

## Your First Schedule -----

(We are happy to enter your first schedule for you for no charge - just click the link on your account home page to send a sample to us!)

## Enter a Previous Schedule Week - Add Shifts

Once you have [entered your Position names](#) and [set which Positions each employee can work](#) you are ready to enter your first weekly schedule which will be the basis for future weeks.

The easiest way to get your first schedule into our system is to duplicate one of your previously scheduled weeks. Whether your current schedule is in a spreadsheet on your computer or handwritten on a calendar - you can enter the work assignments into WhenToWork and use that as a basis for future weeks. Even if your schedule vary from week to week WhenToWork can automate your scheduling and save you hours each week.

Your first schedule takes the longest to set up - once you have defined your shifts for the first week you can copy it into later weeks and make any necessary changes and then AutoFill to get the best work assignments for the new week. Optional: if many of your shifts have the same begin & end times (or unpaid lunch breaks or color etc.) you can [Create Categories](#) first so that you can choose them when adding shifts to quickly populate those fields as you add your shift).

## To add your First Shifts use the "By Employee" Schedule View.

(The "By Employee" view is always recommended for creating and editing your schedule)

From any Page:

- Click SCHEDULES in the top menu to go to the scheduling section
- In the Schedule View dropdown menu in the upper left choose **By Employee** to go to that schedule view
- Click **Week>** to navigate to the week you want to schedule.
- Click the cell that corresponds to the employee and day you want to add a shift (the cursor turns to plus sign) to open the **Quick Shift ADD** window.

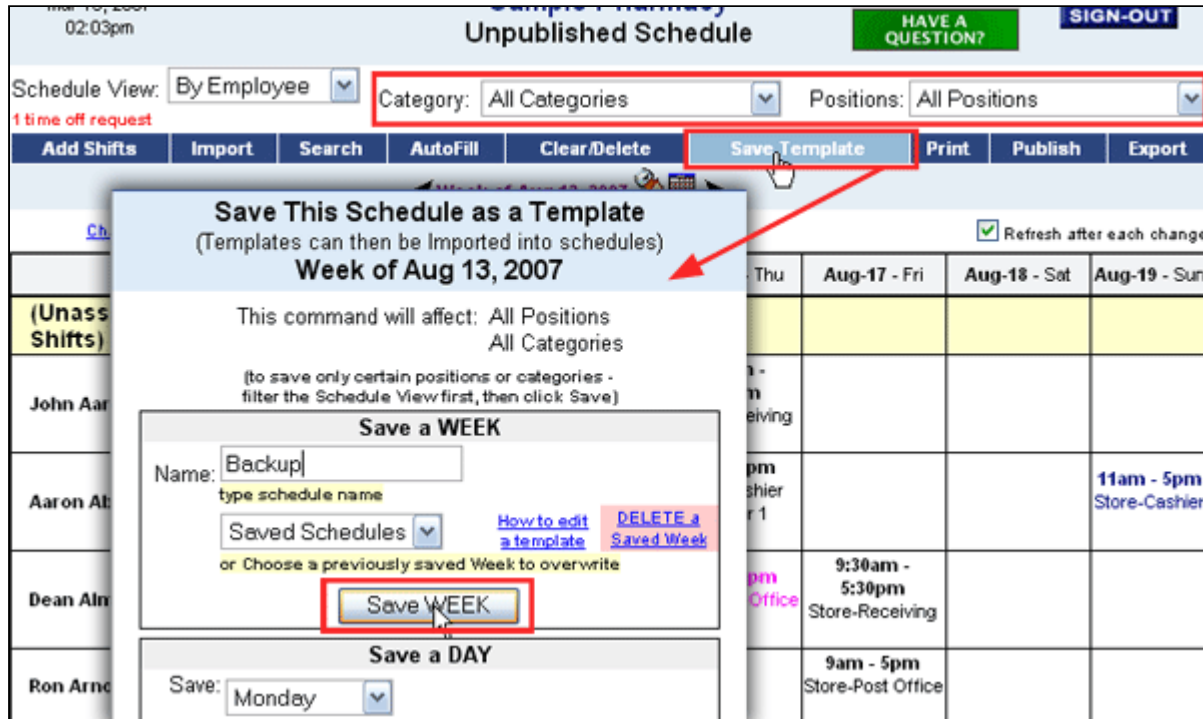
**(Optional) - Save / Name Your Schedule as a Template**

You may want to save and name your first schedule "as-is" for a backup. This means you will have a named template that contains the exact schedule you have on your screen right now that can be imported into another week.

**To Save as a Template:**

From any weekly Schedule View:

- Be sure you are set to see "All Categories" and "All Positions"
- Click **Save Template** to open the Save as Template window



- Type the name you want to give the template in the Save a WEEK Section (ex. "Backup")
- Click **Save WEEK** button

Your Template will now appear as an option under "Import a Named Week" when you open the **Import** window.

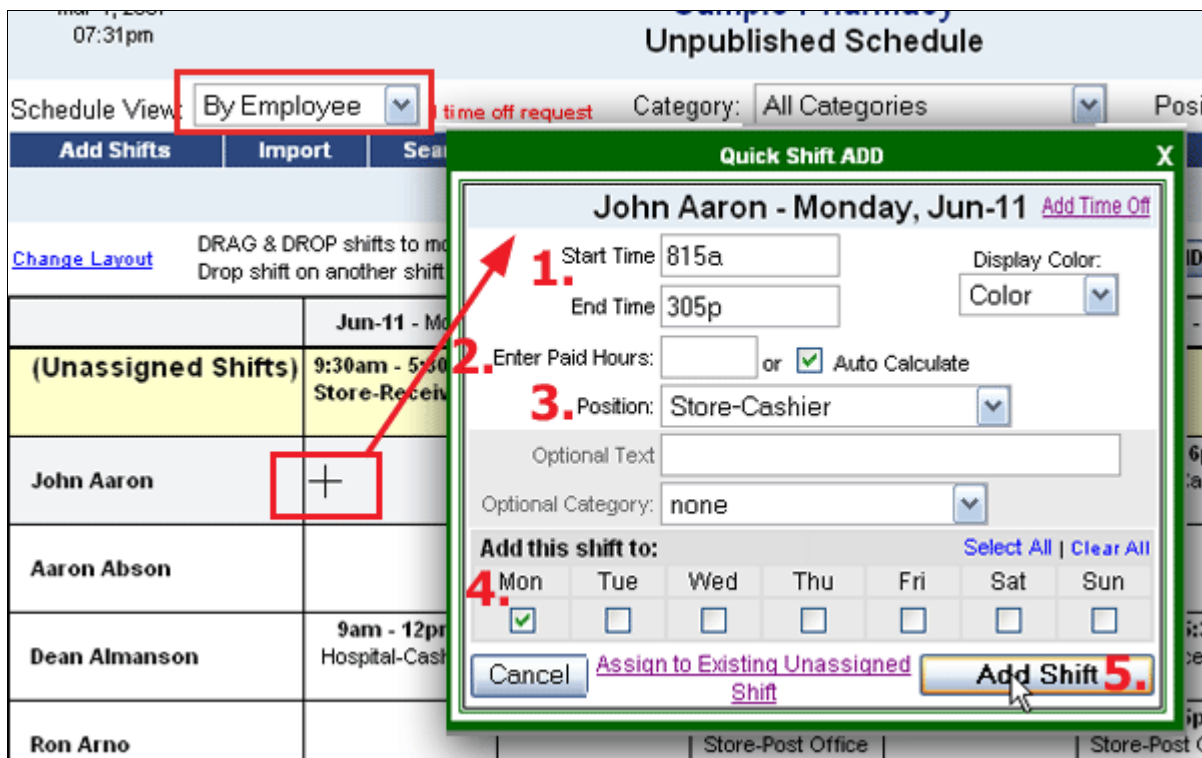
**To see your new template in the Import list**

From any UNPublished Schedule View

- Click **Import** to bring up the Import Shifts window
- In the Import a Template dropdown you will now see your new template

**Related Topics:**

- [Deleting Saved Schedules](#)
- [Creating a Day Template](#)



(If you added Categories - choose a category first to automatically enter any of the information below)

1. Add a **Begin** and **End Time** for the shift - Enter the time with the letter a or p after it to indicate AM or PM. (Ex. 815a), or military time (Ex. 2215). You can enter any times you like down to the minute. (The times can later be changed to reflect actual time worked etc.)
2. **Paid Hours** - (Duration of shift) - if the shift includes unpaid **Lunch period** or break time you can uncheck the **AutoCalc** box and enter the time the employee will be paid for this shift. (Ex. 8am to 5pm with an hour lunch or meal break enter 8 paid hours)
3. In the Quick Shift ADD window **Select a Position** that this shift is for
4. **Check off any other days of the week to add this shift** - to quickly add the same shift for this employee on those days
5. Click **Add Shift** button

Make a mistake? If you need to change any shift you can [drag/drop](#) it to another day or employee or [click the shift to change](#) the times, position, or employee assigned. Or you can use the [Multi-Shift Edit view](#) to make changes to more than one shift at a time. To copy a shift use Ctrl drag/drop.

**Note:** After adding the shift(s) the window will close and your schedule is immediately updated without the page reloading.

### **Optional information that can be entered for any shift**

Optional Text - which can be displayed with the shift on the schedules (Ex. if there are special instructions to the employee, break / lunch times, location notes or meeting times)

Optional [Categories](#) - If you have shifts with similar begin and end times over multiple Positions, or if you have [other reasons to use categories](#), you can click the Category drop down box and choose Add / Edit Categories to create categories. (Ex. if you have similar night shifts for different positions you can create a NIGHT category and enter and defaults so that when you Add Shifts you can first choose that Category and the fields will be prepopulated (but changeable) for you in the Shift Change window.

To add an "Unassigned shift" - Click the Add Shifts button (or click on a day in the highlighted unassigned shifts area at the top of the schedule) and leave the worker assigned set to "None - AutoFill."

Note: you can have [unassigned shifts automatically post to the tradeboard](#) when you Publish so that employees can pick them up.

**Related Topics:**

- [By Employee View - Drag & Drop](#)
- [Adding Shifts to a Schedule](#)
- [Adding New Shifts Using Shift Categories](#)
- [Click Shifts to Change](#)
- [By Employee View - DRAG & DROP](#)
- [Assigning an Employee Yourself](#)
- [Automatically Assigning Employees Using AutoFill](#)