

Categories & Shift Colors - (Optional) - - - - -

Why Use Optional Shift Categories?

You might want to [create Categories](#) for your shifts for many reasons. It allows you to [filter](#) schedules to show only certain groups of shifts (beyond [filtering](#) by Position or Position Group) and for certain time periods etc. Or you might want to create [Reports](#) to track certain types of shifts (ex. [Late, or Called Out](#) etc.). The shift category can also appear on various schedule views for each shift and some views can group shifts by category (ex. Calendar Weekly).



If you have shifts with similar begin and end times over multiple Positions you can [create Categories](#) with "Add Shift Default Settings" by clicking the Category drop down box and choosing 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) in the window.

You can create Categories for:

- Different Events - you can set the Category default description to reflect Event details
- Clients that employees deal with on a repeated basis
- Special shifts that you want to distribute evenly to all employees (See [Selective AutoFill](#))
You may want to make sure for example that all employees work at least one night shift per week. Or you may want to be sure your "less popular" shifts are evenly distributed between all employees.
- You can create Categories for any reason

There are many reasons to put shifts into categories:

1. **Better control of AutoFill.** Example: You can set all your weekend shifts (for some or all positions) to a category (WKND for example), then [filter](#) your schedule to that category before AutoFilling to get a better distribution of your weekend shifts before unfiltering to show all the shifts and using AutoFill to assign the remaining non-weekend shifts.
2. **Create an at-a-glance view** of who is working certain types of shifts through the [Category Chart's](#) display of the assigned shifts' categories for up to 4 weeks at a time.
3. **Get statistics** (either through [Statistics](#) schedule view or the [Reports](#) section) on which employees have worked shifts of certain categories like "graveyard" or "premium shift" or "Tardy" or for a certain event or client category.
4. **For adding repeating shifts** you can set a category default: position, start and end time, duration,

color and/or description. When [adding new shifts](#) just choose the category and the shift is automatically defaulted to your choices.

5. **Grouping categories** choose which categories to display together by creating [Category Groups](#) (similar to the [Position Groups](#)). You can use these category groups as shortcuts to view statistics or create reports as well.

Related Topics:

- [Why Use Shift Categories?](#)
- [Adding New Category Definitions](#)
- [Existing Shifts - Assigning Categories](#)
- [Adding New Shifts is Easy Using Shift Categories](#)
- [Category Default Shift Colors](#)
- [Allowing Employees to View Categories](#)
- [Evenly Distributing "Special Shifts"](#)
- [Using Categories to Selectively AutoFill](#)
- [Viewing a Compressed Schedule Chart](#)
- [Coloring Individual or Groups of Shifts](#)
- [Setting a Category Default Shift Color](#)
- [Event Scheduling](#)

Add Category Definitions (Optional)

To use shift Categories you must first create a new category name and abbreviation for each Category. Category default choices can also be added for use when [Adding Shifts](#). You can set shifts into a Category when they are first added or you can set any existing shift to be in a Category.

Shifts set to be in a certain category will remain in that category when imported into other weeks. For example if you set 6 shifts to be in a category called "Night Shift" then when you import those shifts from that week into the following week they will still be in that Night Shift Category.

Create / Add a new Category

From any Schedule View

- In the Category dropdown choose **Add / Edit Categories** to open the Add/Edit Categories window

The screenshot shows the 'Sample Pharmacy Published Schedule' 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. Below the navigation bar, the title 'Sample Pharmacy Published Schedule' is displayed. The 'Schedule View' is set to 'By Employee'. The 'Category' dropdown is set to 'All Categories', and the 'Add/Edit Categories' option is highlighted. The 'Positions' dropdown is set to 'All Positions'. Below the dropdowns, there are buttons for 'Add Shifts', 'Search', 'Print', 'UnPublish', and 'Export'. The 'Add / Edit Categories' window is open, showing the following content:

Add / Edit Categories

Categories can be used to speed up adding similar shifts, for filtering schedule views, for selective AutoFilling and for creating a compressed schedule chart.

Add a New Category Add Now

Category Name:

Abbreviation: (up to six characters)

Optional "Add Shift" Defaults
When Adding shifts these defaults appear (but can be changed)

On the right side of the screenshot, there is a table showing the schedule for three days: Jul-10 - Fri, Jul-11 - Sat, and Jul-12 - Sun. The table has columns for the days and rows for shifts. The shifts are: 9am - 3pm, 5pm - 9pm, and 12pm - 6pm. The 5pm - 9pm shift is highlighted in red.

- Enter the Category Name and Abbreviation (Ex. Night Shifts and NT)
- Click the **Add Now** button
- The window will close and go back to your schedule
- If you look at the Category dropdown again it will list your new category

Create a new Category with "Add Shift" Default Settings:

From any Schedule View

- In the Category dropdown choose **Add/Edit Categories**

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

Sample Pharmacy Published Schedule

Schedule View: By Employee

Category: All Categories

Positions: All Positions

Add Shifts Search Add/Edit Categories Print UnPublish Export

Add / Edit Categories

Categories can be used to speed up adding similar shifts, for filtering schedule views, for selective AutoFilling and for creating a compressed schedule chart.

Add a New Category Add Now

Category Name:

Abbreviation:

Optional "Add Shift" Defaults
When Adding shifts these defaults appear (but can be changed)

Position:

Start Time: End Time:

Hours Worked: (total paid hours)

Default Color:

Optional - Description (Ex. BREAK TIMES or instructions)

Edit Current Category

UNDO Drag / Drop Refresh after each change

Send a notification for each change

	Jul-10 - Fri	Jul-11 - Sat	Jul-12 - Sun
u	9am - 3pm	5pm - 9pm	5pm - 9pm
			5pm - 9pm
- 5pm			12pm - 6pm
	9:30am - 5:30pm	9am - 6pm	
am - 3pm	12pm - 6pm	5pm - 9pm	
	9am - 5pm		
	9am - 5pm	9am - 6pm	9am - 12pm
	3pm - 9pm		

- Enter a Category Name and Abbreviation (Ex. Night Shifts and NT)
- Enter any default settings you like in the lower box - ex. times, shift color, description etc.
- Click the **Add Now** button
- The window will close and go back to your schedule

Now when you click on any Schedule View to [Add Shifts](#) and choose this Category your default settings will be automatically entered for you (any of the default information can be changed by clicking and retyping).

Related Topics:

- [Edit a Category](#)
- [Existing Shifts - Assigning Categories](#)
- [Adding New Shifts is Easy Using Shift Categories](#)
- [Using Categories to Selectively AutoFill](#)
- [Creating a Compressed Schedule Chart](#)
- [Coloring Individual or Groups of Shifts](#)
- [Setting a Category Default Shift Color](#)
- [Why Use Shift Categories?](#)

Edit a Category

You can edit Category Name and Abbreviations and it will then appear with the new information on all schedules past and future. NOTE: updating any **Optional Add Shifts Defaults** (ex. times or shift description) will NOT affect any already existing shifts. Those defaults will just be used the next time you add a shift and choose that category

Edit a Category

From any Schedule View

- In the Category dropdown choose **Add/Edit Categories** to open the Add/Edit Categories window
- In the **"Edit Current Category"** dropdown in the bottom of that window choose the Category to edit
- Make changes to that Category
- Click the **Save** button
- The window will close and go back to your schedule

The screenshot displays the 'Add / Edit Categories' window in the WhenToWork.com interface. The window is titled 'Add / Edit Categories' and contains two main sections: 'Add a New Category' and 'Edit Current Category'. The 'Edit Current Category' section is currently active, showing a dropdown menu with 'Late' selected and a 'Save' button. The 'Add a New Category' section includes fields for 'Category Name', 'Abbreviation', 'Position', 'Start Time', 'End Time', 'Hours Worked', 'Default Color', and 'Optional - Description'. The background shows a schedule view with a table of shifts and a dropdown menu for 'All Categories' with 'Add/Edit Categories' highlighted.

	Jul-13 - Mon		
(Unassigned Shifts)	9am - 6pm Hospital-Pharmacist	Late	Less Popular Shifts (L) Night Shifts (NIGHT) Weekend Shifts (WE)
John Aaron	5pm - 9pm Store-Post Office	9:35am - Cash	
Aaron Abson	5pm - 9pm Cashier -drawer 1	9:30am - Store-Re	
Dean Almanson	9am - 5pm Store-Post Office	12pm - Hospital-C	
Ron Arno	9am - 5pm Store-Post Office		

Related Topics:

- [Existing Shifts - Assigning Categories](#)
- [Adding New Shifts is Easy Using Shift Categories](#)
- [Using Categories to Selectively AutoFill](#)
- [Creating a Compressed Schedule Chart](#)
- [Coloring Individual or Groups of Shifts](#)
- [Setting a Category Default Shift Color](#)
- [Why Use Shift Categories?](#)

Delete a Category

Category definitions can be deleted at any time. Note that this will affect all shifts, past and future, that are currently set to that category, with those shifts being set back to Category designation of NONE. There is no way to "undo" deleting Categories, so confirm that you do want to remove the category designation from all shifts before proceeding.

Delete a Category

From any Schedule View

- In the Category dropdown choose **Add/Edit Categories** to open the Add/Edit Categories window
- In the bottom of that window under Edit Current Category choose the Category to delete in the dropdown menu.
- Click the red "**DELETE This Category**" link
- When asked to confirm choose OK

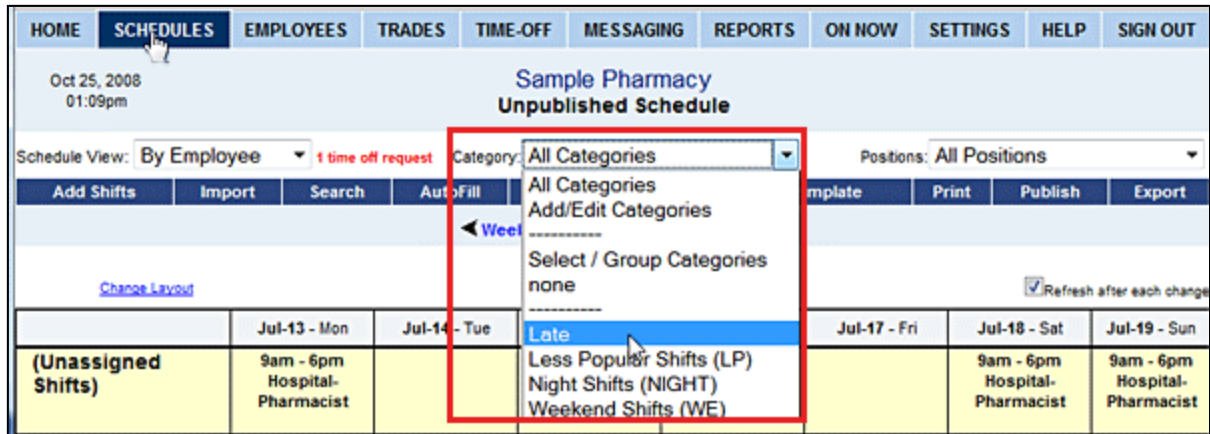
The screenshot displays the 'Add / Edit Categories' window in the WhenToWork.com application. The window is titled 'Add / Edit Categories' and has a 'Sample Unpublished' status. It features a 'Schedule View: By Employee' dropdown and a 'Category: All Categories' dropdown. A red box highlights the 'Add/Edit Categories' option in the 'Category' dropdown menu. Below this, a 'Select / Group Category' dropdown is set to 'none'. The 'Edit Current Category' section shows a dropdown menu with 'Late' selected, and a red box highlights the 'DELETE This Category' link. A confirmation dialog box is overlaid on the window, asking 'Are you SURE you want to delete this category? (This action cannot be undone.)' with 'OK' and 'Cancel' buttons. A red arrow points from the 'DELETE This Category' link to the 'OK' button. The background shows a schedule view for 'Jul-13 - Mon' with various shifts and employees listed.

Related Topics:

- [Existing Shifts - Assigning Categories](#)
- [Adding New Shifts is Easy Using Shift Categories](#)
- [Using Categories to Selectively AutoFill](#)
- [Creating a Compressed Schedule Chart](#)
- [Coloring Individual or Groups of Shifts](#)
- [Setting a Category Default Shift Color](#)
- [Why Use Shift Categories?](#)

Existing Shifts - Assigning Categories

Once you have defined your Category names they will appear in the Category dropdown menu on your Schedule pages.

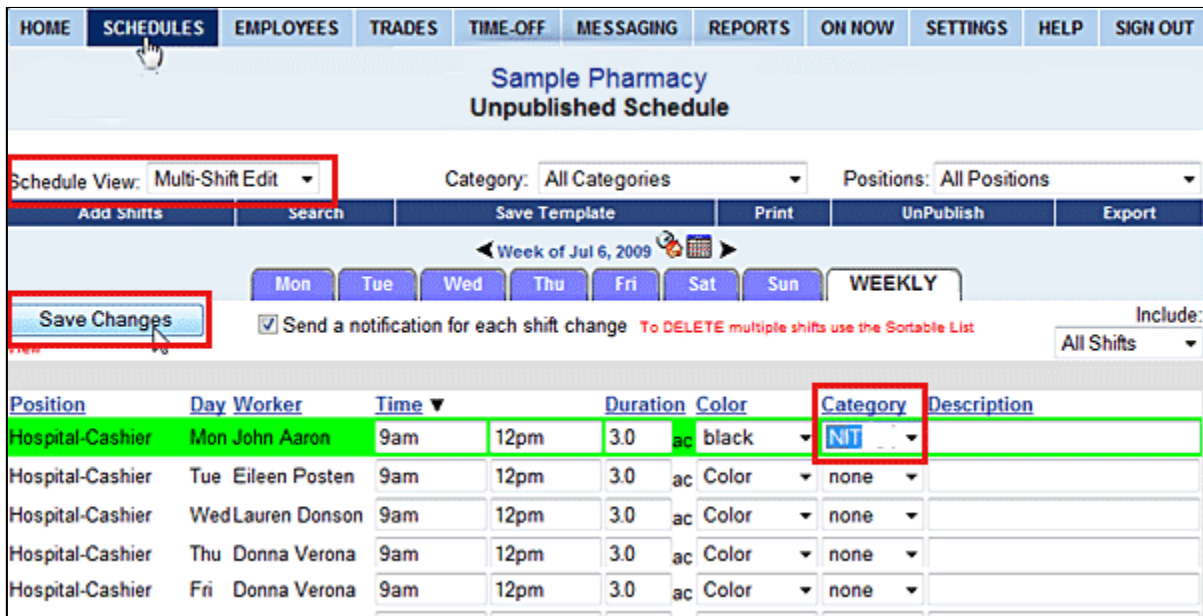


You can choose a category when adding new shifts or click any shift to edit and choose a category or you can set multiple shifts into a Category using the **Multi-Shift Edit** Schedule View.

Setting Existing Shifts to be in a Category:

From any Schedule View

- In the Schedule View dropdown choose **Multi-Shift Edit**
- Choose a Day or the Week Tab to see all of the shifts you want
- **Sort** the display by any column by clicking the title - Ex. if setting night shifts you might want to sort by Time
- Change the dropdown box for each shift to be the Category you want
- When finished click the **Save Changes** button



To test the Category and view the shifts

From any Schedule View

- In the Category dropdown choose your new category name
- (Be sure the Positions dropdown is set to **All Positions**)
- The Schedule View will now include only the shifts in that Category

- You can also filter on a position to see only shifts both in that category and that position

Note: Changing an existing shift to be in a Category DOES NOT change the times or any items set in the category defaults. Category defaults are only used when Adding New Shifts.

Related Topics:

- [Why Use Shift Categories?](#)
- [Adding New Category Definitions](#)
- [Adding New Shifts is Easy Using Shift Categories](#)
- [Using Categories to Selectively AutoFill](#)
- [Viewing a Compressed Schedule Chart](#)
- [Coloring Individual or Groups of Shifts](#)
- [Setting a Category Default Shift Color](#)

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Add New Shifts Using Categories

If you have [created Categories](#) with any "Add Shift Default Settings" these defaults will automatically appear when you choose a Category in the [Add Shifts](#) window. This can make adding similar shifts for different Positions much easier or it can be an easy way to predefine begin and end times, paid hours, shift colors etc.

To Add Shifts using Categories

From any Schedule View

- Click **Add Shifts** to open the Add Shifts window
- Before typing anything **choose a Category** in the Category dropdown
- Any Category "add shift defaults," ex. begin/end times or color etc., will appear (Any of the information can be changed for that particular shift)
- Enter any other desired information for the shift(s)
- Click **Add Shift**

To test the Category and view the shifts

From any Schedule View

- In the Category dropdown choose your new category name (Be sure the Positions dropdown is set to All Positions)
- The Schedule View will now include only the shifts in that Category

Related Topics:

- [Why Use Shift Categories?](#)
- [Adding New Category Definitions](#)
- [Existing Shifts - Assigning Categories](#)
- [Using Categories to Selectively AutoFill](#)
- [Viewing a Compressed Schedule Chart](#)
- [Coloring Individual or Groups of Shifts](#)
- [Setting a Category Default Shift Color](#)

Selectively AutoFill with Categories

You may want to make sure for example that all Employees work at least one night shift per week. Or you may want to be sure your "less popular" shifts are evenly distributed over the week between all Employees.

This can be accomplished by [setting these special shifts to be in a certain Category](#) and then [AutoFill](#) that Category first before AutoFilling the rest of the schedule.

The first time you set up Categories it takes a bit longer but in future schedules the categories and shifts will already be set and all you will have to do is [Import](#) and [AutoFill](#).

Example: You want to be sure night shifts are evenly distributed among Employees.

The first time using Categories you must:

Create the Category name

From any Schedule View

- In the Category dropdown choose **Add/Edit Categories** to open the Add/Edit Categories window
- Enter at the Category Name and Abbreviation Ex. Night Shifts and NT
- Click **Add Now**
- The window will close and go back to your schedule

Then Define Shifts as belonging to that Category

From any Schedule View

- In the Schedule View dropdown choose **Multi-Shift Edit**
- Click the **Week** Tab if it is not already chosen
- Click the **Time** column heading to sort the shifts by the begin time
- Choose a shift and in the Category dropdown for that shift change to the Category (Ex. NT)
- Change all shifts on the page that you want to be in that Category
- Click **Save Changes**

Once the Categories have been created you can simply:

AutoFill the Shifts in that Category

From any weekly Schedule View

- In the Category dropdown choose the Category name (ex. Night Shifts)
- Click **AutoFill** to open the AutoFill window
- Click the radio button next to: **Fill these categories: Night Shifts**
- Click **YES AutoFill this Schedule**

Then AutoFill the Remaining Shifts

- In the Category dropdown choose **All Categories**
- Click **AutoFill** to open the AutoFill window
- Be sure it is set to: **Leave AutoFilled shifts alone, fill the empty shifts**
- Click **YES AutoFill this Schedule**

Related Topics:

- [Why Use Shift Categories?](#)
- [Adding New Category Definitions](#)
- [Existing Shifts - Assigning Categories](#)
- [Adding New Shifts is Easy Using Shift Categories](#)
- [Viewing a Compressed Schedule Chart](#)
- [Coloring Individual or Groups of Shifts](#)
- [Setting a Category Default Shift Color](#)

Coloring Individual or Groups of Shifts

Shifts can be set to display in different colors for a variety of reasons. Ex. to call attention to them on the schedule or to mark the shift as verified or that the employee was late etc.

Shifts can be displayed in colors in various ways:

- Click on any shift in the system and in the **Shift Change** Window change the Display Color
- Use the **Multi-Shift Edit Schedule View** to choose the color for multiple shifts at a time and click Save Changes
- **Create a Category** that has an "Add Shifts Default" Display Color and when you add new shifts the Display Color will be defaulted to that color

Note that color coding is based on shifts not employees or positions (although you could manually color code Employees by coloring their shifts).

Related Topics:

- [Adding New Category Definitions](#)
- [Existing Shifts - Assigning Categories](#)
- [Adding New Shifts is Easy Using Shift Categories](#)

WhenToWork.com Online Scheduling

Category Default Shift Colors

When [adding Categories](#) you can set the "Add Shifts Default Display Color." When you [Add New Shifts](#) and choose that Category the Display Color will automatically be set to that Default color. You can always [change the Display Color](#) of an individual shift by changing it in the Display Color dropdown.

Create a new Category with Add Shift Default Settings:

From any Schedule View

- In the Category dropdown choose **Add/Edit Categories** to open the Add/Edit Categories window
- Enter at the Category Name and Abbreviation (Ex. Night Shifts and NT)
- Enter any default Display Color setting you like in the lower box
- Click **Add Now**
- The window remains open for you to add more categories - when done close the window to go back to your schedule

Changing the Add Shift Default Settings of an Existing Category:

From any Schedule View

- In the Category dropdown choose **Add/Edit Categories** to open the Add/Edit Categories window
- **Scroll down to the bottom box - Edit Current Categories**
- In the dropdown choose the Category name to Edit
- The Category details will appear below
- Choose the Default Color you want from the dropdown
- Click the **Save** button

Now when you click [Add Shifts](#) on any Schedule View and choose this Category your default color will be automatically entered for you (any of the default info can be changed).

Related Topics:

- [Why Use Shift Categories?](#)
- [Adding New Category Definitions](#)
- [Existing Shifts - Assigning Categories](#)
- [Adding New Shifts is Easy Using Shift Categories](#)
- [Using Categories to Selectively AutoFill*](#)
- [Viewing a Compressed Schedule Chart](#)
- [Coloring Individual or Groups of Shifts](#)

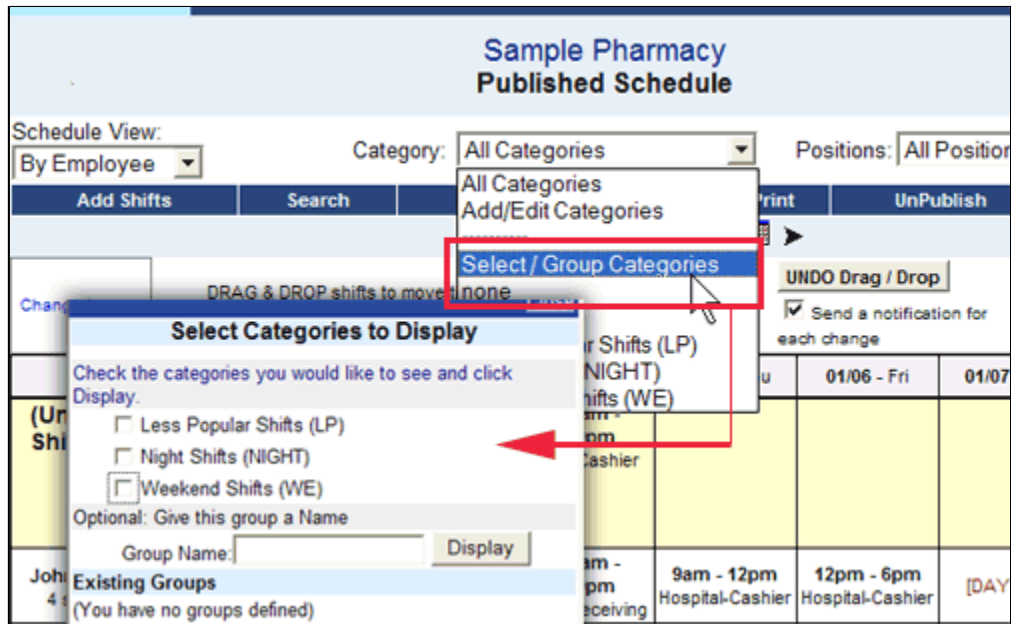
Create Category Groups (Optional)

You can create a special **filter** for your schedules that includes only certain categories. This can be useful if you have certain categories that you would like to view at the same time on the screen. This is just another way to create a shortcut for viewing a set of shifts. You can create as many category groups as you like and each category can be in as any number of groups as you like.

Create a new Category Group

From any Schedule View

- In the Category dropdown choose **Select/Group Categories** to open the Select Categories window



- Check off the Categories that you want to include in this group
- Click the **Display** button (If you want to save the group for later use type a name for the Group before clicking Display)
- The window will close and go back to your schedule filtered on that group of categories
- If you look at the Category dropdown again it will list your new category group if you gave it a name.

Related Topics:

- Existing Shifts - Assigning Categories
- Adding New Shifts is Easy Using Shift Categories
- Using Categories to Selectively AutoFill
- Creating a Compressed Schedule Chart
- Coloring Individual or Groups of Shifts
- Setting a Category Default Shift Color
- Why Use Shift Categories?

Allow Employees to View Categories

Your Employees cannot view Categories unless you change this option on your [SETTINGS>Global Employee Permissions](#) page.

Two things need to be set to allow Employees to see only Category designations you have set for shifts:

- 1) The option on your [SETTINGS>Global Employee Permissions](#) page - Be sure the option: "Can see CATEGORIES" is set to "Yes"

Sample Pharmacy
SETTINGS

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

Company / My Information
My Notifications Email/Text
Global Employee Permissions

Info & Settings My Notifications **Employee Permissions** Add/Edit Managers Add/Edit MANAGERS
Save Changes

Display

Can see SHIFT COLORS on schedules	<input type="radio"/> Yes <input type="radio"/> No
Can see CATEGORIES on schedules	<input checked="" type="radio"/> Yes <input type="radio"/> No
Can see the EMPLOYEE COMMENTS field	<input type="radio"/> Yes <input checked="" type="radio"/> No

Preferences

Can Set their own Prefer & Dislike work time PREFERENCES	<input checked="" type="radio"/> Yes <input type="radio"/> No
Can Set their own CANNOT WORK times	<input type="radio"/> Yes <input checked="" type="radio"/> No
Can Set their Preferences for POSITIONS	<input checked="" type="radio"/> Yes <input type="radio"/> No

Viewing Other Employees & Their Schedules

Can View EVERYONE'S SCHEDULE*	<input checked="" type="radio"/> Yes <input type="radio"/> No
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- 2) The manager [Calendar WEEKLY](#) Schedule View controls the look of the Employee "Everyone's Schedule" View. Use the **Change Layout** link on your Calendar Weekly view to set how you want the Employees to see the schedule.

Sample Pharmacy

Configure "Weekly" Schedule View

Note: These settings will also control what your employees see when they view Everyone's Weekly Schedule.

Screen View

Group by Position Category

Hide groups with no shifts

Show Category/Position

Show Description

Compress the schedule (do not align positions)

Name Display: First Last

Font Size: Small

Printout

Group by Position Category

Hide groups with no shifts

Show Category/Position

Show Description

Hide unassigned shifts

Compress the schedule (do not align positions)

WEEKLY MONTHLY

Refresh page after each change

Friday Jun-8	Saturday Jun-9	Sunday Jun-10
Hospital-Cashier Jana Rostenmen 9am - 1pm	Hospital-Cashier Aaron Abson 9am - 12pm	Hospital-Cashier Nathan Radison 9am - 12pm
Hospital-Pharm. Assistant Amy Cabillo 9am - 6pm	Hospital-Pharm. Assistant Jana Rostenmen 12pm - 6pm	(Unassigned) - LP Hospital-Pharm. Assistant Gordon 9am - 6pm
Hospital-Pharmacist Judy Gray 9am - 6pm	Hospital-Pharmacist Judy Gray 9am - 6pm	Hospital-Pharmacist Amy Cabillo - LP 9am - 6pm
Store-Cashier John Aaron 1:30am - 5:15pm Lunch at 12	Store-Cashier Judy Gray 9am - 6pm	Store-Cashier Judy Gray - LP 9am - 6pm
Donna Verona 9am - 5pm -drawer 1	Donna Gallerton -VVE 5:30pm	Donna Gallerton -LP 11am - 5pm

Check off the option to "Show Category/Positions" and then choose whether you prefer to

have the shifts displayed in groups sorted by Position or Category, (you might want to try both to see which you prefer).

The view the Main Manager creates using the "Change Layout" links set up how Employees see that view in their accounts.

Related Topics:

- [Why Use Shift Categories?](#)
- [Adding New Category Definitions](#)
- [Existing Shifts - Assigning Categories](#)
- [Adding New Shifts is Easy Using Shift Categories](#)
- [Using Categories to Selectively AutoFill*](#)
- [Viewing a Compressed Schedule Chart](#)
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