

## Import Schedules (Templates) - - - - -

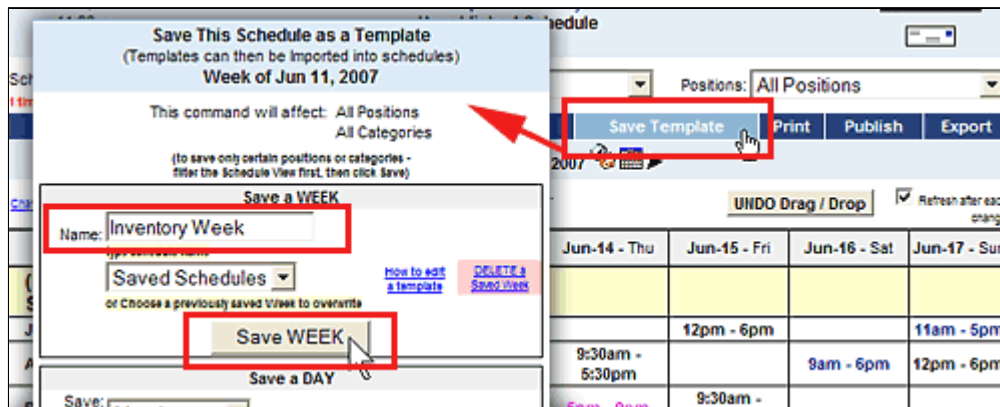
### Create Schedule Templates

You can Import a previous week or day by choosing that date in the Import window but if you want to create and name certain schedule "templates" (Ex. if you want to create a holiday schedule and save/name it as a template for later importing) you can do so at any time. You can save any schedule that you have on the screen or you can navigate to an **empty** week (future or past) and create a schedule to save as template. When you are finished creating the template click **Save Template** and name it. If you used an empty week to create the template be sure to use the Clear/Delete function to "Erase the Entire Schedule" - removing the shifts from that week and setting that week back to empty after saving as a template.

### How to create a Schedule "Template"

From any weekly Schedule View

- Either use a week you currently have on screen OR
- Navigate to an empty week (past or future) by clicking the "**Week of...**" row to temporarily create your shifts in that week
- Click **Add Shifts** (or Import) to create your shifts



- Make any changes or Clear/Delete work assignments
- Click **Save Template** to open the Save Schedule window
- Type a name for this template and click **Save WEEK** (or choose the day of the week you want to save and type the name for that day template and click **Save DAY**)
- When the warning asks if are you sure you want to save click **OK**

### To see your new template in the Import list

From any UnPublished Schedule View

- Click **Import** to bring up the Import Shifts window

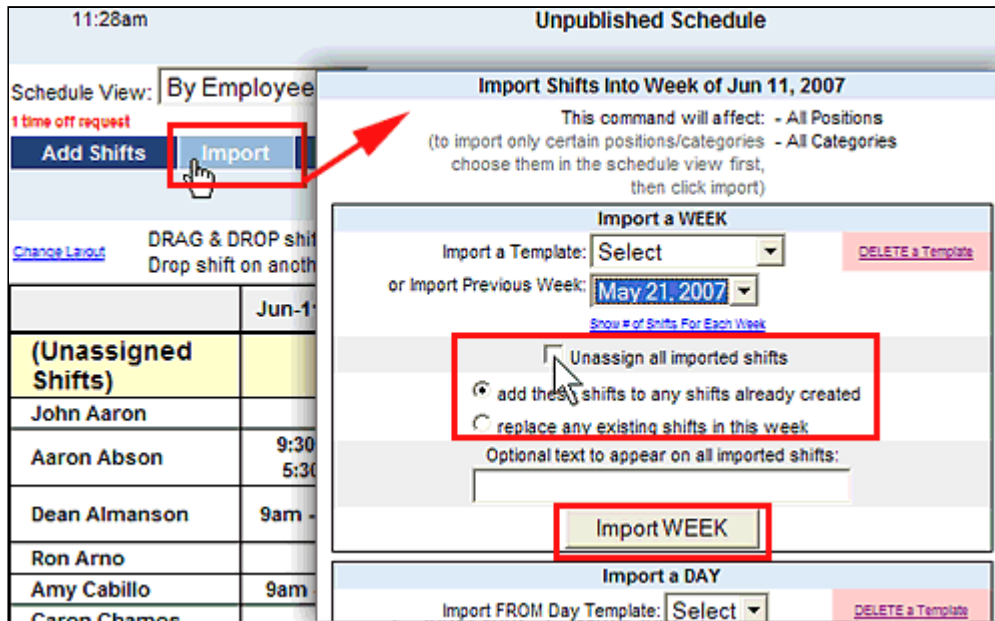
## Import Shifts into a Week or Day

- Full or partial schedules can be imported into a Week or Day.
- You can import a complete schedule or only certain positions or categories
- You can import and remove any existing shifts in that day/week, or import and keep the existing shifts
- You can import any other week or day's shifts by choosing that week from the list
- You can also import previously Saved and Named Templates

### To Import All Shifts

From any weekly Unpublished Schedule View

- Click **Import** to open the Import window. To Import a Week use the top section - for a Day use the bottom section
- Choose the "Template" or "By Date" week/day you want to import
- Set whether you want to "Clear the Work Assignments" (most users will clear work assignments so that they can use AutoFill to automatically assign the shifts later based on the new week's availability).
- Set whether you want to: "add these shifts to any shifts already created" or "replace any existing shifts" in this week
- Optional - If you want all the imported shifts to have a certain Shift Text (for instance to specify an event or location)
- Click **Import Day** or **Import Week**



Import is only available on weekly UnPublished Schedules

#### Related Topics:

- [Importing Only Certain Positions or Categories](#)
- [Clearing Work Assignments](#)
- [Saving / Naming Schedules & Shifts](#)

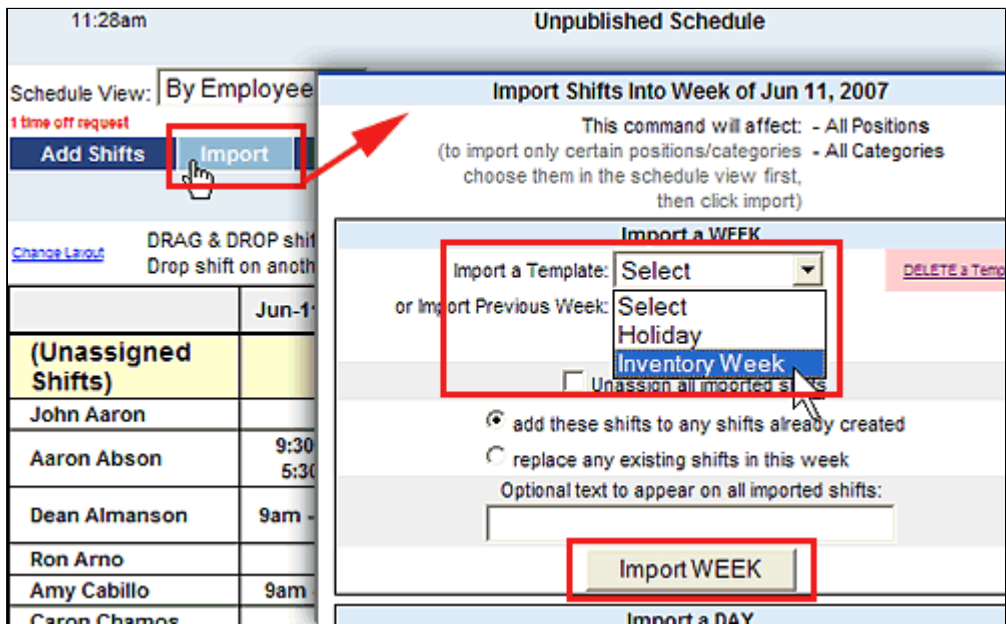
## Change a Schedule Template

Once you have saved a template you can open it, make changes and resave it by going to an empty schedule week, importing the template, making changes to it and resaving it with the same name.

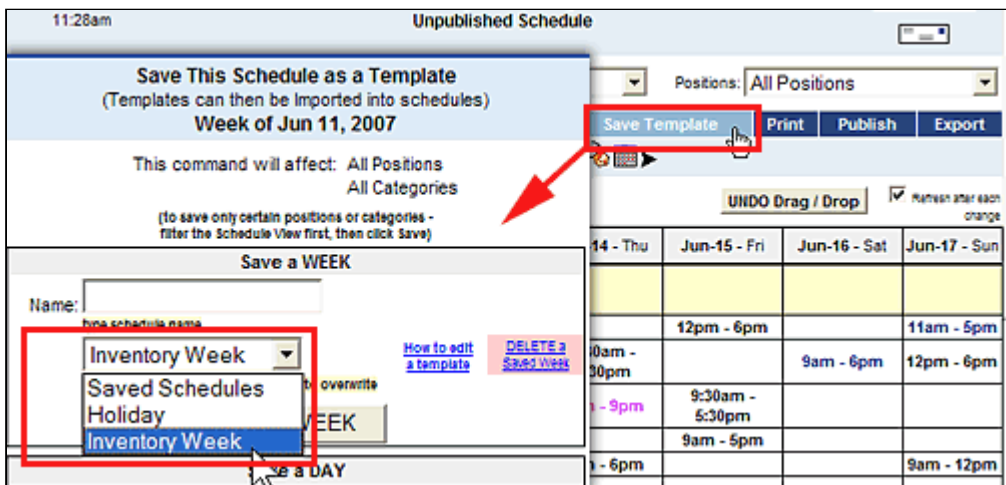
### To make changes to a Template:

From any weekly Schedule View:

- Navigate to any empty week (one that has no shifts in it) past or future
- Click **Import** to open the Import Shifts window



- In the Import a Template dropdown choose the template you want to change
- Click the Import WEEK button (or Import DAY if you are changing a day template) (Your Schedule will now display the shifts in your Template)
- Make the changes to your shifts - when all changes are made click **Save Template** to open the Save as Template window



- Choose the template name from the dropdown (ex. Inventory Week)
- Click **Save WEEK** (or Save DAY if changing a day template)
- Be sure to use **Clear/Delete** to change the previously empty week back to being empty

Your template is then changed and will show the changes the next time you Import it

Related Topics:

- [Deleting Saved Schedules](#)

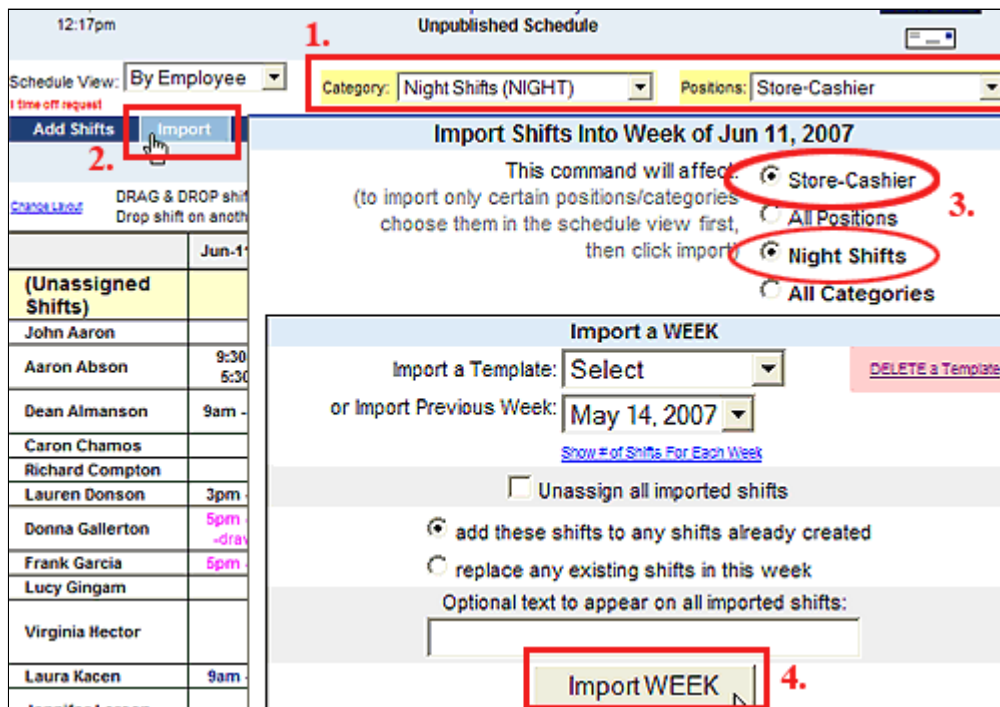
## Import One Position (Position Group or Category)

To limit what you are importing into your schedule, first [filter your Schedule View](#) to show only the Positions/Categories you want to Import - then perform the Import.

### To Filter and Import

From any Unpublished weekly Schedule View:

- In the dropdown menu for Category and Positions choose what you want to be included when you import. **(1.)**
- Click **Import** to open the Import window **(2.)**



- Be sure that the proper Positions, Categories or Groups are listed at the top of the Import Window **(3.)**
- Then choose to "Add the shifts to any shifts already created" or "to replace any existing shifts" in this week
- Click **Import Week** or **Import Day** **(4.)**
- The window will close and your schedule view will be updated.

### Related Topics:

- [Filtering the Schedule View/Printout](#)
- [Existing Shifts - Assigning Categories](#)
- [Creating & Editing "Position Groups"](#)
- [How Position Groups can be Used](#)

## Clear Old Work Assignments

On UnPublished weekly schedule views if you Import a schedule without clearing workers you can use Clear to unassign the shifts." Clearing shifts sets them to unassigned so that they can be AutoFilled, manually assigned or picked up off the tradeboard later.

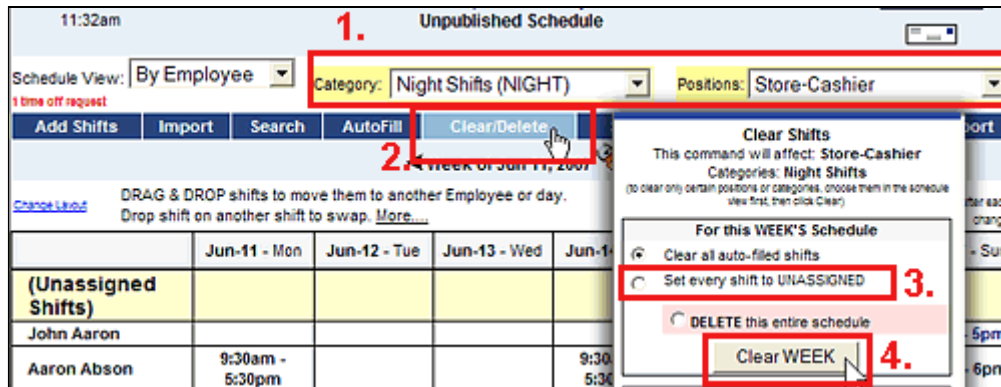
You can Clear (unassign) shifts:

- one at a time (by **clicking that shift and setting the employee to "None"**)
- a number of shifts at once (using the **Sortable List** Schedule View)
- or all at the same time (using the **Clear/Delete** button).

### To Clear Work Assignments (or Clear Shifts in certain Positions or Categories):

From any Unpublished weekly Schedule View

- Optional - If you want to Clear only certain Positions, Categories or Groups choose those in the dropdowns **(1.)** to display only those shifts



- Click **Clear/Delete** to open the Clear/Delete window **(2.)**
- If the schedule is filtered, those Position/Category choices will be preselected in the window
- You can choose to either:
  - Clear all AutoFilled shifts
  - Set every shift to Unassigned (as in example)
  - or Erase the entire schedule (this deletes the shifts entirely - leaving you with an empty schedule week) **(3.)**
- Click **Clear Week** **(4.)**
- The window will close and the schedule view will be updated

Clear/Delete is only available on Unpublished Schedule Views. You can use the Sortable List Schedule View to delete or unassign shifts on Published views.

#### Related Topics:

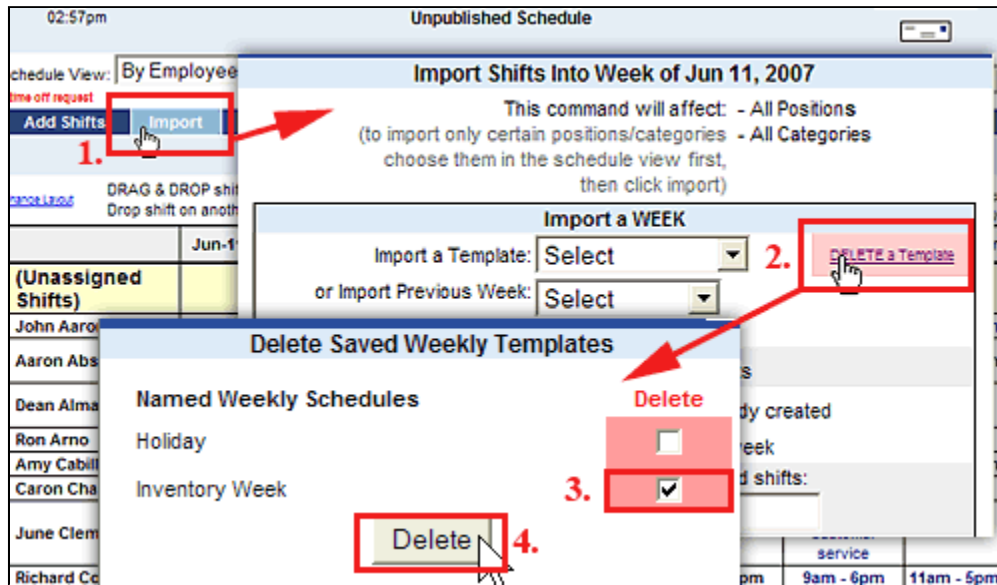
- Clicking a Shift to Edit, Delete, Clone or Assign
- Deleting Multiple Shifts
- Tracking Changes to Shifts - Shift History

## Delete Templates

When you save a schedule template it is available under "Import a Template" in the Import Window. If you want to delete a saved Template from that list you can do so.

From any weekly Schedule View

- Click **Import** or **Save Template** to open the Import Shifts window (1.)



- Click **Delete a Week Template** or **Delete Day Template** link to open the Delete Saved Template window (2.)
- Choose the template you want to delete (3.)
- Click **Delete** (4.)

Deleting named templates does not affect the ability to import regular weekly schedules by the date.

### Related Topics:

- [Saving / Naming Schedules & Shifts](#)

11:28am **Unpublished Schedule**

Schedule View: **By Employee**

1 time off request

**Add Shifts** **Import**

[Change Layout](#) DRAG & DROP shift Drop shift on another

**Import Shifts Into Week of Jun 11, 2007**

This command will affect: - All Positions  
(to import only certain positions/categories - All Categories  
choose them in the schedule view first,  
then click import)

**Import a WEEK**

Import a Template: Select [CREATE a Template](#)

or Import Previous Week: Select  
Holiday  
Inventory Week

add these shifts to any shifts already created  
 replace any existing shifts in this week

Optional text to appear on all imported shifts:

**Import WEEK**

**Import a DAY**

	Jun-11				
<b>(Unassigned Shifts)</b>					
John Aaron					
Aaron Abson	9:30 - 5:30				
Dean Almanson	9am -				
Ron Arno					
Amy Cabillo	9am -				
Caron Chamos		3pm - 9pm	9am - 3pm		

- In the "Import a Template" dropdown you will now see your new template (or if you saved a day you will see it in the Import a Day section).

**Related Topics:**

- [Importing Shifts into a Week or Day](#)
- [Importing Only Certain Positions or Categories](#)
- [Clearing Work Assignments - Deleting Shifts](#)
- [Saving / Naming Schedules & Shifts](#)
- [Deleting Saved Schedules](#)