

Two Ways to Create a New Schedule

Once you have [entered your first schedule](#) it is easy to create new schedules using the [Import](#) function. Import any previous week "as is" by choosing a date or Import a [saved template](#) by choosing a template name.

You can [Import](#) clearing the work assignments (and then use [AutoFill](#) to get the best assignments for the new week based on the employee work time preferences), or you can Import and leave the assignments the same.

To assign shifts BASED ON EMPLOYEE [WORK TIME PREFERENCES](#) so that you can automatically create shift assignments based on when employees are available and prefer to work:

DIFFERENT assignments
each week
based on preferences

1. [Navigate](#) to the new week
2. [Import](#) the previous week's schedule or saved template (**clearing the work assignments**)
3. [AutoFill](#) to get the best assignments based on employee work time preferences, granted time off and any other constraints you have set
4. [Publish](#) the schedule to automatically email it to employees and make it available to them online, and allow them to trade shifts if you have set that on your [Settings>Employee Permissions](#)

OR if you prefer to create your schedules BASED ON KEEPING THESE CURRENT ASSIGNMENTS EACH WEEK you can do the following instead:

CONSISTENT assignments
each week

1. [Navigate](#) to the new week
2. [Import](#) the previous week's schedule **leaving the assignments** (if an assignment conflicts with granted time off it will be set to unassigned) or you can [Import a saved Template](#) which could contain all your basic shifts with no one having time off etc.
3. [AutoFill](#) to assign any open shifts if needed, or you can always click a shift and see a list of who is available and you can choose a worker and click Save
4. (Optional) - [ANALYZE Shifts](#) to see how the assignments compare to employee work time preferences and other constraints such as [maximum hours/shift per day/week](#) and make any [adjustments to the shifts](#) as needed.
5. [Publish](#) the schedule to email it to employees and make it available to them online. and allow them to trade shifts if you have set that on your [Settings>Employee Permissions](#)

Note that for AutoFill to work properly you will need to review the AutoFill Maximums on the [Employee List Grid](#) and make any necessary changes in their max hours/shifts per day/week. The default is set to 40 hours.

The [ANALYZE](#) function can be used at any time to check how the shift assignments compare to the the current work time preferences, so you can use the second approach above of keeping the assignments intact and then use Analyze to check for any conflicts.

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](#)

Send Schedule Reminders to Employees

You can send reminders to Employees - which will send an email only to those who are scheduled for the date range chosen. It will send them a list of their upcoming shifts along with your optional message. On the **List Employees** page check off the Employees to include overall (usually all), then choose the date range for the shifts to include. Reminders will be sent out only to the checked off Employees who have shifts during that date range.

To Send Schedule Reminders

From any page

- ⌘ In the top menu hover over **EMPLOYEES** and choose **List Employees**
- ⌘ Optional - filter the view to just Display one position or group **(1.)**
- ⌘ **Check off the Employees to include**, or click the top checkbox to choose all **(2.)**
- ⌘ Click the **Schedule Reminder** link to open the Send Schedule Reminders window **(3.)**
- ⌘ Choose a predefined **date range** or the begin and end dates
- ⌘ Optional - add a subject line for the emails
- ⌘ Optional - add a comment to be included in the reminder email
- ⌘ Click the **Send Reminders** button

The screenshot displays the 'List Employees' interface. At the top, the 'EMPLOYEES' menu is active, showing options like 'List Employees - Add/Edit/Delete', 'Positions', 'Notifications Grid', and 'Send Schedule Reminders'. Below the menu, there are tabs for 'Employee Information', 'Employee Positions', and 'Employee Email Notifications'. A toolbar contains buttons for 'Add New Employee', 'Add/Edit Positions', 'E-Mail Sign-In Instructions', 'Show DELETED Employees', 'Print', and 'Export'. The main area features a table of employees with columns for 'View', 'Edit', 'First', 'Last', 'Phone', and 'E-Mail*'. A 'Send Selected' button and a 'Schedule Reminder' link are highlighted with red boxes and labeled '3.'. A 'Positions:' dropdown menu is highlighted with a red box and labeled '1.'. A 'View' checkbox in the table is highlighted with a red box and labeled '2.'. A 'Send Reminders' button in the 'Send Schedule Reminders' dialog is highlighted with a red box. The dialog includes fields for 'Choose a Date Range', 'Begin Date', 'End Date', 'Subject', and 'Additional Comment to Include'.

You will see a confirmation of all the emails sent out. Schedule Reminder automatically omits any Employee who does not have a shift during that Date Range.

Related Topics:

- ⌘ [Editing Employee Details](#)
- ⌘ [Should I Let Employees Sign In?](#)
- ⌘ [Each Employee has a sign-in ID](#)
- ⌘ [Sending Employees Sign In Instructions](#)
- ⌘ [Optional Tradeboard](#)
- ⌘ [Enter E-Mails for Automatic Forwarding](#)
- ⌘ [Controlling what Employees View/Do](#)

Print 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 on separate pages by choosing that option in the **Change Layout** window:

The screenshot displays the 'Sample Pharmacy' software interface. At the top, there is a navigation bar with tabs: HOME, SCHEDULES, EMPLOYEES, TRADES, TIME-OFF, MESSAGING, REPORTS, ON NOW, SETTINGS, HELP, and SIGN OUT. The 'SCHEDULES' tab is active. Below the navigation bar, the 'Schedule View' is set to 'By Employee'. A 'Change Layout' link is highlighted with a red box. A dialog box titled 'Configure "By Employee" Schedule View' is open, showing options for 'Screen View' and 'Printout'. The 'Print' button is highlighted with a red box. The 'Print each employee on a separate page' checkbox is also highlighted with a red box. The background shows a schedule grid with columns for dates (Jul-17 - Fri, Jul-18 - Sat, Jul-19 - Sun) and rows for employees (John Aaron, Aaron Abson, Dean Almanson, Ron Arno, Amy Cabillo, Caron Chamos, June Clemson, Richard Compton). The grid shows shifts for each employee, such as '9am - 6pm' and '5pm - 9pm'.

To print one individual Employee's weekly or monthly schedules use that [Employee's details page](#) (Schedules/Preferences tab):

We recommend [Exporting your schedules](#) to your computer as a backup - either by using the **Export** button on any schedule view or by using the **Reports** section where you can specify a date range to include in the export. You also can print your schedule to a pdf file for reference if you like. 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](#)

Schedules Sent to Employees Via Email

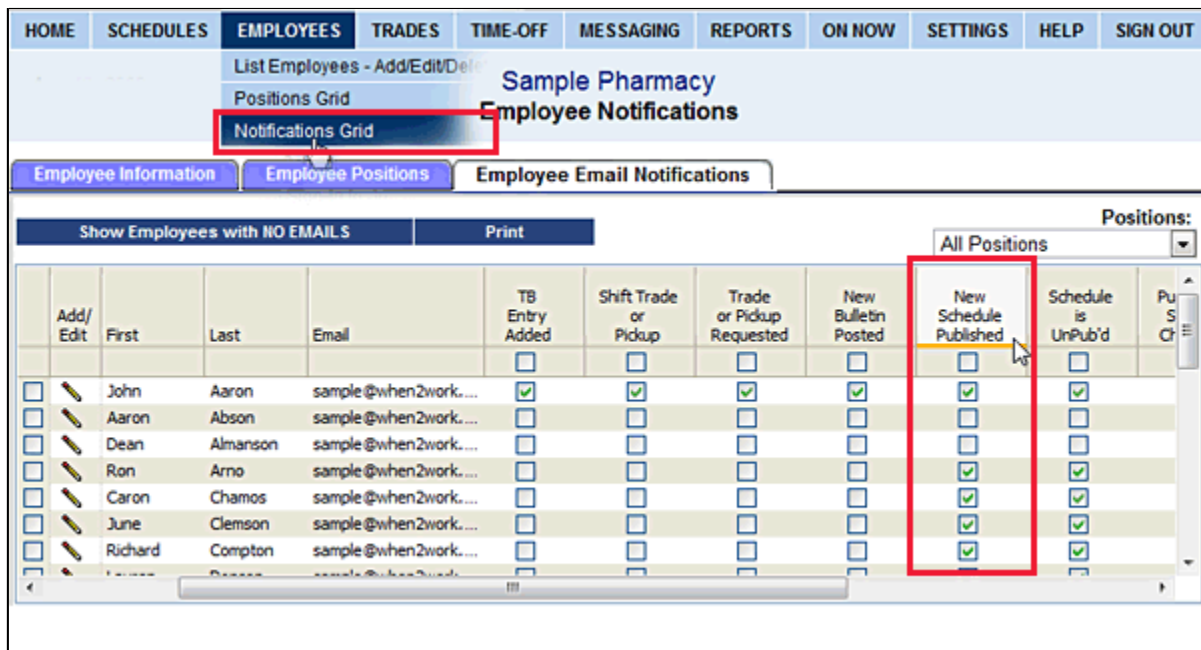
Automatic emailing of schedules and changes:

Your account is defaulted to automatically send Employees an email of their schedule when you [Publish](#) a schedule week that they are working one or more shifts and when any of their published shifts change.

Your [Settings>Info](#) page controls whether notices are sent when you publish a schedule week.

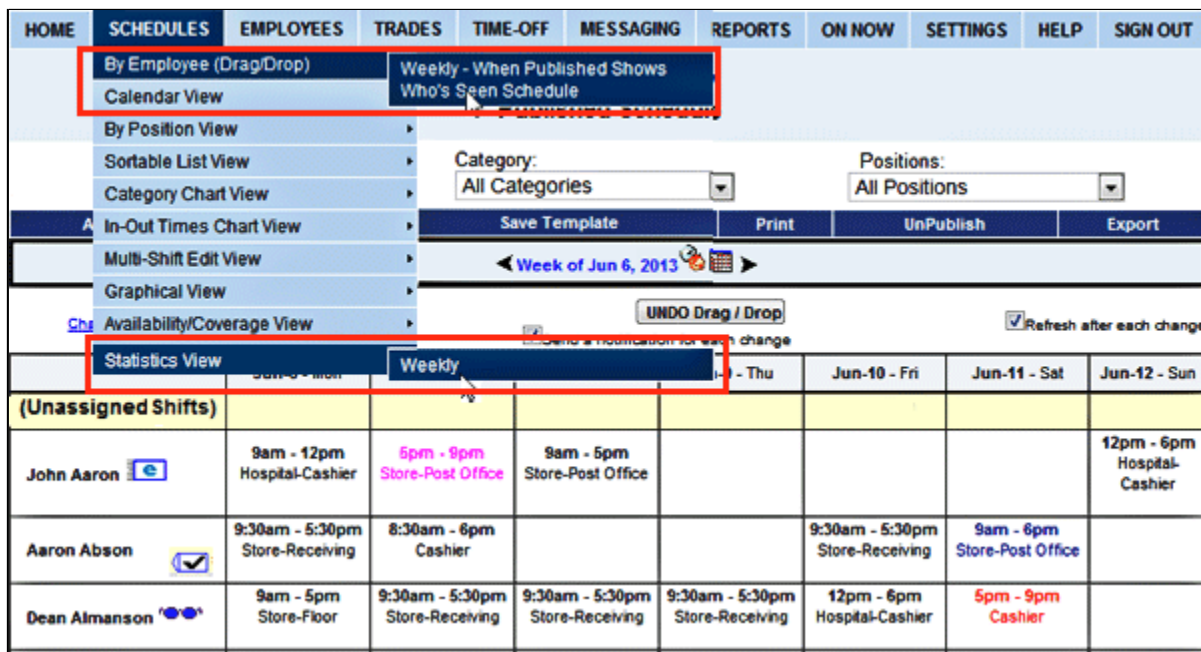
The screenshot shows the 'Sample Pharmacy SETTINGS' page. The navigation bar includes HOME, SCHEDULES, EMPLOYEES, TRADES, TIME-OFF, MESSAGING, REPORTS, ON NOW, SETTINGS, HELP, and SIGN OUT. The 'SETTINGS' tab is active, and a dropdown menu is open, showing options like 'Company / My Info & Upload Logo', 'My Notification's Email/Text', 'Global Employee Permissions', 'Add/Edit MANAGERS', 'Payments - Pricing - Billing', 'Upgrade to Higher Employee Level', and 'Create a New LINKED ACCOUNT Expires: Jun 28, 2012'. The main content area has tabs for 'Info & Settings', 'My Notifications', 'Employee Permissions', and 'Add/Edit Managers'. A 'Save Changes' button is located below these tabs. The 'COMPANY INFORMATION' section shows 'Account #: 247117' and 'Current Total Employees: 50'. The 'YOUR INFORMATION' section includes fields for 'First Name: John', 'Last Name: Smith', and 'E-Mail & Text Message: (See My Notifications Tab)'. There are also links for 'Connect or Remove' for Google calendar and OpenID. The 'GLOBAL SCHEDULE & ACCESS SETTINGS' section shows 'Schedule START DAY: Monday' and 'AutoFill MINIMUM TIME OFF Between Shifts: 12 hours'. A red box highlights the 'SEND NOTIFICATIONS when Publish or Unpublish: Yes' radio button. The 'COMPANY LOGO' section is at the bottom.

and on the [Employees>Notification Grid](#) you can see whether each employee is set to have their schedule forwarded to email or notice of publishing sent to their text address.



Tracking who was sent a schedule email:

After publishing you can track who has been sent an email and who has confirmed receipt of that schedule email on the [By Employee](#) or [Statistics](#) schedule view.



Manually sending an Employee their schedule:

You can send an individual Employee their schedule via email from their **Employee Details** page. Note that sending the schedule this way does NOT allow you to track their status on the **By Employee** schedule view.

HOME SCHEDULES **EMPLOYEES** TRADES TIME-OFF MESSAGING REPORTS ON NOW SETTINGS HELP SIGN OUT

List Employees - Add/Edit/Delete

Sample Pharmacy
Employee List

John Aaron Next ▶

Employee Information Employee Position

Add New Employee Add/Edit

Select Columns to View Send Selected: Schedule Reminders

View Edit First Last E-Mail*

<input type="checkbox"/>	John	Aaron	sample@
<input type="checkbox"/>	Aaron	Abson	None:sa
<input type="checkbox"/>	Dean	Almanson	sample@
<input type="checkbox"/>	Ron	Arno	sample@
<input type="checkbox"/>	Amy	Cabillo	

Information Schedules - Preferences Time Off

View MONTHLY Schedule - Recent Shift Change Notifications

EDIT This Employee

Week of Jun 4, 2007

Mon - Jun-4	Tue - Jun-5	Wed - Jun-6	Thu - Jun-7	Fri - Jun-8	Sat - Jun-9	Sun - Jun-10
1:30am - 5:15pm Store-Cashier Lunch at 12	5pm - 9pm Store-Post Office	9am - 12pm Hospital- Cashier	9:30am - 5:30pm Store- Receiving	12pm - 6pm Hospital- Cashier		

Working 29.0 hours

Click to E-MAIL Schedule Click to PRINT Schedule

Work Time Preferences

Time > 12a 1 2 3 4 5 6a 7 8 9 10 11 Noon 1 2 3 4 5 6p 7 8 9 10 11

Emailing Schedule Reminders::

You can [send reminders from the Employees List page](#) to one or more employees who are working during a defined date range. Note that sending reminders does NOT affect the status icons on the By Employee schedule view.

HOME SCHEDULES **EMPLOYEES** TRADES TIME-OFF MESSAGING REPORTS ON NOW SETTINGS HELP SIGN OUT

List Employees - Add/Edit/Delete

Sample Pharmacy
Employee List

Employee Information Employee Positions Employee Email Notifications

Add New Employee Add/Edit Positions E-Mail Sign-In Instructions Show DELETED Employees Print Export

Select Columns to View Send Selected: Schedule Reminders Message

Positions: All Positions

2. View Edit First Last Phone E-Mail*

<input type="checkbox"/>	John	Aaron	555-2239	sample@when2w
<input type="checkbox"/>	Aaron	Abson		sample@when2w
<input type="checkbox"/>	Dean	Almanson	555-2875	sample@when2w
<input type="checkbox"/>	Ron	Arno	555-2967	sample@when2w
<input type="checkbox"/>	Susan	Bosteen		
<input type="checkbox"/>	Amy	Cabillo	555-9284	
<input type="checkbox"/>	Caron	Chamos	555-2839	sample@when2w
<input type="checkbox"/>	June	Clemson		sample@when2w
<input type="checkbox"/>	Richard	Compton	555-1960	sample@when2w
<input type="checkbox"/>	Lauren	Donson		sample@when2w
<input type="checkbox"/>	Penny	Folsom	555-7397	sample@when2w
<input type="checkbox"/>	Donna	Gallerton	555-8236	
<input type="checkbox"/>	Frank	Garcia	555-2879	sample@when2w

1. Positions: All Positions

3. Schedule Reminders

Send Schedule Reminders To 50 Employees

Choose a Date Range

or click on calendars below to select dates

Begin Date

End Date

Subject: W2W Schedule

Additional Comment to Include:

Send Reminders

Related Topics :

- ⌄ [Finding an Employee's ID & Password](#)
- ⌄ [Each Employee has a sign-in ID](#)
- ⌄ [Sending Employees Sign In Instructions](#)

Make Schedule Changes (after Publishing)

On a [Published schedule](#) you also can make changes to any 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 (who have chosen that [notification option](#)) are automatically sent a notification of the changes with a link to confirm receipt. You can use the "Send Notices" checkbox to prevent these notices from being 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 45 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 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 shows the 'Sample Pharmacy Published Schedule' interface. The 'SCHEDULES' tab is highlighted. The 'Schedule View' dropdown is set to 'By Employee'. A 'Quick Shift EDIT' window is open for 'John Aaron - Monday, Jul-6', showing fields for Start Time (9am), End Time (12pm), Position (Hospital-Cashier), and a 'Save Changes' button. A checkbox 'Send a notification for each change' is checked.

	Jul-6 - Mon	- Sat	Jul-12 - Sun
(Unassigned Shifts)	9am - 3pm 1pm - 9pm	9pm	5pm - 9pm 5pm - 9pm
John Aaron	9am - 12pm		12pm - 6pm
Aaron Abson	9:30am - 5:30pm	6pm	
Dean Almanson	9am - 5pm	9pm	
Ron Arno	5pm - 9pm		
Amy Cabillo		6pm	9am - 12pm

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

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 WEEKLY tab to view shifts for the whole week)

- ⌘ Make the changes to shifts (the changed rows will appear green)
- ⌘ Uncheck the "Send Notices To Affected Employees" box
- ⌘ Click the **Save Changes** button

HOME **SCHEDULES** EMPLOYEES TRADES TIME-OFF MESSAGING REPORTS ON NOW SETTINGS HELP SIGN OUT

Sample Pharmacy
Published Schedule

Schedule View: Multi-Shift Edit Category: All Categories Positions: All Positions

Add Shifts Search Save Template Print UnPublish Export

Week of Jul 6, 2013

Mon Tue Wed Thu Fri Sat Sun WEEKLY

Save Changes Send a notification for each shift change To DELETE multiple shifts use the Sortable Include All Shifts

Position	Day	Worker	Time	Duration	Color	Category	Description
Hospital-Cashier	Mon	John Aaron	9am - 12pm	3.0	ac black	none	
Hospital-Cashier	Tue	Eileen Posten	9am - 12pm	3.0	ac Color	none	
Hospital-Cashier	Wed	Lauren Donson	9am - 12pm	3.0	ac Color	none	
Hospital-Cashier	Thu	Donna Verona	9am - 12pm	3.0	ac Color	none	

Related Topics:

- ⌘ [Editing Multiple Shifts at Once](#)
- ⌘ [Adding Shifts to a Schedule](#)
- ⌘ [Unpublishing](#)
- ⌘ [Enter E-Mails for Automatic Forwarding](#)
- ⌘ [Tracking Changes to Shifts - Shift History](#)




Publish Your Schedule

Once your schedule is finished and you want to make it viewable by your employees when they log in you can click to Publish it. Publishing affects shifts for ALL POSITIONS.

When you Publish a schedule, your Employees will then be able to see that week when they sign into their [individual employee accounts](#). Employees can also [choose to receive their published schedules via email](#).

Employees will see a "New Schedule" alert on their Employee home page.

Managers will see status icons on the [By Employee](#) schedule view:


- ⌵  if the Employee has viewed that week's schedule online
- ⌵  if Employee has been e-mailed their latest schedule for that week
- ⌵  if they have confirmed receipt of that e-mailed schedule.

If you would like to Publish more than one week at a time you can navigate to the first week and then click Publish - this will display all future weeks with shifts and you can choose how many weeks to Publish at that time.

Note: If you need to publish certain positions or position groups (locations) separately you can set up [separate WhenToWork accounts](#) (assuming you do not have any Employees that work at multiple locations). These [accounts can be linked](#) for billing purposes. Since all positions must be ready before Publishing we recommend only one manager have permission to Publish.

Before publishing you may want to:

- ⌵ check the [Statistics view](#) for details and totals on your shifts
- ⌵ use the [ANALYZE shifts](#) function to check for any conflicts against the current employee work time preferences and constraints. Conflicts could occur if an Employee has changed their work time preferences since you AutoFilled or created the schedule.

Note: Publishing sends notifications to any scheduled Employee if you have [entered their e-mail](#) and that notification option has been chosen. Employees 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 that includes [their Sign-In ID and password](#).

To Publish:

From any Unpublished weekly Schedule View:

- ⌵ **Navigate** to the week you want to Publish, (or the first week in a series of weeks you want to Publish)
- ⌵ Click **Publish** to open the Publish Schedule window (which will show you how your SETTINGS option is currently set - notifications on or off)
- ⌵ To Publish more than one week change the radio button to choose the week you want to schedule through.
- ⌵ Click the **Publish** button

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.

Sample Pharmacy
Unpublished Schedule

Schedule View: Category: Positions:

Buttons: Add Shifts, Import, Search, AutoFill, Clear/Delete, Save Template, Print, **Publish**, Export

Modal Dialog: Publish the schedule beginning: Sep 2, 2013

Your Settings page option is currently set to: **YES, send notifications**, so your employees will receive email schedule notifications for each week you Publish. "Stats" & "By Employee" will also show =Schedule e-mailed =Employee confirmed receipt

Buttons: Publish Schedules from Sep 2, 2013 through the week of:

	Week Starting	Assigned Shifts	Assigned Hours	Unassigned Shifts	Unassigned Hours
<input checked="" type="radio"/>	Sep 2, 2013	95	637.00	0	0.00
<input type="radio"/>	Sep 9, 2013	92	619.00	3	18.00

Buttons: Publish 1 week

After publishing your the title at the top of the screen will show "Published Schedule" and the [buttons will change](#). Some functions, such as [Import](#), [AutoFill](#) and [Clear](#) are not available after a schedule is published. A WhenToWork message is sent to employees (who have [set up their notifications](#)) telling them that there is a new schedule.

Sample Pharmacy
Published Schedule

Schedule View: Category: Positions:

Buttons: Add Shifts, Search, Save Template, Print, **UnPublish**, Export

Week of Sep 2, 2013

	Sep-2 - Mon	Sep-3 - Tue	Sep-4 - Wed	Sep-5 - Thu	Sep-6 - Fri	Sep-7 - Sat	Sep-8 - Sun
(Unassigned Shifts)							
John Aaron <input checked="" type="checkbox"/>	9:30am - 5:30pm	9am - 5pm	5pm - 9pm	5pm - 9pm			
Aaron Abson	5pm - 9pm	9am - 5pm	5pm - 9pm	5pm - 9pm	5pm - 9pm		11am - 5pm

Employees can then [sign in](#) and see their schedule.

Any Employee with an e-mail entered who has chosen that notification option will also receive an email that includes their schedule and any schedule notes.

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.

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](#)

ANALYZE Shifts for Any Conflicts

When viewing shifts in the future, the **Sortable List** view also includes a special **Analyze Shifts** button that allows you to see if any of the assigned shifts conflict with maximums set for that employee, their "prefer and dislike" work times, "cannot work" times or minimum time off between shifts etc.

Conflicts could occur if an Employee changes their preferences after you have created the schedule or if a manager has manually assigned a shift after being warned of a conflict.

It can be useful to Analyze Shifts before publishing to check for any conflicts due to last minute changes to Employee preferences or constraints.

Pref	Position	Day	Time	Duration	Worker	Category	Description
	Store-Post Office	Sat	9am-6pm	8.0	Aaron Abson	WE	
	Cashier	Sat	5pm-9pm	8.0	Dean Almanson		
	Hospital-Cashier	Mon	9am-12pm	3.0	John Aaron		
	Store-Post Office	Tue	5pm-9pm	4.0	John Aaron	NIGHT	
	Store-Post Office	Wed	9am-5pm	8.0	John Aaron		
	Store-Post Office	Thu	9am-5pm	8.0	John Aaron		
	Store-Receiving	Mon	9:30am-5:30pm	8.0	Aaron Abson		
	Store-Receiving	Fri	9:30am-5:30pm	8.0	Aaron Abson		
	Store-Receiving	Tue	9:30am-5:30pm	8.0	Dean Almanson		

To Use Analyze Shifts

From any Page

- ⌄ In the top menu hover over **Schedules** and choose **Sortable List**
- ⌄ Navigate to the present or a future week
- ⌄ Click the **Analyze Shifts** button
- ⌄ Click the **Prefs** column title twice to sort any conflicts to the top

Your assigned shifts will be displayed with their corresponding status icon compared to the various preferences and constraints that are currently set:

	prefer		prefer & dislike		overlaps cannot work		no min time between shifts		overlapping shifts
	no pref		dislike		over max shifts for day		over max hours for day		conflicts with vacation

Related Topics:

- ⌄ [Clearing Work Assignments - Deleting Shifts](#)

Add Notes to the Weekly Schedule

You can create schedule notes associated with any week. **When Employees sign in** and view the Schedule they can see the Note for that week at the bottom of the schedule.

Add a Note to All Employees - these are notes that the Managers and Employees see at the bottom of the schedule when they view 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 that week's schedule on all views when signed in as a Manager. These private notes do not appear on the printouts.

To add a Note to a weekly schedule:

From any weekly Schedule View


- Scroll down to the bottom of the schedule

The screenshot shows the 'Sample Pharmacy Unpublished Schedule' interface. The 'SCHEDULES' tab is highlighted in the top navigation bar. A modal window titled 'Add Notes to the Schedule Week of 07/20/2013' is open, showing a 'PUBLIC Note' field with the text 'Inventory Week coming up next week.' and a 'PRIVATE Note' field. A red arrow points from the 'Click here to Add/Edit Notes for this schedule' link at the bottom of the schedule grid to the modal. The 'Save' button in the modal is also highlighted with a red box.

	Jul-20 - Mon	Jul-21 - Tue
(Unassigned Shifts)		
John Aaron	9am - 6pm	9am - 6pm
Aaron Abson	9am - 5pm	
Dean Almanson	9am - 5pm	9am - 5pm
Ron Arno		9:30am - 5:30pm
Frank Garcia	6pm - 9pm	6pm - 9pm
Phillip Rayston		9am - 5pm -drawer
Karen Wescott	9:30am - 5pm	

- 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 the **Save** button

HOME Schedule Info Prefs Time-off Trades Messaging Staff On Now Bulletins Guide



Sample Pharmacy
My Schedule
John Aaron

MY SCHEDULE Everyone's Schedule TRADE MY SHIFTS TRADES OFFERED TRADEBOARD PRINT

Weekly Monthly Upcoming Daily Weekly Monthly Chart In-Out

SEE NOTE BELOW < Week of Jul 6, 2013 >

To put a shift on tradeboard, or find a possible replacement click on the shift Working 29.0 hours [Recent Shift Change Notifications](#)

Monday Jul-6	Tuesday Jul-7	Wednesday Jul-8	Thursday Jul-9	Friday Jul-10	Saturday Jul-11	Sunday Jul-12
9am - 12pm Hospital-Cashier	5pm - 9pm Store-Post Office - NIGHT	9am - 5pm Store-Post Office	9am - 5pm Store-Post Office			12pm - 6pm Hospital-Cashier - LP

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																		5pm - 9pm						
Wednesday										9am - 5pm														
Thursday										9am - 5pm														
Friday																								
Saturday																								
Sunday													12pm - 6pm											

Inventory week next week!

Examples of using html code to format your notes:

```

normal text
<b>this is bold</b>
<span style="color:red;">this is red</span>
<span style="color:red;font-size:150%;">this is red and larger</span>
<span style="color:blue; font-size:150%;font-weight:bold;"> this is blue, large and bold</span>
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

Related Topics:

- ⌵ [Adding Daily Notes](#)
- ⌵ [Employee Home Page Notice](#)
- ⌵ [Your Company Bulletin Board](#)

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

If the schedule changes and you need to add or delete shifts, or if you have changes in work assignments, or times you can easily make those changes both before and after the schedule has been Published.

The **By Employee** schedule view allows you to make changes very quickly without the page reloading between changes and it also allows you to [Drag & Drop](#) shifts between days and employees and to Ctrl Drag/Drop to quickly copy shifts.

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

If you change a Published schedule week [notices can be sent](#) to affected employees if their email has been added and they have chosen that option on their [notifications setup](#) page.

To Edit an existing shift using the By Employee view:

On the **By Employee** view:

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

The screenshot shows the 'Sample Pharmacy Unpublished Schedule' interface. The 'By Employee (Drag/Drop)' view is selected in the top navigation bar. The 'Schedule View' dropdown is set to 'By Employee'. The 'Quick Shift EDIT' window is open for 'John Aaron - Monday, Sep-2'. The window contains the following fields:

- DELETE This Shift** (button)
- Shift History** (link)
- Start Time: 9:30am
- End Time: 5:30pm
- Display Color: black (dropdown)
- Enter Paid Hours: 8 or Auto Calculate
- Position: Store-Receiving (dropdown)
- Optional Text: (text input)
- Optional Category: none (dropdown)
- Cancel** (button)
- [Show Available Employees](#) (link)
- Save Changes** (button)

The background schedule table shows the following shifts for John Aaron on Monday, Sep-2:

Employee	Sep-2 - Mon	Sep-3 - Tue
(Unassigned Shifts)		
John Aaron	9:30am - 5:30pm Store-Receiving	9am - 5pm Store-Post
Aaron Abson	5pm - 9pm Store-Post Office	9am - 5pm Cashier-drawe
Dean Almanson	9am - 5pm Store-Floor	5pm - 9pm Store-Post
Ron Arno		9:30am - 5:30pm Store-Receiving

The **Quick Shift EDIT** window also has a [Show Available Employees](#) link at the bottom that opens the [regular Shift Change](#) window that is accessed from the other schedule views when you click a shift.

Editing Multiple Shifts - if you want to make changes to a number of shifts, you can change the Schedule View dropdown in the upper left of the schedule 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.

HOME SCHEDULES EMPLOYEES TRADES TIME-OFF MESSAGING REPORTS ON NOW SETTINGS HELP SIGN OUT

By Employee (Drag/Drop) Calendar View By Position View Sortable List View Category Chart View In-Out Times Chart View

Sample Pharmacy Unpublished Schedule

Category: All Categories Positions: All Positions

AutoFill Clear/Delete Save Template Print Publish Export

Multi-Shift Edit View Daily Weekly

Save Changes

Include: All Shifts

Position	Day	Worker	Time	Duration	Color	Category	Description
Store-Cosmetics	Mon	Laura Kacen	9am - 3pm	6.0	ac navy	WE	
Store-Pharmacist	Mon	Randi Redford	9am - 3pm	6.0	ac black	none	
Store-Cosmetics	Tue	Laura Kacen	9am - 4pm	6.0	ac black	none	
Store-Pharmacist	Tue	Randi Redford	9am - 3pm	6.0	ac black	none	
Cashier	Wed	Josh Lusua	9am - 3pm	6.0	ac Color	none	
Store-Cosmetics	Wed	Lauren Donson	9am - 3pm	6.0	ac black	none	

Deleting Shifts - To delete a shift click the shift and click the **DELETE This Shift** button 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 check 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 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.

HOME SCHEDULES EMPLOYEES TRADES TIME-OFF MESSAGING REPORTS ON NOW SETTINGS HELP SIGN OUT

Schedule View: By Employee

Add Shifts Import Search

Change Layout

Jul-20 - Mon

(Unassigned Shifts)

John Aaron 9am - 6pm

Aaron Abson 9am

Dean Almanson 9am - 5pm 9am - 5pm

Ron Arno 9:30am - 5:30pm

Amy Cabillo 1pm - 9pm 12pm - 6pm

Caron Chamos 3pm - 9pm

June Clemson

Quick Shift EDIT

John Aaron - Monday, Jul-20

DELETE This Shift Shift History

Start Time 9am Display Color: black

End Time 6pm

Enter Paid Hours: 9 or Auto Calculate

Position: Hospital-Pharm. Assistant

Optional Text

Optional Category: none

Cancel Show Available Employees Save Changes

Hospital-Pharm. Assistant Shift Change Monday - Jul 20, 2013

DELETE This Shift

Start Time 9am Display Color: Color

End Time 3pm

Enter Paid Hours: 9.0 or Auto Calculate

Optional Text

Optional Category: none

create 1 copies of this shift Save Changes

Assigned To: John Aaron View Available

On other weekly schedule views besides the By Employee view you can click a shift to change it using

the regular [Shift Change window](#).

Related Topics:

- ε [By Employee View - DRAG & DROP](#)
- ε [Editing Multiple Shifts at Once](#)
- ε [Deleting Multiple Shifts](#)
- ε [Clicking a Shift to Edit or Delete](#)
- ε [Manually Assigning Employees to Shifts](#)
- ε [Multi-Shift Edit Schedule View](#)
- ε [Searching for Shifts](#)
- ε [Adding Shifts to a Schedule](#)
- ε [Tracking Changes to Shifts - Shift History](#)

WhenToWork.com Online Scheduling

AutoFill Results Summary

After [AutoFill](#) you will see a results window that shows a list of how many shifts are assigned and unassigned for each day and for the week and lists each scheduled employee and shows their shift and hours count for the week, similar to the [Statistics Schedule View](#).

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

- Some multi-week schedule views do not have an AutoFill button. Change to a weekly or daily view.
- Only UNPUBLISHED weeks have the AutoFill option
- Your [main manager](#) may not have set your permissions to allow you to AutoFill.

AutoFill Shifts to Assign Workers

How do you want to fill the shifts?

- By Priority Group (set for each employee)
- By Seniority (using hire date)
- Equal Priorities

Ignore employee "prefer" and "dislike" hours

Your Minimum Time Off Between Shifts is currently set at: 12 Hours
(This setting can be changed on your Settings page)

Week Starting	Assigned		Unassigned	
	Shifts	Hours	Shifts	Hours
Sep 2, 2013	0	0.00	95	637.00

Do you want to continue?

YES AutoFill this schedule

Schedule Stats for Week of Sep 2, 2013

Shifts Summary				Employees Summary		
Click on day to edit	Unassigned Shifts	Assigned Shifts	Assigned Hours	Employee	Working Shifts	Total Hours
Monday	0	16	106.0	John Aaron	4	24.0
Tuesday	0	16	106.0	Aaron Abson	6	30.0
Wednesday	0	17	112.0	Dean Almanson	5	34.0
Thursday	0	16	106.0	Ron Arno	4	32.0
Friday	0	16	106.0	Susan Bosteen	1	6.0
Saturday	0	8	63.50	Amy Cabillo	3	24.0
Sunday	0	6	37.50	Caron Chamos	2	12.0
Total	0	95	637.0	June Clemson	2	13.50
				Richard Compton	6	41.0

You can see how the 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. If repeated AutoFill does not give different results it is likely due to only a few employee preferences having been set, and where AutoFill is repeatedly trying to accommodate those preferences.

Note: If you have some [set or "pinned" employees](#) you can [Import a saved Template](#) that has all shifts unassigned except for those pinned employees and then you can AutoFill only the open shifts around that set of 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](#)

AutoFill - Automatically Assign Employees to Shifts (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 for everyone in a matter of seconds. AutoFill must be done one week at a time.

WhenToWork's AutoFill feature uses advanced mathematic algorithms to determine the best possible schedule for that week and automatically assign Employees to shifts based on [granted time off](#), employee [work time preferences](#), [minimum time off between shifts](#), 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. Change to a weekly or daily view.
- Only UNPUBLISHED weeks have the AutoFill option
- Your [main manager](#) may not have set your permissions to allow you to AutoFill.

To AutoFill your Shifts

On an UnPublished Weekly Schedule page

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

AutoFill Shifts to Assign Workers

How do you want to fill the shifts?

By Priority Group (set for each employee)
 By Seniority (using hire date)
 Equal Priorities

Ignore employee "prefer" and "dislike" hours

Your Minimum Time Off Between Shifts is currently set at: 12 Hours
(This setting can be changed on your Settings page)

Week Starting	Assigned		Unassigned	
	Shifts	Hours	Shifts	Hours
Sep 2, 2013	0	0.00	95	637.00

Do you want to continue?

YES AutoFill this schedule

Schedule Stats for Week of Sep 2, 2013

Shifts Summary				Employees Summary		
Click on day to edit	Unassigned Shifts	Assigned Shifts	Assigned Hours	Employee	Working Shifts	Total Hours
Monday	0	16	106.0	John Aaron	4	24.0
Tuesday	0	16	106.0	Aaron Abson	6	30.0
Wednesday	0	17	112.0	Dean Almanson	5	34.0
Thursday	0	16	106.0	Ron Arno	4	32.0
Friday	0	16	106.0	Susan Bosteen	1	6.0
Saturday	0	8	63.50	Amy Cabillo	3	24.0
Sunday	0	6	37.50	Caron Chamos	2	12.0
Total	0	95	637.0	June Clemson	2	13.50
				Richard Compton	6	41.0

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 new statistics for that AutoFilled week. These stats can also be accessed at any time by changing the Schedule View to "[Statistics](#)."

You can see how the 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. If repeated AutoFill does not give different results it is likely due to only a few employee preferences having been set, and where AutoFill is repeatedly trying to accommodate those preferences.

Note: If you have some [set or "pinned" employees](#) you can [Import a saved Template](#) that has all shifts unassigned except for those pinned employees and then you can AutoFill only the open shifts around that set of employees.

Related Topics:

- ε [How AutoFill Works](#)
- ε [After AutoFill - No Assignments?](#)
- ε [AutoFill by "Priority Group"](#)
- ε [AutoFill by "Seniority"](#)
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- ε [Minimum Time Off Between Shifts](#)
- ε [AutoFilling One Position Separately](#)
- ε [Tracking Schedule Changes - Import, AutoFill, Publish](#)

Import Results Summary

After [Importing a previous day/week or saved template](#) you will see a window displaying the Import Results. It will show the total shifts imported and how many were automatically unassigned.

If you imported any shifts with assignments you will see those details and also any specifics about why any shifts imported as assigned were changed to unassigned (ex. if the employee had granted time off on that day).

Imported Assigned Shifts will be set to Unassigned when:

- ⌘ A granted time off for the employee overlaps the shift
- ⌘ If the Imported shift overlaps a time employee is already assigned
- ⌘ If the Imported shift is assigned to a now deleted employee

The screenshot shows the 'Sample Pharmacy Unpublished Schedule' interface. The 'Import' button is highlighted in red. The 'Import Shifts Into Week of Jul 8, 2013' dialog box is open, showing options for 'Import a WEEK' and 'Import a DAY'. The 'Import WEEK' button is also highlighted in red. A summary window displays the results: '95 shifts were added by import. 3 shifts were unassigned (total). 1 shift was cleared because of time off conflict. 2 shifts were cleared because employee already assigned at that time.'

	Jul-8 - Mon
(Unassigned Shifts)	
John Aaron	
Aaron Abson	
Dean Almanson	
Ron Arno	
Susan Bosteen	
Amy Cabillo	
Caron Chamos	
June Clemson	
Richard Compton	
Lauren Donson	
Penny Folsum	
Donna Gallerton	

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](#)

Import a Previous Week (or Saved Template)

Once you have [entered your first schedule](#) it is easy to create new schedules using the **Import** function to copy those shifts to another week. Import any previous week "as is" by choosing a date or Import a saved template by choosing a template name.

When Importing you can check off to unassign all 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 first [filtering](#) your schedule view to a certain position or category before clicking Import you can Import only those particular shift position(s) from previous week or template.

Don't see the IMPORT button?

- ⋮ Be sure you are on an **UNpublished** week
- ⋮ Contact the main manager to make sure your manager permissions allow you to Import

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

From any UNPUBLISHED weekly Schedule View

- ⋮ Click **Week>** to **Navigate** to the new week you want to schedule (1.)
- ⋮ (Confirm that your Category and Position dropdowns are set to show "All" to import all positions and categories)
- ⋮ 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

After Import you will see an [Import Results Summary](#) showing how many shifts were imported, how many are unassigned, and information about why some shifts were automatically unassigned if they

conflicted with time off etc.

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

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](#)

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