

Import a Saved Template or Previous Week

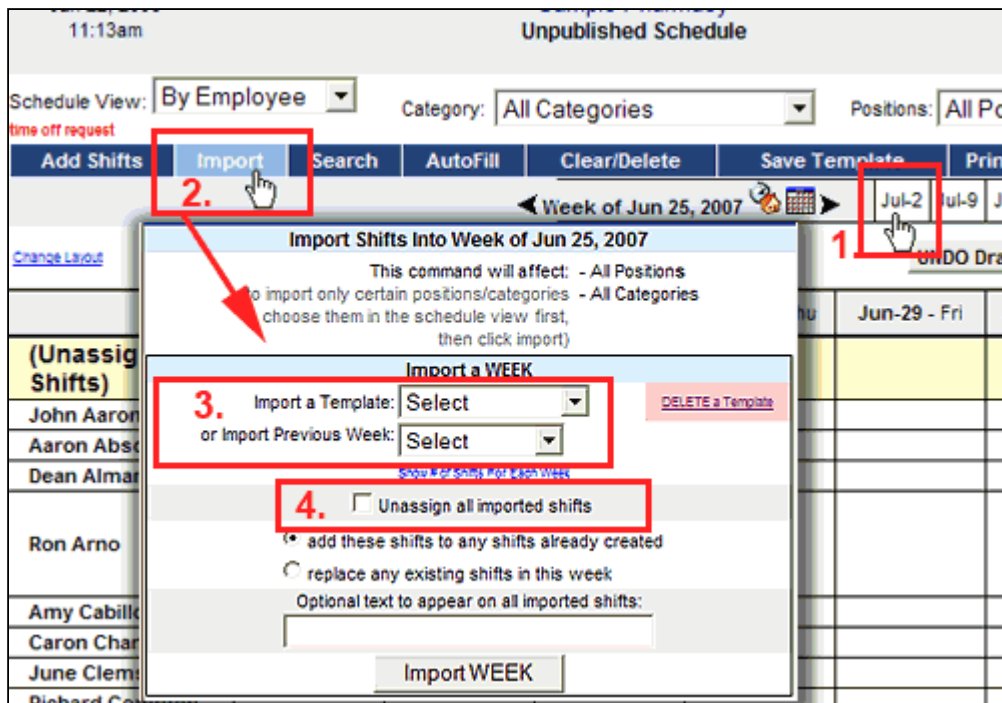
Once you have entered your first schedule it is easy to create new schedules using Import. Import any previous week "as is" by choosing a date or Import a saved template by choosing a name. When Importing you can check off to clear the old work assignments (or do this later with the [Clear](#) button) and then **AutoFill** to get the best possible work assignments for the new week. When your schedule is ready you can **Publish** and you are done!

Note that by filtering your view to a certain position or category before clicking Import you can Import only those particular shifts.

To Create (or add shifts to) a Schedule using Import:

From any weekly Schedule View

- Click **Week** to navigate to the new week you want to schedule (1.)
- (Check that your Category and Position dropdowns are set to show All to import all positions and categories in the template or week)
- Click **Import** to open the Import window (2.)



- You can Import any other week into the current week (by choosing a date in the **Import a Previous Week** dropdown) or if you have Saved Templates you can Import them by choosing the Template name (3.)
- Check the box to "Unassign all imported shifts" so that the workers will be cleared when the shifts are brought in (or you can import as assigned and then use the Clear Function later). (4.)
- Click **Import Week** button

You also can Import shifts for one day at a time by using the "[Import a Day](#)" bottom section in the Import window.

Note: you can also filter your position or category dropdown menu before Importing to Import only those shifts.

AutoFill - Automatically Assigning Employees with AutoFill (Using the default "Equal Priorities" option)

Once your shifts have been added (using Add Shifts or Import) you can use **AutoFill** to automatically assign workers to achieve the best possible schedule in a matter of seconds. WhenToWork's AutoFill feature uses advanced mathematic algorithms to determine the best possible weekly schedule and automatically assign your employees to shifts based on granted time off, employee work time preferences and any employee maximum shifts/hours/days you have set. (You also can choose to AutoFill based on [Priority Groups](#) or [Seniority](#))

Don't see the AutoFill button on your UnPublished Weekly schedules?

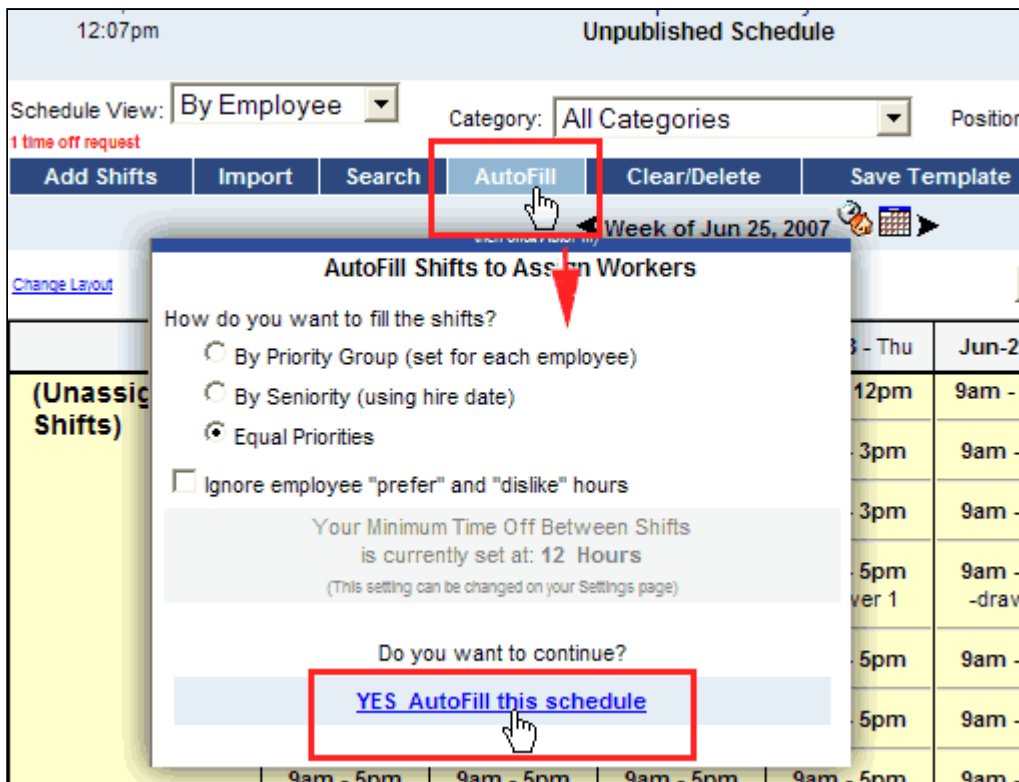
-Some multi-week schedule views do not have an AutoFill button.

-Your main manager may not have set your permissions to allow you to AutoFill.

To AutoFill your Shifts











On the Schedule page

- Click **AutoFill** to open the AutoFill window
- In the AutoFill window click **YES AutoFill this Schedule**



This will assign the best worker to each shift and optimize the schedule so that it is the best possible for everyone.

When AutoFill is complete a window will appear that shows the AutoFill results and the Schedule Statistics - you can see if any of the shifts were left unassigned as well as an employee summary of how the shifts were distributed to the employees and how the shifts compare to the employee work time preferences.

Schedule Stats for Week of 06/12/2006						
Summary of Autofilled Shifts						
Shifts	Employee Preferences		Shifts	Violations		
130		Assigned to Preferred times	0	 Over maximum shifts per day		
72		Assigned to No Preference times	0	 Over maximum hours per day		
0		Overlap some Dislike times	0	 Violate the min time between shifts		
0		Assigned to Dislike times	0	 Overlapping Shifts		
0		Violate CANNOT WORK constraints	0	 Overlap TIME OFF		
(The Sortable List schedule view shows these details for each shift)						
Shifts Summary			Employees Summary			
Click on day to edit	Unassigned Shifts	Assigned Shifts	Assigned Hours	Employee	Working Shifts	Total hours
				20/06/2006 Gunderson	2	13.25

The top section gives you a quick overview of how AutoFill did assigning shifts to your employees within their preferred work times. Depending on how many shifts/employees you have and how much availability they have **AutoFill** sometimes has to give shifts to employees during times that overlap or are set to "dislike". AutoFill will never assign shifts that overlap granted Time Off, Cannot Work times or are in violation of the maximums you have set. For specific details on how each shift compares to assigned employees' preferences use the **Sortable List** view.

These stats can also be accessed at any time by changing the Schedule View to "Statistics." You also can check how shifts compare to the most current employee work time preference and minimum time off between shifts etc. using the [Analyze shifts function on the Sortable List view](#).

You can even **Clear** the AutoFilled assignments and **AutoFill** again to get slightly different assignments. Because AutoFill starts with a random ordering, if employee preferences or availability are similar our scheduling engine tries to randomize the assignments as much as possible.

Note: If you have some set or "pinned" employees you can Import a Template with all shifts unassigned except for those pinned employees and then AutoFill only the open shifts around the set employees.

Related Topics:

- [How AutoFill Works](#)
- [After AutoFill - No Assignments?](#)
- [AutoFill by "Priority Group"](#)
- [AutoFill by "Seniority"](#)
- [Assign Employee Before AutoFill](#)
- [Prevent an Employee from being AutoFilled](#)
- [Evenly Distribute "Special Shifts" ADVANCED](#)
- [Ignoring Employee Preferences](#)
- [Minimum Time Off Between Shifts](#)
- [AutoFilling One Position Separately](#)
- [Tracking Schedule Changes - Import, AutoFill, Publish](#)

Make Quick Schedule Changes using the "By Employee" Schedule View

If your scheduling needs change and you need to add shifts or delete shifts, or have changes in work assignments, you can easily make those changes. The By Employee view allows you to make changes very quickly without the page reloading between changes and for Internet Explorer users it also allows you to [Drag & Drop](#) shifts between days and employees and Ctrl Drag/Drop to quickly copy shifts.

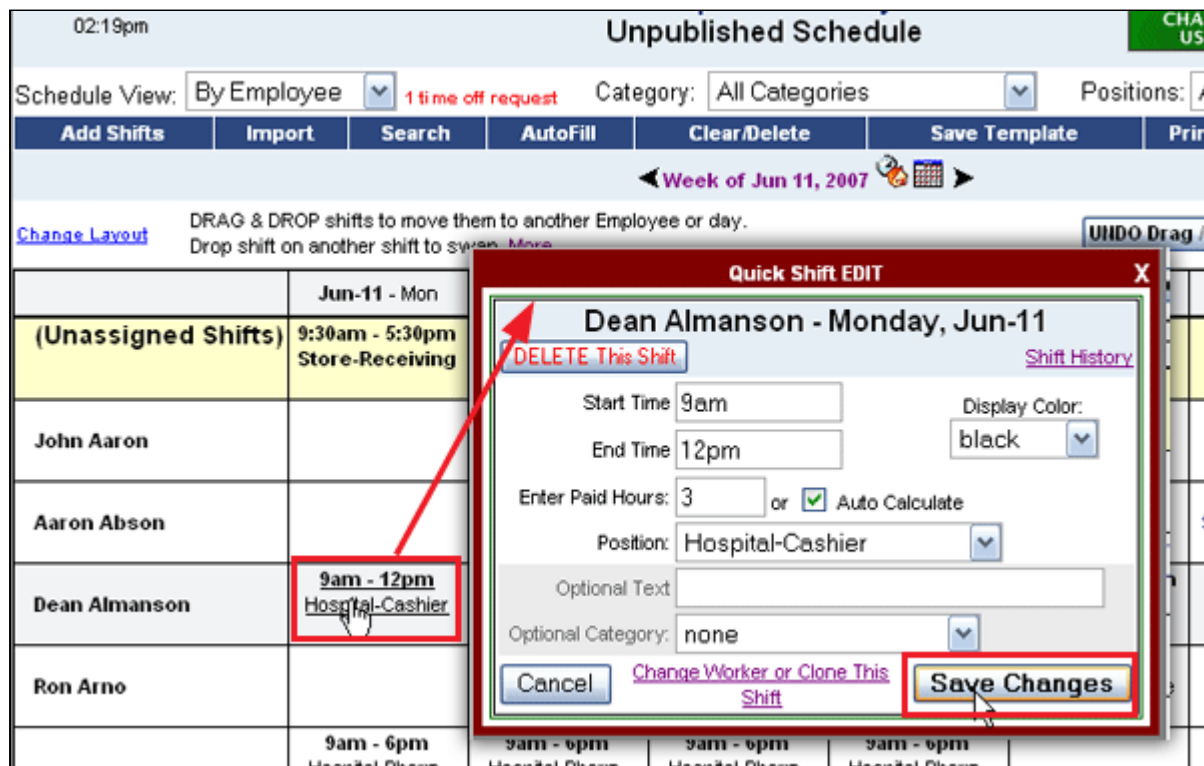
The By Employee view is the only view that allows you to click a shift and change its position name using the Quick Shift EDIT window.

If you change a Published schedule [notices will normally be sent](#) to affected employees.

To Edit an existing shift using the By Employee view:

On the By Employee view:

- Click the **shift you want to change** to open the **Quick Shift EDIT** window
- Make the changes
- Click **Save Changes**



The screenshot shows the 'Unpublished Schedule' interface. At the top, the 'Schedule View' is set to 'By Employee'. Below this, there are buttons for 'Add Shifts', 'Import', 'Search', 'AutoFill', 'Clear/Delete', 'Save Template', and 'Print'. A navigation bar shows 'Week of Jun 11, 2007'. A table lists employees and their shifts. The shift for 'Dean Almanson' on 'Jun-11 - Mon' is highlighted with a red box. A 'Quick Shift EDIT' window is open over this shift, showing details for 'Dean Almanson - Monday, Jun-11'. The window includes fields for 'Start Time' (9am), 'End Time' (12pm), 'Display Color' (black), 'Enter Paid Hours' (3), 'Position' (Hospital-Cashier), and 'Optional Category' (none). A red arrow points from the shift in the table to the 'Quick Shift EDIT' window. The 'Save Changes' button in the window is also highlighted with a red box.

Employee	Shift
(Unassigned Shifts)	9:30am - 5:30pm Store-Receiving
John Aaron	
Aaron Abson	
Dean Almanson	9am - 12pm Hospital-Cashier
Ron Arno	
	9am - 6pm Hospital Pharm

The Quick Shift EDIT window also has a "[Change Worker or Clone This Shift](#)" link which opens the regular Edit Shift window that is accessed from the other schedule views when you click a shift.

Editing Multiple Shifts - if you need to make changes to a number of shifts, you can change the Schedule View dropdown to [Multi-Shift Edit](#). This view allows you sort by any column and then to make multiple changes and then save them all at once.

12:12pm Unpublished Schedule

Schedule View: **By Employee** Category: All Categories

1 time off request

Add Shifts AutoFill Clear/Delete Save Term

Week of Jun 25, 2007

Change Layout

move them to another Employee or day. Shift to swap. More....

(Unassigned Shifts)

	Jun-26 - Tue	Jun-27 - Wed	Jun-28 - Thu
John Aaron	9am - 3pm	5pm - 9pm	12pm - 6pm
Aaron Abson	9:30am - 5:30pm		9am - 5pm
Dean Almanson	9am - 12pm	9:30am - 5:30pm	9:30am - 5:30pm

Deleting Shifts - if you need to delete a shift you can click the shift and choose **DELETE Shift** in the upper left, or to delete a number of shifts, you can change the Schedule View dropdown to **Sortable List**. This view allows you sort by any column and then to check off the shifts you want to delete and delete them all at once.

Adding Shifts - You can always add more shifts by clicking the **Add Shifts** button or by clicking the **Employee/Date cell** on the By Employee Schedule View.

Splitting Shifts - If a shift needs to be split you can click the shift and change the begin or end time and also in the "create copies of this shift field," enter 1 to make a copy of the shift before clicking Save Changes. Then click the new unassigned shift and assign a new employee and change the begin or end time.

DELETE This Shift Hospital-Cashier Shift Change Monday - Jun 11, 2007 [Shift History](#)

Start Time End Time Display Color:

Enter Paid Hours: or Auto Calculate

Optional Text

Optional Category:

create copies of this shift **Save Changes**

Assigned To: **Dean Almanson** **View Availability Chart**

Click a row, then the Save Changes button, to assign that employee. (Double click a name to see employee details) (Click column headings to sort)

Name	Phone	Week Shifts	Week Hours	Hours Left	Group Availability
None (Unassigned Shift)					

On other weekly schedule views besides the By Employee view you can click a shift to change it using the regular [Shift Change window](#).

Add Notes to the Weekly Schedule

You can create schedule notes associated with any week.

Add a Note to All Employees - these are notes that the Managers and Employees see when they view the schedule for that week. Schedule Notes are also sent to employees along with their work times when you Publish the schedule.

Manager Notes - these are notes to yourself and other Managers that the employees do not see. They appear at the bottom of all weekly schedule views and in printouts when signed in as a Manager.

To add a note to a weekly schedule:

From any weekly Schedule Views

- Scroll down to the bottom of the schedule

Post Office 9am - 5pm Ron Arno	Post Office 9am - 5pm Frank Garcia	Post Office 9am - 6pm Phillip Rayston	Post Office	Post Office 9am - 5pm Phillip Rayston
5pm - 9pm Phillip Rayston	5pm - 9pm Karen Wescott			5pm - 9pm Karen Wescott
Receiving 9:30am - 5:30pm Dean Almanson	Receiving 9:30am - 5:30pm Dean Almanson	Receiving	Receiving	Receiving 9:30am - 5:30pm Dean Almanson
Schedule Notes:	Click here Add/Edit Notes for this schedule			
Note to Employees:				Managers Note:

- Click the "**Click here to Add/Edit Notes for this Schedule**" link at the bottom of schedule
- Enter any notes to Employees or Managers (you can use html code to change the size/look of the text - [click here for some examples](#))
- Click **Save**

Schedule Notes to Employees appear at the bottom of their schedule for that week:

When Employees sign in and view the Schedule they can see the Note for that week at the bottom of the schedule.

sample Pharmacy My Schedule John Aaron Jan 22, 2006 12:43pm

MY SCHEDULE Everyone's Schedule Daily Weekly Monthly Chart In-Out TRADE MY SHIFTS TRADES OFFERED TRADEBOARD PRINT

SEE NOTE BELOW < Week of Jun 4, 2007 VCAL Export to Outlook

To put a shift on tradeboard, or find a possible replacement click on the shift

Monday Jun-4	Tuesday Jun-5	Wednesday Jun-6	Thursday Jun-7	Friday Jun-8	Saturday Jun-9	Sunday Jun-10
9am - 12pm Hospital-Cashier	5pm - 9pm Store-Post Office - NIGHT	9am - 12pm Hospital-Cashier	9:30am - 5:30pm Store-Receiving	12pm - 6pm Hospital-Cashier		

Working 24.0 hours

Time >	12	1a	2	3	4	5	6	7	8a	9	10	11	12	1p	2	3	4	5	6	7	8p	9	10	11
Monday										9am - 12pm														
Tuesday																								
Wednesday										9am - 12pm														
Thursday										9:30am - 5:30pm														
Friday														12pm - 6pm										
Saturday																								
Sunday																								

Be sure to pick up a new benefits package this week.




Examples of using html code to format your notes:

normal text
 this is bold
 this is red
 this is red and larger
 this is blue, large and bold
 this is back to normal text

You can try highlighting, copying and pasting the code above into your notes section to see how it appears. It should appear similar to this:

normal text
this is bold
 this is red
 this is red and larger
 this is blue, large and bold
 this is back to normal text

Publish Your Schedule

When you Publish a schedule week, your employees will then be able to see this schedule by signing into their individual employee accounts. They will see a "New Schedule" alert on their employee home page and you will see the  icon if they have viewed the schedule,  if they have been e-mailed their latest schedule, and  if they have confirmed receipt of the e-mail.

Once your schedule is finished and you want to make it visible to your employees when they log in you can click **Publish**. Publishing affects ALL POSITIONS and is done one week at a time.

Note: If you need to publish only certain positions or position groups (locations) separately you can set up [separate WhenToWork accounts](#) (assuming you do not have employees that work at multiple locations). These [accounts can be linked](#) for billing purposes.

Before publishing you may want to check your shifts against the current employee work time preferences and your set constraints. Use the [Sortable List view to Analyze shifts](#) to check for any conflicts. Conflicts might occur if an employee changes their work time preferences after you AutoFilled or created the schedule.

Note: publishing normally sends notifications to any working employee if you have entered their e-mail. When the employee receives the email they can click a link in the e-mail to verify receipt of the schedule. (You can turn off these notifications on your **Settings** page.) You also can [send sign-in instructions](#) to your employees before or after publishing that includes [their Sign-In ID and password](#).

To Publish a Weekly Schedule:

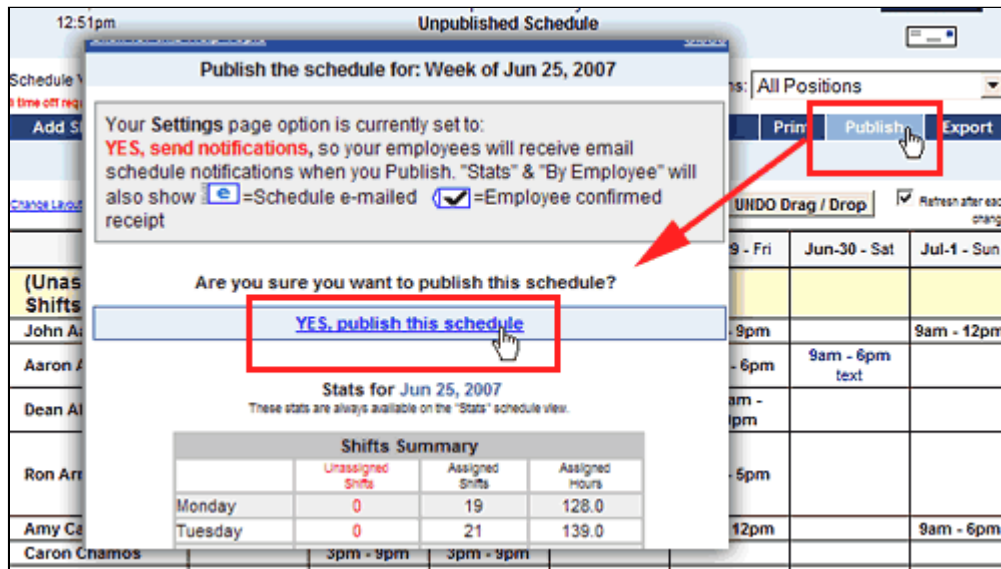
From any Unpublished weekly Schedule View:


- Click **Publish** to open the Publish Schedule window (which will show you how your SETTINGS option is currently set - notifications on or off)
- Click **YES Publish This Schedule**

Don't see the Publish button on your UnPublished Weekly schedules?

-Some multi-week schedule views do not have a Publish button.

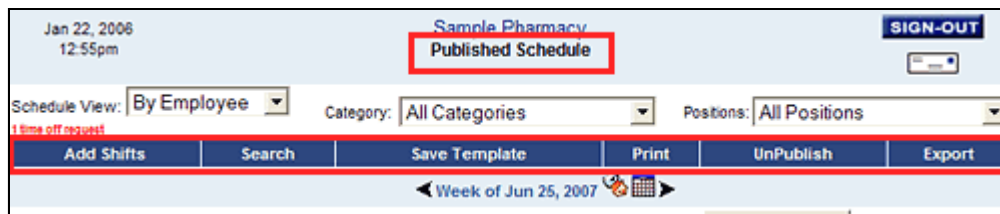
-Your main manager may not have set your permissions to allow you to publish.



The screenshot shows a web interface for publishing a schedule. A modal window titled "Publish the schedule for: Week of Jun 25, 2007" is open. It contains the following text: "Your Settings page option is currently set to: YES, send notifications, so your employees will receive email schedule notifications when you Publish. 'Stats' & 'By Employee' will also show  =Schedule e-mailed =Employee confirmed receipt". Below this, it asks "Are you sure you want to publish this schedule?" with a button labeled "YES, publish this schedule". A red arrow points from the "Publish" button in the background to the "YES, publish this schedule" button. At the bottom, there is a "Stats for Jun 25, 2007" section with a "Shifts Summary" table.




	Unassigned Shifts	Assigned Shifts	Assigned Hours
Monday	0	19	128.0
Tuesday	0	21	139.0

- The schedule page will show "Published" at the top and a WhenToWork message is sent to all employees telling them that there is a new schedule.



- Employees can then sign in and see their schedule and messages.

Any employees with e-mails entered will also receive their schedule with schedule notes by e-mail.

You can track which employees have  viewed the schedule,  been sent an e-mail, or  verified receipt of the e-mail on the [Statistics](#) or **By Employee** Schedule View.

After publishing your schedule the title at the top of the screen will show "Published" and the [buttons will change](#). Some functions, such as Import, AutoFill and Clear are not available after a schedule is published.

Related Topics

- [Why Publish a Schedule?](#)
- [Publishing an Open Schedule](#)
- [Unpublishing](#)
- [Should I Let Employees Sign In?](#)
- [Each Employee has a sign-in ID](#)
- [Sending Employees Sign In Instructions](#)
- [Linking Accounts for Billing](#)
- [Multiple locations or departments](#)

Make Changes (after Publishing)

On a Published schedule you also can make changes to the shifts. Managers (with permission) can add, edit, unassign or delete shifts in the same manner as on an Unpublished schedule week (see [Making Schedule Changes](#)) Normally when you make changes to a published schedule the affected employees are automatically sent a notification of the changes with a link to confirm. You can use the "Send Notices" checkbox to set whether or not these notices are sent out either in the Change Shift window or at the top of the **By Employee, Sortable List** and **Multi-Shift Edit** views).

Note: a log of all changes to a shift in the last 30 days can be viewed by clicking the "[Shift History](#)" link after clicking a shift.

By Employee View - Changes can quickly be made on the "By Employee" schedule view by using the [Drag & Drop](#) and Quick Shift EDIT/ADD functions. You can use the checkbox at the top of that view to turn on/off notifications when changes are made.

The screenshot displays the 'Sample Pharmacy Published Schedule' interface. At the top, it shows the date 'Mar 19, 2007 02:58pm' and a 'SIGN-OUT' button. The main area shows a schedule view for the 'Week of Aug 6, 2007'. A 'Quick Shift EDIT' window is open for 'Aaron Abson - Monday, Aug-6'. The window contains the following information:

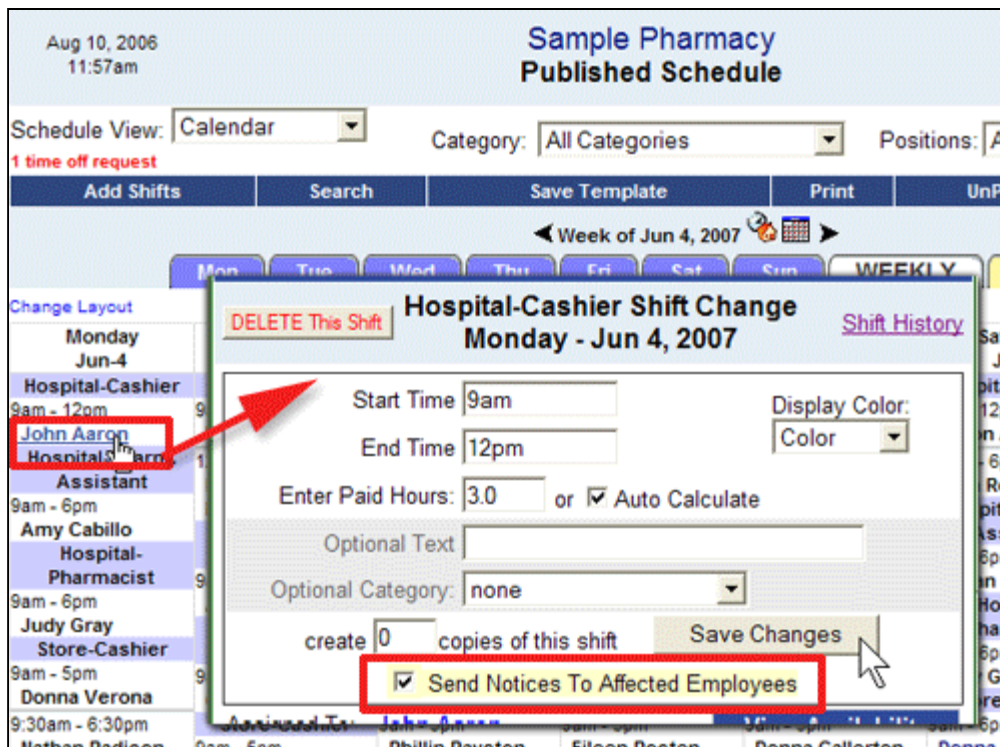
- Shift Title:** Aaron Abson - Monday, Aug-6
- Start Time:** 10:30am
- End Time:** 5:30pm
- Position:** Store-Receiving
- Optional Category:** none
- Buttons:** Cancel, Change Worker or Clone This Shift, Save Changes

At the top of the 'Quick Shift EDIT' window, there is a checkbox labeled 'Send a notification for each change' which is checked. A red box highlights this checkbox and the 'Save Changes' button. A red arrow points from the '9:30am - 5:30pm Store-Receiving' shift in the main schedule grid to the 'Quick Shift EDIT' window.

To prevent notices from going out when you make changes to a single shift:

On any Published weekly Schedule View:

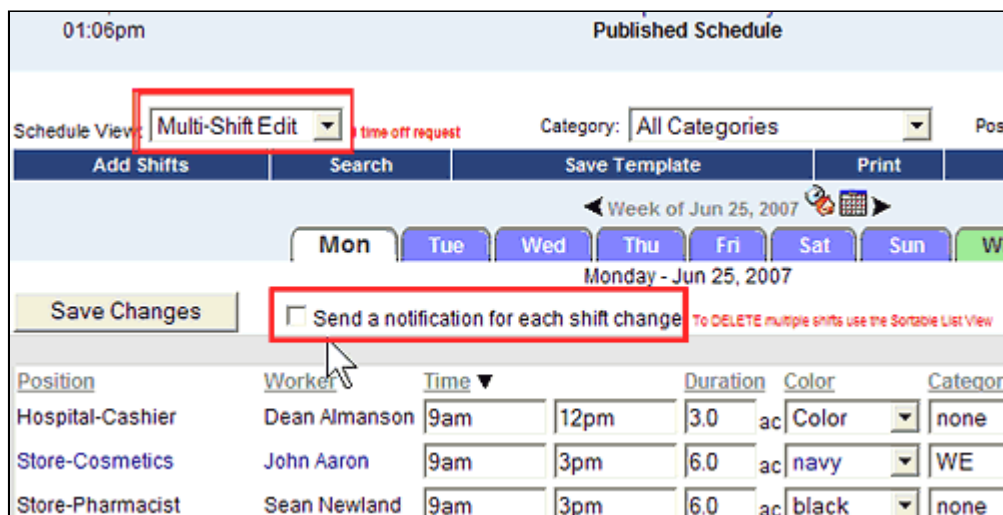
- Click on the shift to open the Shift Change window
- Uncheck the box next to "Send Notices To Affected Employees"
- Make the changes to the shift
- Click **Save Changes**



OR to change a number of shifts at one time and not send out notifications:

On any Published Schedule View

- In the Schedule View dropdown choose **Multi-Shift Edit** (you can click a day tab to see one day or the Week tab to view shifts for the whole week)
- Make the changes to shifts (the rows changed will appear green)
- Uncheck the "Send Notices To Affected Employees" box
- Click **Save Changes**



Related Topics:

- Editing Multiple Shifts at Once
- Adding Shifts to a Schedule
- Unpublishing
- Enter E-Mails for Automatic Forwarding

Printing & Exporting Schedules

You can print a schedule from any schedule view using the "Print" button. Use the "Change Layout" link before printing to set up how your printout will look on each schedule view. Note that you can control the page margins, landscape printing, header/footer and many other functions under your browser menu File>Page Setup. Set your browser options and your Change Layout options first, then click the Print button.

The **By Employee** schedule view also allows you to print individual weekly schedules for all employees by choosing that option in the Change Layout window:

The screenshot shows the 'Configure "By Employee" Schedule View' dialog box. The 'Printout' section is expanded, showing the following options:

- Show: Description Position Category
- Hide workers with no shifts
- Show **approved time off** on the schedule
- Show "OFF" on days with no shifts or time off
- Show **unassigned shifts** on the schedule
- Show worker's **total hours**
- Show worker's **phone number**
- Show the **date header once**
- Use the Quick Shift Edit and Add boxes
- Name Display:
- Font Size:
- Print each employee on a separate page**

The 'Update Display' button is highlighted with a red box. A red arrow points from the 'Change Layout' link in the background interface to the dialog box.

To print individual employee weekly or monthly schedules use that employee's details page (Schedules/Preferences tab):

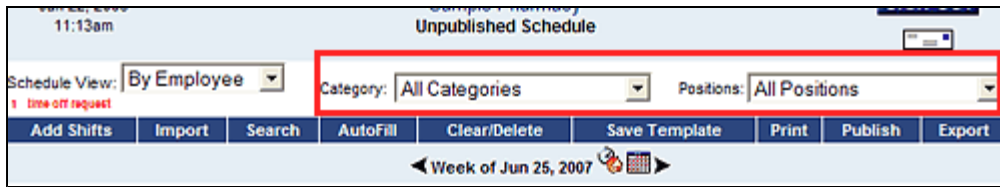
The screenshot shows the 'Employees' management interface. At the top, there's a status bar with '04:33pm' and a 'CHAT WITH US LIVE!' button. Below that, a navigation bar contains 'Add New Employee', 'Add/Edit Positions', 'Tradeboard', 'Print', and 'Export'. A sidebar on the left lists employees: John Aaron, Aaron Abson, Dean Almans, Ron Arne, Amy Cabillo, Caron Cham, and June Clemson. The main content area is titled 'John Aaron' and has tabs for 'Information', 'Schedules - Preferences', and 'Time Off'. The 'Schedules - Preferences' tab is active, showing a weekly schedule for 'Week of Jun 11, 2007'. The schedule grid shows: Mon - Jun-11 (empty), Tue - Jun-12 (empty), Wed - Jun-13 (empty), Thu - Jun-14 (empty), Fri - Jun-15 (12pm - 6pm Hospital-Cashier), Sat - Jun-16 (empty), and Sun - Jun-17 (11am - 5pm Store-Cosmetics). Below the grid, it says 'Working 12.0 hours'. A 'Click to PRINT Schedule' button is highlighted. At the bottom, there's a 'Work Time Preferences' section with a grid of time slots (12a, 1, 2, 3, 4, 5, 6a, 7, 8, 9, 10, 11, Noon, 1, 2, 3, 4, 5, 6p, 7, 8, 9, 10, 11) and a row of values: sample@when2work.com, 12306, Jan-21, 06, 02:21pm, 40, 7, 14, 1.

We recommend Exporting your schedules to your computer as a backup - either by using the **Export** button on any schedule view by using **Reports** section where you can specify a date range to include in the export or just by printing your schedule to a pdf file. You can export to many different file formats for use with other programs.

The [Reports](#) section also allows you to Export other information such as time off and information for a designated date range.

Related Topics:

- [Standard Printouts](#)
- [Custom Reports - Date Ranges](#)
- [Problems - Page Breaks, Colors](#)
- [Exporting Data](#)



Related Topics:

- [Importing Shifts for a Week](#)
- [Importing Only Certain Positions or Categories](#)
- [Clearing Work Assignments](#)
- [Saving / Naming Schedules & Shifts \(Templates\)](#)
- [Tracking Schedule Changes - Import, AutoFill, Publish](#)