **notification email** will be used to send notifications for certain schedule or request changes, depending on how your administrator has the settings set up.

The default web page allows you to go directly to Dashboard or into Viewer after logging in.

My Account

First Name:	**Ryan**	
Last Name:	**Lacey**	
Username:	**rlacey**	
Password:	******	Edit
Recovery email address:	**ryan@lightningbolt.com**	Edit
(for username and password recovery)		
Notification email address:	**ryan@lightningbolt.com**	Edit Email Address
(for notification of requests and schedule changes)		
(notification status — schedule: On — requests: On)		
Default web page:	**Dashboard**	Edit
(the web page you see after logging in)		